## Contents

1. **Introduction**
   - Getting the most out of Outlook® .................................................. 1
   - The best practices of Getting Things Done® .................................... 2
   - The need for simple lists ............................................................... 2
   - Making your lists portable .......................................................... 3
   - Speed up your processing ............................................................ 4

2. **Using Outlook Tasks**
   - New definitions of “Category” and “Task” ......................................... 8
   - One-time setup instructions .......................................................... 8
   - Clean up and simplify your Task view ............................................ 8
   - Customize your categories to work as lists ..................................... 15
   - The best categories to start with .................................................. 17
   - Linking projects to actions ........................................................... 23
   - Marking entries private ............................................................... 25
   - Using due dates ........................................................................... 25
   - How to create a new entry in Tasks .............................................. 25
   - How to create a Task using shortcut keys ...................................... 26
   - Working with completed Tasks ................................................... 26

3. **Using the Calendar**
   - Time-specific actions ................................................................. 27
   - Day-specific actions ................................................................... 27
   - Day-specific information ............................................................. 29
   - How to create a Calendar entry using shortcut keys ....................... 29
   - Reviewing your action choices .................................................... 31

4. **Managing Email**
   - The fundamental success factor: operate from zero base ................. 32
   - How to get email to zero .............................................................. 32
   - Tip for tracking Waiting For items .............................................. 33
   - Two methods for organizing actionable emails ................................. 35
   - Using Quick Steps ....................................................................... 37
   - Delegating through Outlook ....................................................... 38
   - Option for categorizing emails .................................................... 38

5. **Other Useful Lists**
   - How it works as a list manager ..................................................... 39
   - Some great categories and lists ................................................... 41
   - Capturing information on the go .................................................. 42

6. **Tips about Contacts**
   - Get good at creating new entries ................................................ 43
   - Creative use of search .................................................................. 43

7. **Conclusion** ............................................................................. 44

8. **Speed Key Tips Sheet** .............................................................. 45
The best practices of Getting Things Done

In order to understand our specific recommendations for Outlook setup and usage and to maximize its potential in practice, it’s important to clarify some simple but powerful productivity behaviors. These are fundamental to the success of the system.

1. Don’t leave anything in your head or in unprocessed stacks
If your system contains only partial information, it won’t give you the payoff of a system, and you won’t be motivated to maintain it. For example, if your “Calls” list doesn’t have every single call you need to make, your head will still have to keep remembering and reminding you about the rest of them. Trying to keep only some of them in Outlook will be too much work for the minimal benefit you’ll gain.

2. Decide the next physical action
If you don’t determine the very next action needed on a task or project or an email, you won’t know where to park the reminder, and the pressure of still needing to make a decision will cause you to avoid engaging with your lists.

3. Review and update the contents of the whole system regularly
A system is only as trustworthy and beneficial as it is current, consistent and complete. The more the system can be kept up to date as you go along, the more “alive” and supportive it will be to allow your mind to focus on the work at hand. The world will probably come at you faster than you can keep it totally processed and organized, but you can’t let it slip too long before you catch up. The reminders of projects and actionable items must be cleaned up and refreshed at least every seven days, in a process we call the “GTD Weekly Review®”.

The need for simple lists

Once you have appropriately processed your “stuff”, simple lists will store most of your reminders and reference information. These can be “flat” lists—not tied or related to other things, nor sorted by priority or urgency—just lists. You need a list of projects, a list of all the calls you need to make, a list of all the things you are waiting for to come back from other people, etc. You may also want lists of your key objectives for the year, books you might want to read, and all the things you might want to pack whenever you take a trip. The Outlook Tasks section can be a terrific list manager for your actionable items and the Outlook Notes area can serve as a very functional catalog of checklists and reference material.

---

2 The *Getting Things Done* book has many helpful tips about the Weekly Review, including a checklist to follow.
2. **Clean up old Tasks.** Get rid of any outdated entries currently in Tasks. You can do this by either deleting or marking items complete. This will ensure that you have a fresh start to Tasks.

**Additional tips for cleaning up old tasks:**

A. Print out your current tasks view in hard copy and toss it into your hard copy Inbox to reprocess later into your new system. Then, select all entries <Ctrl a>, and Delete <Ctrl d>.

or

B. Leave the entries you have in there, but keep them uncategorized (no Category assigned to them). You can do this by collapsing the list down to only categories, then select all the categories, right-click on the selected list, select “Categorize”, and “Clear All Categories”.

3. In the **View** tab, change to **Categories** under **Arrangement**. Make sure you are still in **Simple List** under **Home** tab.

4. **Change the Columns for your Tasks view.** Click **View > View Settings**.
Marking entries private

Some people feel more comfortable putting personal information into Outlook if they know they can mark the entry private. While your IT group can see anything on your company PC, the Private feature typically blocks colleagues from seeing details about your entries if you click the “Private” button in a Calendar or Task item. We recommend checking your privacy settings carefully, before entrusting that key information will be hidden by this feature.

Using Due Dates

All overdue Task items will appear until you complete the item or change the due date. We recommend using due dates judiciously. A quick way to erode trust in your system is to create a pattern of false due dates, where you are constantly questioning what’s a real versus made up due date, as well as spending your valuable time changing dates on overdue Tasks you thought you would get to.

How to create a new entry in Tasks:

Click the New Task button in the top left corner of the ribbon in the Tasks view.

Enter the description for Next Action, Project, or Someday Maybe in the Subject field.

Click the Categorize button and select a category (or in GTD terms, a “list”) to assign the entry.
Putting the Calendar and Tasks together functionally
The combination of your Calendar and Task lists in one view will give you the flexibility to move between those key views throughout your day. To have your Tasks appear in the right panel, select View, To-Do Bar. Check off Tasks:

Similar to the one-time setup instructions you went through in Tasks (pages 9-16), there are a few simple view one-time changes to make in the To-Do Bar as well.

1. Right-click on the words Arrange By above the Tasks in To-Do Bar and select Categories.
2. Right-click on the words Arrange By again and select View Settings.

3. Click on Columns button. Under the Columns window:
   - **Add:** Complete field from the left column to the right by selecting it and clicking Add to move it to the right. Double clicking on the field name also works.
   - **Remove:** Remove Header Status, Flag Status, Start Date, Reminder time, In Folder, Categories, Reminder and Outlook Data File columns from the right by selecting each one and clicking Remove.
Managing Email

To add an email to an existing entry, open the Calendar or Task item, click on the Insert menu in the ribbon, and select the Outlook Item icon. From the dialog box, select the email(s) to insert, choose Text Only or Attachment, and click OK. A copy of the email is attached and does not affect the original email.

By moving the entire email over to Tasks as a file attachment, when you decide to work on it you can simply launch the email from within the created task without having to find the email again in a folder.

If you ever want to move the email back to an email folder from Tasks, open the email from Tasks, select File > Move item to a different folder > Copy to Folder and select the location to copy the email into.

The advantage of moving emails to Tasks is that it puts all your next action reminders in one coordinated set of lists instead of spread into two different functional places in Outlook. The disadvantage is the small extra step it takes to get them over there.

Method Two

Use the email as a central reminder and move it to an @Actions email folder

With this method, the @Actions email folder serves like a Task list. When you have an actionable email, simply hold down your left mouse button and drag and drop it to the @Actions folder. If you choose this method, capture your next action in the subject of the email so that you don’t have to process and rethink what you planned to do about that email. You’ll appreciate this when you revisit those action choices and don’t have to figure out what you were going to do all over again.

To edit an email subject line, open the email in a new window (this will not work from your inbox list or Reading Pane), and simply click on the subject line and start typing. You can still preserve the original subject line (if you need to), and delete your next action before replying back.

Add your Next Action in parenthesis, while preserving original subject line