



MICROSOFT[®] OUTLOOK[®] 2019 FOR WINDOWS

Setup Guide

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FOCUS OF THIS GUIDE

Our focus with this Guide is to show you how to use Microsoft® Outlook® 2019 for Windows® desktop for your GTD® workflow. You will learn best practices for configuring Email, Tasks, Calendar, and Notes.

The guide is based on the latest version of Outlook 2019, as of April 2021. If you are using an earlier version of Outlook, particularly Outlook 2013, some of the instructions and screenshots will be different for you and we recommend our Guides specific to those versions instead. Everything you setup in Outlook 2019 on your desktop will sync to Outlook on the web, except for Notes. On mobile, email and calendar will sync to the Microsoft Outlook app and Tasks will sync to the Microsoft To Do app. Notes will not sync to mobile.

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

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 likely are also using other tools in your day-to-day workflow, such as OneNote® and Teams®. But the approach you will learn in this Guide will give you a good foundation for processing and organizing in Outlook.

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.

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 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.

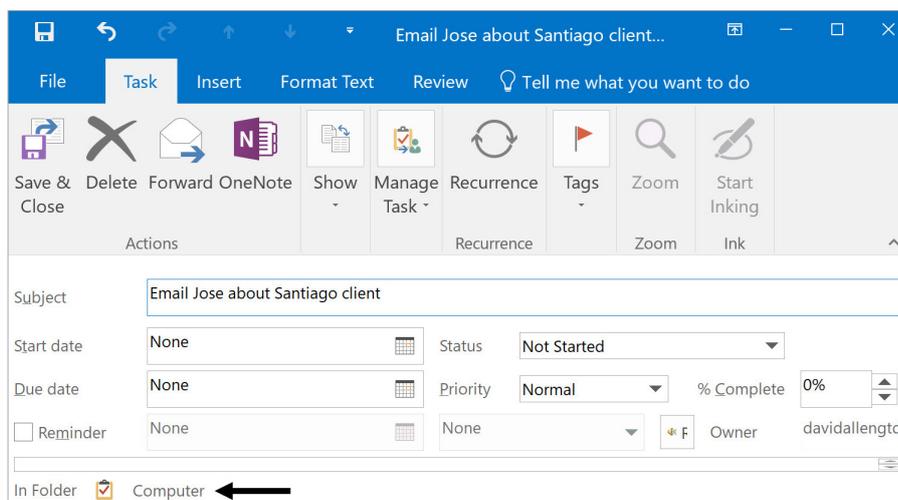
CLEANING UP OUTLOOK

If you've already populated Outlook Tasks, be sure to delete or mark as complete any entries you have created that are no longer current. If you don't have the time to do that cleanup now or aren't sure what to do yet, capture it as a Mind Sweep item to clarify later.

ADDING ITEMS TO YOUR LISTS

THERE ARE SEVERAL DIFFERENT WAYS TO ADD NEW TASKS:

- Go to the list where the item will be organized (e.g., Projects, Calls, Computer, Waiting For, etc.) and use the shortcut key Ctrl + N. The destination list (folder) will be displayed at the bottom of the New Task window.

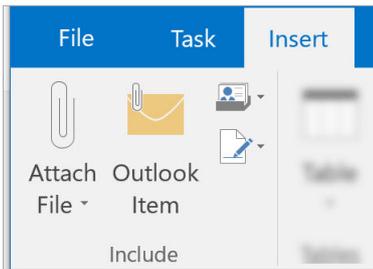


- Go to the list where the item will be organized (e.g., Projects, Calls, Computer, Waiting For, etc.) and use the quick add field at the top of the list.



Any notes you have about the project, also known as your project plans/project support, can be added to the Notes field for each project on the list, as well as uploading relevant files. While this Notes field may not be robust enough to capture all of your project details, and it may not make sense to transfer everything to this location (such as all of the emails also related to the project), 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 for for the project are not tracked in this notes field but on those lists.

You might also find it helpful to add related files to your list entries. To upload an attachment, go to the Insert tab in the Task window and choose Attach File to attach a document or Outlook item to attach an email.



Example of project support included as a file attachment and in the Notes field of a project:

Subject	Get GTD Up & Running		
Start date	None	Status	Not Started
Due date	None	Priority	Normal
<input type="checkbox"/> Reminder	None		None

Download Guided Weekly Review podcast
 Redo home filing
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 Go through GTD Installation Guide
 Watch Keys to Getting Things Done webinar on GTDConnect.com
 Get inboxes for home office
 New filing cabinet for home office?


 GTD Installation
 Guide.docx

Remember, the recommendation is that project support only holds future actions, project plans, notes, and support material. Current next actions on a project are instead tracked under the correct context list.

SAVING EMAILS TO WAITING FOR FOLDER

You may find it useful at times to send a copy of a sent email directly to your @Waiting For or @Waiting For Support folder. What this rule does is eliminate the step of having to dig through your Sent Items folder to find emails for which you are waiting on a response.

You can do this through the Save Sent Item To option in the ribbon or by creating a rule. You decide which one works best for you.

Using Save Sent Item To

1. Compose a new email message
2. Select Options in the ribbon and click Save Sent Item To
3. Click Other Folder and select the @Waiting For or @Waiting For Support email folder
4. Send your message

The email is filed automatically in your selected folder. It does not also go to Sent Items. The next time you send an email, it reverts back to being filed in Sent Items folder.

Using a Waiting For Rule

Before you start these steps, be sure you have created yourself as a contact, using your Outlook email address, in your address book.

1. Select Rules from the Home tab



2. Click Create Rule



3. Click Advanced Options button

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 web version of Outlook. 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, like syncing them to a notes app on your phone.

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., GTD Weekly Review, Packing, Home Maintenance)
- Areas of focus
- Higher Horizons of Focus
- 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