



MICROSOFT[®] OUTLOOK[®] FOR WEB

Setup Guide

TABLE OF CONTENTS

FOCUS OF THIS GUIDE

WHAT YOU CAN EXPECT FROM THIS GUIDE

1 FOCUS OF THIS GUIDE

UNDERSTANDING THE GTD[®] BEST PRACTICES

AN OVERVIEW OF THE KEY BEST PRACTICES OF THE GTD METHODOLOGY

2 WHAT IS GTD?

2 GTD'S FIVE STEPS OF MASTERING WORKFLOW

2 THREE STAGES TO INTEGRATING GTD

3 THE GTD WORKFLOW MAP

4 THE GTD WEEKLY REVIEW[®] CHECKLIST

APPLYING GTD TO MICROSOFT[®] OUTLOOK[®] FOR WEB

SETTING UP TO DO FOR GTD

PROJECTS AND NEXT ACTIONS

5 USING TO DO TO MANAGE PROJECTS AND NEXT ACTIONS LISTS

5 THE MOST COMMON GTD LISTS

6 DEFAULT LISTS IN OUTLOOK TO DO

6 SETTING UP LISTS

8 EXPLANATION OF THE COMMON GTD LISTS

15 LINKING PROJECTS TO THEIR RELATED ACTIONS

17 MOVING ITEMS BETWEEN LISTS

18 THE GTD WEEKLY REVIEW TIES IT ALL TOGETHER

18 CUSTOMIZING YOUR CONTEXTS

(CONTINUED)

TABLE OF CONTENTS (CONTINUED)

APPLYING GTD TO MICROSOFT TO DO (CONTINUED)

- 18 USING STEPS
- 19 CREATING GROUPS
- 19 USING THE TASKS LIST AS AN INBOX
- 20 REVIEWING YOUR LISTS
- 20 USING DATES, REMINDERS, STARRING, AND THE MY DAY LIST
- 22 MARKING ITEMS COMPLETE
- 23 SHARING FROM TO DO

EMAIL

- 24 INTEGRATING ACTIONABLE EMAIL WITH TO DO
- 24 TWO OPTIONS FOR MANAGING ACTIONABLE EMAIL
- 25 CREATING NEW TO DO AND CALENDAR ITEMS FROM EMAILS
- 28 GETTING YOUR INBOX TO ZERO
- 29 SYNCING OUTLOOK
- 29 INTEGRATING TO DO AND MICROSOFT PLANNER
- 29 REVIEWING YOUR CALENDAR

CALENDAR

- 30 WHAT BELONGS ON YOUR CALENDAR

REFERENCE

- 31 USING TO DO TO STORE REFERENCE INFORMATION

CONCLUSION

FINAL THOUGHTS AND NEXT STEPS

- 34 ADDITIONAL RESOURCES

FOCUS OF THIS GUIDE

Our focus with this Guide is to show you how to use the web version of Microsoft® Outlook® for your GTD® workflow. The web version is what you would access through your browser on Office.com or Outlook.com. This Guide will focus on configuring and populating Outlook for your Project lists and plans, Next Actions lists, and Reference.

While Outlook will sync between the web, desktop, and mobile versions, their designs are quite different—particularly between the web and desktop applications. If you are using the desktop version as well, we recommend our GTD & Outlook for Windows or Mac Desktop Guides for specific instructions about features unique to those versions.

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.

We are aware that there are many features and ways to configure your GTD system in Outlook. This is not a technical manual, nor will it cover all the instructions for how to use Outlook. We'll leave that to the folks at Microsoft to share with you through their excellent support material.

This Guide focuses on the methods we have found work well for GTD for a wide range of people. It's also important to note that no one tool will handle all of your needs for GTD, including Outlook. You will no doubt have reference stored in other locations. But in this Guide, you will learn fundamental GTD best practices that can extend to your other applications as well.

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 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.

Don't worry about using every available feature in Outlook. There may be more offered than you will ever need. Focus on what makes a difference for you. 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.

UNDERSTANDING THE GTD BEST PRACTICES

To get the most out of To Do 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 in any given moment.

THREE STAGES TO INTEGRATING GTD

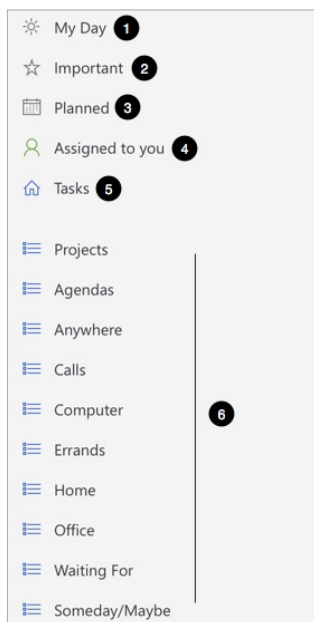
- 1. UNDERSTANDING** You understand the distinct differences in the five steps of Mastering Workflow. You understand a project versus a next action. You know how to transform what you've captured by asking the key clarifying questions, about what something is, and what you want to do about it.
- 2. IMPLEMENTATION** You have installed at least the basic gear to support a GTD system, including ubiquitous capture 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 To Do 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.

DEFAULT LISTS IN OUTLOOK TO DO

1. **My Day:** Items that you have tagged in To Do as something to work on today.
2. **Important:** Items you have starred as important.
3. **Planned:** Upcoming items with a due date.
4. **Assigned to you:** Items assigned to you through the Microsoft Planner app.
5. **Tasks:** A list that can be used as inbox for unprocessed entries (described later in the Guide).
6. **Lists:** These are the GTD lists you will create (Agendas, Anywhere, Calls, etc.).



SETTING UP LISTS

Let's set up the 10 suggested lists now. 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.

1. Click on New list in the bottom left corner of To Do in Outlook for Web.



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 GTD 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.

Someday/Maybe ...	
+ Add a task	
<input type="radio"/>	Improve the system for tracking memberships
<input type="radio"/>	Replace website host
<input type="radio"/>	Learn Italian
<input type="radio"/>	Clean off old cell phone and donate

Go ahead and capture any new items for your Someday/Maybe list that come to mind.

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 within the next 12 months. Projects should always have a defined endpoint.

Projects ...	
+ Add a task	
<input type="radio"/>	Hiking in the Dolomites completed
<input type="radio"/>	Anne's party completed
<input type="radio"/>	Employee handbook is revised and distributed
<input type="radio"/>	My GTD system is up and running

Any notes you have about the project, also known as your project plans/project support, can be added to the Note field for each project on the list, as well as uploading relevant files. While this Note field may not be robust enough to capture all of your project details, nor will it make sense to transfer everything to this location, it will be useful for quick bullet lists of notes, files, milestones, and future actions you want to capture. The current Next Actions and Waiting Fors for the project are not tracked in this Note field or as steps, but in those lists.

REVIEWING YOUR LISTS

On a daily basis, we recommend reviewing your Next Actions lists (the ones we set up as contexts, such as Calls, Computer, etc.), as often as you can or when appropriate. On a weekly basis, in your GTD Weekly Review, we recommend reviewing all of your actionable lists in To Do, including Next Actions, Waiting For, Someday/Maybe, and Projects. This will be valuable time spent to acknowledge what you've completed, capture any new next actions, and ensure each Project is moving forward.

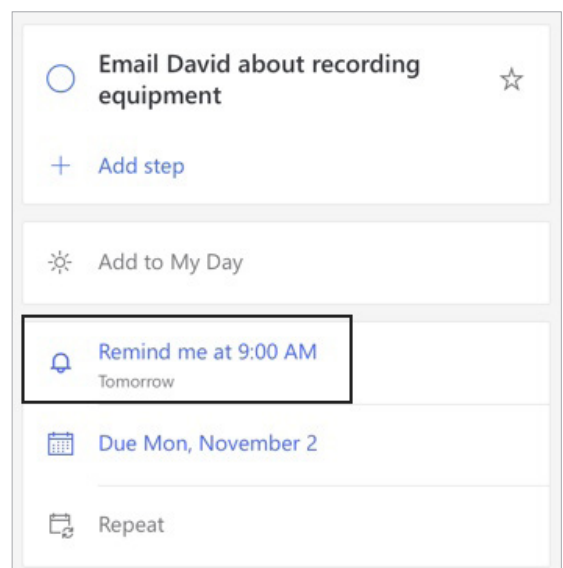
USING DATES, REMINDERS, STARRING, AND THE MY DAY LIST

DUE DATES

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 items you thought you would get to.

REMINDERS

In addition to due dates you can set up reminders for your tasks in To Do. In our experience, many people overuse reminders and start to go numb to them. Use them sparingly when you really need the extra support of being reminded that something is due and start to build your habit of regular reviews of your lists and calendar to trust you know what's coming due.



SYNCING OUTLOOK

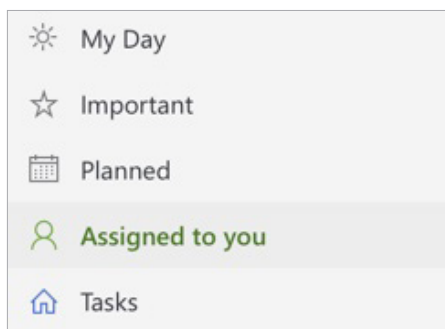
The web version of Outlook syncs seamlessly to the Microsoft applications on your mobile device.

On mobile, you will need to download two separate applications:

- Microsoft Outlook for mobile for your Outlook Email and Calendar
- Microsoft To Do for mobile for your Outlook To Do lists

INTEGRATING TO DO AND MICROSOFT PLANNER

If you are a Microsoft Planner user, as a standalone app or inside of Microsoft Teams, those tasks can also be viewed in To Do under the Assigned to you view. This is useful so that you have an integrated view of all of your commitments.



If you are not seeing your Planner tasks or the Assigned to you view, you may need to enable this feature under To Do Settings.

Items in the Assigned to you list cannot be moved to your other To Do lists (you would need to manually copy/paste them if you want them to appear on your To Do lists). But they can be renamed, assigned due dates, added to My Day, and marked as important.

REVIEWING YOUR CALENDAR

On a daily basis, we recommend reviewing your calendar for time-specific and day-specific actions, any chance you get. On a weekly basis, in your GTD Weekly Review, we recommend reviewing your calendar backward for any “Oh, that reminds me...” items, and forward for any “I need to start prepping for...” items to capture.

CONCLUSION

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[®].

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 MORE INFORMATION ABOUT GTD, PLEASE VISIT:

gettingthingsdone.com

gtdconnect.com