# Priority

#### Setting-up Outlook 365 (Windows) for WorkingSm@rt

Ask about these related training programmes: 'WorkingSm@rt + Microsoft TEAMS' and 'WorkingSm@rt + OneNote'

The 'WorkingSm@rt + Outlook' training programme will enable you to increase productivity, control your Inbox, feel more in control and overall improve your work/life integration.

Note: Ask about our separate course WorkingSm@rt with Outlook for Mac 'WorkingSm@rt' is delivered globally by 55 Priority Management International offices + Vancouver HQ

## Follow all steps on Pages 1-6 (Note: NO changes to Inbox)

- A. Email Notifications Turn Off p.1
- B. Start Outlook in Calendar p.2
- C. Daily Task List Turn On p.3

D/E. To Do Bar Turn On (+ Reset) p.3

- F. Task Folder "Simple List" view customise p.4
- G. Task Folder "Detailed" customise view p.6



#### A. Turn off Email Notifications



### **B. Start Outlook in Calendar**

| 1              |  | Outlook Options   |  |  |  |  |  |  |  |
|----------------|--|---|--|--|--|--|--|--|--|
|                | General  | Options for working with Outlook.   |  |  |  |  |  |  |  |
| 1.<br>2.<br>3. | Select File > Option<br>Under Outlook star<br>Browser<br>Select Calendar | es > Advanced<br>et and exit click<br>Outlook panes.  |  |  |  |  |  |  |  |
|                | Se<br>Lan <u></u> ge<br>Ease of Access                                   | Outlook start and exit         Start Outlook in this folder: <u>E</u> mpty Deleted Items folders when exiting Outlook |  |  |  |  |  |  |  |
|                | Advanced   | AutoArchive   |  |  |  |  |  |  |  |
|                | Customize Ribbon<br>Quick Access Toolbar                                 | Reduce mailbox size by deleting or moving old items to an archive data file.  |  |  |  |  |  |  |  |
|                | Add-ins<br>Trust Center  | Keminders   |  |  |  |  |  |  |  |



#### C. In CALENDAR turn on Daily Task List



#### D. In Inbox & Calendar turn on To-Do Bar



### E. Option: To-Do Bar Reset Current View



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#### F. Task Folder customise "Simple List" view:



# F2. Tasks Folder "Simple List" for group by date

|  |                 |                 | _  | _                  |                                    |   |                |  |           |  |                              |                                     |            |                | -           |      |
|--|-----------------|-----------------|--|--------------------|------------------------------------|---|----------------|--|-----------|--|------------------------------|-------------------------------------|------------|----------------|-------------|------|
| ◙∂9×⊽  |                 |                 | D Sei  | arch               |                                    |   |                |  |           |  |                              |                                     |            | -              | ð           | ×    |
| File Home Se   | end / Receive   | Folde           | er Vi  | iew He             | elp                                |   |                |  |           |  |                              |                                     |            | Try the new Ou | tlook 🔵     | off  |
| Rew New New New New New New New New New N                            | Delete<br>S →   | Reply           | Reply<br>All   | Forward<br>Respond | Meeting<br>G IM ~<br>C More ~      | Mark Remove<br>Complete from Lis<br>Manage Task | t P            | Today P Next Week<br>Tomorrow P No Date<br>This Week P Custom<br>Follow Up | Detailed  | Simple List To-Do List                       | Prioritized =                | Move Send to<br>ConeNote<br>Actions | Categorize | Search Peop    | Book        | ~    |
|  | <               |                 |  |                    |                                    |   |                |  |           |  |                              |                                     |            |                |             |      |
| ✓ My Tasks   |                 | C               | Tas  | sk Subject         |                                    |   |                | Due Date 📥   |           | Categories                                   | In                           | Folder                              |            |                | *           |      |
| To-Do List<br>Tasks - tgpriority@out<br>Project Z<br>Tasks - MAILBOX | look.com        | 2 <sup>56</sup> | CBC<br>V WE<br>V See<br>V WB   |                    | <u>A</u> rrange<br><u>R</u> everse | By<br>Sort                                      | >              | Wed-21/06/2023<br>Tue-04/07/2023<br>Wed-05/07/2023                         |           | WF-(Waiting-For)                             | S<br>A                       | ent items<br>roject Z<br>rchive     |            |                | ~<br>~<br>~ |      |
| 4. RIGHT CI  | lck             |                 | ♥ imi<br>♥ iMi<br>♥ €0   |                    | Field <u>C</u> h                   | ooser   |                | m Thu 06/07/2023<br>m Fri 07/07/2023<br>Fri 14/07/2023                     |           | PROJECT Y<br>My-Work<br>My-Work              | T<br>T                       | isks<br>isks                        |            |                | ~ ~         |      |
|  |                 | 2<br>2          | v imi<br>v Rei   |                    | <u>R</u> emove                     | This Column                                     |                | Fri-14/07/2023<br>Wed 19/07/2023   |           | PROJECT-X                                    | Ŧ                            | isks                                |            |                | ~           |      |
|  |                 | <u>≥</u>        | ✔ My<br>✔ W\$  | 2                  | <u>G</u> roup B                    | y This Field                                    |                | Fri-21/07/2023<br>Mon-24/07/2023   |           | Reading                                      | in<br>S                      | box<br>int-items                    |            |                | $\sim$      |      |
|  |                 | 2<br>2          |  |                    | Group b                            | y Box   |                | Mon 21/08/2023<br>Mon 21/08/2023   |           | PROJECT X                                    | T.<br>T.                     | isks<br>isks                        |            |                | Po<br>Po    |      |
|  |                 | È               | ML   | ~                  |                                    |   | _              | Mon 21/08/2023   |           | MY WORK                                      | т                            | isks                                |            |                | Po          |      |
|  |                 |                 | TA'  | 522                | View Set                           | ttings  |                | Mon 21/08/2023   |           | PROJECT X                                    | т                            | isks                                |            |                | Pa          |      |
|  |                 |                 |  |                    |                                    |   |                | Mon 21/08/2023   |           | -  | т                            | isks                                |            |                | P0          |      |
|  | 5. Group by Box |                 | MUST DO TO   |                    | JDAY                               |   | Tue 22/08/2023 |  | MY WORK   | T.   | isks                         |                                     |            | р<br>10        |             |      |
| 5 Group h  |                 |                 | 2 □ IASK<br>2 ☑ Native Hawaiians-organize-aid-for-Maui-fire-victims as-government-lags<br>3 □ TASK 2 |                    |                                    | Tue 22/08/2023                                  |                | PROJECT X  | T.        | ISKS   |                              |                                     | ۳ <b>۰</b> | Ш              |             |      |
| J. Group c   |                 |                 |  |                    |                                    | Tue 22/08/2023                                  |                | MY WORK  | T.        | isks   |                              |                                     | Po         | Ш              |             |      |
|  |                 | È               | WF   | FRED TOD/          | AY                                 |   |                | Tue 22/08/2023   |           | WF Follow Up                                 | т                            | isks                                |            |                | Po          |      |
|  |                 | 2               | 🗌 TAS  | sk                 |                                    |   |                | Tue 22/08/2023   |           | _  | т                            | isks                                |            |                | Pa          |      |
|  |                 | 2               | REA  | AD AND REP         | PLY                                |   |                | Wed 23/08/2023   |           | PROJECT X                                    | T                            | isks                                |            |                | Ρ           |      |
| 14.7 GB Free Items: 0  |                 | Ċ               | TAS  | ж                  |                                    |   |                | Wed 23/08/2023   | All folde | PROJECT Y<br>ers are up to date. Connected t | T:<br>to: Microsoft Exchange | ssks<br>Bisplay Setting             | 25 🔟 🕅     |                | <b>Pa</b>   | 100% |

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|                               | F3. Tasks Folder "Simple List" for group by date |   |   |                     |                 |   |  |  |  |  |  |
|-------------------------------|--|---|---|---------------------|-----------------|---|--|--|--|--|--|
| •                             | G ♭ × ⇒  |   |   |                     |                 | - 0 ×   |  |  |  |  |  |
|                               | File Home Send / Receive                         | Folder View Help                                      |   |                     |                 | Try the new Outlook () off  |  |  |  |  |  |
|                               | New New New Delete                               | Reply Reply Forward G IM *<br>All G More *            | Remove<br>from List P1 Tonorrow P1 No Date P1 This Week P2 Custom D D | etailed Simple List | tized v Send to | Categorize I<br>Tags Find V   |  |  |  |  |  |
| <ul><li>✓</li><li>☑</li></ul> | ~ My Task<br>то-Do Li<br>Tasks - tg              | a column head   | <u> </u>  |                     |                 |   |  |  |  |  |  |
| ب                             | Project Z  | WF-ME-T-delegation                                    | Wed-21/06/2023  | WF-(Waiting For)    | Sent-Items      | ~   |  |  |  |  |  |
|                               | Tasks - MAILBOX                                  | Send Project info 2                                   | Tue 04/07/2023  |                     | Project-Z       | ~   |  |  |  |  |  |
| 7                             | Tasks for workshop                               | Without affirmative action, how will colleges seek    | racial-diversity? Wed-05/07/2023                                      |                     | Archive         |   |  |  |  |  |  |
| C'                            | o4p  | Important & Not Urgent Flag in 7 days + Later C       | ategory (WorkingSm., Thu 06/07/2022                                   | PROJECT Y           | Tasks           |   |  |  |  |  |  |
|                               | COMPLETED TASKS                                  | Important Reply in next 3 days (WorkingSmart)         | Training Practice Em., Fri 07/07/2023                                 | My Work             | Tasks           |   |  |  |  |  |  |
|                               |  | Complete Actions from meeting                         | Fri 14/07/2023  | My Work             | Tasks           |   |  |  |  |  |  |
| m                             |  | important task  | Fri 14/07/2023  |                     | Tasks           |   |  |  |  |  |  |
| 66                            |  | Reply to Jane   | Wed 19/07/2023  | PROJECT-X           | Tasks           | , in the second s |  |  |  |  |  |
|                               |  | My work Time and another event today.                 | Fri 21/07/2022  | Reading             | inbox           |   |  |  |  |  |  |
|                               |  | WE Tim test delegation                                | Mon 24/07/2023  | WE Follow Up        | Sent Items      | , in the second s |  |  |  |  |  |
|                               |  |   | Mon 21/08/2023  | PROJECT X           | Tasks           | Ru  |  |  |  |  |  |
|                               |  |   | Mon 21/08/2023  | WE Follow Up        | Tasks           | Pa  |  |  |  |  |  |
|                               |  |   | Mon 21/08/2023  | MY WORK             | Tasks           | Pa .  |  |  |  |  |  |
|                               |  |   | Mon 21/08/2023  | PROJECT X           | Tasks           | 8   |  |  |  |  |  |
|                               |  |   | Mon 21/08/2023  | THUSE CE A          | Tasks           | 8   |  |  |  |  |  |
|                               |  |   | Tile 22/08/2023   | MY WORK             | Tasks           | Po D  |  |  |  |  |  |
|                               |  |   | Tue 22/08/2023  | PROJECT X           | Tasks           | Pa la   |  |  |  |  |  |
|                               |  | V Native Hawaiians, organize aid for Maui fire virtin | 15 as government lags Tue 22/08/2022                                  | Prodect A           | Tacks           |   |  |  |  |  |  |
|                               |  |   | Tue 22/08/2023  | MY WORK             | Tasks           | <b>•</b>  |  |  |  |  |  |
|                               |  |   | Tue 22/08/2023  | WE Follow Lip       | Tasks           | la l  |  |  |  |  |  |
|                               |  |   | Tue 22/00/2023  | Wr Pollow Op        | Tasks           | 19<br>Ba  |  |  |  |  |  |





### G. Task Folder customise "Detailed" view:

#### G1. Tasks Folder "Detailed" for Group by Category 09× ⊽ € Search 0 ٥ Try the new Outlook 🔘 Home Send / Receive Folder View Help File $\square$ Meeting P Next Week Fly. ۵ Search People Î 🗠 🗗 P Today م 🗠 廁 Reply Reply Forward All 1 Q 1 iii P Tomorrow P No Date Address Book Mark Remove Complete from List Move Send to V OneNote Categorize Delete New Email New New Task To-Do List Prioritized mple List P This Week Custom 🛱 More 🗸 Items ' RR Manage Task Follow Up Current View Actions Find ✓ My Tasks Due Date 🔺 Categorie In Folder Ŷ To-Do List Ć Tasks - tgp 🗹 W4 Wed 21/06/2023 WF (Waiting For) Sent-Item Project Z 🔁 🗹 s Tue-04/07/2023 Project Z $\checkmark$ P٦ Tasks - MA ₩. ↑↓ <u>Reverse Sort</u> Wed 05/07/2023 Archive 🔁 🛛 4 PROJECT Y Tacks Thu 06/07/2023 8. RIGHT CLICK My-Work 🔁 🗹 1848 Field Chooser ي ي 😒 Fri 14/07/2023 My Work Tasks 🔁 🗹 🖛 Remove This Column 🔁 🗹 R4 Wed 19/07/202 PROJECT X 88 🖂 🔽 Ma Reading Group By This Field **∑**₩ 🕢 ₩ WF Follow U Ρ PROJECT X 2 🗆 74 Mon 21/08/2023 Tasks Group by Box 2 Ρ WF Follow Up Mon 21/08/2023 Tasks μ MY WORK Mon 21/08/2023 Tasks View Settings... Р Mon 21/08/2023 PROJECT X Tasks μ Mon 21/08/2023 Tasks þ MUST DO TODAY Tue 22/08/2023 MY WORK Tasks Ρ 🖄 🗆 TASK Tue 22/08/2023 PROJECT X Tasks 9. Group by Box 🖄 🗹 Native Tasks Ρυ TASK 2 Tue 22/08/2023 MY WORK Tasks WF FRED TODAY Tue 22/08/2023 WF Follow Up Tasks Ρ 🖄 🗆 TASK Ro Tue 22/08/2023 Tasks 🖄 🗆 READ AND REPLY Po Wed 23/08/2023 PROJECT X Tasks



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