



MICROSOFT® TO DO

Setup Guide

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FOCUS OF THIS GUIDE

Our focus with this Guide is to show you how to use Microsoft® To Do for your GTD® workflow. This Guide will focus on configuring and populating To Do for your Project lists and plans, Next Actions lists, and Reference.

To Do works seamlessly, and is nearly identical, across the Windows desktop, Mac desktop, web (also called Cloud, Outlook.com, or Microsoft 365 version), and mobile. You may be using To Do as a stand-alone application on your desktop or inside of Outlook web version. For simplicity, this Guide will support all users. The screenshots will be of the web version and we have noted if there is a difference on Windows or Mac.

If you are new to To Do, 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 To Do, 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 To Do. This is not a technical manual, nor will it cover all the instructions for how to use To Do. 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 To Do. Even with your lists managed in To Do, you'll still have your calendar and email in other programs, unless you are using the web version inside of Outlook where those are in the same app.

Whatever configuration you choose in tools like To Do, 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 and add-on in To Do. There may be more offered than you will ever need. Focus on what makes a difference for you. OK...let's get started!

***Your mind is for having ideas,
not holding them.®
—David Allen***

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.

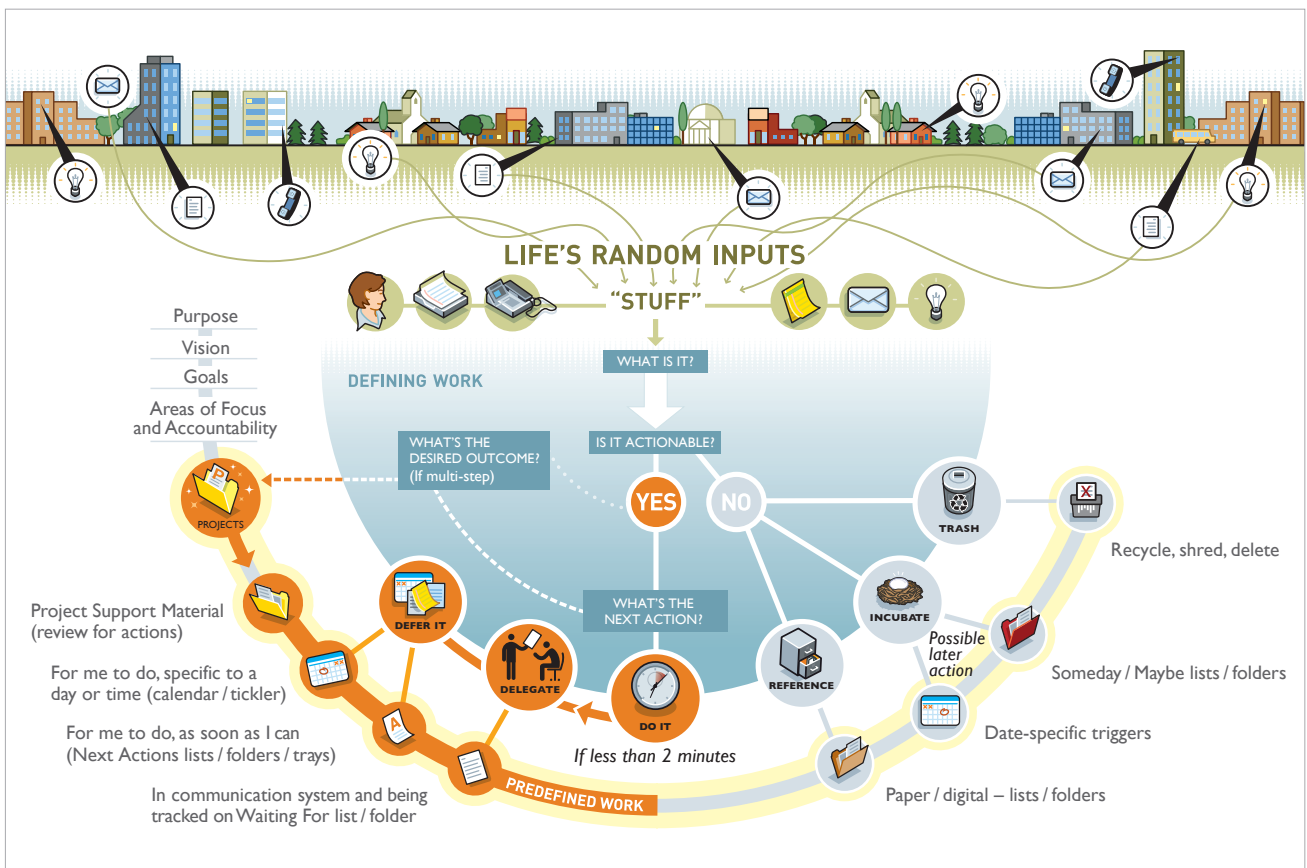
THERE ARE MANY WAYS TO GET A BASIC UNDERSTANDING OF GTD, INCLUDING:

Read or listen to the book *Getting Things Done* is the essential manual for this methodology (part one is an excellent overview of the whole game).

Take a course The courses offered by our global partners around the world are excellent primers for understanding the key steps of Mastering Workflow.

Practice, practice, practice The GTD Workflow Map (shown below) is a fantastic coaching tool for walking yourself through the core models for capturing, clarifying, organizing, reflecting, and engaging.

THE GTD WORKFLOW MAP



We recommend getting the full Workflow Map, with all of the GTD models, which comes as PDF download. Visit our online store at gettingthingsdone.com/store to learn more.

THE GTD WEEKLY REVIEW[®] CHECKLIST

Any tool you use will take effort to keep clean and current, so that you can trust your action choices. The To Do application is no exception. Rest assured, the GTD Weekly Review² is what ties this whole thing together, ensuring that you have actions for all the active parts of your projects on a consistent basis, so you can trust that what you are choosing from your next action lists is current. The GTD Weekly Review steps include:

GET CLEAR

Capture Loose Papers and Materials

Gather all accumulated business cards, receipts, and miscellaneous paper-based materials into your in-tray.

Get “IN” to Zero

Clarify completely all outstanding paper materials, journal and meeting notes, voicemails, dictation, and emails.

Empty Your Head

Put in writing and clarify any uncaptured new projects, action items, waiting for's, someday/maybe's, etc.

GET CURRENT

Review Next Actions Lists

Mark off completed actions. Review for reminders of further action steps to record.

Review Previous Calendar Data

Review past calendar in detail for remaining action items, reference data, etc., and transfer into the active system.

Review Upcoming Calendar

Review upcoming calendar events—long and short term. Capture actions triggered.

Review Waiting For List

Record appropriate actions for any needed follow-up. Check off received ones.

Review Project (and Larger Outcome) Lists

Evaluate status of projects, goals, and outcomes, one by one, ensuring at least one current action item on each. Browse through project plans, support material, and any other work-in-progress material to trigger new actions, completions, waiting for's, etc.

Review Any Relevant Checklists

Use as a trigger for any new actions.

GET CREATIVE

Review Someday/Maybe List

Review for any projects which may now have become active, and transfer to “Projects.” Delete items no longer of interest.

Be Creative & Courageous

Any new, wonderful, hare-brained, creative, thought-provoking, risk-taking ideas to add into your system???

² See the *Getting Things Done* book or our GTD Methodology Guides for a GTD Weekly Review checklist.

APPLYING GTD TO MICROSOFT® TO DO

PROJECTS AND NEXT ACTIONS

USING TO DO TO MANAGE PROJECTS AND NEXT ACTIONS LISTS

To Do is an excellent option for managing the lists in your GTD system. We recommend you create lists in To Do to match the common set of lists recommended in the *Getting Things Done* book, which we describe in more detail over the following pages.

THE MOST COMMON GTD LISTS

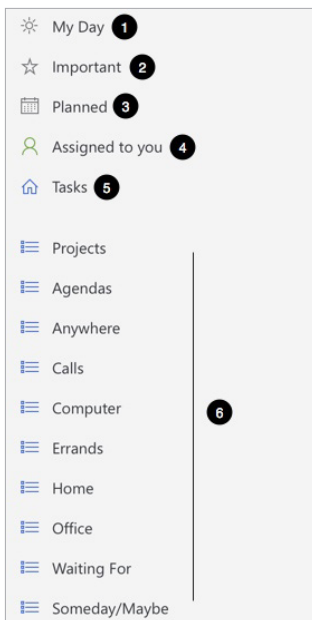
Here are the 10 lists that are a good starter set for most people:

- | | |
|-------------|------------------|
| 1. Agendas | 6. Home |
| 2. Anywhere | 7. Office |
| 3. Calls | 8. Waiting For |
| 4. Computer | 9. Someday/Maybe |
| 5. Errands | 10. Projects |

Sorting your next actions by context (lists 1–7 above) is recommended because when you are choosing what to do, context will always be your first limitation. For example, if you are the office, 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.

DEFAULT LISTS IN TO DO

1. **My Day:** Items that you have tagged in the To Do app 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

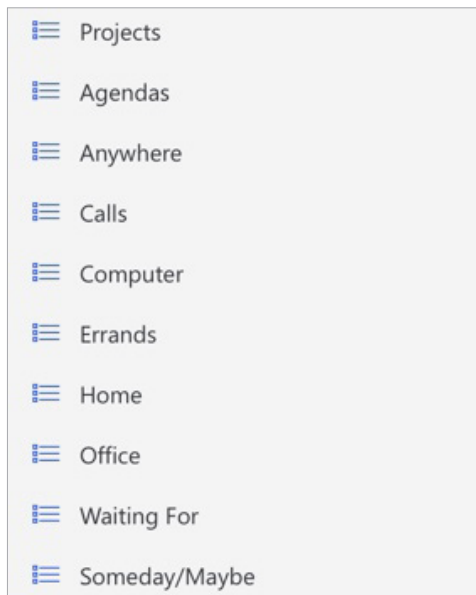
Let's set up the 10 suggested lists in the web, Windows, or Mac version of To Do now. You can always go back to customize these later, after you've experimented, to discover what works best for you. We encourage you to give these lists some time, especially if the concept of sorting by contexts is new to you. We suggest doing this initial setup on your desktop version of To Do and not your mobile device.

1. Click on New List in the bottom left corner of To Do (or use shortcut Ctrl + L on Windows, or ⌘ + L on Mac).



2. Type the first list name to add. Press Enter/Return to save your list.
3. Repeat steps 1 and 2 for the remaining lists.

When you are done, your lists will appear in the left panel of To Do. You can change the order of any of your lists by holding your mouse on the list name and dragging it to a new location. Otherwise, your list order will be sorted by the order in which they were created. We moved Projects to the top of the list, Waiting For and Someday/Maybe to the bottom, and grouped all of the Next Actions lists (Agendas–Office) together.

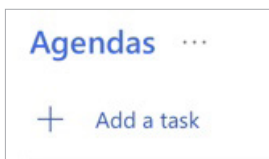


Next we'll go into greater detail about what goes on these lists and show you how to populate your lists.

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. The Agendas list is not for tracking next actions that you need to take related to that person or team (for example, a call you need to make to that person, which would instead go on your Calls list). Once you're on the call, you may refer to the Agenda list for that person, but it's the Calls list that is triggering the action to make the phone call, not Agendas.

To create an agenda for a particular person, click on the Agendas list and start typing in the field that says Add a Task.

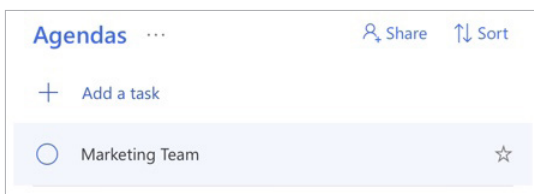


Once you add a new entry, pressing Enter/Return will bring you automatically back to the Add a Task field to add another.

Or, use the keyboard shortcut $\text{⌘} + N$ on Mac or $\text{Ctrl} + N$ on Windows or web versions to create a new list entry (what To Do calls a Task). Or, choose File > New Task on the desktop versions. You have three different options for entering Agenda items.

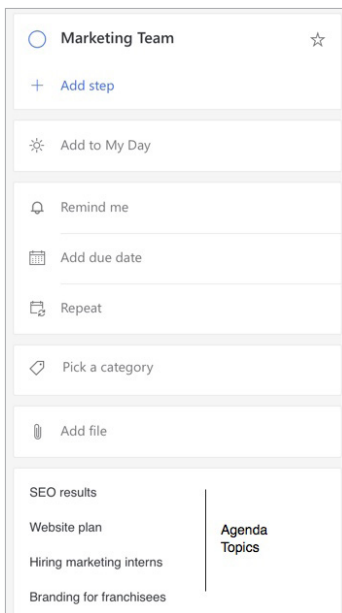
OPTION ONE: ONE TASK PER PERSON OR TEAM WITH AGENDA ITEMS IN THE NOTES FIELD

Enter the name of the person or group for which you want to create an agenda (e.g., Boss, Spouse, Marketing Team). For example:

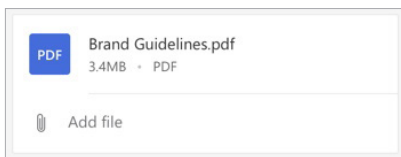


To capture specific items for that Agenda list, click on the Task for the expanded details to appear and enter those in the Note field.

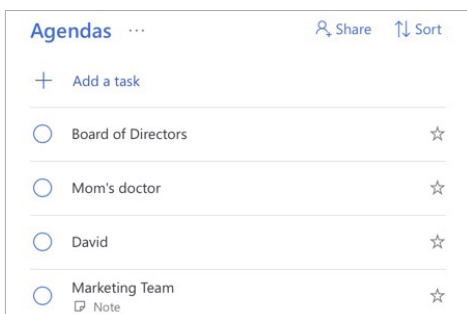
The Task will remain static, as long as you have a need for agenda items for that person, whereas the text field will be dynamic, as your agenda topics for them change.



You might also find it helpful to add related documents to your agenda entries. Click on Add file to upload a file:



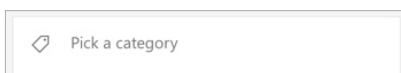
You could easily have half a dozen people and meetings that you are tracking this way—your direct reports, your boss, your assistant, your spouse, the weekly staff meeting, the monthly board meeting, etc., with the agenda items tracked in the Note field.



Notes:

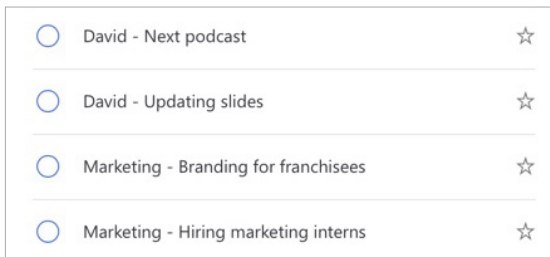
You can change the order of any of your list entries by dragging and dropping the Task to a new position within the list.

You will see Pick a category as an option on the web version, but not Windows or Mac versions. That field relates to the old Categories feature in the Outlook for Windows desktop app.



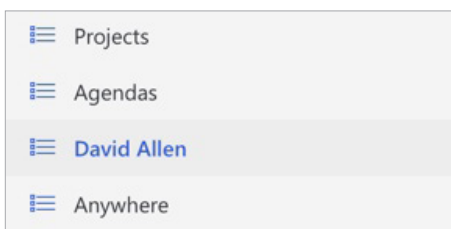
OPTION TWO: EACH AGENDA LISTED AS A SEPARATE TASK

You can also enter your agenda items as individual Tasks. The advantage of this is that you see all agenda items in one view, without having to check the Note fields. With this option, you can use the Note field for additional notes referring to that specific agenda item (if needed). We suggest starting with the agenda name in front of the item to sort similar items together alphabetically.



OPTION THREE: SEPARATE LISTS FOR SPECIFIC PEOPLE OR TEAMS

Some people have so many items for just one person or team that they create an entire list for them, rather than park them as an entry under the Agendas list. For example, if David were your boss and you often have a large volume of agenda items to track, you might create a list dedicated to David:



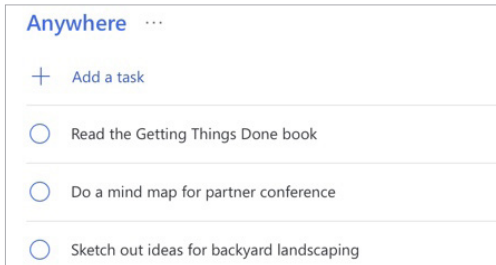
If you create a list for a specific person or meeting, you'll have a little more flexibility in how easily you can add new entries for that Agenda list by using your shortcut keys to create a new Task or dragging and dropping a Task from another list, versus going to Agendas list > Person/Meeting > Note field.

Just be careful you don't create so many lists that it becomes difficult to find what you need and keep them current.

Remember, Agendas lists are for standing items to discuss when you next connect or have a meeting with a person or team. They are not where you would go to be reminded of a next action you have related to that person or team. For example, if you need to gather SEO data to bring up at the next Marketing Team meeting, your reminder of that action would be on your @Computer list. To track that you want to discuss the SEO data at the meeting, that would go on the Agendas list for the Marketing Team.

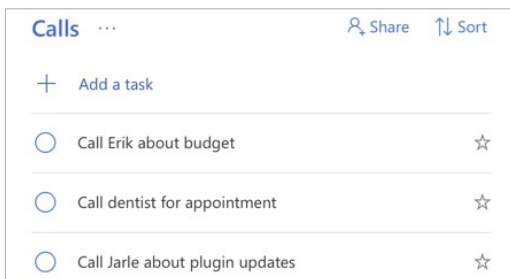
Go ahead and add any people or regular meetings you have as new Tasks under your Agendas list, as placeholders, that would make sense to you.

ANYWHERE An action that can be accomplished, without any restriction about where it's done, would go on this list. Notice in the example below that all the next actions on this list start with a verb. That is the recommended best practice for all of your next actions entries, so that when it comes time to choose what to do, you've already done the thinking about what your action is.



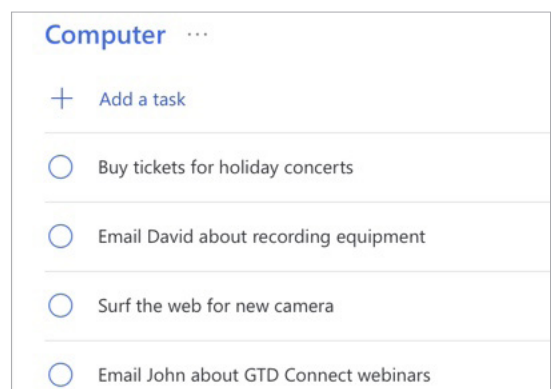
Go ahead and capture any new items for your Anywhere list that come to mind.

CALLS Place reminders of calls you need to make in this list, if they can be made from any phone. If a call requires a specific location instead (like home or office,) we recommend putting the action in one of those lists instead. If the phone number is not already in your contacts, then add it to the title, so you're ready to go when you're ready to make the call.



Go ahead and capture any new items for your Calls list that come to mind.

COMPUTER If the action requires a computer (e.g., emails to send, documents to edit or draft, spreadsheets to develop, websites to visit, data to review, etc.), add it to this list. This list then comes into play whenever you are at your computer(s) with any discretionary time. Even if you only have a computer in the office, it's still convenient to have this list separate from your Office list of things to do, because you wouldn't need to look at this list when you are looking for non-computer things to do. If you have a high volume of email, you may want to have a Computer - Email list just for email-related next actions.



Go ahead and capture any new items for your Computer list that come to mind.

ERRANDS This holds reminders of things that you need to do when you are “out and about” (e.g., take something to the tailor, buy something at a store, etc.). If you are likely to think of more than one thing to do or get at one of those locations (like the hardware store), make “Hardware store” the Subject and put your running list of things to get/do there in the Notes field.

The image shows two screenshots from the Microsoft To Do application. The left screenshot shows a list titled "Errands" with a plus sign and "Add a task" button. Below are three tasks: "Hardware Store:", "Buy birthday card for Leigh", and "Drop off dry cleaning". The right screenshot shows a detailed view of the "Hardware Store:" task. It includes a plus sign and "Add step" button, an "Add to My Day" button, "Remind me", "Add due date", "Repeat", "Pick a category", and "Add file" options. At the bottom, there is a list of items: "Paint brushes", "Nails", "Glue", and "Fence boards".

Go ahead and capture any new items for your Errands list that come to mind.

HOME This list is for next actions that have to be done in your home environment (e.g., gather tax receipts, repair the cabinet door, organize old hard copy photos, etc.).

The image shows a screenshot of a list titled "Home" in the Microsoft To Do application. It features a plus sign and "Add a task" button at the top. Below are three tasks: "Scan old photos", "Gather tax receipts", and "Trim trees".

Go ahead and capture any new items for your Home list that come to mind.

OFFICE These are the next actions that require you to be in your office space, because of the equipment or resources there, such as purging old printed files, scanning documents on the office scanner, etc. This can apply to your home office or an office you go to.

Office ...

+ Add a task

Scan NDA docs

Reorganize hard copy legal files

Clean out old training binders

Go ahead and capture any new items for your Office list that come to mind.

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 a colleague is supposed to be finding out before you can move forward on a key project.

Waiting For ...

+ Add a task

Joseph - Call back about contract - 10/15

Framing store - print job - 10/3

Cirill - Get back to me about meeting agenda - 12/1

We suggest adding the date you started waiting in the title 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.

Go ahead and capture any new items for your Waiting For list that come to mind.

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

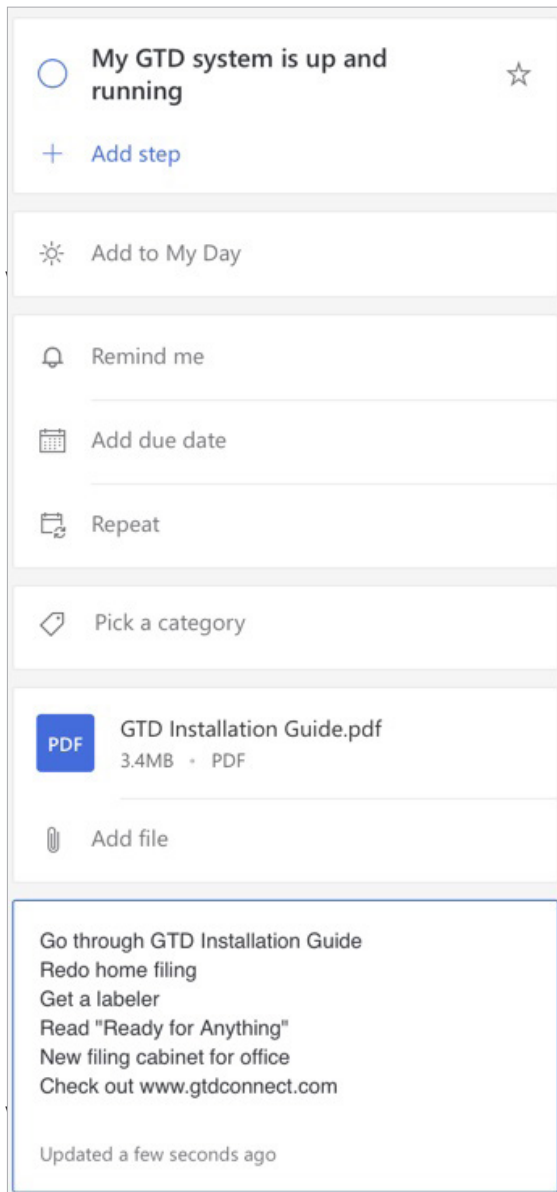
Go ahead and capture any new items for your Someday/Maybe list that come to mind.

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 Notes field may not be robust enough to capture all of your project details, nor will it 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 Fors for the project are not tracked in this Note field or as steps, but in those lists.**

Example of project support included in the Description field of a project:



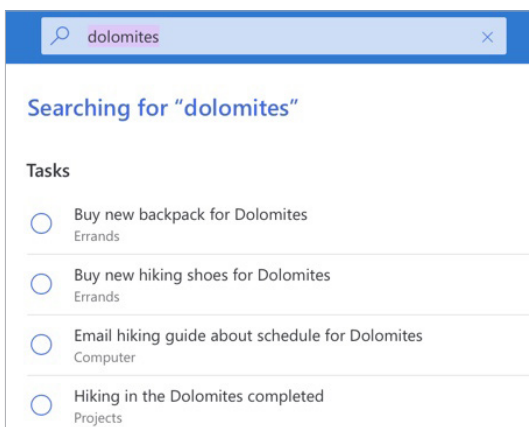
Go ahead and capture any new projects for your Projects list that come to mind. If you have more project planning to do on the project, or need to add more details to the project plans, add that as a next action now as well.

LINKING PROJECTS TO THEIR RELATED ACTIONS

Sorting next actions by context, not by project, can initially seem awkward. Some people are used to having multiple files, piles, notepads, documents, and spreadsheets related to a project, with next actions for the project buried amongst all of that information. Next Actions lists don't replace project plans—we would just call that data project support, and in our experience, it rarely works to have current next actions buried among project support for day-to-day action management.

Think of the last time you had 20 minutes free and decided to work on a key project. How easy was it to dig through your project support to find the immediate next actions based on the tools, people, and places available to you in the moment? It was probably more repellent to you, especially if you knew there was still thinking to do from the project support.

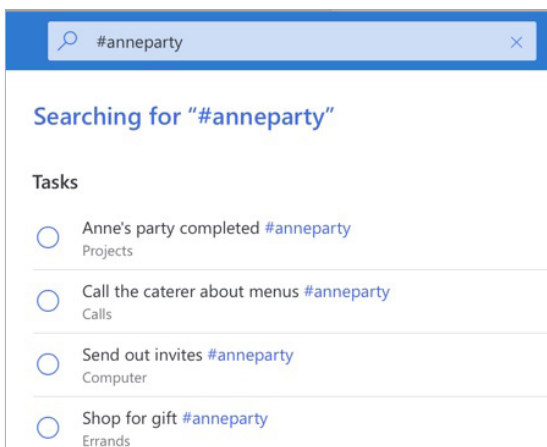
When your next actions are already defined and sorted by context, you can move more quickly, more easily, and more in sync with how you are naturally choosing what to do first—by context. Then, project support remains the parking lot for future actions. You can always add a keyword for the project in your next action or waiting for description. That way, you can rely on the powerful To Do search function in the top of the window of To Do (or $\text{⌘} + F$ on Mac or $\text{Ctrl} + F$ on Windows or web) to pull together related information. For example, if you wanted to pull together everything related to the “Dolomites” project, searching on that keyword will show you the results of all entries that include that word.



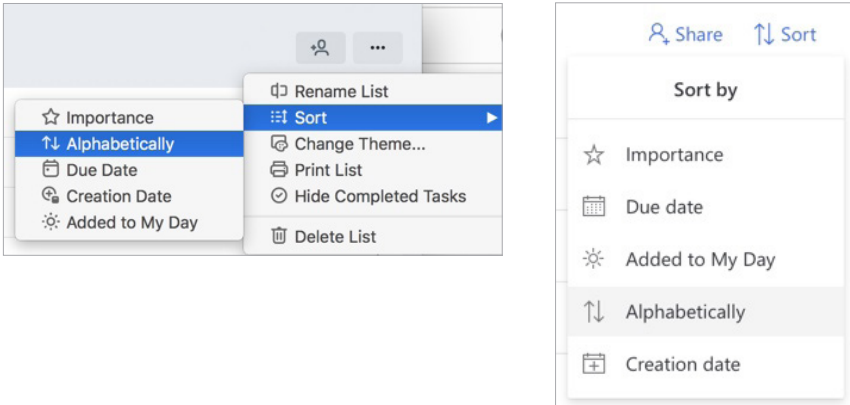
Using Tags

You can also use tags for a specific project and search on that tag. For example, you could tag the project, and all of the related next action and waiting for items. Then, when you search on that tag, you can see everything related to the project in one quick view.

Simply type your keyword tag as one contiguous word (e.g., no spaces), beginning with #, in the title of your Task entry. The tag will turn blue. Clicking on the tag will use the same search function described above to show you all of your entries that include that tag:



If you add the #tag before the title, you can group tasks with the same tag together within a list by sorting alphabetically. If your lists aren't sorting alphabetically, you can change that by clicking on ... > Sort > Alphabetically in the top right on Mac or Windows or the Sort > Alphabetically on web.



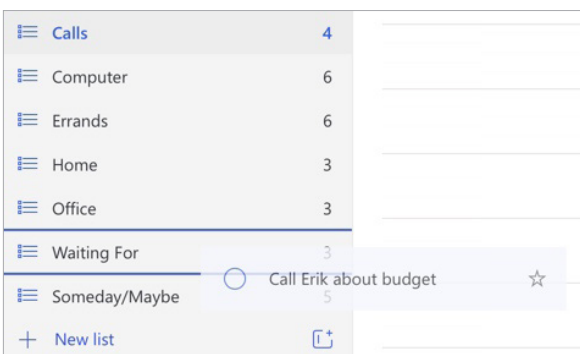
The difference between just using a keyword and creating a tag is that searching on a tag (e.g., #anneparty) will only bring results that include the tag in either the title or as a Note. Using a keyword (e.g., dolomites) will show results from all entries that include the that keyword in either the title or in a Note. Experiment with both to see which option is a better fit for you.

Just be careful that whatever additional criteria you add for creating new entries, like creating and adding tags, does not become a burden or requirement. You may find tags useful for one project, but overkill for another. It's easy to let a feature like tags become unwieldy, so watch it carefully to ensure it's helping your productivity and not hindering it.

MOVING ITEMS BETWEEN LISTS

When you are working your GTD 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 becomes 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. Be sure to edit the subject line after you move it to correctly reflect you are now waiting, instead of taking action.



THE GTD WEEKLY REVIEW TIES IT ALL TOGETHER

Rest assured, the GTD 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, largely based on those project support materials, so you can trust that what you are choosing from your Next Actions list is current. You'll find the GTD Weekly Review checklist earlier in the Guide, as well as in the *Getting Things Done* book, and in our Methodology Guides.

CUSTOMIZING YOUR CONTEXTS

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 next actions. 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.

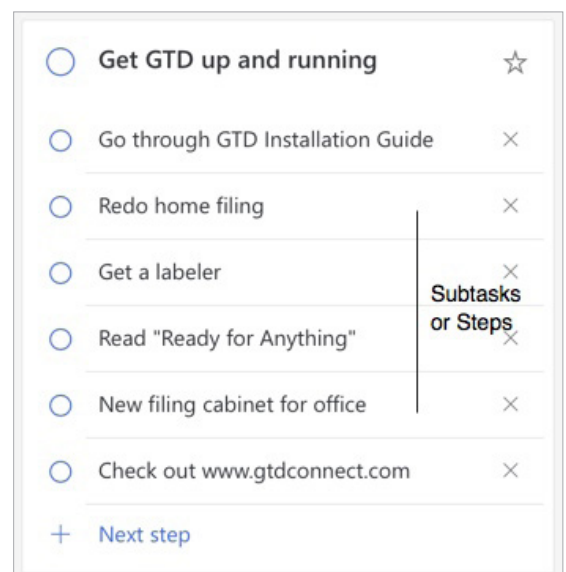
Be willing to experiment to find the set of lists that will work best for you.

USING STEPS

To Do comes with an option for creating subtasks (called Steps in To Do) within a Task entry. While this is tempting for many people, we generally recommend using flat lists that are visible in the main view of your lists and not creating layers within layers of tasks. In our experience, subtasks will often overcomplicate a system—not enhance it.

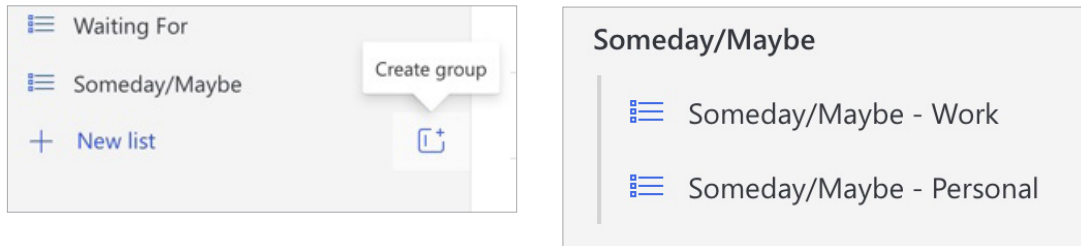
The exception might be to use subtasks as a way to stage “future actions” within a project entry, much like you might use the Notes field.

When the action becomes current, you would need to copy it from a Step (or Notes if you're using that instead) to your current Next Actions lists. For example, Go through GTD Installation Guide would get copied to your Computer list. Unfortunately, there is no way to drag and drop a step to a new task or other list.



CREATING GROUPS

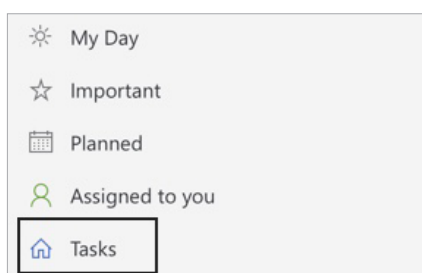
Another handy feature of To Do is creating groups for your lists. This can be helpful to group lists of a similar nature or topic. For example, if you create multiple Someday/Maybe lists, you could group them in one group in your left navigation panel. To create a group, click on the "Create group" icon in the lower left area next to "+ New list."



Putting lists together in groups will be even more useful with reference lists, which we describe later in the Guide. The advantage of stacking lists in groups is being able to group similar lists, being able to hide lists you don't use as often, and having a shorter list of lists to look through in your left panel. The disadvantage is potentially over complicating your structure and having to expand the groups before being able to drag and drop an entry into it.

USING THE TASKS LIST AS AN INBOX

Now that you have your lists set up, the Tasks list that comes by default in To Do can be used as an inbox for thoughts or ideas on the fly that you do not know exactly what the next action is yet, but you don't want to lose the idea. Or, you may see something on the web you want to get back to and add it to the Tasks list to quickly capture it. Putting items on the Tasks list allows you to store the idea until you are ready to clarify it (through the questions on the GTD Workflow Map shown on page 3 of this Guide) to decide what it means and what you want to do about it.



The difference with this list versus your other lists is that these items are unprocessed. You still have not clarified yet what the item is or what you want to do about it. To make the Tasks list work like an inbox, you'll need to treat items you create there with the same rigor you would your email inbox and your physical in-tray by processing the items in this list down to zero on a regular basis.

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.

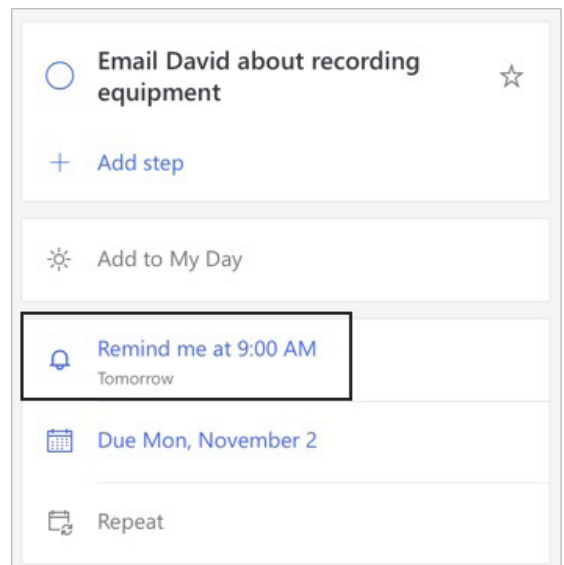
USING DATES, REMINDERS, STARRING, AND THE MY DAY LIST

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.

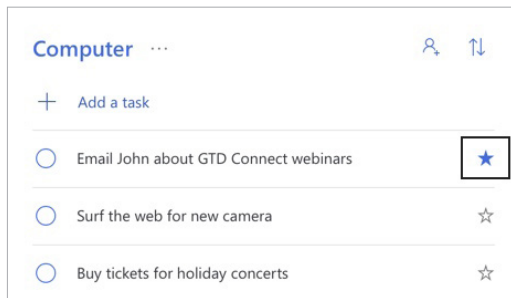
REMINDERS

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.

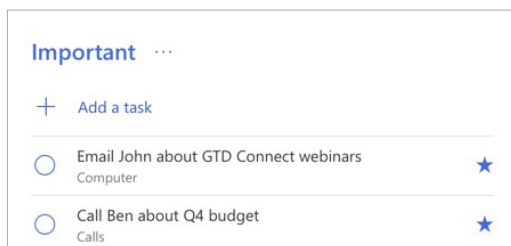


STARRING

Starring is a feature to mark items important. The same trust factor is true for starring items as with setting due dates—use them sparingly so that when you do see them, you trust them. To star an item, click on the star icon to the right of the title. A solid star will then appear:



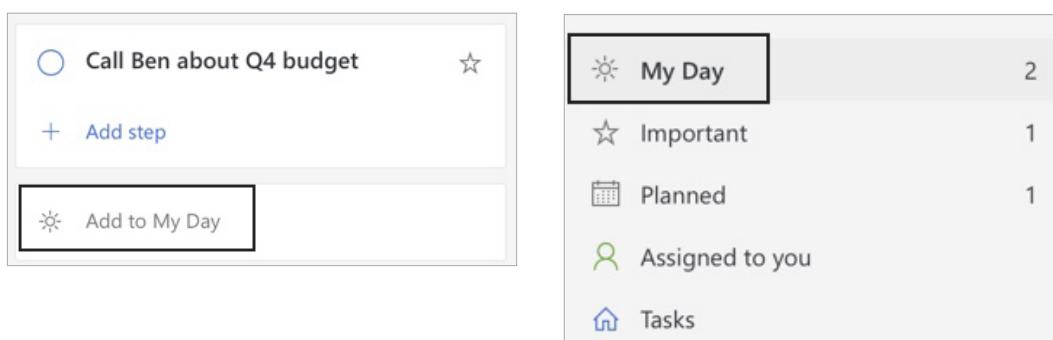
All items that have been starred also appear on a separate filter list called Important.



The Important view should not replace regular reviews of all of your lists. We recommend the My Day list, instead of the Important view, which is a daily high-priority list that resets each day.

MY DAY

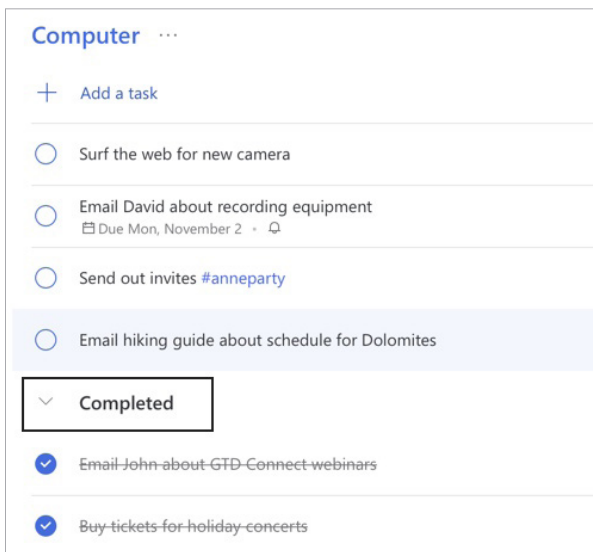
This list will show you items that you have marked as something to work on today. To Do treats this as a one-day list and clears it at the end of each day. The items are not removed from the original list they are stored on—they are just removed from My Day. Any item can be added to My Day in the task details.



MARKING ITEMS COMPLETE

Many GTD folks ask if they should keep or delete completed items from their lists. If you think you'll ever want to retrieve the item, we recommend keeping it. This can be useful for year-end reviews when you want to see and acknowledge all of the projects you completed. You may find this unnecessary though for all of the next actions. Trust that you know best about what would be useful for you to keep. Or, as David Allen says, "When in doubt, keep it. When in doubt, throw it out!"

When you mark an item complete in To Do by clicking the checkbox to the left of the title it goes to the completed Tasks view.



To move an item back to the active list, click on the checkmark again.

USING SHORTCUT KEYS

The ability to capture information and facilitate tasks quickly, through shortcut keys, can greatly enhance your productivity. To Do offers some shortcut keys for common functions in the app. Here is a short list of the most common ones:

WINDOWS

Add new task: Ctrl + N

Create new list: Ctrl + L

Add task to My Day: Ctrl + T

Complete task: Ctrl + D

Search: Ctrl + F

MAC

Add new task: ⌘ + N

Create new list: ⌘ + L

Add task to My Day: ⌘ + T

Complete task: ⌘ + D

Mark as Important: Shift + ⌘ + I

Hide/show completed tasks: Shift + ⌘ + D

Search: ⌘ + F

WEB

Add new task: Ctrl + N

SHARING FROM TO DO

To Do isn't just for managing your own workflow, you can also use it for collaborating with friends, family, and coworkers.

Here are some practical uses for sharing:

- Collaborating with colleagues on a work project
- Collaborating with family or friends on a personal project
- Sharing meeting notes with your team
- Sharing an errands list with your partner/spouse/roommates
- Sharing your Projects list with your boss
- Sharing your Agenda list with someone before you meet with them

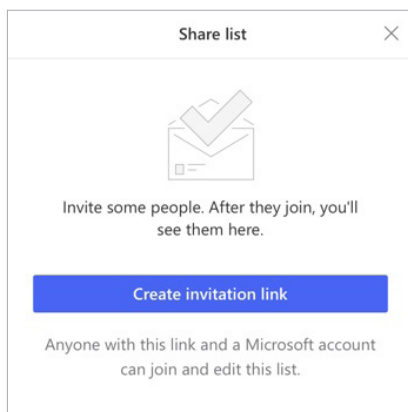
You can also share entire lists with other Microsoft To Do users, which will give them the ability to view and edit the list in their version of the app.

Note: Sharing is possible under the following conditions:

- Sharing between personal Microsoft accounts (private accounts).
- Sharing between enterprise Microsoft accounts (work accounts) within the same company.
- Sharing between personal and enterprise accounts. Users then have the ability to join lists that are shared from an external personal account. Enterprise users will not be able to share their lists with external personal accounts.

To share a list, highlight the list name and select the Share icon  **Share** in the upper right corner.

You can invite other people by creating an invitation link.



You can always stop sharing lists at any time by clicking on the Share icon again and choosing Stop Sharing. On the web version, it's under Manage Access.

Note: All changes—including deleting, adding, editing, or commenting made by any list member—will affect all list members.

EMAIL

INTEGRATING ACTIONABLE EMAIL WITH TO DO

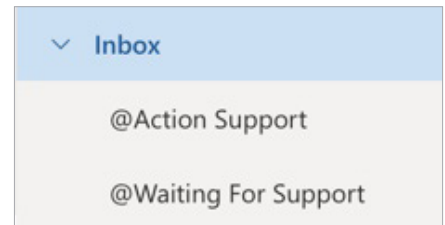
The master key for managing email is the hardest habit for many to change—working from a regularly empty inbox.

It takes less mental effort to operate from a zero base than to leave anything sitting in the inbox. That doesn't mean that the inbox in email is kept at zero—just that it gets there on some regular basis (at least once a week in the GTD Weekly Review). The problem is that most people do not have a system for managing their emails beyond the inbox area, so if they can't move on or finish dealing with the email right then, they will leave it in the inbox as the safest place.

TWO OPTIONS FOR MANAGING ACTIONABLE EMAIL

OPTION ONE: USE NEXT ACTIONS LISTS IN TO DO OR YOUR CALENDAR AS THE ACTION REMINDER

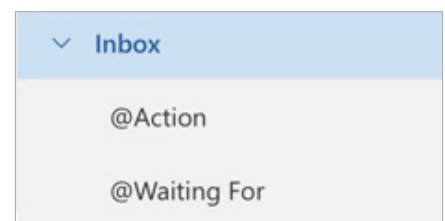
Create @Action Support and @Waiting For Support folders in your email program to hold supporting information for actions that are tracked on your Calendar or Next Actions lists. In this case, the folders only serve as storage buckets to hold the information you need to take the action on. You would be reminded of the action when you review your Calendar or Next Actions lists. It's one fewer place to look for actions or waiting for items, whereas the next option adds an additional location to look for a complete view of your reminders.



People often like this option because all of your reminders will be tracked in as few places as possible, as you would add the next action reminder to the appropriate Next Actions list in To Do.

OPTION TWO: USE THE EMAIL AS THE REMINDER

Create @Action and @Waiting For folders in your email program, and use them like an action list. You would not also put those reminders on your Calendar or Next Actions lists in To Do—the email itself would be the only reminder. That means you need to scan these folders with as much discipline as you would your Next Actions lists and Calendar, for reminders of your commitments. The @ symbol is a trick to push these folders to the top of your email structure for easy access. If the @ symbol does not work in your email program, try another symbol.



People often like this option for the quick win it gives in getting your inbox processed to zero. The downside with this option in email is that you have no place to capture the next action or due date that's associated with that actionable email. So you'll inevitably be doing some "re-deciding" about emails you've already processed, if the next action is not apparent by the subject line.

Go ahead and create either the @Action and @Waiting For or @Action Support and @Waiting For Support folders in your email program now.

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/Bring Forward file³)?

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 To Do.

Defer it If you need 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 To Do.

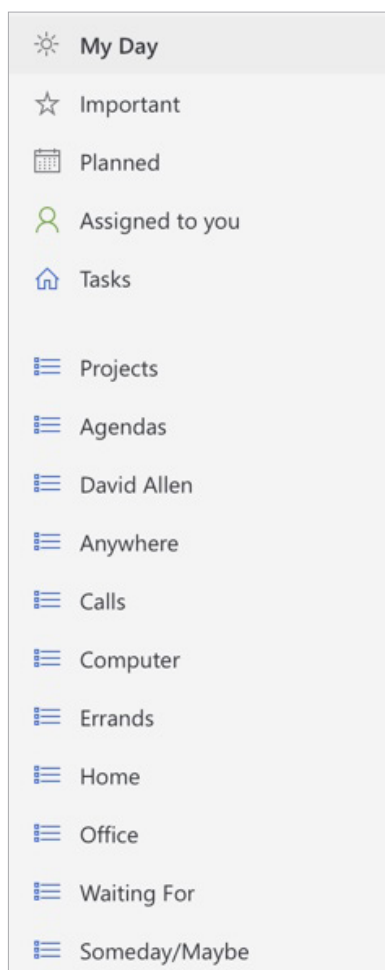
³For more information on using a Tickler/Bring Forward file, see the *Getting Things Done* book.

INTEGRATING TO DO AND OUTLOOK DESKTOP

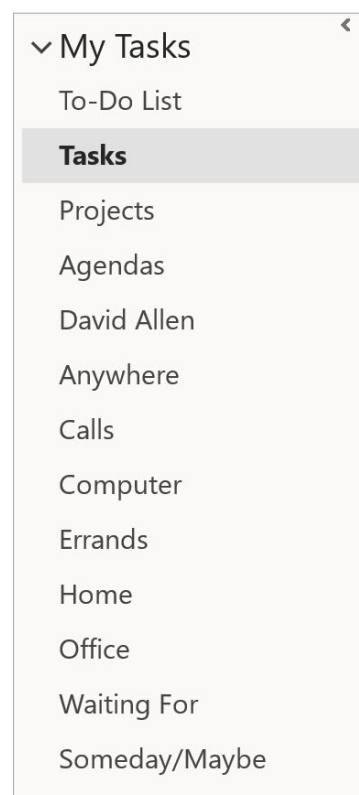
To Do can be used as a stand-alone app, as described throughout this Guide, and can also work in combination with Outlook desktop. Think of To Do as a viewer of Outlook Tasks. The data is one and the same. Tasks you create in Outlook should sync seamlessly to To Do, and vice versa. There are some differences to be aware of:

- In our GTD & Outlook for Windows Setup Guide, we instruct you to create Task folders. These folders become lists in To Do. Same functionality and data, just different names.
- To Do has features that Outlook does not, such as My Day, Important, and Planned views, as well as Subtasks/Steps, and Tagging. Outlook will not change any settings for these, if you set them in To Do, but won't recognize those attributes given they are not functional in Outlook desktop.
- In To Do, starred items are called Important and in Outlook they are called High Priority.
- To view Outlook Tasks on mobile, download the Microsoft To Do mobile app, for iOS and Android.

Lists in To Do

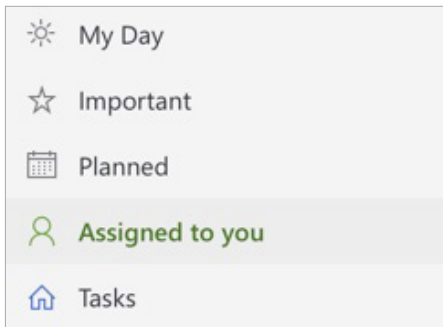


Folders in Outlook Desktop



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.

CALENDAR

WHAT BELONGS ON YOUR CALENDAR

Outside of To Do, your calendar is a critical component in your GTD 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 To Do, 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?”.

THERE ARE ONLY THREE THINGS THAT BELONG ON YOUR CALENDAR:

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:

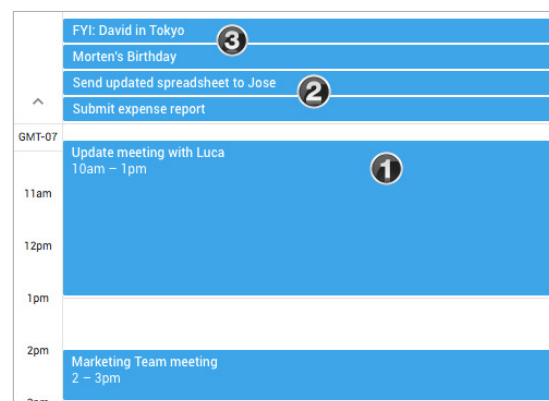
- A call you have to make before you leave for the day
- Something that you have to finish and submit by the end of the day
- An agenda you must cover with someone before they leave the office

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

Examples:

- Things 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.).

Here is a calendar showing all three types of entries:



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.

REFERENCE

USING TO DO TO STORE REFERENCE INFORMATION

To Do can manage an unlimited number of potentially useful (and fun!) non-actionable simple reference lists and checklists. This functionality is open-ended and in one sense, so simple the possibilities are infinite.

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?

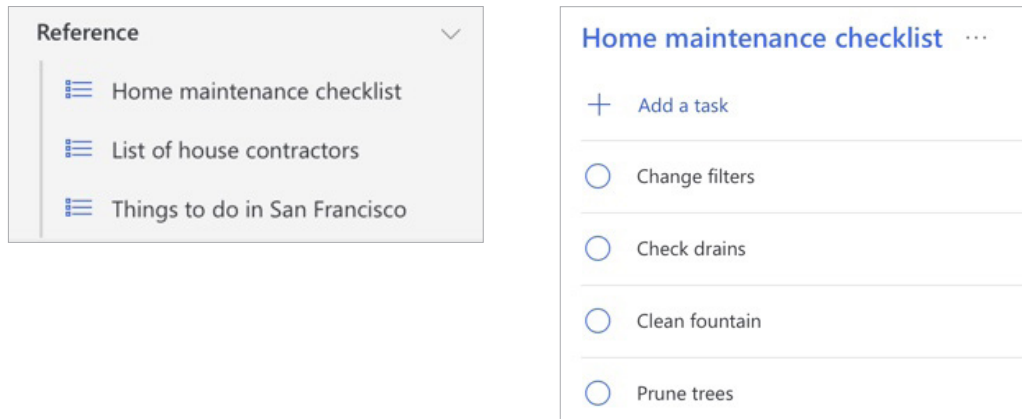
Here are some possible new reference lists to try:

- Checklists (e.g., GTD Weekly Review, Packing, Home Maintenance)
- Areas of focus
- Higher Horizons of Focus⁴
- 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

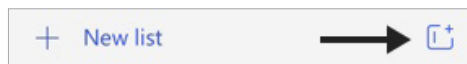
⁴ See David Allen's *Getting Things Done* or *Making It All Work* books for more information on Horizons of Focus.

You have a few options for how to set this up in To Do, depending on your preference. As we consistently suggest, be careful to not overcomplicate your system to the point where it becomes unwieldy to find or maintain the information. Read through the following options and be willing to experiment with the solution that will work best for you.

Example One Create multiple reference lists within one Reference group

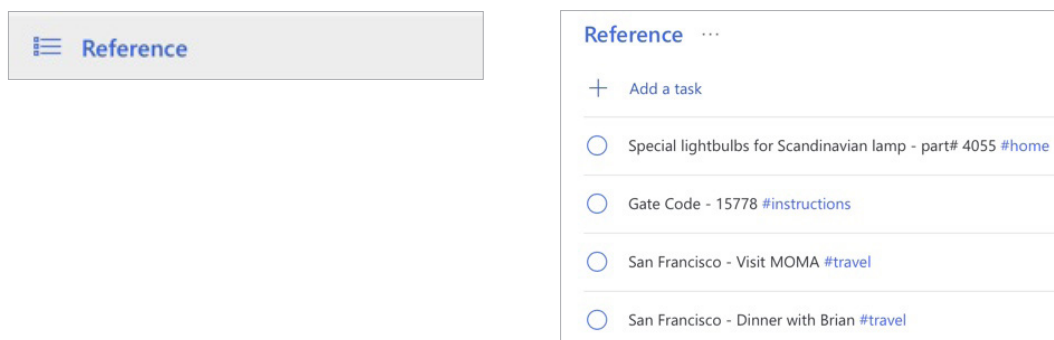


To create a group, click on the Create group icon in the bottom left corner. Then drag your desired lists into that group.



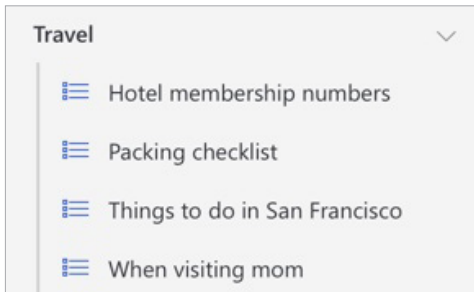
Example Two Create individual items under one Reference list

With this option, you could have dozens, if not hundreds of items of various topics in one list. For that reason, you may want to try adding Tags to these list items to be able to quickly sort.

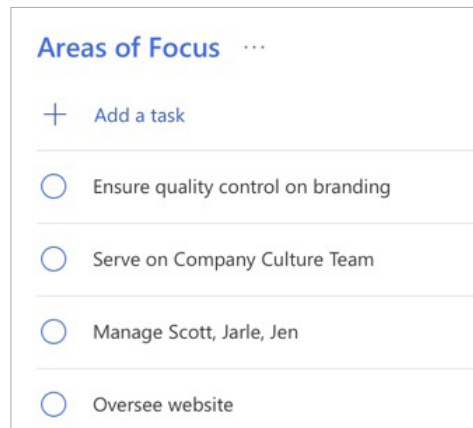


Example Three Create Reference groups by topic

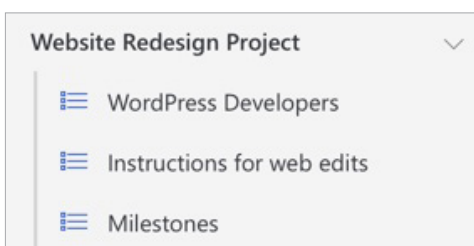
If you expect to have quite a bit of reference, you may want to consider creating separate groups by topic. For example, if you have many travel-related reference items, you could create a travel reference group just to store travel lists:



You may also find it useful to create a Horizons of Focus folder, with each horizon as its own list.



If you have a project with many project plans, notes, and reference information you will need to capture, that would be a great use of a group:



If managing reference in To Do seems to limit you in any way, check out Evernote[®] or OneNote[®] just for reference, and keep your Projects, Next Actions, Waiting For, and Someday/Maybe lists in To Do. We offer GTD Setup Guides for both of those tools to get you up and running quickly.

The possibilities with capturing reference are endless. Just remember to keep it clean & current, and fast & fun.

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