



OUTLOOK[®]

2013/2016

Setup Guide

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FOCUS OF THIS GUIDE

Our focus with this guide is to show you how to setup Outlook[®] 2013 or 2016 on your desktop for your GTD workflow so that you can view your Tasks in both the Microsoft To-Do application on your mobile device and the desktop browser version Outlook (also called Office 365 version of Outlook and Outlook.com). Up until now, viewing Outlook Tasks on a mobile device, particularly the iPhone, has been a challenging endeavor. With the release of To-Do, viewing Tasks on your mobile device is easier, with a very specific configuration of Tasks on your desktop, as we will instruct you. This guide focuses on the methods we have found work well for GTD for a wide range of people.

This new guide recommends setting up Tasks in a different way than our previous Outlook Guides, in order to support viewing Tasks in To-Do. We've also included instructions in the appendix for setting up Tasks like we describe in previous guides, using the Master Category list, if using To-Do is of no interest to you, you have another way to sync, or you have already set up Tasks based on our previous guides and want to stay with that method. But we do think this new way of setting up Task lists as folders, as described in the majority of the Guide, is the best way to configure Tasks, regardless of whether you plan to sync.

This guide covers these key areas of Outlook for your GTD workflow: Email, Calendar, Tasks, and Notes. If you are new to Outlook, this guide should be an excellent starting point for you to build a solid GTD foundation for optimizing your productivity using the built-in features. If you already have an established system in Outlook, use this guide as an opportunity to fine-tune or simplify, if you have found you've underused or overbuilt your setup. Or, if you have already created a system in Outlook following one of our previous guides and now want to view Tasks in the To-Do app on your mobile device, this will be an opportunity to reconfigure your Tasks setup to make that work.

We are aware that there are many features and ways to configure your system in Outlook. This is not a technical guide, nor will it cover all the instructions for how to use Outlook. We will talk about what to sync, but not how to sync, as there are so many variables for this. Additionally, Microsoft currently only supports synchronizing Outlook to To-Do through Exchange online accounts. The guide is based on the latest version of Outlook 2016 on the Windows desktop, as of July 2018. If you are using an earlier version of Outlook, particularly Outlook 2013, some of the instructions and screenshots will be different for you. But the 2013 and 2016 versions are close enough in functionality that this will still serve as an excellent tool for you.

Whatever configuration you choose in tools like Outlook, be careful not to overcomplicate it to the point where you can only maintain it when you are at your peak of mental clarity. It's too easy to have a complicated system fall apart when you're not at your best. Your GTD tools should be complex enough to manage your workflow, but simple enough that if you were sick in bed with the flu, you could still easily maintain them.

Be careful not to overcomplicate your systems to the point where you can only maintain them when you are at your peak of mental clarity.

OK...let's get started!

UNDERSTANDING THE GTD BEST PRACTICES

To get the most out of Outlook as a tool for your GTD practice, let's review the fundamentals of the Getting Things Done® approach, so you understand how the methodology and tools will intersect.

WHAT IS GTD?

GTD is the shorthand brand for “Getting Things Done,” the groundbreaking work-life management system and bestselling book¹ by David Allen, which provides concrete solutions for transforming overwhelm and uncertainty into an integrated system of stress-free productivity.

GTD'S FIVE STEPS OF MASTERING WORKFLOW

- CAPTURE** Collect anything and everything that's grabbing your attention.
- CLARIFY** Define actionable things into concrete next steps and successful outcomes.
- ORGANIZE** Sort information in the most streamlined way, in appropriate categories, based on how and when you need to access it.
- REFLECT** Step back to review and update your system regularly.
- ENGAGE** Make trusted choices about what to do at any given moment.

THREE STAGES TO INTEGRATING GTD

- 1. UNDERSTANDING** You understand the distinct differences in the five steps of Mastering Workflow. You understand a project versus a next action. You know how to transform what you've collected by asking the key processing questions, clarifying what something is, and what you want to do about it.
- 2. IMPLEMENTATION** You have installed at least the basic gear to support your GTD practice, including ubiquitous collection tools, functioning reference systems for your non-actionable information, and seamless buckets with “clean edges” for tracking your projects and next actions.
- 3. BEHAVIOR CHANGE** The five steps of Mastering Workflow are second nature to you. You have changed the way you think and work and are achieving stress-free productivity on a regular basis. When you “fall off” you know what to do to get “back on.”

This guide will leap forward to the Implementation stage, by configuring Outlook as an organizing tool for your projects, actions, and reference. Success at the implementation stage depends on your understanding of GTD. If you are committed to GTD and experiencing stress-free productivity, don't shortchange yourself by skipping the “Understanding” stage.

¹ *Getting Things Done: The Art of Stress-Free Productivity*; Viking, New York; 2001, 2015 hardback or paperback. Available from booksellers everywhere.

APPLYING GTD TO OUTLOOK[®]

This guide will focus on four areas of Outlook for your GTD implementation:

1. Email (Ctrl + 1)
2. Calendar (Ctrl + 2)
3. Tasks (Ctrl + 4)
4. Notes (Ctrl + 5)



NOTE: *The image above is using the latest version of Outlook 2016, as of July 2018. Your icons and navigation bar may appear different if you are using an earlier version, but the end result is still the same.*

USING TASKS

Outlook Tasks is the best option for managing the Projects, Next Actions, Waiting For, and Someday/Maybe lists. Tasks is the only area of Outlook that will sync to Microsoft To-Do. Get creative in your thinking that it says Tasks and just think of it as your lists section, as it will hold a variety of different types of entries and lists. We recommend you create lists in Outlook to match the common set of 10 lists recommended in the *Getting Things Done* book and make some one-time changes to your Outlook views, which we describe in more detail over the following pages. Configuring your lists and views will take about 15 minutes (pages 4 to 10).

SETTING UP LISTS

Let's set up the 10 suggested lists. We recommend doing this initial setup in the desktop version of Outlook (and not on the desktop browser version, or the in the To-Do browser or mobile apps, as they are more limited in functionality and features). You can always go back to customize these later, after you've experimented, to discover what works best for you. We encourage you to give these lists some time, especially if the concept of sorting by contexts is new to you.

Go to Outlook Tasks by clicking on Tasks in your navigation bar or using the shortcut keys Ctrl + 4. In the top left margin of Tasks you should see two default lists; To-Do List and Tasks:



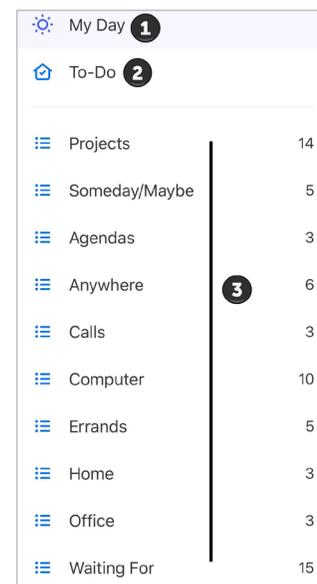
Although similar, these two lists have some important differences:

- The To-Do List holds all Outlook items that you have flagged anywhere in Outlook, including tasks, appointments, emails, and contacts.
- The Task list holds all task entries.

THERE ARE THREE WAYS YOUR TASKS CAN BE VIEWED IN THE TO-DO APP:

1. **My Day:** This list will show you items that you have tagged in the To-Do app as something to work on today.
2. **To-Do:** This list will show you items in the default Tasks list from Outlook (a list we don't use, given the recommendation to create Task lists as folders instead).
3. **Tasks by folder:** This list will display all Tasks that are in the Task folders you created (e.g., Projects, Agendas, Calls, Computer, etc.).

The risk in using a feature like My Day is that it becomes a parking lot for only “important” items that automatically roll over from one day to the next. To use the My Day view productively, we recommend reviewing it at the end of each day and marking any items as complete that you finished and move any you did not do, or your priority changed, back to the context lists. The My Day view should not replace regular reviews of ALL of your lists. Think of it as a temporary, short-term pick list for items you absolutely must give attention to today, that you might otherwise miss on your other lists.



The To-Do List in Outlook that shows all list items in one view does not appear in the To-Do app. Also, attachments in the notes field of Tasks in Outlook do not appear in the To-Do app. So, while you can add and view them on your desktop version of Outlook, you will not see them in To-Do. This will be important to remember when we talk about creating tasks from emails later in this guide.

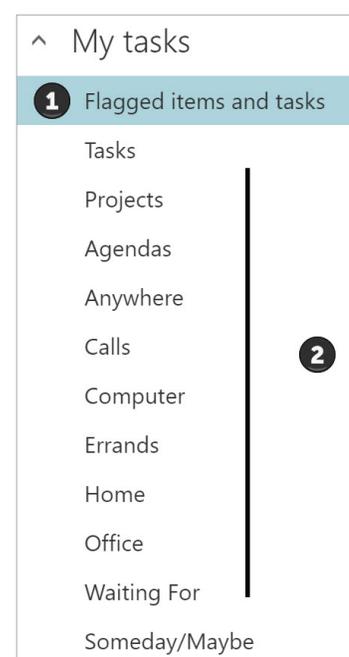
WHAT TO EXPECT IN THE DESKTOP BROWSER VERSION OF OUTLOOK

The browser version of Outlook is also commonly referred to as Outlook for Office 365 or Outlook.com.

THERE ARE TWO WAYS YOUR TASKS CAN BE VIEWED IN THE DESKTOP BROWSER VERSION OF OUTLOOK:

1. **Flagged items and tasks:** This list matches your To-Do List view on the desktop version of Outlook and shows all Task items in one unsorted list.
2. **Tasks by folder:** This list will display all Tasks that are in the Task folders you created (e.g., Projects, Agendas, Calls, Computer, etc.).

Attachments in the notes field of Tasks in Outlook on your desktop appear in the browser version as well.



WAITING FOR

This list keeps track of all the actions, projects, and deliverables that you want to happen, but which are someone else's responsibility. It could be something you've ordered that hasn't come yet, something you've handed off to your assistant for which you're waiting on a response or something your boss is supposed to be finding out before you can move forward on a key project.

- Frame store - print order - 6/25
- Anne - Get back to me about London trip and flights - 7/15
- Ivo - Feedback on new design - 7/8
- Frank - Signed agreement - 7/12

Typically, we suggest adding the date you started waiting in the description of the item. This can be helpful when deciding when it's time to follow up again if they have not responded. The Waiting For list should be reviewed as necessary (at least once a week in the GTD Weekly Review[®]) triggering appropriate actions on your part to follow up, light a fire, or just check the status.

SOMEDAY/MAYBE

These are the things you might want to do at some point in the future, but with no commitment to move on them at present. They could represent next actions or projects that were current at one time or not. Many people find they triage things onto and off the Someday/Maybe list when their priorities shift. Your only commitment to items you put on the Someday/Maybe list is that you will review the choice regularly in your Weekly Reviews. That should give you the freedom to capture onto this list without the stress of feeling like you've made a commitment you may not have the resources to take on.

- Open new office in Sydney
- Clean off old cell phone and donate
- Learn Dutch
- Replace website host
- Move 401k investments around

PROJECTS

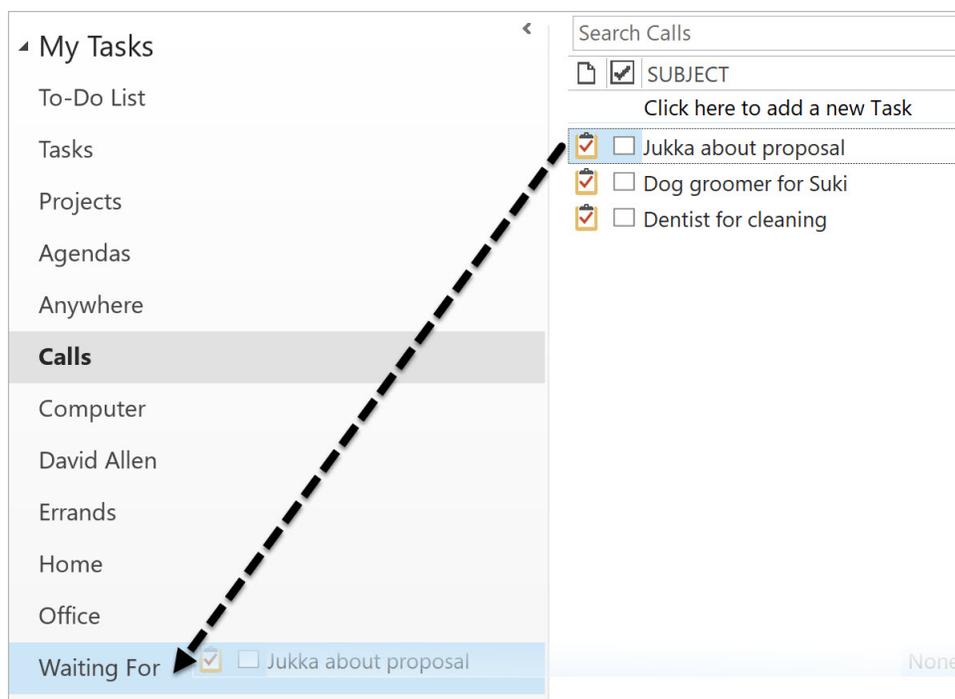
The Projects list tracks any of your desired outcomes that require more than one action step to complete, which you expect to be done over the next 12 months. Projects should always have a defined endpoint in the form of a verb (e.g., complete, rollout, submit, finalize, finish, etc.).

- Complete taxes
- Hire new webmaster
- Put on party for Rebecca
- Get GTD Up & Running
- Take trip to Tahiti

MOVING ITEMS BETWEEN LISTS

When you are working in your system, you'll be moving items between lists frequently. For example, you may have a next action in your Calls list to make a call. If you reach their voicemail but need to track that the person calls you back, that item would get reassigned to the Waiting For list. Or, you may have a project that has changed in priority and became a someday/maybe, or vice versa.

To change the list assigned to an entry, simply drag it from one list and drop it in another. For example, to move a next action from the Calls list to the Waiting For list, drag it from the Calls list to the Waiting For list:



You can also move a Task by highlighting it on your list, using the keyboard Ctrl + Shift + V, then selecting a new Task list from the list.

CUSTOMIZING OUTLOOK

The lists and setup we have suggested should serve as a starting point. There are many ways to set up Outlook for GTD, and no two setups will be the same. You may need more lists or fewer than we suggest. We write these guides to offer a solid foundation to get you started, without overwhelming you with all of the possible options and scenarios. That said, here are some customizations to consider:

CONTEXTS

Some people find they want to break out Computer into more specific lists, such as which type of computer work, such as email-related next actions. Executive support staff can often use a context called Meetings to Schedule. Or, you may find you don't want to use as many contexts, and a simple list called Next Actions would suffice for your action lists.

GETTING YOUR INBOX TO ZERO

Getting your inbox to zero means you have decided about what each email means and what you want to do about it. Using the questions from the GTD Workflow Map (pictured earlier in this guide) you would simply ask:

WHAT IS IT?

IS IT ACTIONABLE?

NO Is it trash, to file as reference, or to incubate (add to your Someday/Maybe list, calendar, Tickler or Bring Forward file²)?

YES What's the next action?

Do now, delegate to someone else, or defer to do myself later?

Do it now If it takes less than 2 minutes, handle it in the moment.

Delegate it If you need to track this getting completed, track the waiting for reminder in your @Waiting For folder in email or Waiting For in Tasks.

Defer it If needing to do it later, track the action reminder in @Action folder in email, Calendar, or on a Next Actions list.

If multiple actions, what's your desired outcome? Track that outcome on your Projects list in Outlook.

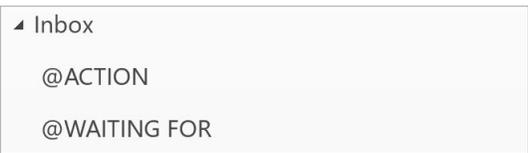
We recommend getting your inboxes to zero daily, or at least once a week in your Weekly Reviews.

TWO OPTIONS FOR MANAGING ACTIONABLE EMAIL

OPTION ONE

Use the email as the reminder

Create @Action and @Waiting For email folders in Outlook and use them as an action list. You would not also put those reminders on your calendar, or Next Actions by context (e.g., Calls, Computer, etc.) or Waiting For lists in Outlook Tasks—the email itself would be the only reminder. That means you need to scan these folders with as much discipline as you would your lists and calendar, for reminders of your commitments. Using the @ symbol is a trick to push these folders to the top of your email structure for easy access.



```

  ▲ Inbox
    @ACTION
    @WAITING FOR
  
```

² For more information on using a Tickler/Bring Forward file, see the *Getting Things Done* book.

CALENDAR

WHAT BELONGS ON YOUR CALENDAR

Your calendar is a critical component in your system for reflecting the action choices that need to be done ON a specific day versus those that you see on your Next Actions lists in Outlook, which can be done on ANY day, or BY a specific day. Your daily calendar page should represent the “hard landscape” for your day and will provide a trusted foundation at a glance for moment-to-moment orientation about “what’s next?”.

1. Time-specific actions Things that need to happen on a specific day and time.

Examples:

- Meetings, appointments, time blocked to work on projects

2. Day-specific actions Things that need to happen during the day, but not at a specific time.

Examples:

- A call you have to make before you leave for the day
- Something that you have to finish and submit by the end of the day
- An agenda you must cover with someone before they leave the office

3. Day-specific information This is information you want to know or be reminded of that day—not necessarily something to do.

Examples:

- Events that might disrupt your day (server shut-downs, office moves, etc.).
- External events to be aware of (marathons, elections, heads of state visits, etc.).
- Activities related to other significant people of interest to you (kids, spouses, bosses, assistants, vacations, etc.).

Add day-specific actions and day-specific information as All Day Events at the top of your daily calendar page, which Outlook considers free time.

Here is a calendar showing all three types of entries:

THURSDAY	
28	
FYI: David in Tokyo 3	
Send updated spreadsheet to Jose 2	
Submit expense report	
11 AM	Update meeting with Luca 1
12 PM	
1	
2	Marketing Team Meeting
3	

REFERENCE

OPTIONS FOR ORGANIZING REFERENCE

Outlook Tasks (Ctrl + 4) or Outlook Notes (Ctrl + 5) can manage a limitless number of potentially useful and fun non-actionable simple reference lists and checklists. The Outlook Notes app seems like the obvious choice, but it does not sync to Microsoft To-Do or the desktop browser version of Outlook. They will only be accessible in Outlook on your desktop. For that reason, we recommend setting up Reference in Tasks, as we did earlier, instead of Notes, so that they sync to Microsoft To-Do unless you have another option for syncing Notes.

SOME GREAT CATEGORIES AND LISTS

There are many options and possibilities for storing reference information. Here are some triggers to get you started:

Have you ever...

- had a wild idea you didn't know what to do with?
- wanted to remember the great restaurant you ate at in London?
- needed to remember all the things to check before you leave on a trip?
- read something inspirational you wanted to keep and re-read every once in a while?
- wondered where to put a suggestion about something to do the next time you visit a country?
- needed to remember everything you need to handle when you put on a special kind of event?
- wanted to keep track of all the articles, blog posts, or essays you might want to write?
- wanted to have a list of clients and prospects to review occasionally?
- wanted a place to keep track of the possible gifts to give special people in your life?
- needed a place to capture great team building and staff recognition ideas?
- needed a quick emergency contact list?

Here are some possible new reference lists to try:

- Checklists (e.g., Weekly Review, Packing, Home Maintenance)
- Areas of focus
- Higher Horizons of Focus³
- Fun
- Ideas
- Inspirations and affirmations
- Great quotes
- Lists
- Might like to buy
- Might like to read
- Music to download
- Next time in...
- Travel
- Vacation ideas

³ See David Allen's *Getting Things Done* or *Making It All Work* books for more information on Horizons of Focus.