

### Introduction

The GTD system by David Allen offers among other things a practical workflow to deal with all the stuff that land in your inbox. Even though this customization is not optimal, it provides a good tool for handling e-mails efficiently. Best of all, this tool is free and you can easily change it any way you like it!

### Review of the processing concept

In GTD you process your inbox for stuff at regular intervals and then places everything in the right "buckets" - be it an archive, the calendar or an action lists. So when you process the inbox you are basically only analyzing and sorting the things as opposed to doing them. The only exception to the rule is using the Two Minute Rule.

The stuff that you receive can be actionable or not. If it is not actionable you need to decide whether it is trash, something you can't commit to, something you need to archive in your "A-Z Archive"/"Reference Material" or something that you want to defer your "Someday/Maybe List" as it is not something you will take action on at the moment.

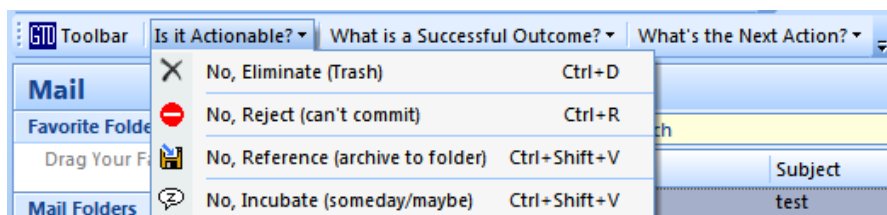
Most people will use the subfolder structure in Outlook 2007 to create the "A-Z Archive" and the "Reference Material" archive. The "Someday/Maybe List" may be a mail folder or a category used in the Outlook Task List. I will use the later in this article.

Next question to ask is whether or not this item is related to an existing outcome or do we need to register a new project on the "Project List". This list can again be an Outlook mail folder or a special category in the Task List, e.g. "!Project". I will again use the later option in this article. Even if we create a new project, we still need to continue processing the item to determine the "Next Action".

Finally, we need to determine if the action that needs to be done can be done in less than two minutes (The Two Minute Rule), can be delegated, is time specific or can be deferred to different action "buckets" or "lists" based on context.

### The GTD Bar

Before we move on to the details, let us take a look at the end result. Below you can see how the GTD Bar could look like. This bar is not helping you do anything you can't already do using shortcuts or the mouse, but it can make things a little easier, especially on laptop computers.



*By Lars Axelsen  
www.Productivity.DK  
September 2007*

*The Two Minute Rule:*

*"If it takes less than two minutes to do a thing, then do it right away!"*

*The argument is that it will take longer to archive, locate, re-read and understand the item again than just doing it. Also you will become more responsive to other people and not being the bottleneck that limits their productivity on simple inquiries.*

*A Project:*

*"Any outcome that you are committed to which takes more than one action for completion"*

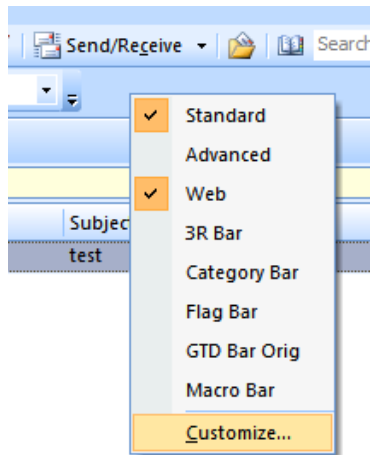
*Next Action:*

*"The real next step to move a task forward that actually can be done physically"*

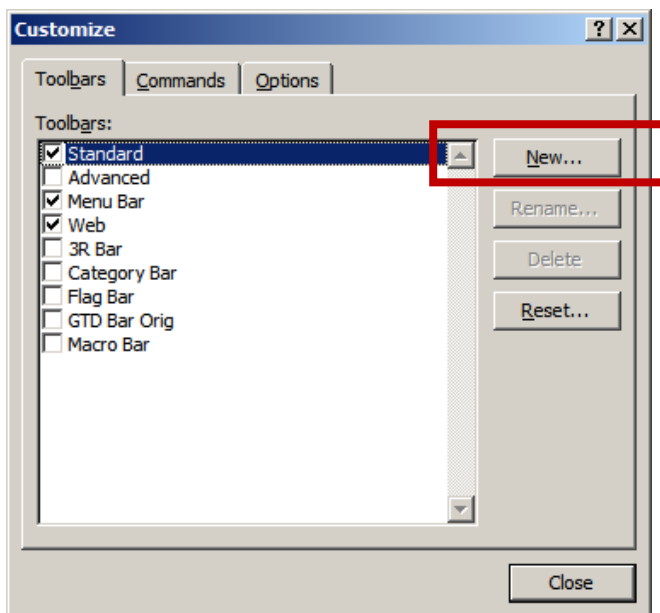
*The GTD approach is to organize Next Actions based on the context for with they can be done, e.g. if the NA is to call someone, this NA can't be done unless you have a phone.*

### Creating an Empty Bar in Outlook

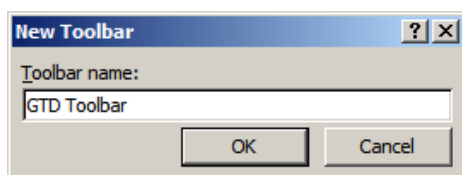
First we need a new toolbar in outlook to customize and add GTD related elements to. If we right-click on the toolbar area (either on the blue empty space or on any existing button), we get a drop-down menu where we can select "Customize".



Next, we will see the Customize window where we can create a new toolbar on the "Toolbars" tab.



When we have clicked the "New" button, we are asked to name the toolbar (can be renamed later if we want). Let's call it "GTD Toolbar".



The new toolbar will float in the air, so you should drag'n drop it onto the toolbar area.



*Most these techniques can be done in either Outlook 2007 or Outlook 2003! This manual shows how to do it in Outlook 2007; things may look slightly different in previous versions of Outlook.*

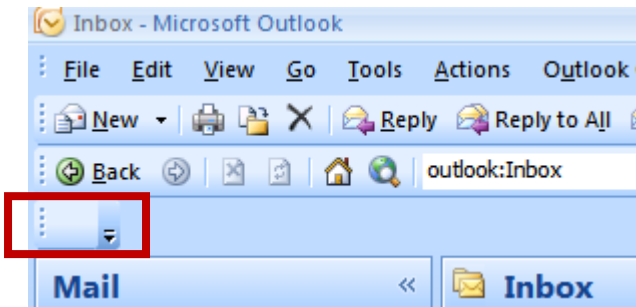
*The Toolbar(s) you create can be moved to another computer by transferring the file "Outcmd.dat" to another computer that has the same version of Office installed. Please notice that the new computer will have its toolbar overwritten if you do this!*

*Find the Outcmd.dat file in the folder:*

***C:\Documents and Settings\\Application Data\Microsoft\Outlook\***

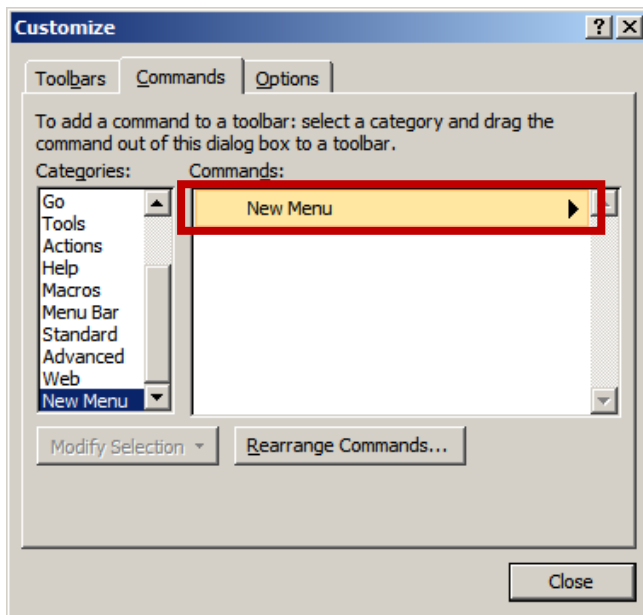
*(You may need to disable hiding of "hidden folders" and "protected operating system files")*

We have now dragged the empty toolbar to the top below the Web Toolbar.



### Creating the Three Main Menus

From the Customize windows we select the "Commands" tab and scroll to the bottom of the categories. Here we select "New Menu" in the Commands area.



We drag and drop the "New Menu" onto the new GTD Toolbar three times, so that we have three of them.



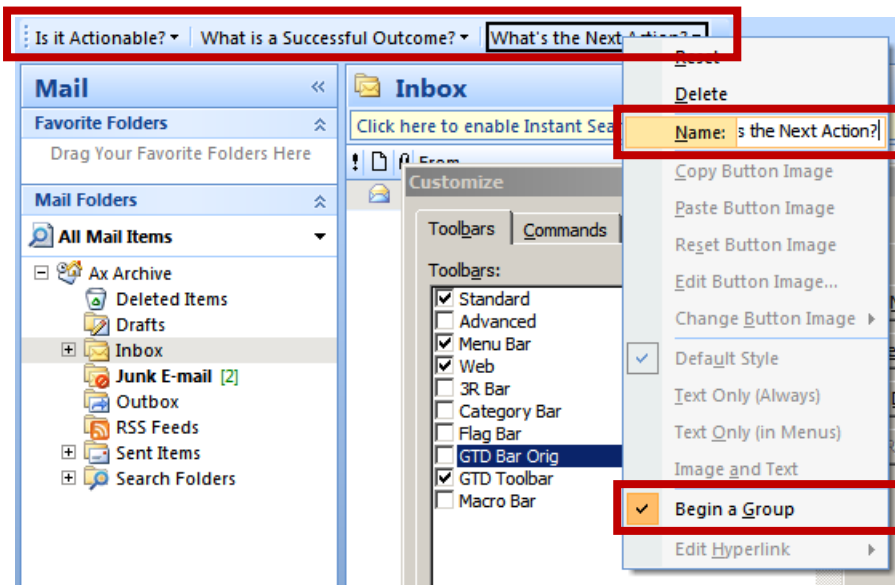
We then label the three menus: "Is It Actionable?", "What is a Successful Outcome?" and "What's the Next Action?". This is done by right-clicking the individual menus.

We also enable "Begin a Group" for the last to menus, so that there will be a little line between menus. See image on next page.

*We need three menus to handle the three key questions about dealing with an item:*

*"When it is not actionable, registering a Project and handle the Next Action"*

## Setup a GTD Toolbar in OL 2007



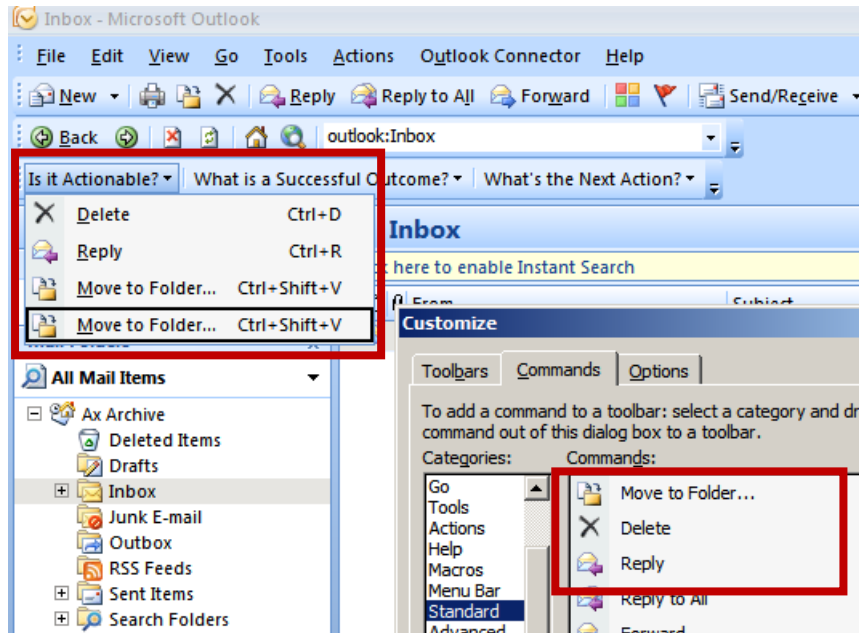
You can rename the labels to anything you want – this article just tries to stick to the GTD workflow and naming conventions from the GTD book and official GTD articles.

You might choose more simple names like:

- Actionable?
- New Project?
- Next Action?

### Populating the “Is it Actionable?” Menu

From the Commands tab we select the category “Standard” and drag four menu items to the first GTD Toolbar menu called “Is it Actionable?”. First we drop “Delete” onto the menu, then “Reply”, and finally two times the “Move to Folder...”.



The “Move to Folder...” button can be used to move items to mail subfolders, e.g. the A-Z Archive, but also to the Task List folder and the Calendar folder as they are also folders in Outlook!

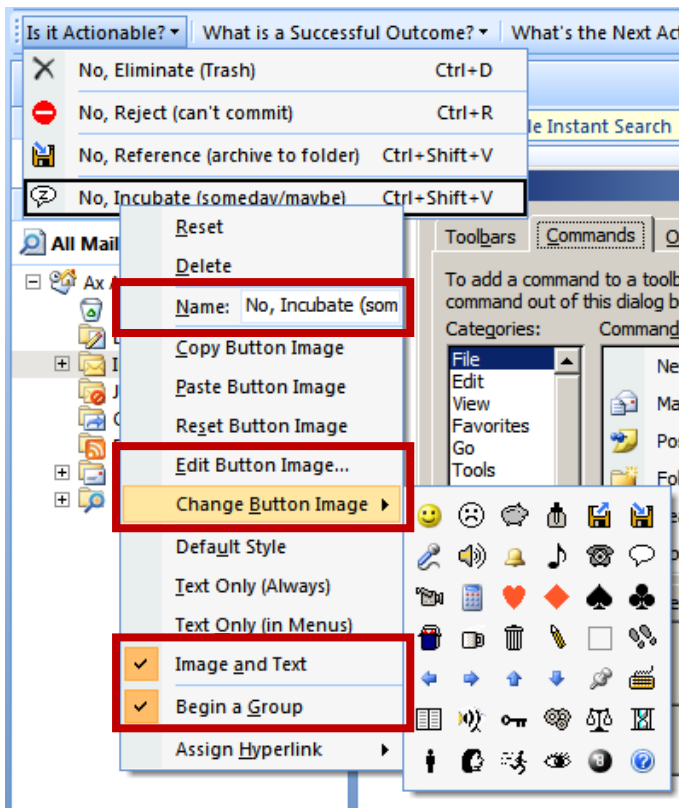
We have to use the “Move to Folder...” and **manually select the destination**, e.g. Task List, A-Z Archive or Calendar as Outlook does not allow us to insert a predefined destination. By default Outlook will remember the last folder used.

Then we re-label these four entries and enable “Begin a group”:

- No, Eliminate (Trash)
- No, Reject (can’t commit)
- No, Reference (archive to folder)
- No, Incubate (someday/maybe)

Make sure that “Image and Text” is enabled to see the icons on the buttons

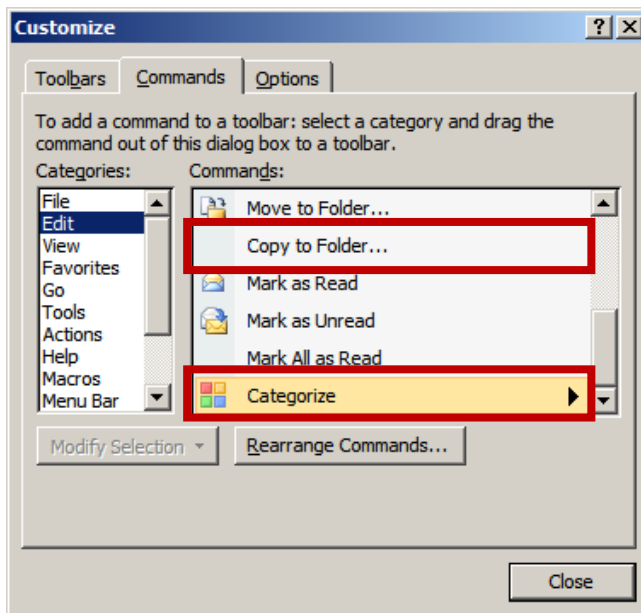
When done, we might even change the icon on the button.



*This article makes a new menu entry for each option in the GTD workflow, but since several actually has the same function, e.g. "Move to Folder...", you might choose to just have an "Archive" entry in the menu and not two, e.g. for both reference and incubate.*

## Populating the "What is a Successful Outcome?" Menu

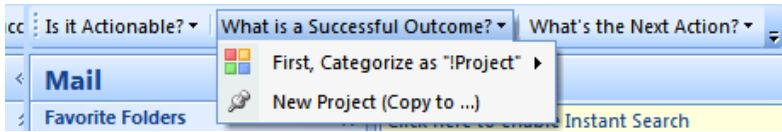
For this menu we add the submenu "Categorize" and the button "Copy to Folder...". They can be found under the Category "Edit".



*The Categorize is only used if you archive Projects as Tasks that uses a special category. If we apply a category first before we copy the mail to the task folder it will be easier to process the inbox since we can use the GTD Toolbar.*

You can see the end result after renaming on the next page.

## Setup a GTD Toolbar in OL 2007



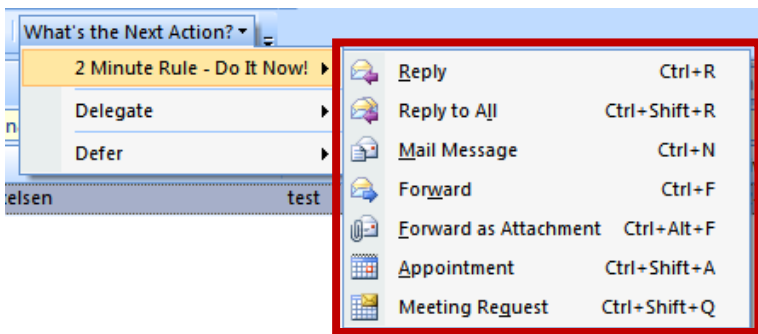
We re-label the Categorize menu to 'First, Categorize as "!Project"' so we remember to use that Category (and not the others).

### Populating the "What's the Next Action?" Menu

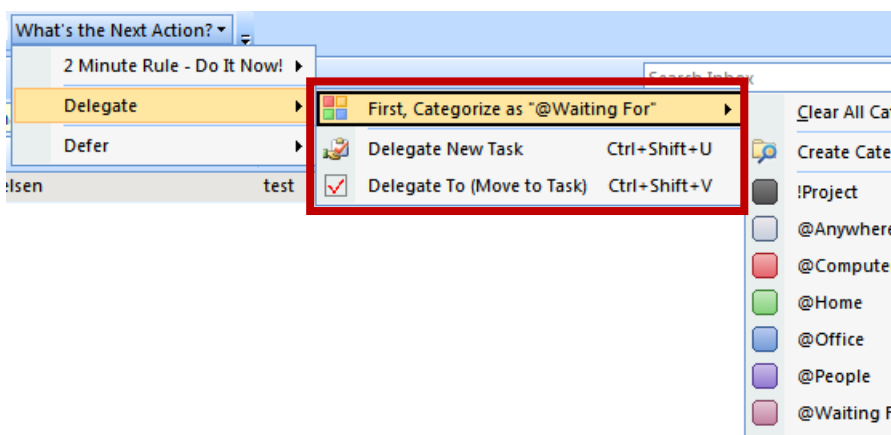
The Next Action menu is a little more complex, so we have divided it into three subsections.

First we add three "New Menu" items to the drop down menu "What's the Next Action."

The first is to be used when we follow the Two Minute Rule where we can reply, reply to all, write a new email, forward, reserve time or setup a new meeting. Using this 2-Minute menu assumes that we use the "Reading Pane" in Outlook to read and act on the email, as it makes no sense to use the GTD Toolbar if the mail is opened in its own window.



If the items will take more than two minutes to handle the next step is to determine if we should or could delegate. On the delegate menu we first add the "Categorize" menu which can be found under the "Edit" category and re-label the menu to 'First, Categorize as "@Waiting For"' so we remember to use that Category (and not the others). We also add the "New Task" and "Move To" buttons, so that we can either create a brand new task to delegate or move the email to the Task folder and then delegate that as a task.

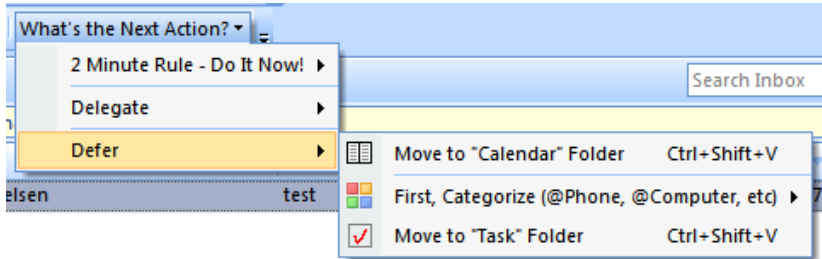


*All the buttons for the "Two Minute Rule" can be found under the "Standard" category.*

*If a Task is delegated you cannot change it until it is given back, so remember to set the Category "@Waiting For" before delegation!*

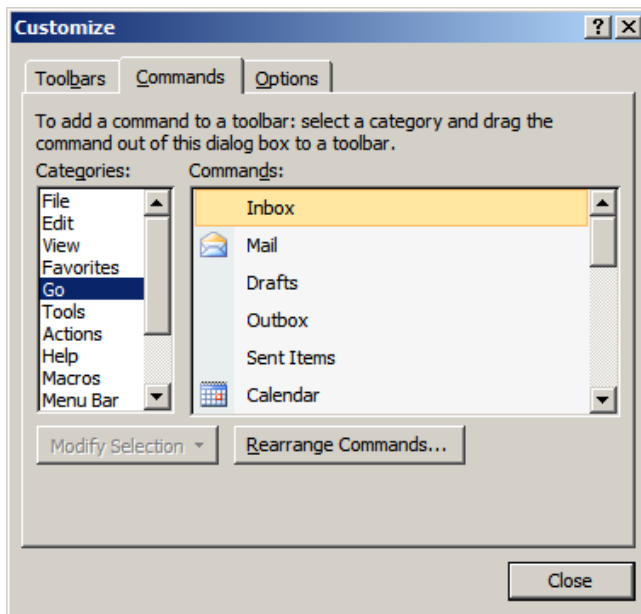
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Finally, we label the last menu “Defer” where we have two sections. The first is deferring (“Move To”) to the Calendar and the second is to Categorize and then deferring (“Move To”) to the Task List. This time we re-label the Categorize menu to indicate more options: “First, Categorize (@Phone, @Computer, etc)”.

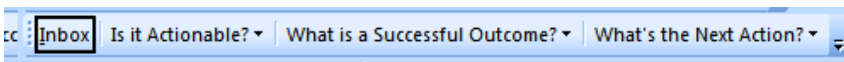


### Finishing Touch

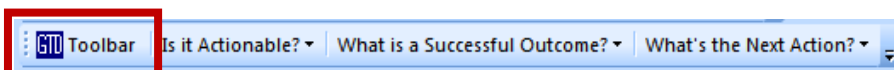
As a final touch we can add the button “Inbox” from the “Go” category:



To the left side of the GTD Toolbar:



Then we re-label to “Toolbar” and edit the icon so it looks like the GTD logo. The end result can be seen below.



*Remember to enable “Begin a Group” for the “Is it Actionable?” menu.*

*If we click the GTD logo, we will be taken to the Inbox.*

**Enjoy!**