![ClearContext for Microsoft Outlook logo]
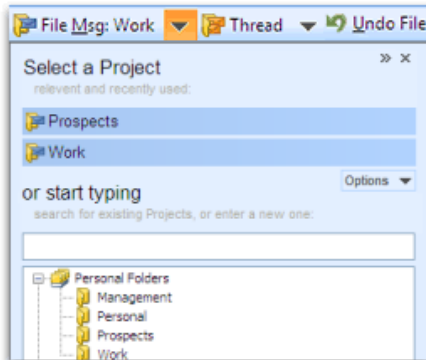
USING CLEARCONTEXT PRO FOR MICROSOFT OUTLOOK

WITH GETTING THINGS DONE

For those who want to dive right into setting up a trusted system, here are the basics for setting up GTD with ClearContext Pro:

Projects: ClearContext allows the assignment of Projects to email conversations. A project is automatically created for each Outlook folder. Use the ClearContext filing buttons to file email to Projects. Use a "/" when creating a Project to designate sub-projects (i.e. "Project/Sub-Project").

Categories = Context: Create Outlook master categories starting with "@" (@Phone, @Desk, etc.) to view tasks in the Dashboard and Organizer by Context Categories.
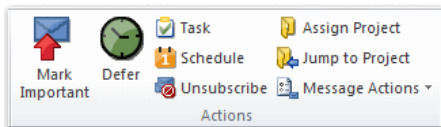
Empty Your Inbox: Use ClearContext workflow buttons (Task, Schedule, Delegate, Defer, etc.) to quickly process messages in the Inbox. When creating a Task or Appointment, assign context via categories (@Work, @Phone, etc.) for easy viewing of context-specific action lists in the Dashboard. Use *File Original Message* when replying or creating a Task/Appointment and ClearContext will automatically file the original email to a Project folder.
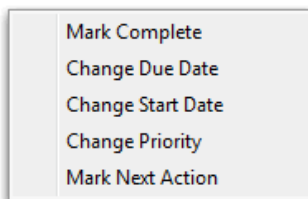
Next Actions: Right click a task in the ClearContext Dashboard or Organizer to mark it as a Next Action. A category of *!Next* is assigned and a small arrow highlights the Next Action by Project.
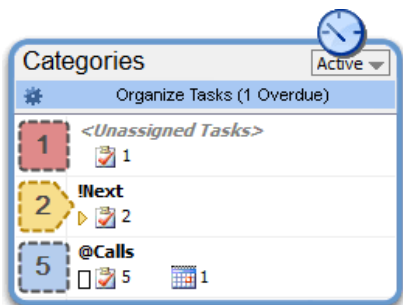
Review: Use the ClearContext Organizer to review your To-Do's by context category, project, next action and/or date. Open the organizer from the ClearContext Dashboard or via the ClearContext menu.

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INTRODUCTION

3 | Using ClearContext Pro for Microsoft Outlook with Getting Things Done
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Many individuals overwhelmed with information take control of Microsoft Outlook by combining ClearContext's flexible and customizable email management features such as inbox prioritization and automated categorization with their favorite parts of David Allen's Getting Things Done methodology to create a powerful information management strategy. Below, we outline basic steps our customers have taken to set up ClearContext and Microsoft Outlook to support GTD email processing including creation of context-specific action lists, designation of next actions, project categorization, creation and maintenance of a "tickler" file, and steps to quickly implement a weekly review. ClearContext also provides email metrics and measurement to help track how well you are handling email. Use this guide to get started – we expect everyone will adjust the system to match their particular information processing requirements.
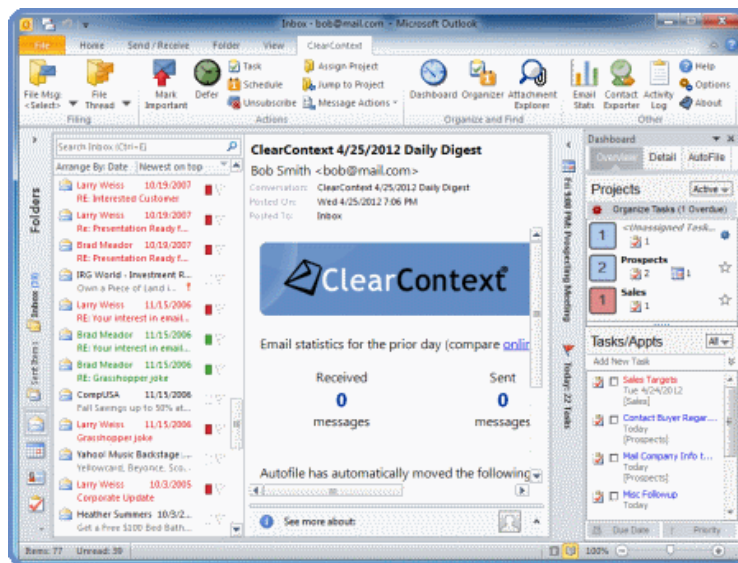
For the purposes of this guide we assume that you have a working knowledge of GTD prior to implementation of ClearContext software. If not, we recommend you visit the Getting Things Done website and find some reference materials to get you started. For an introduction to Getting Things Done, see "What is GTD?"

The process in this whitepaper was developed by ClearContext customers and is the result of real-world use of the product. For detailed discussion on Getting Things Done and ClearContext, see the ClearContext discussion forums. In particular the forum post GTD Users: Start Here contains a collection of GTD-related links.

Overview

In his methodology, David Allen suggests categorizing your email by project and context. Most technology solutions address one or the other well, but do not give a comprehensive way of tracking

both. Using ClearContext, Projects are assigned to messages, tasks and appointments via the ClearContext toolbar and native Outlook categories are used to denote context. Tasks and Appointments can then be viewed by project or context using the Dashboard and the ClearContext Organizer.

WORKFLOW

ClearContext gives several features to process the Inbox quickly and get it to empty. Each button below can automatically file the original message to an associated project folder and link the item to the current message conversation:

Task creates an Outlook task from the currently selected message. Assign an Outlook category to this item to maintain action lists.

Delegate automatically creates either an assigned task or a forwarded message with an associated task for quick delegation to another person.

Schedule creates an appointment from the current message contents.

Defer places the current message in a deferred folder for a given period of time or until a given date. This is an excellent way to create and maintain a "tickler" file.

Filing buttons (**File Msg**, **Thread** or **Project**) automatically moves messages, conversations, or entire projects of email into associated Project Folders. Use these buttons to archive reference material that does not require one of the actions above.

Followup Message allows the creation of a special task tied to a message conversation. When sending an email, create a follow-up to remind you if you do not receive a response within a specified amount of time. If you do receive a response, the follow-up task is automatically cancelled.

Unsubscribe automatically files current and future messages of a given conversation to either their Project folder or an unsubscribed folder. This helps remove those long email threads that you have no interest in that are cluttering your Inbox.

REVIEW

In addition, several ClearContext features provide a view across all messages, tasks, and appointments; regardless of location:

The **Dashboard** displays both Project and Context Category views of your tasks, providing a control panel for implementation of GTD in ClearContext. Switch between Project and Context Category views via the menu at the top of the Dashboard.

From the Context Category view, double click a context to quickly jump to your action lists (@Work, @Phone, etc.) or a list of all Next Actions. From the Project view, pin the projects that are most important to you. Identify Next Actions by Project. Double click a project name to take notes and display all related tasks, appointments, contacts and files.

Much like the Dashboard, the **ClearContext Organizer** displays a list of global tasks that can be filtered by date, project, category, and/or priority. The Organizer is perfect for those who want a more robust way to filter and review their task list, providing an efficient vehicle for performing the weekly review.

Action Management

Following Allen's advice, the bulk of your email messages (those that you can't answer in two minutes, delete, or file away for reference) will become ta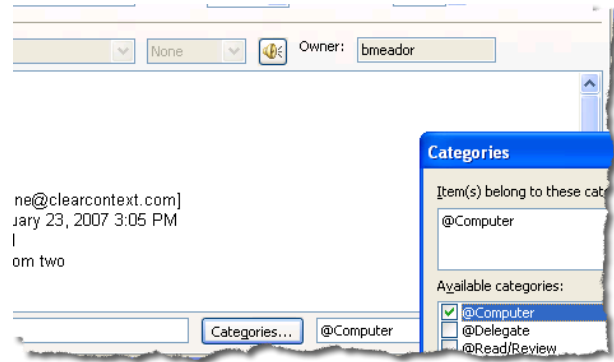sks or appointments in your trusted system. ClearContext Pro's Task, Delegate and Schedule buttons allow you to quickly create tasks and appointments from email messages. Assign Outlook categories to these items to denote context, ensuring that they are assigned to the appropriate action list.
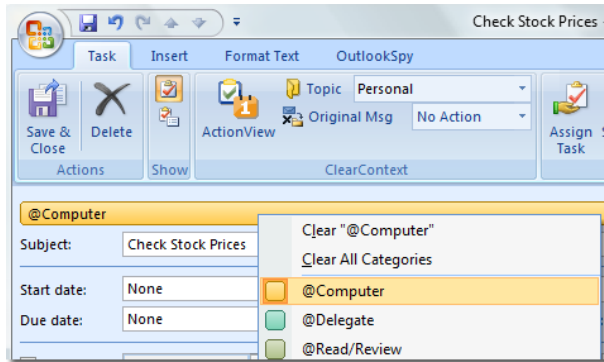
Category Assignment in Outlook 2007 and Later

Category Assignment in Outlook 2003

Setup

The first step in setting this up, customize your Outlook Master Categories list to include the action list categories you use as you process your Outlook information. Putting the '@" symbol in front of each description will ensure that these display at the top of the categories list and appear in the ClearContext Dashboard. We realize that this is a personal list that each user will want to adjust for his/her on working style. Examples of common categories many of our customers have found useful include:

@Car	@Desk	@Internet
@Delegate	@Home	@Phone

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To customize the category list in Outlook 2003 and earlier:

1. Open a new task or appointment
2. Click the categories button in the lower right hand corner
3. Click the Master Category list button
4. Edit the list as desired

To customize the category list in Outlook 2007 and later:

1. Right click the category color field on an email, task, or appointment
2. Select the "All Categories…" menu item
3. Click New and add a category
4. Optionally add a color code
5. Repeat for each category

PROCESSING

Once this setup is complete, process the inbox using the ClearContext workflow buttons, answering those emails that you can, deleting those that you don't need, filing reference material using ClearContext File buttons, and creating tasks or appointments for future work. As tasks and appointments are created, assign a context using Outlook's native category assignment feature and one the categories created above. This will automatically associate the item with the appropriate action list.

THE "TICKLER" FILE

Many GTD'ers follow Mr. Allen's suggestion of creating a "tickler file." ClearContext's **Defer** button is an excellent way to maintain an electronic version of this file. The Defer button moves an email out of the inbox and schedules it as unread at a given time interval or on a given date.

When a message is deferred, a dated folder is created as a subfolder of the "ClearContext Deferred" folder. Consider these your tickler files. Click on any day's folder to review upcoming items or simply wait for the message to re-appear in your Inbox as scheduled.

For example, say you receive an invite to a corporate networking event on the 25th. It's still three weeks off and you don't need to RSVP until the day before. Click Defer and "schedule" the message for the 24th. The message is moved into a subfolder with the month and day you have designated. You can click on this folder at anytime to see all messages pending for that day. Alternatively, the message automatically re-appears in your Inbox, **unread**, on the 24th, reminding you that you need to make a decision about the event.
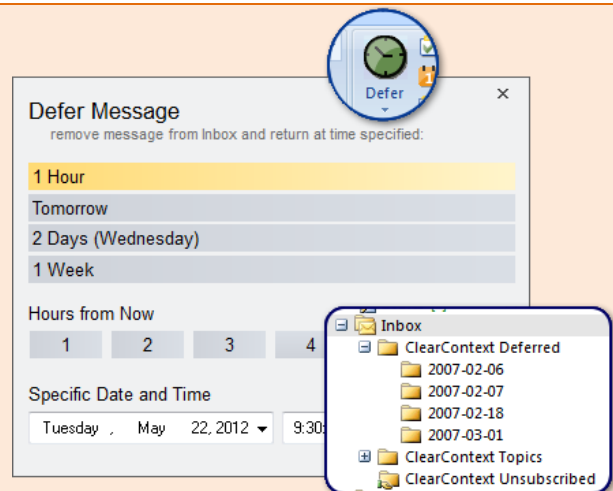
Project Designation
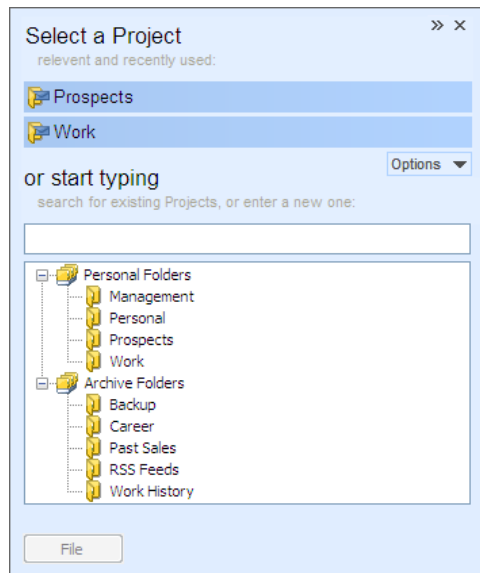
ClearContext makes it easy to assign Projects to messages, tasks and appointments. When filing email to a Project folder, all messages in that email conversation – past, present and future - are automatically associated with the assigned project. As you create a Task or Appointment, ClearContext asks for a Project assignment. ClearContext suggests project names for those conversations that do not already have a project assigned. Press the File button to accept the suggestion or the arrow next to it to open the **Project Selector** and see other Project choices.

File Msg, **Thread** and **Project** buttons quickly move email messages from the Inbox to automatically created Project folders for later reference. In addition, ClearContext can automatically save sent messages in these project folders to ensure that all project correspondence is properly tagged and stored together in one filing system. Project assignments are automatically carried over to Tasks and Appointments generated from email conversation and Projects can be easily assigned to new items as they are created. ClearContext suggests Project assignment based on your email history with the current contact.

The **Project Selector** (depicted above) allows quick project assignment to messages, tasks and appointments. Select a suggested Project or start typing the Project name and ClearContext will narrow your Project list to match your search. Arrow down to select a Project and assign to the conversation.

To create multi-level projects, place a "/" between the Main Project heading and the Sub-Project (i.e. "Client/Implementation"). ClearContext will automatically create Project folders that reflect the hierarchy (i.e. main folder "Client" with sub-folder "Implementation").

Someday/Maybe File

If you would like to follow David Allen's suggestion to maintain a Someday/Maybe file, create a special ClearContext Project called "Someday." Assign Project "Someday" to ideas that you want to think about later. Click the file button and the message will automatically be placed in a subfolder of your ClearContext Project folder. When you're ready to review these items, open up the Project folder for review.

NEXT ACTIONS

Use the ClearContext Dashboard to quickly identify your Next Actions; those tasks required to keep your projects moving forward.
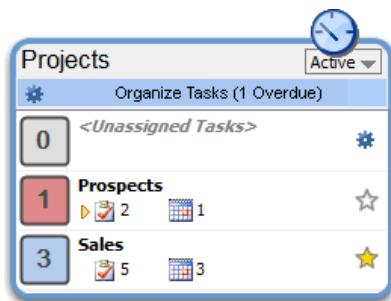
MARK NEXT ACTION
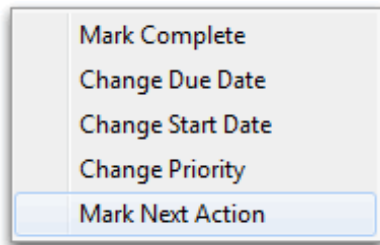
After you have processed your Inbox, view the ClearContext Dashboard in the Sidebar to see your task list by Project. If the Sidebar isn't open, open it via the Dashboard button on the ClearContext toolbar or ClearContext menu.

From the Dashboard task list, right click a task to mark it as a Next Action. A small arrow will be added to the left of the task and a category of *!Next* will be added to it.

REVIEW NEXT ACTIONS BY PROJECT

Select a Project view from the Summary Dashboard menu (*Active* in the image to the left). Scan the Project list in the Summary Dashboard to view your active Projects. Those projects with Next Actions assigned will have a small arrow next to the total Task count. Double-click a project without a Next Action to open it. Right click the next task required to move the project forward and mark it as a Next Action. If none of the tasks listed are an appropriate next action, quickly create a new task using the Add Task entry box above the Task list.

WORK ON NEXT ACTIONS
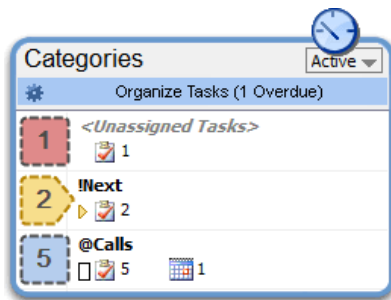
Select a Context Category view from the Summary Dashboard menu (*Active* in the image to the left). Double-click *!Next* to open the Next Actions Detail Dashboard, showing all tasks designated *!Next*. This allows you to focus on those tasks that are most important to the progress of your Projects.

REVIEW

Once the Inbox has been processed, ClearContext provides several methods for reviewing and acting on To-Do Lists.

SUMMARY DASHBOARD
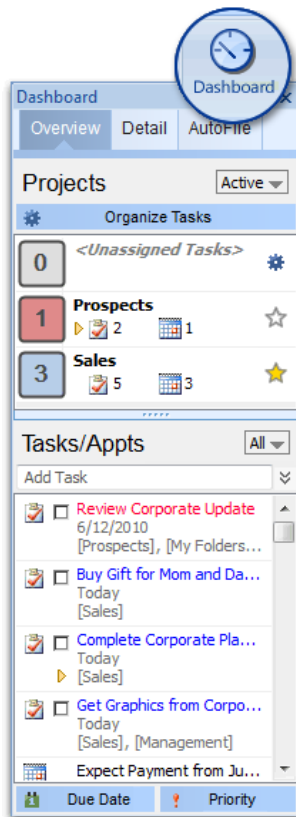
The Summary Dashboard in the ClearContext Sidebar is the control panel for your day. If you close the Sidebar, access the Dashboard from the button in the toolbar or via the ClearContext menu.

CATEGORIES AND PROJECTS

The top half of the Dashboard allows you to quickly see which Context Categories or Projects require your attention. Select either a Context Category or Project view of tasks via the menu at the top right of the Dashboard (*Active* in the image to the left).

The Context Category view only displays categories with special characters in front of them (i.e. @Phone). The large count to the left of each category indicates the total number of due tasks. Counts highlighted in red indicate categories with overdue tasks. Double-click to open a list of all tasks for the selected category. Double-click *!Next* to see all tasks that have been marked as Next Actions. Double-click *<Unassigned Tasks>* to open the Organizer and view a list of all tasks that have not had a category assigned to them.

When viewing Projects in the Dashboard, large counts to the left of each Project give the total number of due tasks, highlighting in red those Projects with overdue tasks. Projects with Next Actions assigned show a small arrow next to the Task count.

Use the star shaped favorite icon to to mark your most important Projects. To view only favorite Projects, select a view from the Project header (*Active* in the picture to the left). Double-click *<Unassigned Tasks>* to view all your tasks without Project assignment. Double-click individual Projects to open a Project Dashboard.

TASKS/APPTS

The Tasks and Appointments section of the Summary Dashboard shows all of your Tasks across projects and Categories. Use the filter selector in the header (*All* in the picture to the left) to filter by date or priority. When ready to focus on a single context (i.e. @Phone) or a single project, open a Detail Dashboard.

The **Due Date** and **Priority** buttons at the bottom of the Dashboard can be used to quickly change task information. Highlight multiple tasks and click the Due Date button to change the date due for all selected tasks. Assign Next Action, Date and Priority by right-clicking a Task.

DETAIL DASHBOARD
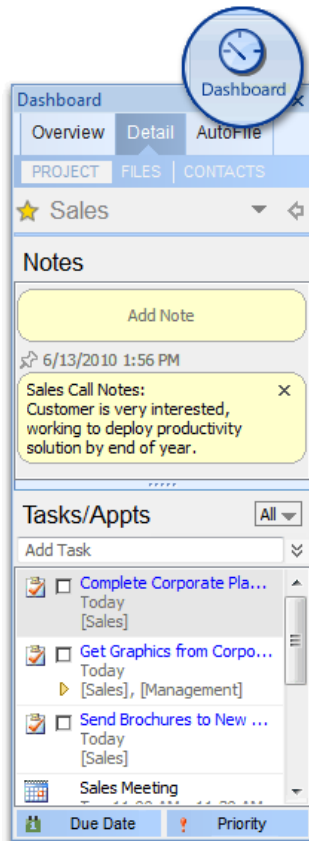
When ready to focus on an individual project or category, open the Detail Dashboard by double-clicking a Project or Context Category in the Summary Dashboard.

CATEGORY DETAIL

When viewing the detail for a Context Category, ClearContext displays all tasks and appointments with the current category assigned. When you're ready to work on a single context/action list (i.e. @Phone), this is the place to do it. As in the Summary Dashboard, right click a task to assign Due Date, Start Date, Priority or Next Action.

PROJECT DETAIL

In the Project Detail, add project related notes and view all tasks and appointments assigned to the Project. Click the Project name header to quickly open favorite Projects. Click the Jump to Folder icon to the right of the Project name to open the associated Project folder. Click the star icon to mark the Project as a favorite. As in the Summary Dashboard, right click a task to assign Due Date, Start Date, Priority or Next Action.

FILES AND CONTACTS

Click the Files tab at the bottom of a Project Dashboard to view all attach*m*ents that have been emailed for this Project. Click the Contacts tab to view all Contacts you have corresponded with for this Project.
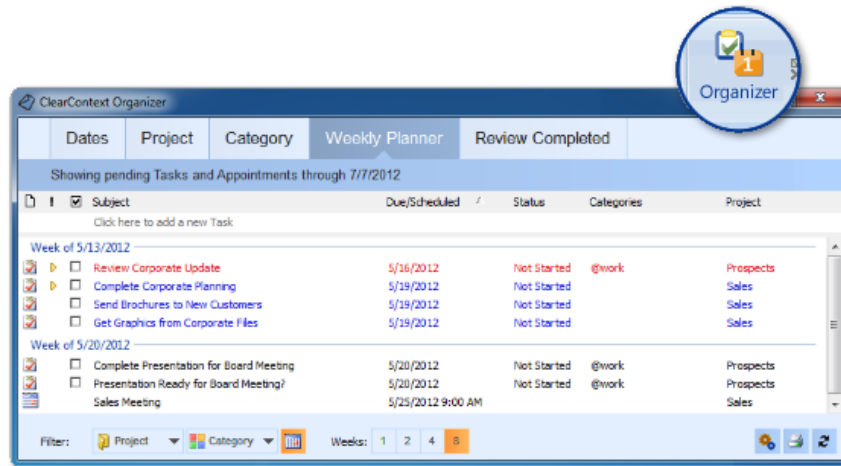
Click the **Organize Tasks** button at the top of the Dashboard to open up the ClearContext Organizer and perform the weekly review. There are five tabs in the Organizer:

- **Dates** – view overdue and pending tasks at a glance. Highlight multiple tasks and use the Due Date button to quickly move tasks due dates.
- **Project** – see project assignments for all tasks and quickly assign Projects to unassigned tasks.
- **Category** – view all tasks by context categories and assign new categories as needed.
- **Weekly Review** – view pending tasks by week. Filter by Project or Category.
- **Review Completed** – view completed tasks by week. Filter by Project or Category.

As in the Dashboard, Next Actions are designated throughout the Organizer by a small arrow to the left of the Task in the priority field. Right click a task to mark it as a Next Action. When assigning or filtering by category in the Organizer, it will only display categories where the first character is not a letter, for example *@Phone* or *!Next*.

THE WEEKLY REVIEW

Many GTD users find David Allen's suggestion of a weekly review to be the most critical component of their GTD implementation. To automate the weekly review with ClearContext, use the ClearContext Organizer and ClearContext's custom Inbox views to process actions by project. To perform the review, use these tools on a weekly basis:

1. **Empty the Inbox** - Go through the email remaining for the last week – starting with high priority email first - and action it using **Task**, **Schedule**, **Delegate**, **Defer** or **Delete**.
2. **Empty the Head** - Capture new tasks using the quick *Add Task* function on the Dashboard.
3. **Review** - Select **Organizer** from the ClearContext menu.
   a. Click the *Date* tab. Mark items complete as needed and reassign dates in bulk.
   b. On the *Project* tab, ensure that all tasks have Projects assigned to them.
   c. Also on the *Project* tab, identify those Projects that do not have a Next Action assigned. Either mark an existing task as *!Next* via right click or add a new task via *Add Task* at the bottom of the Organizer.
   d. Open the *Category* tab and assign tasks to action lists as required.
   e. Click the *Review Completed* tab and look at the past week's completed items to see if further action is required and/or document for reference.
   f. Click the *Weekly Planner* tab and review tasks and appointments for the upcoming week. Right click and reassign dates as necessary. Capture any new actions that are triggered. Optionally filter by Project or Category for closer scrutiny.
4. Review the **Someday/Maybe** folder and transfer any items to your system that have become active or delete any items that are no longer relevant.

OTHER USEFUL FEATURES

In addition to the above, ClearContext provides many additional features to help you focus on your most important work and manage your email more efficiently. Here are a couple that are of particular interest to our GTD customers.

AUTOFILE
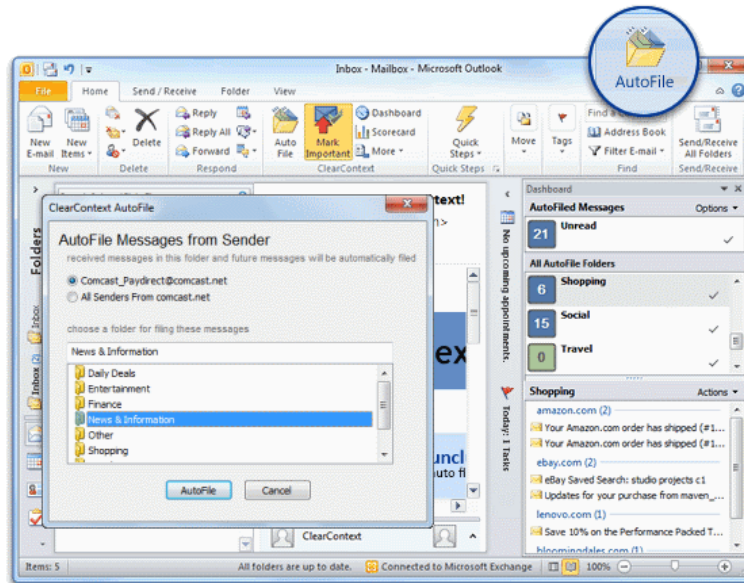
AutoFile speeds up Inbox processing by automatically moving incoming "graymail" messages - including newsletters, social networking notifications, shopping email, etc. - to categorized folders.

AutoFile comes pre-configured with filing rules for common senders of automated email. These rules are updated over time as ClearContext users identify new senders. Create your own custom AutoFile rules in one of two ways:

1. Highlight a message and press the AutoFile button on the toolbar or select AutoFile from the ClearContext menu. In the dialog that appears, choose whether you want to create a sender-based rule (i.e. bacn@bulksender.net) or a domain-based rule (i.e. bulksender.net) and select the group you would like to file to. All messages in the current folder that match your rule will be filed to the group you selected. All future messages from that sender or domain will be filed as well.
2. Click and drag a message onto a filing group in the Sidebar. Select Move on the dialog. As above, all current and future messages from this sender or domain will be moved to the AutoFile filing group.
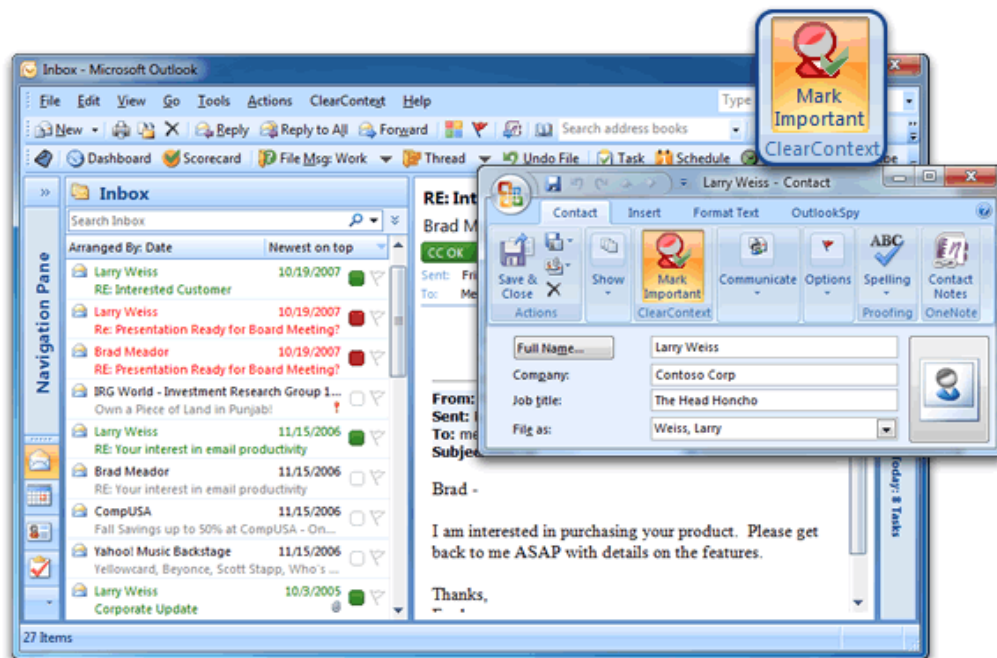
A core feature of ClearContext is the automated prioritization of individual email messages. Though email prioritization is not a core tenet of GTD email processing, ClearContext's prioritization engine can be extremely helpful when trying to get the Inbox down to empty. When there are too many messages to process in the time available, ClearContext's prioritized view allow you to address your most important messages first while saving the less important items for later.

Priority is determined by the sender of the email and the directness of the email (CC: vs. To:). Designate given senders as VIPs and ClearContext will use that information to prioritize the Inbox. Messages are color-coded by priority, with the most important email from the most important senders highlighted in red. In addition, as you process individual emails, manually mark email conversations as important and future email in this conversation will also be marked important.
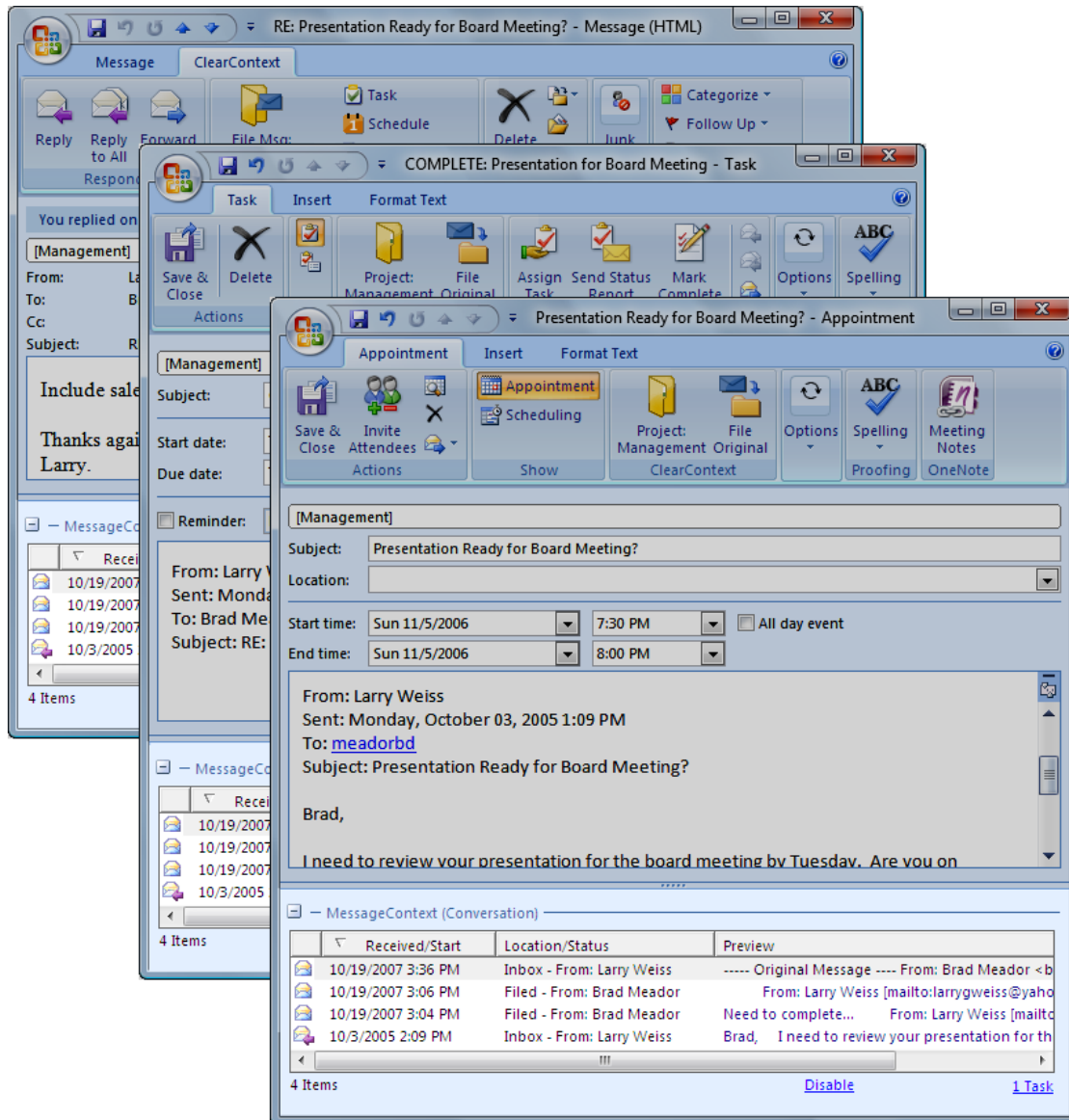
The MessageContext is a view of all related items for a given conversation. For example, your Inbox is empty and you receive a new message regarding a meeting you are attending later in the week. Open MessageContext to see previous emails about this meeting, along with any tasks or appointments created from the conversation. In Outlook 2003 and the x64 version of Outlook 2010, access MessageContext via a button on the toolbar.

Measurement and Metrics

The ClearContext Scorecard provides a way to track your progress implementing GTD by measuring how effectively you are staying on top of your Inbox, your response time, etc..

To view your Email Activity Index:

- Outlook 2010: select the ClearContext tab and press the Email Stats button
- Outlook 2007: select Email Scorecard from the ClearContext menu.

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ADDITIONAL INFORMATION

There is a wealth of additional information on the use and optimization of Outlook available on the ClearContext Website. Of particular interest is our ClearContext Daily Workflow, a lightweight process for managing email on a daily basis. All of the above features are documented in more detail in our User Guide. We have created several short tutorials to help learn about the product. Check out our weblog for tips and techniques for getting the most out of ClearContext and/or our User Forums for technical questions and features and tips suggestions.

ABOUT CLEARCONTEXT

ClearContext was founded in 2003 with the goal of building applications to help individuals work more effectively with email. The company builds ClearContext for Microsoft Outlook, an add-in to help individuals effectively manage their email, tasks, and schedule.