

FAQ for *WorkingSm@rt* Training

WORKING SM@RT FREQUENTLY ASKED QUESTIONS (FAQ) – SEE ANSWERS BELOW

Sections: **A: Implement**; **B: Set-up**; **C: Email**; **D: Calendar**; **E: Tasks**

A: Implement

FAQ A1. How to implement WorkingSm@rt

FAQ A2. How to Plan Tomorrow Today

B: Set-up

FAQ B1. How to turn off email notifications

FAQ B2. How to undo Compact Navigation Bar

FAQ B3. How to setup multiple displays with more than one screen

FAQ B4. How to change Microsoft Outlook language

C: Email

FAQ C1. How to Colour code emails

FAQ C2. How to divert emails with Rules/Filters

FAQ C3. How to save time for frequently used content in emails with Quick Parts

FAQ C4. How to set-up regular email searches with (Virtual) 'Search Folder'

FAQ C5. How to change time before emails are marked as 'Read'

FAQ C6. How to remove Categories from Incoming Emails

FAQ C7. How to Combine Multiple Outlook Inboxes

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D: Calendar

FAQ D1. How to auto-colour Calendar Appointments

E: Tasks

FAQ E1. How to view Completed Tasks in Tasks Folder

FAQ E2. How to share a Task Folder in Outlook

A: Implement

FAQ A1. HOW TO IMPLEMENT WORKING SM@RT

1. Complete customisation - see PDF document "Outlook Setting Up for WorkingSm@rt Training"
2. Clean-up Inbox
 - a) Action emails into Tasks or Categorise: 'Later' or 'Reading'
 - b) File all non-Categorised in 'General'
3. Simplify Email folders
4. Set-up Inbox colouring (FAQ 3) & Email Filters (FAQ 4)
5. Set-up Categories for grouping Tasks in Task Folder

FAQ A2. HOW TO PLAN TOMORROW TODAY

1. Clean-up Inbox (4Ds + Categories + Filing)
2. Sent emails for follow-up
3. Re-date incomplete To Do's/Tasks
4. Prioritise top 3 To-Do's for tomorrow + Block Time
5. Prepare for meetings tomorrow

B: Set-up

FAQ B1. HOW TO TURN OFF EMAIL NOTIFICATIONS

1. Select File > Options > Mail > Message arrival > select or clear the 'Display a Desktop Alert' check box and then select OK

FAQ B2. HOW TO UNDO COMPACT NAVIGATION BAR

1. On the Navigation Bar, click ... > Navigation Options > Un-check the Compact Navigation box

FAQ B3. HOW TO SETUP MULTIPLE DISPLAYS WITH MORE THAN ONE SCREEN

1. Windows Button > Settings > System > Display Settings > Multiple Displays > Select "Extend Desktop to this Display"

FAQ B4. HOW TO CHANGE MICROSOFT LANGUAGE

1. Click the File > Options > Language > Under 'Choose Editing Languages', select Language
2. Under 'Choose Display and Help Languages' select Language > Click 'Set as Default' buttons
3. Click OK > Re-start all Office programmes for the changes to take effect

C: Email

FAQ C1. HOW TO COLOUR CODE EMAILS

1. Outlook 365: View Tab > View Settings icon > Click on the 'Conditional Formatting' button to open the 'Conditional Formatting' Window
2. Click 'Add' and enter a name for formatting rule (for example: Senior Managers are Red)
3. Click the 'Condition' button. The Filter dialog appears
4. On the 'Messages' tab, click the 'From' button, select the person's name (make sure they're in the 'From' field), and then click 'OK'
5. Click 'OK' to close the filter dialog box
6. In the 'Conditional/Automatic Formatting' dialog box, click the 'Font' button, select the font, colour and size etc and then click 'OK'
7. Click 'OK' to close the 'Conditional/Automatic Formatting' dialog box

FAQ C2. HOW TO DIVERT EMAILS WITH RULES/FILTERS

You can use the following procedure to quickly create a "one off" rule. However, if you want to use rules that perform similar actions, use Rules and Alerts on the Tools menu instead. For example, if you receive five different newsletters and would like Outlook to automatically move those to a Reading folder, it is better create one rule that will move all five newsletters to the Reading folder.

1. Right-click an email and click 'Rule/Create Rule'. The Create Rule dialog box appears.
2. Under 'When I get email with all of the selected conditions', select which conditions you want to use. For example, select 'Subject contains'.
3. Under 'Do the following', select what you want Outlook to do. For example, select 'Move email to folder'. Then click the 'Select Folder' button and specify which folder you want Outlook to move the email to. (Click on 'Advanced Options' for more options)
4. Click 'OK'. Outlook creates the rule and asks if you want to run the rule now on messages already in the current folder.
5. Select the 'Run the rule now on messages already in the current folder' option.
6. Click 'Finish'. You have now created a rule that will automatically move any messages that meet the criteria you specified to the specified folder.
5. Click OK – and the virtual Search Folder will appear in the list under 'Search Folders'
7. Right click on the new virtual search folder and select "Add to/Show in Favourite Folders" – this makes it easier to find Search Folders quickly. Note: Virtual Search Folders do not duplicate or move emails from their folders – it only uses links to the emails.

FAQ C3. HOW TO SAVE TIME FOR FREQUENTLY USED CONTENT IN EMAILS WITH QUICK PARTS

TO SET-UP QUICK PARTS:

In an open email > highlight the text > Insert > click 'Quick Parts' icon for drop-down > select 'Save selection to Quick Part Gallery' > give it a short name (e.g. first few words or a word of 5 characters or more) > OK.

TO USE QUICK PARTS:

When typing, the Quick Part name will generate a window: "Press ENTER to Insert" > Press 'Enter' to insert the Quick Part full text.

TO EDIT/DELETE QUICK PARTS:

It appears you cannot edit Quick Parts. Instead create a new one and delete the original. To delete: In an open email > Insert > Quick Parts > Right click in any of the existing Quick Part items > select 'Organise and Delete' > Delete

CATEGORIES: Quick Parts presents them in alphabetical order. You can create Quick Parts Categories from the dialogue box to group Quick Parts.

MICROSOFT HELP LINKS:

[Create reusable text blocks for email messages](#)
[Quick Parts](#)

FAQ C4. HOW TO SET-UP REGULAR EMAIL SEARCHES WITH (VIRTUAL) 'SEARCH FOLDER'

1. Right click on 'Search Folders' (located at the foot of Mailbox folders)
2. Select "New Search Folder"
3. A dialog box "Select a Search Folder" will appear and you can select options such as "Mail From and To Specific Person", "Old Mail" or "Mail with Specific Words"
4. Highlight your selection > click on "Choose" > enter your search criteria > OK
5. Click OK – and the virtual Search Folder will appear in the list under 'Search Folders'
6. Right click on the new virtual search folder and select "Add to/Show in Favourite Folders" – this makes it easier to find Search Folders quickly. Note: Virtual Search Folders do not duplicate or move emails from their folders – it only uses links to the emails.

FAQ C5. HOW TO CHANGE TIME BEFORE EMAILS ARE MARKED AS 'READ'

1. File > Options > Mail
2. Reading Pane > "Mark items as read when viewed in the Reading Pane" > "Wait ... seconds before marking item as read". (Default is 5 seconds)

FAQ C6. HOW TO REMOVE CATEGORIES FROM INCOMING EMAILS

1. Click Home > Rules > Create Rule > Advanced Options
 2. Tick "assigned to any category" > Next > tick "clear message's categories" > Finish
- NB do not run rule now!

FAQ C7. HOW TO COMBINE MULTIPLE OUTLOOK INBOXES

1. Click File > Info > Account Settings > Account Settings > highlight account to be delivered to Microsoft Exchange Inbox
2. Click on Change Folder > Expand Microsoft Exchange account to select Inbox > OK > Close

FAQ C8. HOW TO EMPTY AUTO-COMPLETE LIST IN INBOX

1. File > Options > Mail > Send Messages > 'Empty Auto-Complete List' > Yes > OK

D: Calendar

FAQ D1. HOW TO AUTO-COLOUR CALENDAR APPOINTMENTS

1. Calendar > View > View Settings > Conditional Formatting
2. Click Add > Name: type description of meetings > Color: select from drop-down > Condition > Search for the word (s): add key words encased in speech marks " " separating multiple words with 'or'. (Example: "Team" or "Project X" or "Travel") > OK > OK > OK. Now test it!

E: Tasks

FAQ E1. HOW TO VIEW COMPLETED TASKS IN TASKS FOLDER

This can be useful for performance reviews

1. Tasks Folder > View > Change View > Completed
2. To remove strike-throughs: View Settings > Conditional Formatting > highlight Completed and Unread Tasks > Font > uncheck Strikeout > OK > highlight Completed and Read Tasks > Font > uncheck Strikeout > OK > OK

FAQ E2. HOW TO SHARE TASK FOLDER IN OUTLOOK

1. Click Tasks in the Navigation Pane, and then under My Tasks right-click the folder you want to share.
2. Click Share > Share tasks. In the To box, enter the name of the recipient of the sharing invitation message. Optionally, you can change the Subject.