

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)

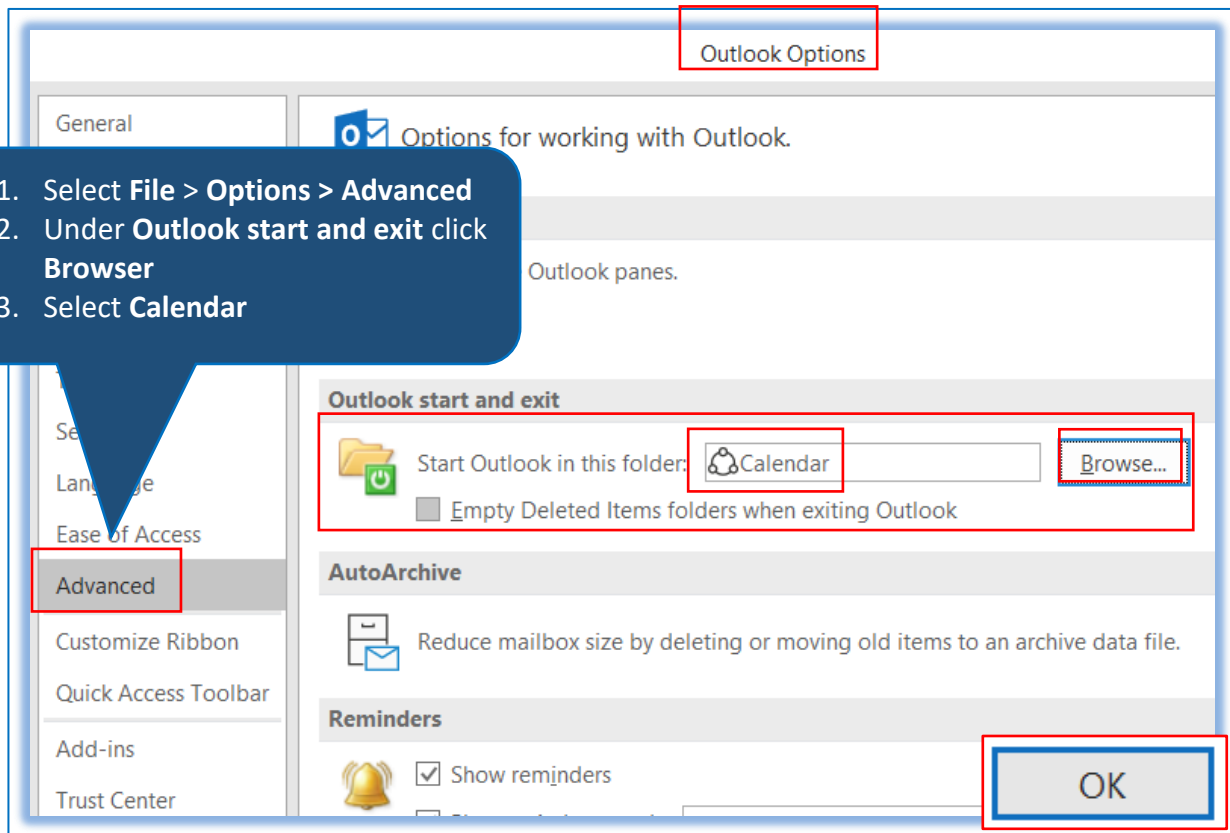
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|-------------------------------------|---|
| A. Email Notifications Turn Off p.1 | D/E. To Do Bar Turn On (+ Reset) p.3 |
| B. Start Outlook in Calendar p.2 | F. Task Folder “Simple List” view customise p.4 |
| C. Daily Task List Turn On p.3 | G. Task Folder “Detailed” customise view p.6 |

A. Turn off Email Notifications

1. Select File > Options
 2. Select Mail
 3. Untick all options on Message arrival

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B. Start Outlook in Calendar



See next page...

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

The screenshot shows the Outlook 365 ribbon with the 'View' tab selected. The 'Daily Task List' dropdown menu is open, showing options: Normal (checked), Minimized, Off, and Arrange By >. A blue callout box contains the following steps:

1. Select View
2. Select Daily Task List
3. Select Normal

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

The screenshot shows the Outlook 365 ribbon with the 'View' tab selected. The 'To-Do Bar' dropdown menu is open, showing options: Calendar, People, Tasks (checked), and Off. A blue callout box contains the following steps:

1. Select View
2. Select To-Do Bar
3. Select Tasks

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

The screenshot shows the 'Advanced View Settings' dialog box with the 'Reset Current View' button highlighted. A blue callout box contains the following steps:

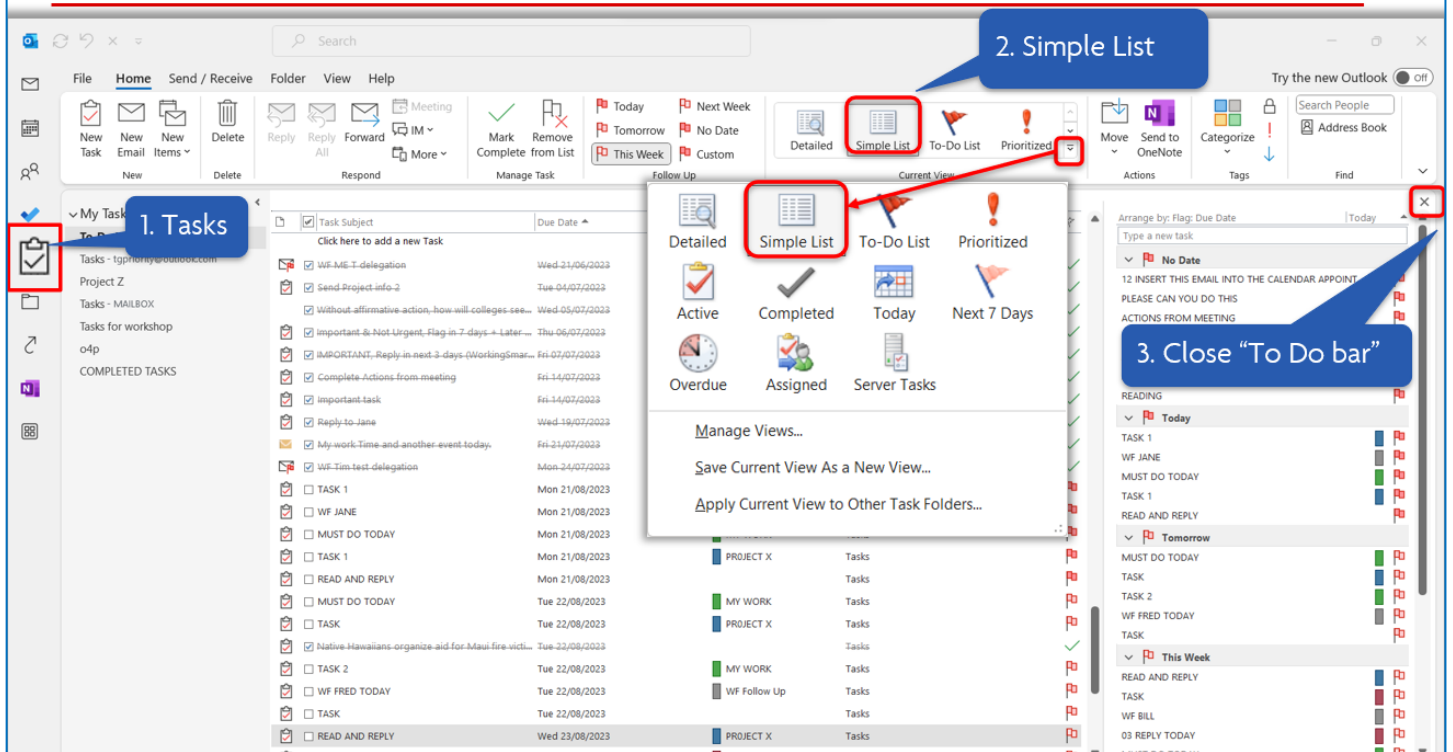
1. Right-click in Titles
2. View Settings
3. Reset Current View

The 'Advanced View Settings' dialog box shows the 'View Settings...' button highlighted. The 'To-Do Bar' dropdown menu is also visible, showing the 'Today' group with tasks like 'WF Bill IMPORTANT, Reply in nex...', 'File only - Now (WorkingSmart T...', 'Prioritising to Work Effectively: W...', and 'Work on Project X'.

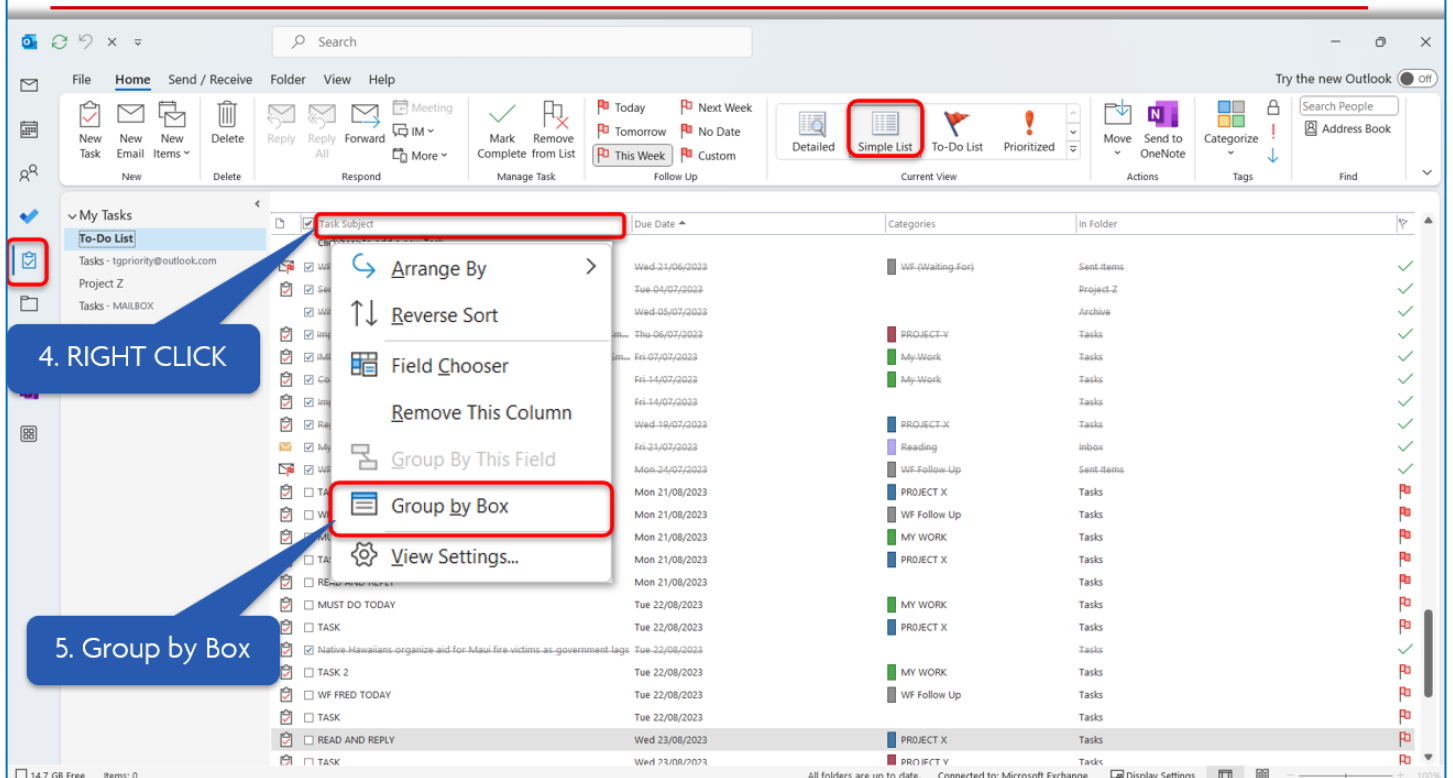
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F. Task Folder customise “Simple List” view:

F1. Tasks Folder “Simple List” for group by date

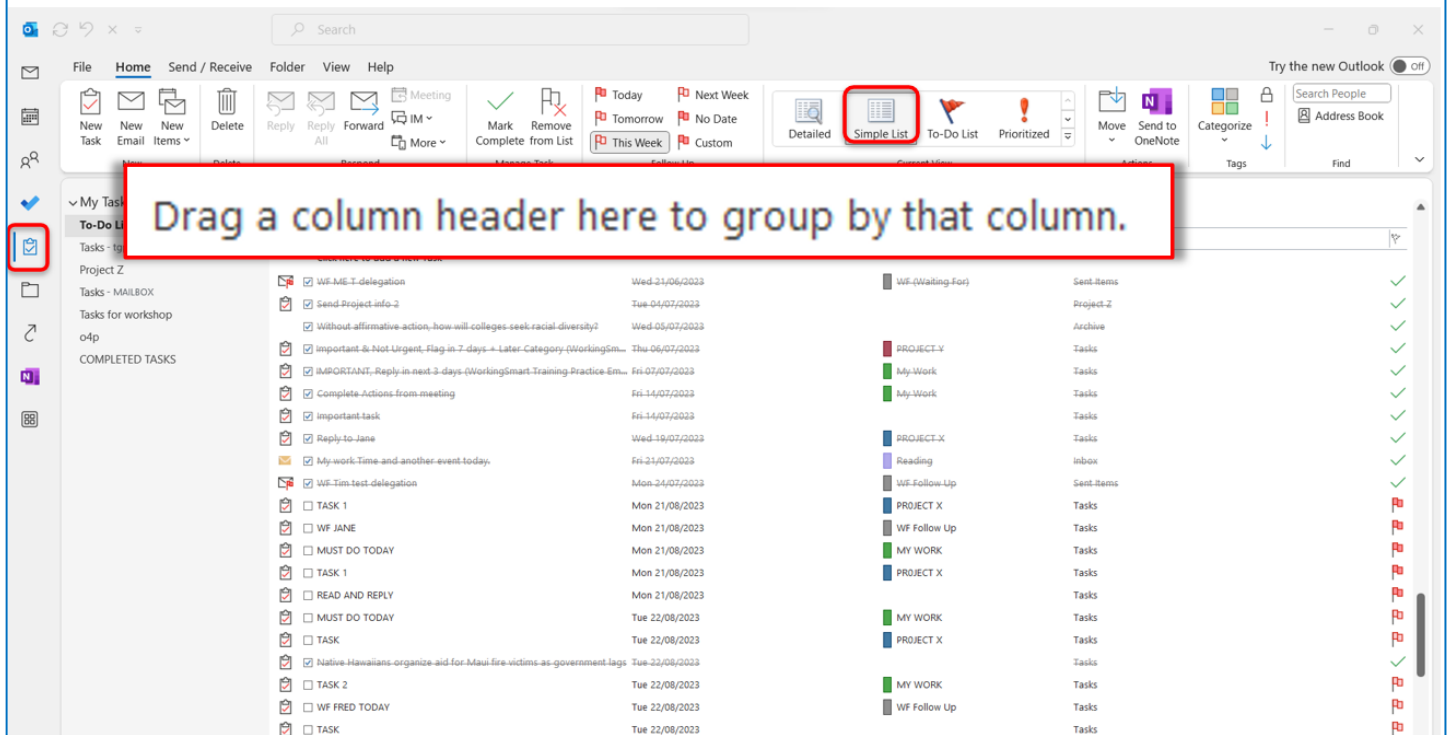


F2. Tasks Folder “Simple List” for group by date

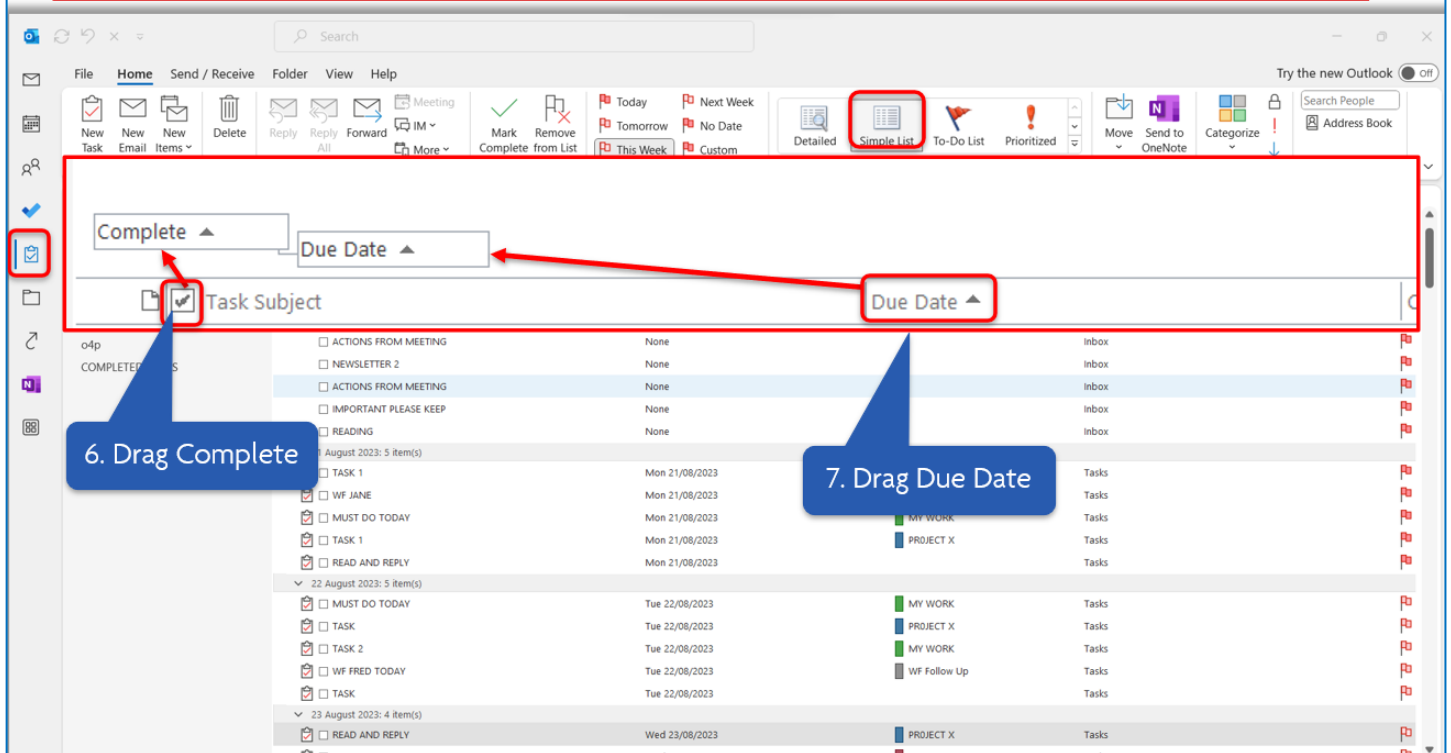


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F3. Tasks Folder “Simple List” for group by date



F4. Tasks Folder “Simple List” for group by date



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G. Task Folder customise “Detailed” view:

G1. Tasks Folder “Detailed” for Group by Category

8. RIGHT CLICK

9. Group by Box

Task Subject	Due Date	Categories	In Folder
WF (Waiting For)	Wed-21/06/2023		Sent-Items
	Tue-04/07/2023		Project-Z
	Wed-05/07/2023		Archive
	Thu-06/07/2023		Tasks
	Fri-07/07/2023	PROJECT-Y	Tasks
	Fri-14/07/2023	My-Work	Tasks
	Fri-14/07/2023	My-Work	Tasks
	Wed-16/07/2023		Tasks
	Fri-21/07/2023		inbox
	Mon-24/07/2023	PROJECT-X	Sent-Items
	Mon 21/08/2023	WF-Follow-Up	Tasks
	Mon 21/08/2023	PROJECT X	Tasks
	Mon 21/08/2023	WF Follow Up	Tasks
	Mon 21/08/2023	MY WORK	Tasks
	Mon 21/08/2023	PROJECT X	Tasks
	Mon 21/08/2023	PROJECT X	Tasks
	Tue 22/08/2023	MY WORK	Tasks
	Tue 22/08/2023	PROJECT X	Tasks
	Tue 22/08/2023	MY WORK	Tasks
	Tue 22/08/2023	WF Follow Up	Tasks
	Tue 22/08/2023	PROJECT X	Tasks
	Tue 22/08/2023	MY WORK	Tasks
	Tue 22/08/2023	PROJECT X	Tasks
	Wed 23/08/2023	PROJECT X	Tasks
	Wed 23/08/2023	PROJECT X	Tasks

G2. Tasks Folder “Detailed” for group by Category

10. Drag Complete

11. Drag Categories

Task Subject	Status	Due Date	Modified	Date Completed	In Folder	Categories
ACTIONS FROM MEETING		None			inbox	
NEWSLETTER 2		None			inbox	
ACTIONS FROM MEETING		None			inbox	
IMPORTANT PLEASE KEEP		None			inbox	
		None			inbox	
		Mon 21/08/2023			Tasks	PROJECT X
		Mon 21/08/2023			Tasks	WF Follow Up
		Mon 21/08/2023			Tasks	MY WORK
		Mon 21/08/2023			Tasks	PROJECT X
		Mon 21/08/2023			Tasks	PROJECT X
		Tue 22/08/2023			Tasks	MY WORK
		Tue 22/08/2023			Tasks	PROJECT X
		Tue 22/08/2023			Tasks	MY WORK
		Tue 22/08/2023			Tasks	WF Follow Up
		Tue 22/08/2023			Tasks	PROJECT X
		Tue 22/08/2023			Tasks	PROJECT X
		Wed 23/08/2023			Tasks	PROJECT X