



# OUTLOOK<sup>®</sup> 2019 FOR MAC<sup>®</sup>

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Setup Guide

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## FOCUS OF THIS GUIDE

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Our focus with this Guide is to show you how to create a seamless GTD<sup>®</sup> system using the built-in features in Outlook<sup>®</sup> for Mac<sup>®</sup> 2019. Given the design changes in the 2019 version, we are recommending a new way to configure tasks, which is different than what will work in the 2011 or 2016 versions.

If you are new to Outlook for Mac, this Guide should be an excellent starting point for you to build a solid foundation for optimizing your productivity. 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.

Don't worry about using every feature in Outlook. There is likely far more built in than you will ever need. Focus on what makes a difference for you. It's important not to overcomplicate your systems to the point where you can only maintain them when you are at your peak of mental clarity. It's too easy to be out of that mindset and have the whole system fall apart. 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.

We should note that this Guide does not focus on all of the technical aspects of Outlook and all of the options for syncing. There are simply too many variables for us to fairly and adequately address every user's needs. A good web search, Microsoft, your handheld device technical support, or your IT department will be your best resources for that.

The primary focus of this guide is about applying GTD to the applications available in Outlook for Mac now—without requiring you to purchase or download anything new. You have a wealth of applications at your fingertips.

OK...let's get started!

***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.***

# APPLYING GTD TO OUTLOOK FOR MAC®

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## USING THE TASKS APPLICATION TO MANAGE PROJECT AND NEXT ACTION LISTS

The Tasks application in Outlook is an excellent option for managing the lists in your GTD system.

We recommend you customize the categories in Tasks to match the set of lists recommended in the *Getting Things Done* book, which we will describe in more detail in the following pages. With our method, categories will become your working “lists.”

## THE MOST COMMON GTD LISTS

There are 10 lists recommended in the *Getting Things Done* book that are a good starter set for most people.

### Next Action Lists:

1. Agendas
2. Anywhere
3. Calls
4. Computer
5. Errands
6. Home
7. Office
8. Waiting For

### Incubation List:

9. Someday/Maybe

### Outcomes List:

10. Projects

Sorting your next actions (lists 1–8) by context is recommended because when you are choosing what to do, context will always be your first limitation. For example, if you are at work, you don’t want to be seeing (and having to take the time to skip over) actions that require you to be at home to do. Contexts should map to the people, places, and tools you need to get work done. We’ll most commonly refer to these as “Next Actions.”

Alternatively, you could group your next actions into one list called Next Actions, instead of sorting by context. Give the context-grouped lists a try if the concept is new to you. You might find it’s surprisingly effective and easy to maintain.

## USING PRIORITY FLAGS

A High Priority flag can be useful if you want to have your attention go to a few select items that must be completed soon, but which are on a long list of to-dos. Like due dates, be careful not to get into the trap most people get into with priority flags, which is to use them for nearly everything. It's too easy to go numb to ALL of them when you start seeing the majority of your items screaming for your attention with a flag. If you do choose to use them, keep in mind that Priority flags are:

- Not a replacement for daily reviews of your Next Action lists
- Not a replacement for thorough Weekly Reviews to clean up and update your lists
- Ineffective if they are overused to the point where you are numb to them

Now let's talk about what goes on your new lists...

## EXPLANATION OF THE COMMON GTD LISTS

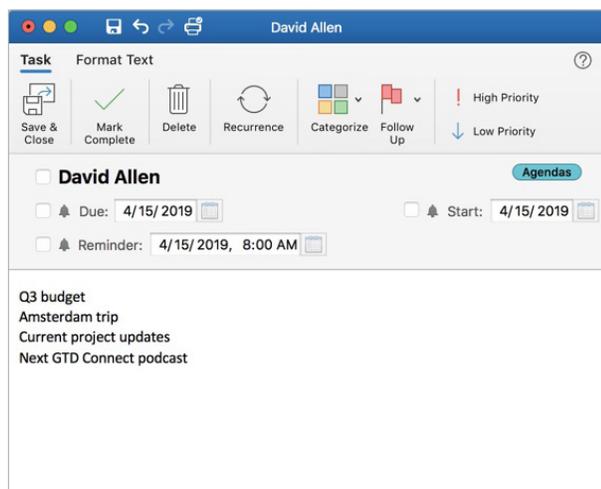
**AGENDAS** This list tracks the topics and agenda items for people you interact with regularly. For example, if you have a standing meeting with a particular team, and want to capture agenda items to bring up at the next meeting, this is the place to capture them.

**You can create agendas two ways:**

**Option One:** Add the person or team name in the subject line and use the note field to capture your agenda items.

With this method, you only have one agenda entry per person or team.

✓	🔄	Title	Due Date	Categories	Folder
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Accountant	No Due Date	Agendas	Tasks
<input type="checkbox"/>	<input checked="" type="checkbox"/>	David Allen	No Due Date	Agendas	Tasks
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Marketing Team	No Due Date	Agendas	Tasks
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Spouse	No Due Date	Agendas	Tasks



The advantage with option one is that all of your agenda items are parked in one place, which can be easier to retrieve and/or print as one page before you go into a meeting.

Outlook will display all entries with that keyword:

✓	●	↔	Title	Due Date	Categories	Folder
<input type="checkbox"/>	✓		David - Q3 budget	No Due Date		Tasks
<input type="checkbox"/>	✓		Finalize the budget	No Due Date	Projects	Tasks
<input type="checkbox"/>	✓		Update budget spreadsheet	No Due Date	Computer	Tasks

Click the  button under the Search tab in the ribbon to return to all Tasks.

## THE GTD WEEKLY REVIEW TIES IT ALL TOGETHER

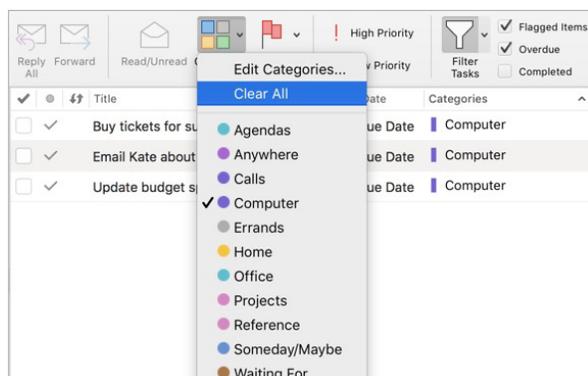
Rest assured, the Weekly Review is what ties the whole thing together, ensuring that you have actions on all the active parts of your projects on a consistent basis, based mainly on those project support materials, so you can trust that what you are choosing from your Action lists is current. See the *Getting Things Done* book for a Weekly Review checklist.

## CUSTOMIZING YOUR LISTS

The lists we have suggested should serve as a starting point. You may need more of these, or fewer. For example, some people find they want to break out Computer into more specific lists, such as a list just for Email. Executive support staff can often use a context called Meetings to Schedule. Some managers find a Projects–Delegated list useful as a high-level Waiting For list. Or, you may find you don't want to use as many contexts, and a simple list called Next Actions or Next Actions-Work and Next Actions-Personal would suffice for your action lists. Be willing to experiment to find the set of lists that will work best for you.

## MOVING ITEMS FROM THE OLD LISTS INTO YOUR NEW GTD LISTS

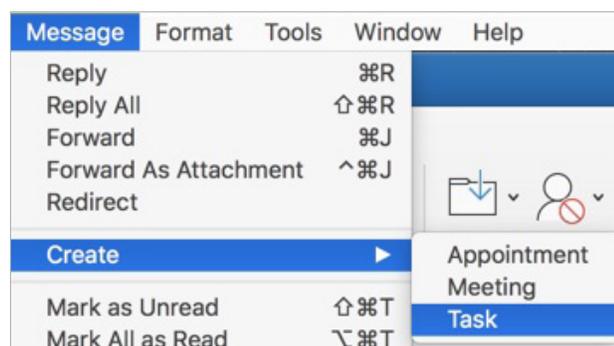
Now that you have a better understanding of how the 10 recommended lists work, go ahead and delete or reassign any existing Tasks you still have on the lists you were previously using that are still relevant. You can change the assigned list by opening the Task entry, clicking the Categorize button, click on Clear All, and then select the new category/list. Click Save & Close when done. You'll also be doing this whenever items move from a Next Actions list (like Calls or Computer) to Waiting For, when you have taken the action but are now waiting for a response. For example:



## TURNING AN EMAIL INTO A TASK

Outlook offers a useful function to turn emails into new tasks. This will be especially useful if you opt for option two, described above. To use this feature, follow these steps.

1. Highlight the email.
2. Click Message > Create > Task in the menu.



Or, click on the email and drag it over the Tasks icon in the bottom left navigation area until you see a + sign.



A new Task is created with a copy of the text from the email in the note field of the Task. The subject line of the task is copied from the subject line of the email. The original email is still located in the same folder you copied it from.

3. Edit the subject line to accurately reflect a project name with a clearly defined outcome, or a next action with a clearly defined verb describing your next physical, visible step.
4. Categorize the Task. Save & Close when done.
5. Go back to Mail and file or delete the email. If the email was located in your Inbox, move it the appropriate folder other than In (such as Action, Action Support or a Project folder) if you will need the original email in the future. This is an important step, as creating a new Task from the email only copied the text of the email's contents—it is not formatted as an email you can launch from Tasks. If you will no longer need the email and only the contents of it as reference, which is now stored in the note of the Task, go ahead and delete the email.

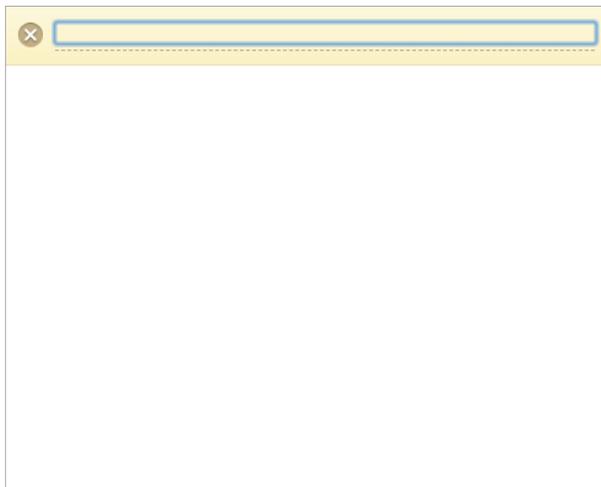
***Go ahead and create a new Task from an email to see how it works.***

We hope this has been a useful overview of Mail and has given you some helpful GTD tips for being more productive!

## CREATING NEW NOTES

1. Click on the Note icon  in the top left corner of Outlook, or type **⌘ N**.

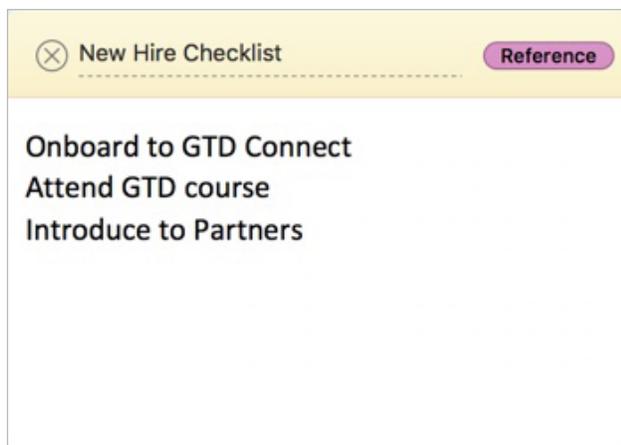
A dialog box will appear to create a new note:



2. Enter your note name in the yellow field.
3. Use the note field (white space below the yellow field) to add note details.
4. Click X icon and Save when done.

Unfortunately, there is no way to categorize a note in the same step as creating the note. To add a category after saving, highlight the note, click the Categorize icon in the ribbon, and select an appropriate reference category. We recommend at least one category designated just for Notes called “Reference.” Add that category now, (if it doesn’t already exist), the same way you added new categories for Tasks.

A populated Note assigned to a category would look like this:



# CONCLUSION

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## ADDITIONAL RESOURCES

We hope this instruction guide has been useful. It is intended as a supplement to our core education of workflow mastery developed over many years—not a substitute. The most successful implementation of this guide builds on the understanding of the GTD best practices presented in our many learning tools, including the *Getting Things Done* book, the courses and individual coaching offered by our global partners, and our online learning center GTD Connect<sup>®</sup>.

Please visit our website to take advantage of the many support tools and training available to assist you in getting your GTD system up and running.

### FOR TECHNICAL SUPPORT WITH OUTLOOK FOR MAC, PLEASE VISIT:

[Microsoft.com](https://www.microsoft.com)

### FOR MORE INFORMATION ABOUT GTD, PLEASE VISIT:

[gettingthingsdone.com](https://www.gettingthingsdone.com)

[gtdconnect.com](https://www.gtdconnect.com)