M365 Outlook Rules and Delegation Job Aid

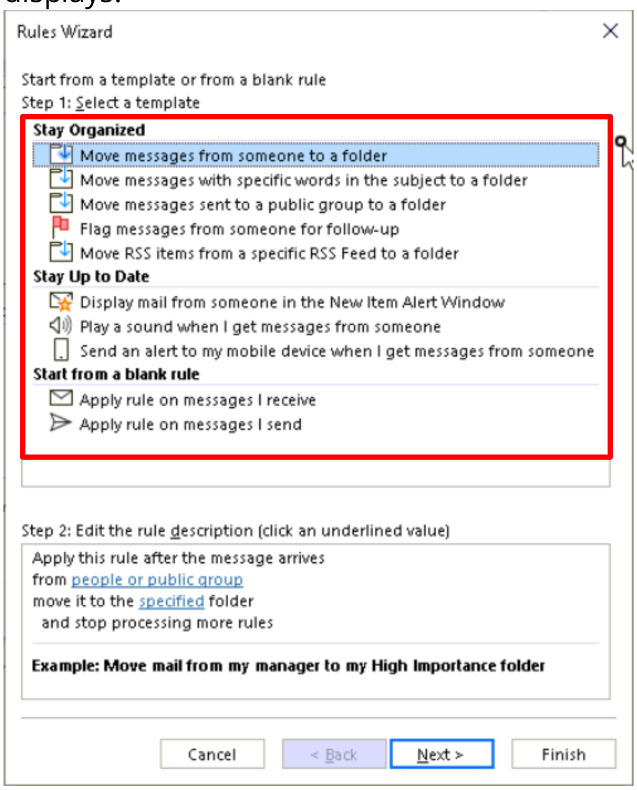
Create Outlook Rules

Use Inbox rules to automatically perform specific actions on email that arrives in your inbox. **Note**: Rules only run on your Inbox; they cannot run on other folders.

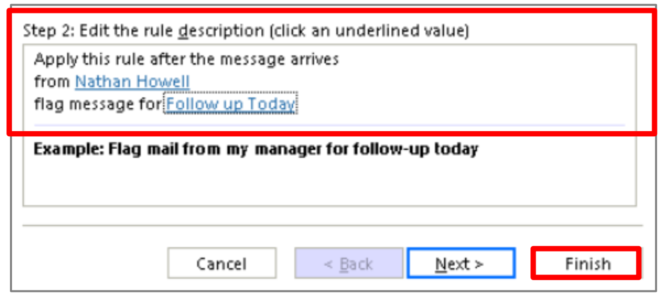
To Create a Rule:

1. Click the **File** tab.
2. Click **Manage Rules & Alerts**.
3. Select **New Rule...**

Result: The **Rules Wizard** dialog page displays:



4. Select one of the options in Step 1.
   Tip: If you are new to Outlook rules, carefully review the template options, noting that you can:
   a. Move emails automatically into folders
   b. Flag messages from someone (your manager or other leader, for example).
   c. Trigger alerts, sounds, or mobile device alerts.
5. Click a link in the Step 2 section to specify the behavior of the rule.



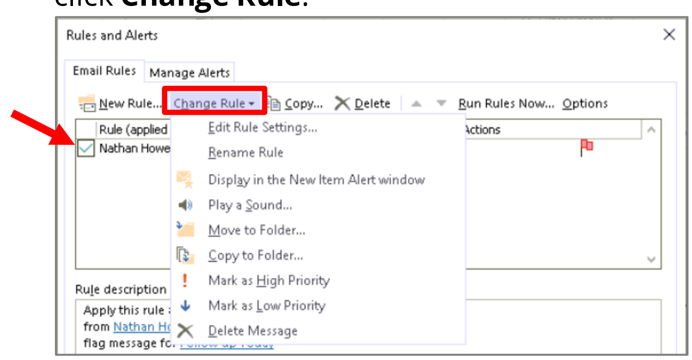
6. Click the **Finish** button.

Note: If you are creating a rule that sends an email to a folder, click the **Next** button to assign the desired folder.

Tip: **Start from a blank rule** (in Step 1) is very flexible and enables you to configure almost infinite combinations of logic.

Edit a Rule

1. After creating a rule, you can initiate editing the rule in one of two ways:
   - Click the **File** tab → **Manage Rules & Alerts**, or
   - Right-click any email, hover over **Rules**, and then select **Manage Rules & Alerts**.
2. Click the rule you wish to edit and then click **Change Rule**.



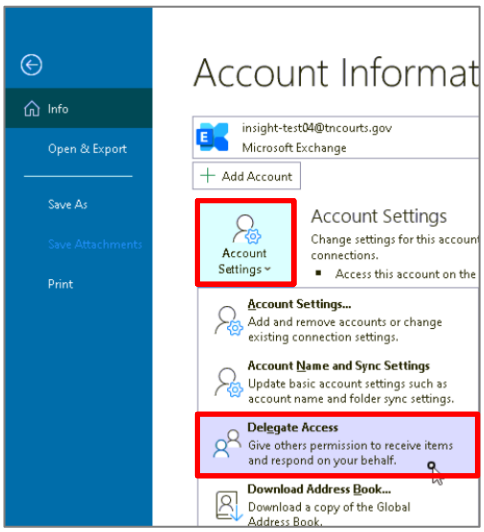
3. Choose from the options in the list and make changes as needed in the dialog boxes that follow.
4. When finished, click **OK**.

Add a Delegate for Mail and/or Calendar

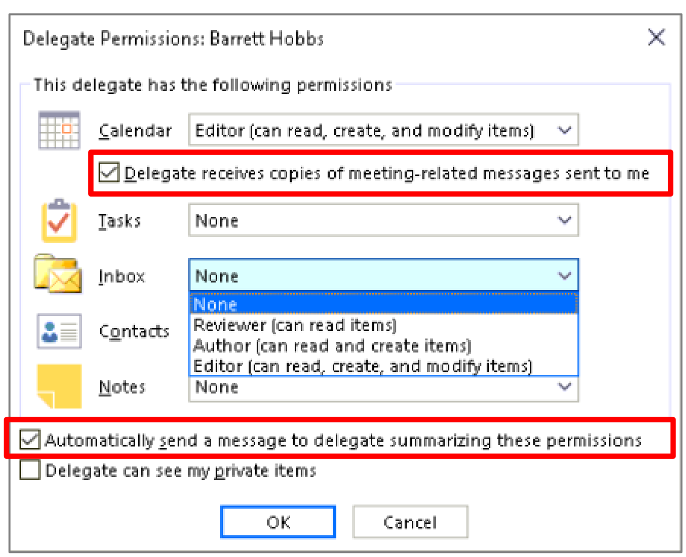
Delegation enables another person to perform many actions on your behalf. This is useful for executive administrative assistants or for managers covering for employees who are on vacation.

To delegate your mail and/or calendar:

1. Click the **File** tab → **Account Options** → **Delegate Access**, as shown below:



2. Click **Add...** on the **Delegates** dialog box.
3. Use the **Add Users** dialog (Address Book) to search for the desired delegate's name and click **Add**, then **OK**.
4. Check both the checkboxes highlighted below. Continue step 5.



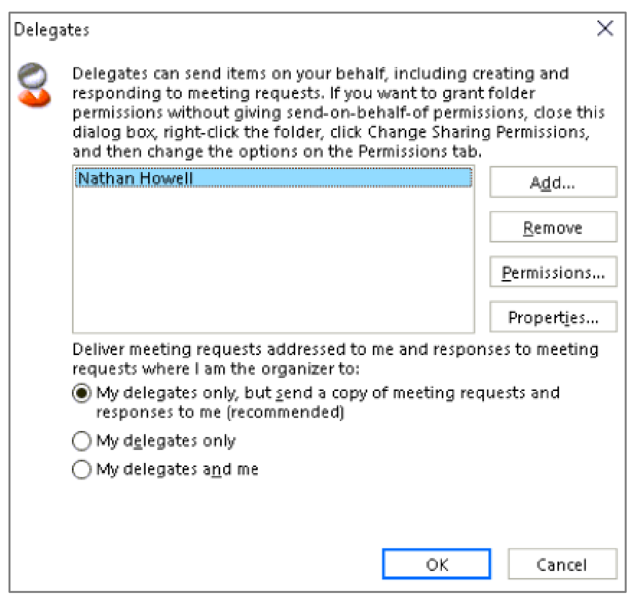
5. Make other selections for Calendar, Inbox, or Tasks as appropriate, and then click **OK**.

   Tip: The Inbox options are expanded in the preceding image so you can see the descriptions of each role. Note that **Editors** have complete control—including the ability to modify or delete items that you created. **Authors** can only create or modify items they created.

   Important: Delegates must perform the actions specified in the email they receive or they will not be able to access your mail/calendar.

Modify or Remove a Delegate

1. Click the **File** tab → **Account Options** → **Delegate Access**, as shown at left.
2. Click the name of the delegate. **Note**: If you only have one delegate they are selected by default.
3. Click **Remove** to completely remove delegated permissions or click **Permissions...** to modify permissions using the same dialog box shown at left.



4. Click **OK** with finished.