



eProductivity.Demo@ica.com

01/03/08 12:01 PM

To Eric.Mack@ICA.com

cc

bcc

Subject Welcome to eProductivity! Here's how to take a quick tour of eProductivity in less than 10 minutes!

Welcome to eProductivity - *The Ultimate Productivity Tool* for Lotus Notes!

To help you get started with eProductivity, I have placed several sample e-Mail messages in this in-box.

Each one has a suggestion for how to process it. *You may want to print out the attached PDF document, which contains all of these emails. This way, follow-along and take notes as you perform each step.*

If you follow the instructions you will experience processing your in-box to empty in just a few minutes. At the same time, you'll discover some of the many features of eProductivity.

Let's get started!

Press the ESC key to close this email and return to the in-box. Then, open the next one in the view and follow the instructions.

On behalf of the entire eProductivity team, thank you!

Eric Mack

Attachment:



20080827 - eProductivity E-Mail Tutorial Pages.pdf



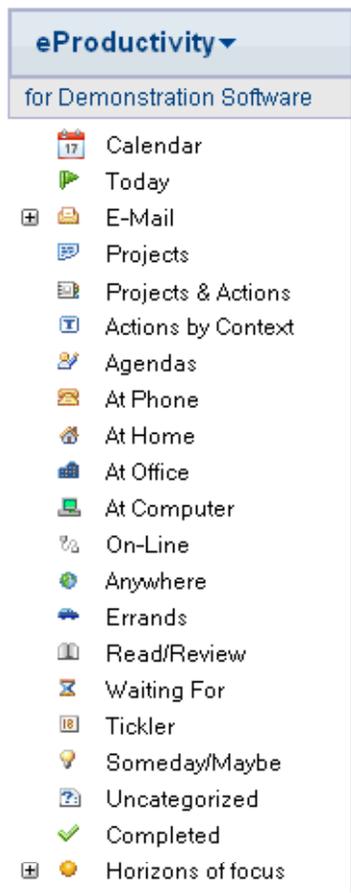
Eric D. Mack eProductivity Specialist

E-mail: Eric.Mack@ICA.com | Tel: (661)242-8410x101 | Skype: [eProductivityGuy](https://www.skype.com/user/eProductivityGuy)

Web: <http://www.ICA.com> | Blog: <http://www.EricMackOnLine.com>



Let's begin by exploring the eProductivity navigation pane ...



To the left, you will find the eProductivity Navigator.

This navigator places all of the important information within easy reach.

You can customize what appears on the navigator from the user preferences.

Here's what to do next:

1. Close this e-mail
2. Explore the various views by clicking on each navigator entry, from top to bottom.
3. When you are done exploring, delete this email and open the next email in the in-box.



Paul Gimble
01/03/08 03:47 PM

To Eric.Mack@ICA.com
cc
bcc
Subject Eric, let's discuss the ACME widget project the next time we meet.

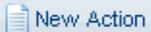
What is it?

You've just been asked to remember to discuss the ACME Widget project the next time you meet with Paul.

What's the next action?

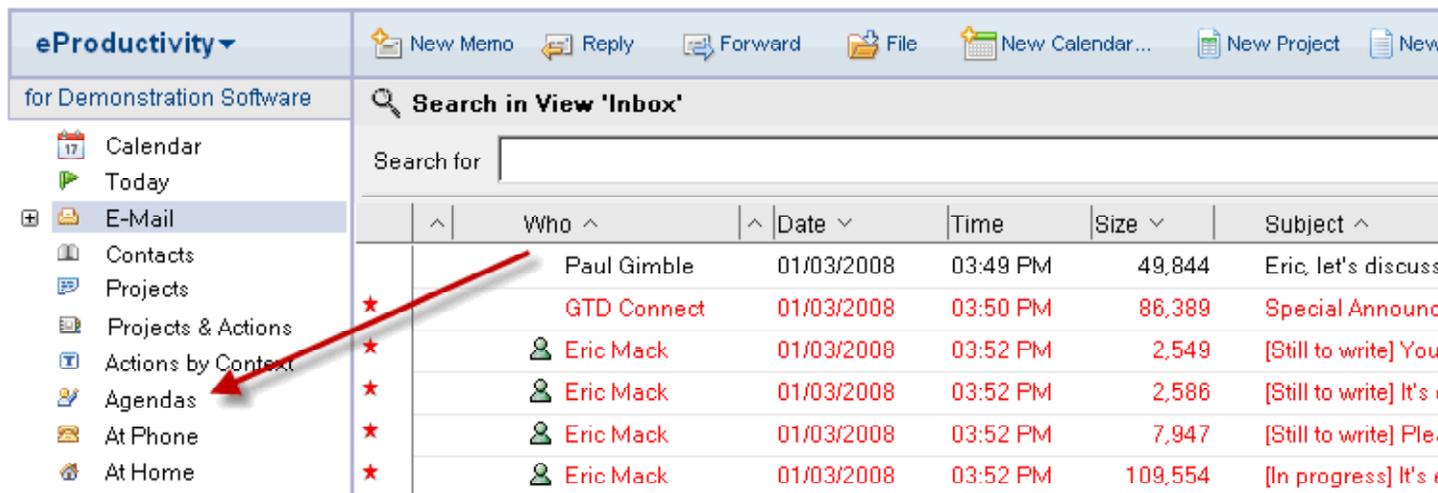
Since you do not know when you will meet with Paul next, this can be considered an "Agenda" item.

Let's create an Agenda item for your meeting with Paul ...

There are multiple ways to add a topic to an agenda. One way is to click on the  New Action button (above) and enter the item. Another way is to drag the e-mail from the in-box to the  Agendas context on the left-hand navigator.

Steps:

1. Press the ESC key to close this e-mail and return to your in-box. (*You can only drag and drop from the in-box view*)
2. Click once on the e-mail to select it in the view
3. Now, drag the selected e-mail to the  Agendas context in the left-hand navigator.



The screenshot shows the eProductivity software interface. The top bar includes navigation buttons: New Memo, Reply, Forward, File, New Calendar..., New Project, and New. Below this is a search bar labeled "Search in View 'Inbox'". The main area displays a list of emails with columns for Who, Date, Time, Size, and Subject. The "Agendas" context is highlighted in the left-hand navigator, and a red arrow points to it from the text above.

	Who ^	Date v	Time	Size v	Subject ^
	Paul Gimble	01/03/2008	03:49 PM	49,844	Eric, let's discuss
★	GTD Connect	01/03/2008	03:50 PM	86,389	Special Announc
★	 Eric Mack	01/03/2008	03:52 PM	2,549	[Still to write] You
★	 Eric Mack	01/03/2008	03:52 PM	2,586	[Still to write] It's
★	 Eric Mack	01/03/2008	03:52 PM	7,947	[Still to write] Ple
★	 Eric Mack	01/03/2008	03:52 PM	109,554	[In progress] It's

A new "Agenda" item will appear and the e-mail details will be pasted into the body of the Agenda item, but, before we save this new Agenda item, let's edit the subject to make it more meaningful...

4. In the subject line, highlight the words "Eric, let's" like this:

Action	What's the next physical action? (Start with a single physical next-action v
	Eric, let's discuss the ACME widget project the next time we meet. Example: "Emily - how did she like the new sales training?" or "Staff Mtg. - Do

5. Type "Paul - " over the selected text, like this:

Action	What's the next physical action? (Start with a single physical next-action v
	Paul - discuss the ACME widget project the next time we meet. Example: "Emily - how did she like the new sales training?" or "Staff Mtg. - Do

6. Now, highlight the words " the next time we meet." and press the DEL key to delete this text, so that the subject will look like this:

Action	What's the next physical action? (Start with a single ph
	Paul - discuss the ACME widget project Example: "Emily - how did she like the new sales training?"

7. Enter Today's date in the DueDate field. Items that have a DueDate assigned will automatically appear on your Today list and calendar. (We'll cover these later).

When	Due <input type="text" value="16"/>
------	-------------------------------------

8. Now, click



eProductivity will help you by prompting for what to do with the original e-mail, like this



The dialog box is titled "eProductivity E-Mail Disposition" and contains an "Email Management" section with a question: "What would you like to do with the original email?". Below the question are three buttons: "Move to folder...", "Delete email", and "Leave mail in original folder".

There's no need to keep the original e-mail in the in-box (a copy of the e-mail is now a part of the Agenda item) so we can delete it.

9. Click the  button to move the e-mail from your in-box to the trash folder.

When you are ready, open the next e-mail and follow the instructions.

Bank of America
01/03/08 03:47 PM

To Eric.Mack@ICA.com
cc
bcc
Subject Your electronic funds transfer has been processed.
Confirmation # 278392121

What is it?

You've just received an e-mail confirmation from your bank.

What's the next action?

You have no specific next action, but you like to hold on to these e-mails for future reference so you decide to file this one...

Let's file this e-mail in a folder...

There are multiple ways to file an e-mail. One way is to click the  File button (above) and choose a folder. Another method is to drag the e-mail from the in-box to the folder pane which is on the right side of your in-box.

Steps

1. Press the ESC key to close this e-mail and return to your in-box. *(You can only drag and drop from the in-box view)*

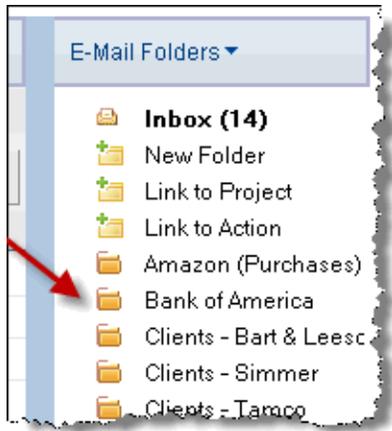


2. Expand the list of folders by clicking on the triangle in the right column:

This will cause the folder pane to appear in the right-hand frame of your in-box. (Note: If you have a large screen, you can set a preference so the folder pane is always displayed.)

3. Click once on the e-mail to select it in the view

4. Now, drag the selected e-mail to the  Bank of America folder in the right-hand navigator.



The key takeaway from this exercise is that when you are processing your e-mail, you drag to the left for projects and actions and drag to the right to file. This is a very powerful technique that will save you a lot of time processing your e-mail.

When you are ready to continue, open the next e-mail and follow the instructions.

Amazon Orders
01/03/08 03:48 PM

To Eric.Mack@ICA.com
cc
bcc
Subject Your order with Amazon: 222-5481085-22322374

What is it?

You've just purchased a book from Amazon and this is the receipt for your purchase.

What's the next action?

You don't want to forget that you have a book coming, so you decide to create an item on your "Waiting For" list.

Let's create a Waiting For item from this e-mail...

There are multiple ways to create a Waiting For item. Since we already have this email and we will want to keep the details, we will create a new Waiting For item by dragging the e-mail from the in-box to the  Waiting For context on the left-hand navigator.

Steps:

1. Press the ESC key to close this e-mail and return to your in-box. *(You can only drag and drop from the in-box view)*
2. Click once on the e-mail to select it in the view
3. Now, drag the selected e-mail to the  Waiting For context in the left-hand navigator.

A new "Waiting For" item will appear and the e-mail details will be pasted into the body of the item.

4. Click .

All Waiting For items must have a due date. To help you, eProductivity will display a dialog box, like this...



Please enter a due date (optional) for this Waiting For item

Due Date
Please enter a due date (optional) for this item.

09/05/2008 +1 week +2 weeks +3 weeks +1 month No Due Date

Save & Close Cancel

If you are satisfied with the DueDate displayed, there's nothing to do. Otherwise, you may enter a new date or click on one of the buttons to choose another period of time.

5. Click the  button to save this new Waiting For item.

eProductivity will ask you what you want to do with the original e-mail...

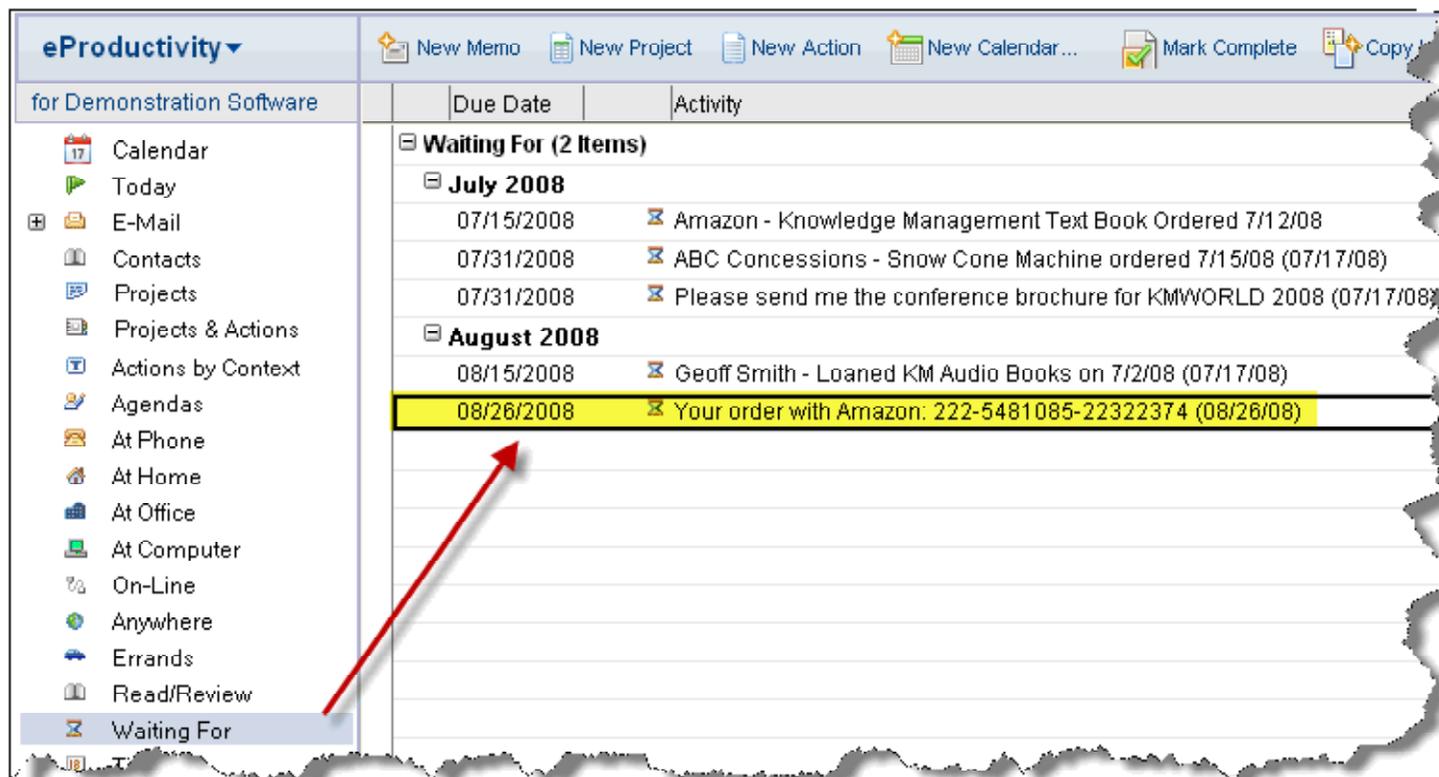


There's no need to keep the original e-mail in the in-box (a copy of the e-mail is already a part of the Waiting For item) so we can delete it.

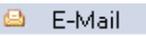
6. Click the  button to move the e-mail from your in-box to the trash folder.

Now, let's look at the items on your Waiting For list to see the new book order that you've just created...

7. Click on  in the left-hand navigator. Your Waiting For view should look similar to this...



Due Date	Activity
Waiting For (2 Items)	
July 2008	
07/15/2008	Amazon - Knowledge Management Text Book Ordered 7/12/08
07/31/2008	ABC Concessions - Snow Cone Machine ordered 7/15/08 (07/17/08)
07/31/2008	Please send me the conference brochure for KMWORLD 2008 (07/17/08)
August 2008	
08/15/2008	Geoff Smith - Loaned KM Audio Books on 7/2/08 (07/17/08)
08/26/2008	Your order with Amazon: 222-5481085-22322374 (08/26/08)

When you are done, click on  in the left-hand navigator and open the next

email in the in-box...

Sample e-mail below

Thanks for your order, Eric Mack!

Want to manage your order on-line?

If you need to check the status of your order or make changes, please visit our home page at Amazon.com and click on Your Account at the top of any page.

Purchasing Information:

E-mail Address: emack@ica.com

Billing Address:

Kathy Mack
P.O. Box 1234
AnyTown USA

Shipping Address:

Kathy Mack

Order Grand Total: \$44.94

Get the [Amazon.com Visa Card](#), the [Amazon.com Business Visa Card](#) or the [Amazon.com Student Visa Card](#) **instantly** and **automatically get \$30 back** after your first purchase. Plus get up to **3% rewards**. Already have an Amazon.com Visa® card? Visit the [Cardholder Specials page](#) for great offers.

Order Summary:

Shipping Details: (order will arrive in 1 shipment)

Order #: [222-5481085-22322374](#)
Shipping Method: Two-Day Shipping
Shipping Preference: Group my items into as few shipments as possible
Subtotal of Items: \$44.94
Shipping & Handling: \$0.00

Total for this Order: \$44.94

Shipping estimate for these items: May 7, 2007

Delivery estimate: May 9, 2007

1 "Together"

Donny & Marie Osmond; Audio CD; \$11.98

Sold by: Amazon.com

1 "Live"

The Osmonds; DVD; \$9.98

Sold by: Amazon.com

1 "The Donny and Marie 1978 Christmas Show"

Donny Osmond; DVD; \$9.99

Sold by: Amazon.com

1 "Dick Van Dyke - In Rare Form"

Dick Van Dyke; DVD; \$12.99

Sold by: Amazon.com

Where can I get help with reviewing or changing my orders?

To learn more about managing your orders on Amazon.com, please visit our Help pages at amazon.com/help/orders/.

Please be aware that items in this order may be subject to California's Electronic Waste Recycling Act. If any items in this order are subject to that Act, the seller of that item has elected to pay any fees due on your behalf.

Please note: This e-mail message was sent from a notification-only address that cannot accept incoming e-mail. Please do not reply to this message.

Thanks again for shopping with us.

Amazon.com

Earth's Biggest Selection

Prefer not to receive HTML mail? [Click here](#)



GTD Connect

01/03/08 03:50 PM

Please respond to
"GTD Connect"
<connect@davidco.com>

To "Eric Mack" <eric.mack@ica.com>

cc

bcc

Subject Special Announcement from The David Allen Company

What is it?

You've just received a notice that the GTD Global Summit will be held on March 11th to 13th, 2009.

What's the next action?

You're undecided whether or not you will attend, but you don't want to forget about this either. Your old self might have left this in your in-box but the new eProductive you will create a reminder about this item. For this example, we'll suppose that you'll need to make a decision on this by October 1, 2008.

What is a Tickler item?

A tickler item is a reminder of an event that will happen in the future. eProductivity treats Tickler items in a special way by automatically showing them on your Calendar and Today view at the right time. Since the Tickler we will create will also have the original e-mail attached to it, everything you will need will be in one place.

Let's create a Tickler item from this e-mail...

Since we already have this email and we will want to keep the details, we will create a new Tickler item by dragging the e-mail from the in-box to the  Tickler context on the left-hand navigator.

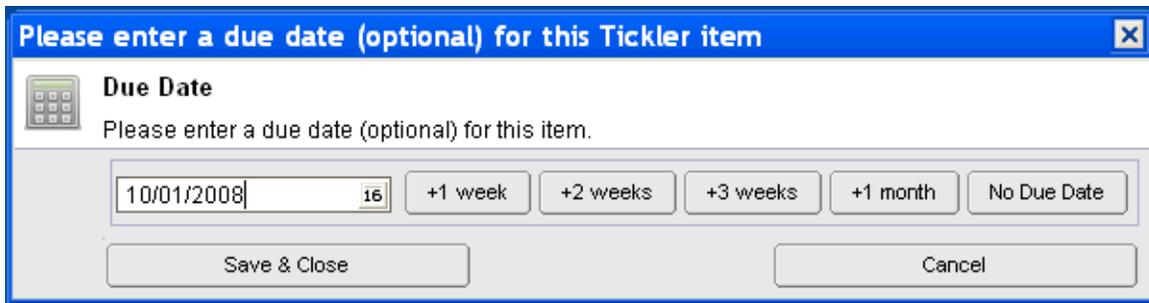
Steps:

1. Press the ESC key to close this e-mail and return to your in-box. (*You can only drag and drop from the in-box view*)
2. Click once on the e-mail to select it in the view
3. Now, drag the selected e-mail to the  Tickler context in the left-hand navigator.

A new "Tickler" item will appear and the e-mail details will be pasted into the body of the item.

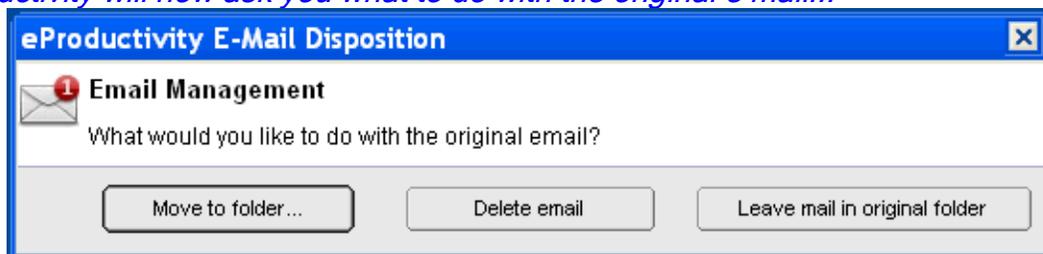
4. Click .

All Tickler items must have a due date. To help you, eProductivity will display a dialog box, like this...



5. Type in the DueDate of 10/01/2008 and click the  button to save this new Tickler item.

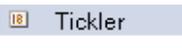
eProductivity will now ask you what to do with the original e-mail...



There's no need to keep the original e-mail in the in-box (a copy of the e-mail is already a part of the Tickler item) so we can delete it.

6. Click the  button to move the e-mail from your in-box to the trash folder.

Now, let's look at the items on your Tickler list to see what's coming up...

7. Click on  in the left-hand navigator. Your Tickler view should look similar to this...

Due Date	Activity	Status
Tickler (3 Items)		
July 2008		
07/19/2008	New member party at Magic Castle - do we want to go?	Overdue
07/25/2008	Knowledge Management Conference - UCLA	Overdue
October 2008		
10/01/2008	Special Announcement from The David Allen Company	In Progress
December 2008		
12/22/2008	GBC Christmas Concert	In Progress

When you are done, click on E-Mail in the left-hand navigator and open the next email in the in-box...

Sample e-mail below



Dear Eric,

We are extremely pleased to announce a major event in the world of GTD...

The Getting Things Done Global Summit!

This inaugural event will take place from March 11th to 13th, 2009 at the Intercontinental in San Francisco. We wanted to extend a special invitation to GTD Connect members to attend.

Complementing David Allen's presentations will be a cadre of some of the most accomplished and effective people in the world:

- Executives and business leaders who have had the insight and vision to implement a GTD culture throughout their organizations, yielding extraordinary results.

- Coaches who will reveal how implementing a GTD strategy has had profound benefits for their clients – from world class athletes to struggling students.
- David's Senior GTD Facilitators who will lead hands-on sessions to share their real-world techniques to help you implement GTD for yourself and your organization and maximize the success you will achieve as a result.
- Surprise guests that will inspire, awe and excite you with their stories of how they managed to achieve success, in some cases against unimaginable adversity and odds.

Of course one of the greatest benefits to attending the GTD Global Summit will be the opportunity to meet and network with five hundred other GTD practitioners – all in one place.

As a GTD Connect member, you are invited to join a special breakout session with David and selected members of his executive team at the event.

Visit www.gtdsummit.com to learn more and register today!

All the best,

The GTD Connect Team

We sent this message to you as part of your GTD Connect subscription.
If you have any questions or concerns, please contact connect@davidco.com



DavidAllen



Kathy Mack
01/03/08 03:50 PM

To Eric.Mack@ICA.com
cc
bcc
Subject You have a TamCo's director's meeting on the 28th of this month...

I told them you'd be there early. Be sure to park in the south lot.

You'll want to arrive 25 - 30 minutes in advance to deal with security.

Here's the address

Tamco Plaza
1234 Main Street
Anytown, USA 91234

What is it?

You've received an email about an event that you must attend.

What's the next action?

You need to get it on your calendar as an appointment and, since there are specific details for this event, you want to save this information along with the appointment in your calendar. This way, the appointment and the details will be in one place, ready when you need them. (If you sync a SmartPhone, PDA, or BlackBerry with Lotus Notes, then this information will be available on your mobile device as well.)

Let's create an Appointment on your calendar ...

There are multiple ways to create an appointment. One way is to click on the  button (above) and enter the item. But then you would have to retype or copy & paste the details into the appointment.

An easier way is to drag the e-mail from the in-box to the  Calendar context on the left-hand navigator.

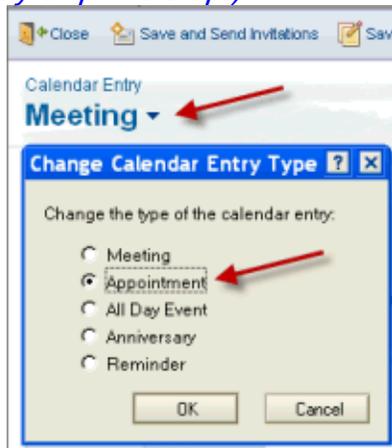
Steps:

- 1. Press the ESC key to close this e-mail and return to your in-box. (You can only drag and drop from the in-box view)*
- 2. Click once on the e-mail to select it in the view*
- 3. Now, drag the selected e-mail to the  Calendar context in the left-hand navigator.*

A new calendar entry will appear and the e-mail details will be pasted into the body of the calendar entry.

Before we save this calendar entry, let's edit a few things to make it more meaningful...

4. Change the calendar entry to an "Appointment" by clicking on the pull-down menu option. *(If your calendar preferences default new calendar entries to "Appointment" then you may skip this step.)*



5. Enter the date and time for this event. *(For our example, choose today, so that we can view it on the Today view)*

You may wish to edit the subject of this calendar entry to be more meaningful, e.g. "TamCo's director's meeting."

6. Click .

You will be returned to the e-mail in-box.

7. Select the "Tamco Director's meeting" e-mail and click  to move the e-mail from your in-box to the trash folder.

When you are ready, open the next e-mail and follow the instructions.



Kathy Mack
01/03/08 03:50 PM

To Eric.Mack@ICA.com
cc
bcc
Subject Please purchase highlighter pens and note pads

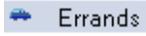
What is it?

You've been asked to pick up office supplies the next time you run errands.

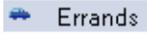
What's the next action?

You want to add this item to your errands list.

Let's create an Errand item...

There are multiple ways to add an item to your Errands list. One way is to click on the  button (above) and enter the item. Another way is to drag the e-mail from the in-box to the  context on the left-hand navigator.

Steps:

1. Press the ESC key to close this e-mail and return to your in-box. *(You can only drag and drop from the in-box view)*
2. Click once on the e-mail to select it in the view
3. Now, drag the selected e-mail to the  context in the left-hand navigator.

A new "Errand" item will appear and the e-mail details will be pasted into the body of the agenda item.

*You may wish to edit the subject to make this more descriptive, like this...
(Note: Editing the subject line is entirely optional.)*

4. In the subject line, highlight the words "Please purchase "...

Action	What's the next physical action? (Start with a single physical next-action verb, when
	Please purchase highlighter pens and note pads Example: "Home Depot - Purchase new extension ladder" or "Cleaners - pick up suits"

5. Type "Office Supply - " over the selected text, like this:

Action	What's the next physical action? (Start with a single physical next-action verb, when
	Office Supply - highlighter pens and note pads Example: "Home Depot - Purchase new extension ladder" or "Cleaners - pick up suits"

6. Now, click .

eProductivity will help you by prompting for what to do with the original e-mail, like this



There's no need to keep the original e-mail in the in-box (a copy of the e-mail is now a part of the Errand item) so we can delete it.

7. Click the  button to move the e-mail from your in-box to the trash folder.

When you are ready, open the next e-mail and follow the instructions.



Sally Camron
01/03/08 03:51 PM

To Eric.Mack@ICA.com
cc
bcc

Subject Here are the notes from Tuesday's Board meeting. Please review and approve...

Board Meeting Minutes
Your Organization

Board Members:

Present: Yogi Bear, Fozzi Bear, Care Bear, Gummy Bears

Absent: W. Pooh

Quorum present? Yes

Others Present:

Exec. Director: Kermit The Frog

Other: Great Gonzo, Elmo

Proceedings:

- *Meeting called to order* at 7:00 p.m. by the Great Gonzo
- (Last month's) meeting minutes were amended and approved

· *Chief Executive's Report:*

- Recommends that if we not able to find a new facility by the end of this month, the organization should stay where in the current location over the winter. After brief discussion, Board agreed.
- Staff member, Miss Piggy, and Mr. Beaker attended the National Puppet Network meeting in Atlanta last month and gave a brief extemporaneous presentation. Both are invited back next year to give a longer presentation about our organization. After brief discussion, Board congratulated Piggy and asked her to pass on their congratulations to Beaker as well.
- Drucker asserts that our organization must ensure its name is associated with whatever materials are distributed at that practitioner's meeting next year. The organization should generate revenues where possible from the materials, too. and so on...

What is it?

You've been asked to review and approve the meeting minutes...

What's the next action?

Add this to your Read/Review list.

Let's create a Read/Review item...

Since we have the details in the email, the easiest way to do this is to drag the e-mail from the in-box to the  Read/Review context on the left-hand navigator.

Steps:

1. Press the ESC key to close this e-mail and return to your in-box. (*You can only drag and drop from the in-box view*)
2. Click once on the e-mail to select it in the view
3. Now, drag the selected e-mail to the  Read/Review context in the left-hand navigator.

A new "Read/Review" item will appear and the e-mail details will be pasted into the body

of the item.

You may wish to edit the subject to make this more descriptive, like this...
(Note: Editing the subject line is entirely optional.)

4. In the subject line, highlight the words "Here are the "



5. Type "Review & Approve" over the selected text. Then, delete the extra words after "Board meeting", like this:



6. Now, click  .

eProductivity will help you by prompting for what to do with the original e-mail, like this



There's no need to keep the original e-mail in the in-box (a copy of the e-mail is now a part of the Read/Review item) so we can delete it.

7. Click the  button to move the e-mail from your in-box to the trash folder.

When you are ready, open the next e-mail and follow the instructions.



Steve Cooper
01/03/08 03:51 PM

To Eric.Mack@ICA.com
cc
bcc
Subject Eric, please FedEx Jim the B&L proposal

Hi Eric, Jim needs to have the Bart & Leeson proposal in his hands by next Tuesday.

When you get to the office, please ship it to him. You can bill my account.

Thanks,

Steve

What is it?

You received this request to ship a package when you are in the office.

What's the next action?

You won't be back in the office until Monday, so you need to file this as an "At Office" item.

Let's create an action for you to take care of "At Office"...

Since we have the details in the email, the easiest way to do this is to drag the e-mail from the in-box to the  At Office context on the left-hand navigator.

Steps:

1. Press the ESC key to close this e-mail and return to your in-box. *(You can only drag and drop from the in-box view)*
2. Click once on the e-mail to select it in the view
3. Now, drag the selected e-mail to the  At Office context in the left-hand navigator.

A new "At Office" item will appear and the e-mail details will be pasted into the body of the item.

*You may wish to edit the subject to make this more descriptive, like this...
(Note: Editing the subject line is entirely optional.)*

4. In the subject line, highlight the words "Eric, please" and click DEL

5. Now, click .

eProductivity will help you by prompting for what to do with the original e-mail, like this



There's no need to keep the original e-mail in the in-box (a copy of the e-mail is now a part of the "At Office" item) so we can delete it.

6. Click the  button to move the e-mail from your in-box to the trash folder.

When you are ready, open the next e-mail and follow the instructions.



Kathy Mack
01/03/08 03:51 PM

To Eric.Mack@ICA.com

cc

bcc

Subject I think it's time to buy a new copier for the office. Can you handle this, please?

Eric, the copier broke for the third time this month. I know we discussed waiting a few months but I think we should buy a new copier now. Please see if you can get a new copier by the end of the month. Thanks. - K

What is it?

This is a request for a new copier for the office.

What to do next?

Looks like you need to find a suitable copier. Since that's not something you can complete in one step, you've got a project. What's your next action? Well, since Jim is your company's copier representative, you need to contact him to set up a meeting.

Let's create a Project with a Next Action ...

For this example, instead of dragging and dropping, we will manually create the Project and Next Action.

Steps:

1. Click  in the action bar to create a New Project

Let's define the successful outcome for this project.

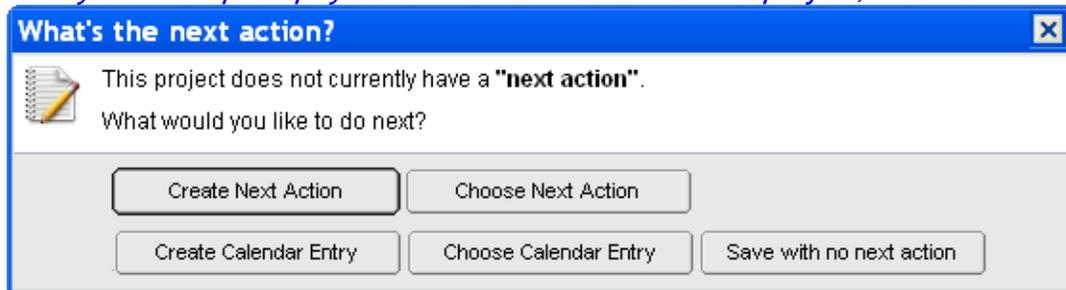
2. In the Subject field, type "New Copier Installed"

Project	What's the successful outcome? (Describe as if already done; what would that look like? See list)
	New Copier Installed Example: "Web site launched by 4/15" or "Annual report completed"

If you had details that you wanted to keep with this project, you could type them into the body field. Otherwise, you're done defining the project; now it's time to create the next action.

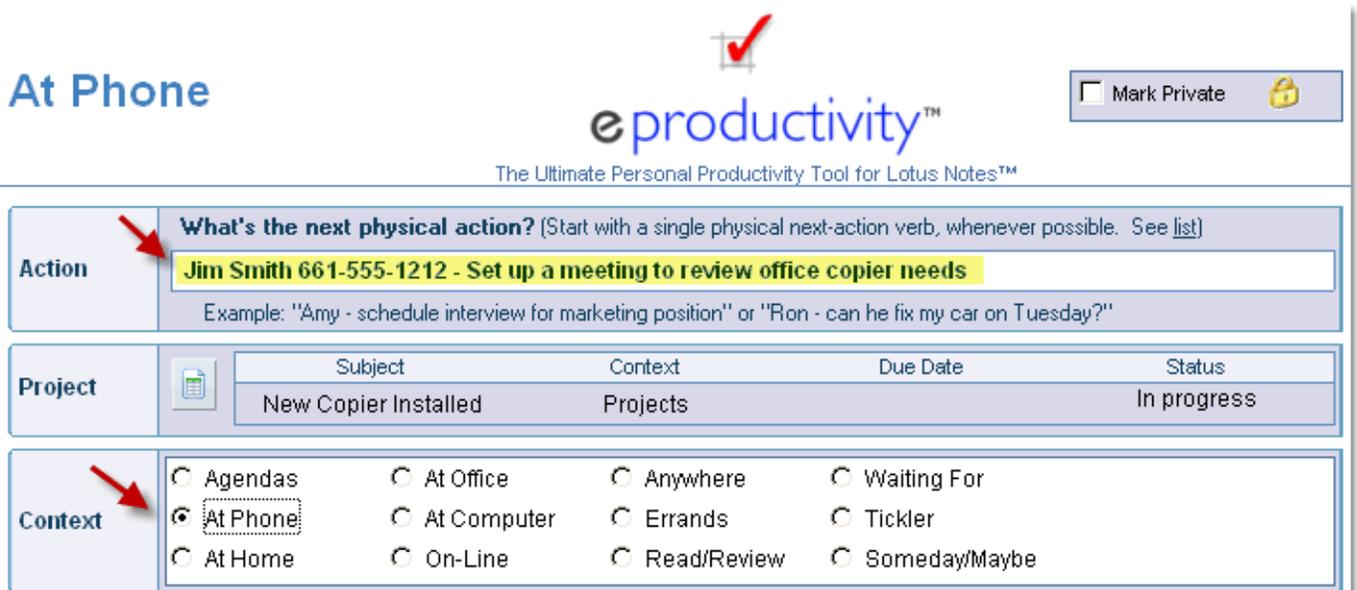
3. Click .

eProductivity will now prompt you for the Next Action for this project, like this



We need to call Jim, so let's create an "At Phone" item as our Next Action

4. Click . The Next Action form will appear.



Subject	Context	Due Date	Status
New Copier Installed	Projects		In progress

Agendas At Office Anywhere Waiting For
 At Phone At Computer Errands Tickler
 At Home On-Line Read/Review Someday/Maybe

5. Choose "At Phone" as the context for this action

6. Enter the subject, as shown above...

7. Click 

This will return you to this e-mail that was open before you created the New Project.

8. Press ESC to exit the email and return to your In-Box view. *At the end of this exercise, you may delete this email, as it is no longer needed.*

You have now created a Project with a linked Next Action . Let's see how this looks in eProductivity...

Let's look at your Projects list to see how the project appears:

The screenshot shows the eProductivity application interface. At the top, there are buttons for 'New Memo', 'New Project', 'New Action', 'Create Next Action', and 'New Calendar...'. Below this is a header for 'for Demonstration Software' and a tab for 'Activity'. On the left, a sidebar contains menu items: 'Calendar', 'Today', 'E-Mail', 'Contacts', 'Projects' (highlighted), 'Projects & Actions', and 'Actions by Context'. The main area displays a list of projects under the heading 'Projects (3 Items)'. The projects listed are 'Accounting - Second Quarter Tax Returns filed', 'Company cruise to England aboard Queen Mary II', and 'New Copier Installed'. A red arrow points to the 'New Copier Installed' project.

We can see the Next Action that is linked to this Project in one of two ways:

First, we can open the Project to view its contents.

9. Double-click on the Project in the view. *This will display the project and any linked Actions:*

The screenshot shows the 'Projects' view in eProductivity. At the top, there is a 'Projects' header with a red checkmark icon and the eProductivity logo. A 'Mark Private' button is visible. Below the header, the project details are displayed in a form-like structure:

- Project:** 'New Copier Installed' (highlighted). Below it, an example text: 'Example: "Web site launched by 4/15" or "Annual report completed"'. Above the project name is a red checkmark icon.
- Context:** 'Projects'.
- When:** Due [16], Start [16], Priority: None (dropdown), In progress.
- Actions:** A section with a toolbar containing 'Mark Complete', 'Unlink', and a trash icon. Below the toolbar is a table of linked actions:

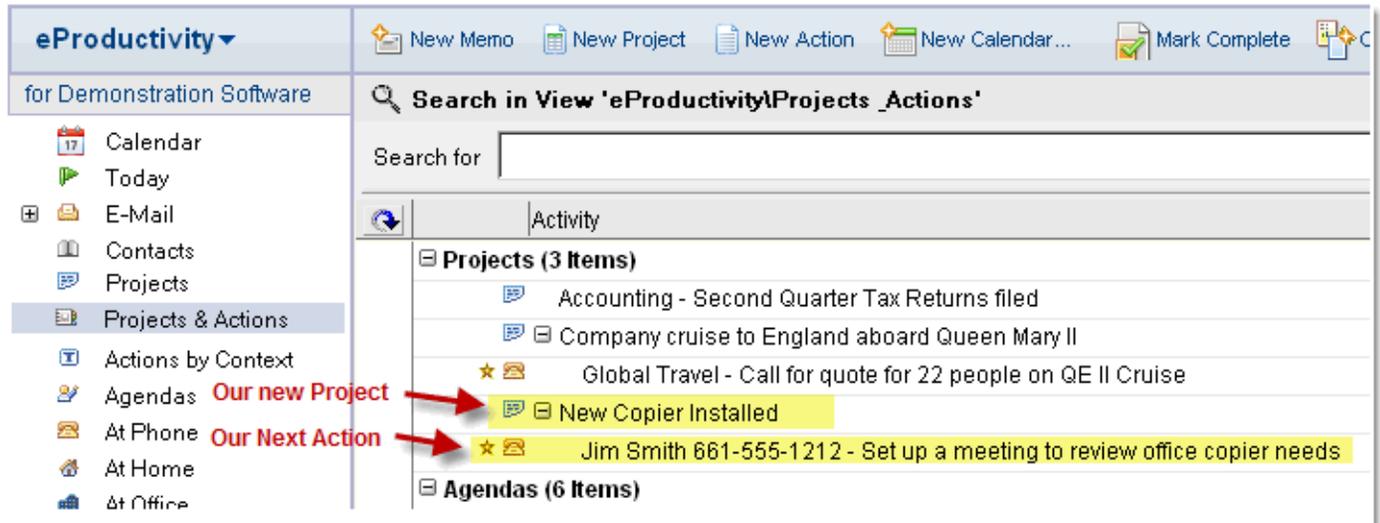
Status/Type	Description	Due Date
★ At Phone	Jim Smith 661-555-1212 - Set up a meeting to review office copier needs	

A red arrow points to the 'Linked Action' label on the left side of the actions table.

10. Press ESC to exit this document

Another way to view Projects and their linked Actions is with the "Projects & Actions" view, available in the left-hand navigator.

11. Click  Projects & Actions to display a list of Projects and their linked Actions.



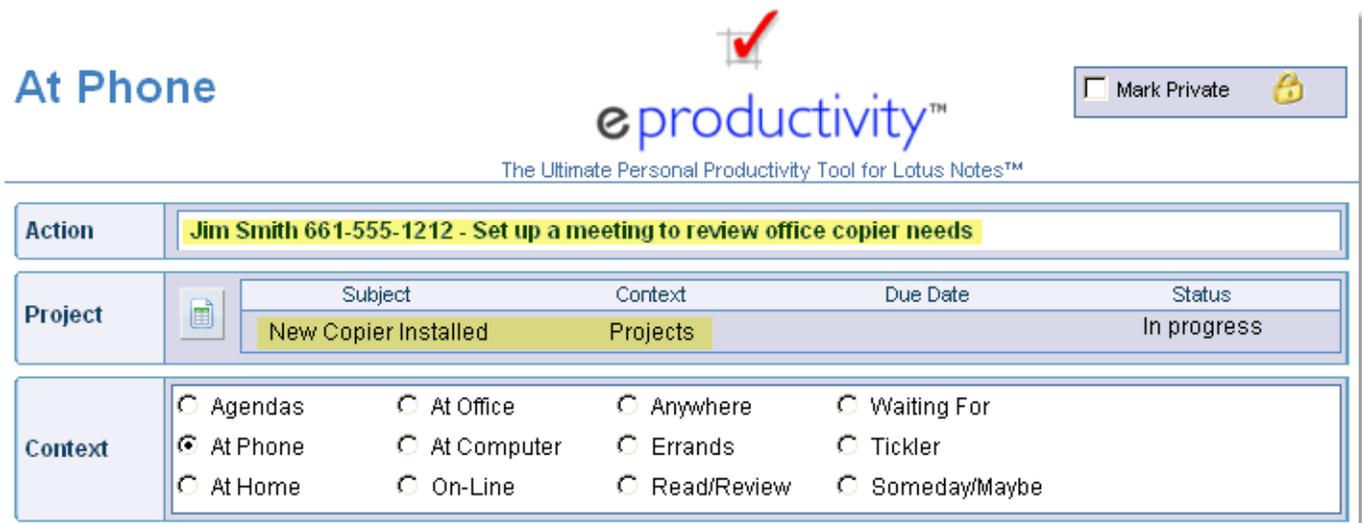
The screenshot shows the eProductivity interface. The left sidebar contains a list of views: Calendar, Today, E-Mail, Contacts, Projects, **Projects & Actions**, Actions by Context, Agendas, At Phone, At Home, and At Office. The main area has a search bar and a list of activities. Under the 'Projects (3 Items)' section, the following items are listed: 'Accounting - Second Quarter Tax Returns filed', 'Company cruise to England aboard Queen Mary II', and 'Global Travel - Call for quote for 22 people on QE II Cruise'. Two items are highlighted in yellow: 'New Copier Installed' and 'Jim Smith 661-555-1212 - Set up a meeting to review office copier needs'. Red arrows point from the text 'Our new Project' to the first highlighted item and 'Our Next Action' to the second highlighted item.

Finally, you can open the Action itself to view the linked (parent) Project.

12. Click  At Phone to display a list of phone calls to make

13. Double-click on the reminder to call Jim Smith to display its contents

Notice that the Action shows what the parent Project is...



The screenshot shows the 'At Phone' view in eProductivity. The title bar displays 'At Phone' and the eProductivity logo. Below the title bar is a table with three sections: 'Action', 'Project', and 'Context'. The 'Action' section shows 'Jim Smith 661-555-1212 - Set up a meeting to review office copier needs'. The 'Project' section shows a table with columns: Subject, Context, Due Date, and Status. The 'Context' section shows a list of radio buttons for different contexts.

Section	Content								
Action	Jim Smith 661-555-1212 - Set up a meeting to review office copier needs								
Project	<table border="1"> <thead> <tr> <th>Subject</th> <th>Context</th> <th>Due Date</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>New Copier Installed</td> <td>Projects</td> <td></td> <td>In progress</td> </tr> </tbody> </table>	Subject	Context	Due Date	Status	New Copier Installed	Projects		In progress
Subject	Context	Due Date	Status						
New Copier Installed	Projects		In progress						
Context	<input type="radio"/> Agendas <input checked="" type="radio"/> At Phone <input type="radio"/> At Home <input type="radio"/> At Office <input type="radio"/> At Computer <input type="radio"/> On-Line <input type="radio"/> Anywhere <input type="radio"/> Errands <input type="radio"/> Read/Review <input type="radio"/> Waiting For <input type="radio"/> Tickler <input type="radio"/> Someday/Maybe								

Note: If you click on the button to the left of the project title, the parent Project will be displayed

You have now learned how to create a New Project with a linked Next Action and then view this Project and its Action in a number of different ways.

When you are done, press ESC to exit. You may return to the in-box by clicking  E-Mail in the Navigator.

Delete the e-mail and proceed to the next email in the in-box...



Kathy Mack
01/03/08 03:51 PM

To Eric.Mack@ICA.com
cc
bcc
Subject Here's some information on the new ACME copier I think we should buy...

Eric, I forgot to include this in my last e-mail: Have a look at the new ACME copier, it's really fast. <http://www.acmefastcopier.com>

Please consider this in your research.

Thanks - Kathy

What is it?

This is supporting information for that copier project you are working on.

What to do next?

Kathy wants you to check out this new copier the next time you are on-line.

Let's create an Action linked to an existing Project...

Our project already exists. All we need to do is to create an "On-Line" Action from this email and then link it to our existing Project..

Steps

1. Press the ESC key to close this e-mail and return to your in-box. *(You can only drag and drop from the in-box view)*
2. Click on the e-mail one time to select it in the view *(do not double-click on the e-mail as that will open it)*
3. Drag the selected e-mail to the **On-Line** context in the left-hand navigator.
4. Edit the Subject to say "Review features of ACME Copier"

It's possible to link an Action to a Project at the time that you save it. To do this, you will need to display the additional options bar:

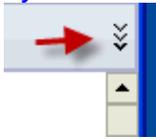
IF the additional options bar is already visible, as shown below, please skip step #5 and proceed to step #6



If you do not see the additional options bar above, please be sure to do step #5

5. Click on the inverted chevron symbol (in the upper right-hand corner of the screen) to

display the additional options bar

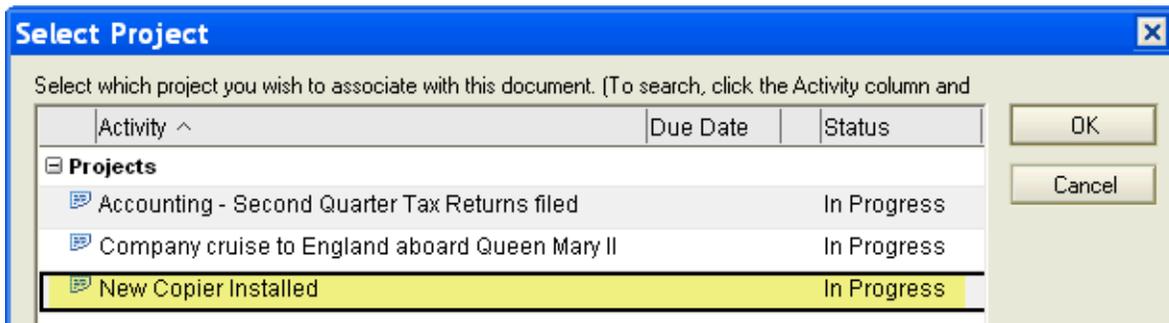


The options bar should now appear, as shown...



6. Click on the triangle and select **... a link to an existing project**

7. Click  Save And Close. *This will save this action and display a list of existing projects to choose from...*



8. Select the New Copier project and click 

Now, you will be prompted for what to do with the original email.



We can safely delete the original e-mail, as we have already captured the Action.

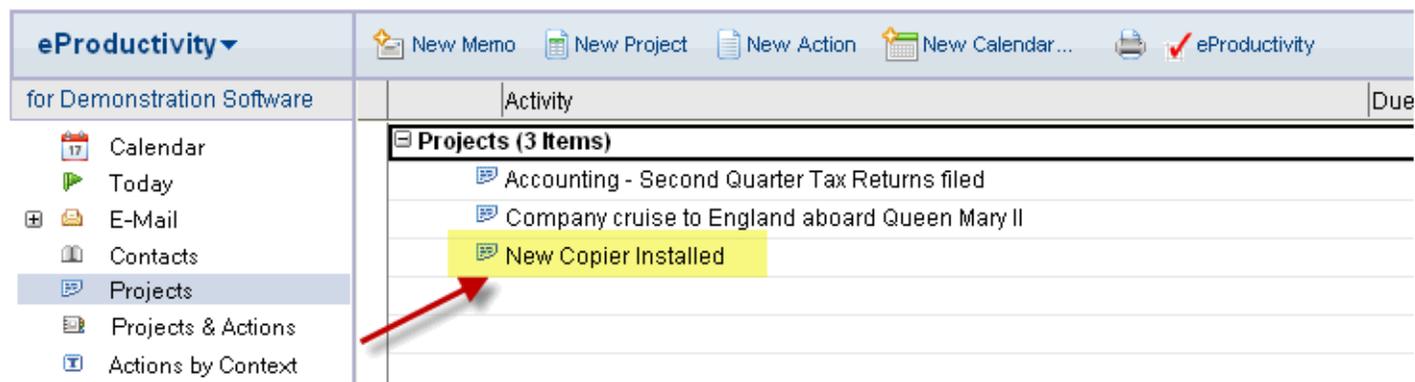
9. Click 

You have successfully created an additional Action and we have linked it to an existing Project. Now, let's see how this looks in eProductivity...

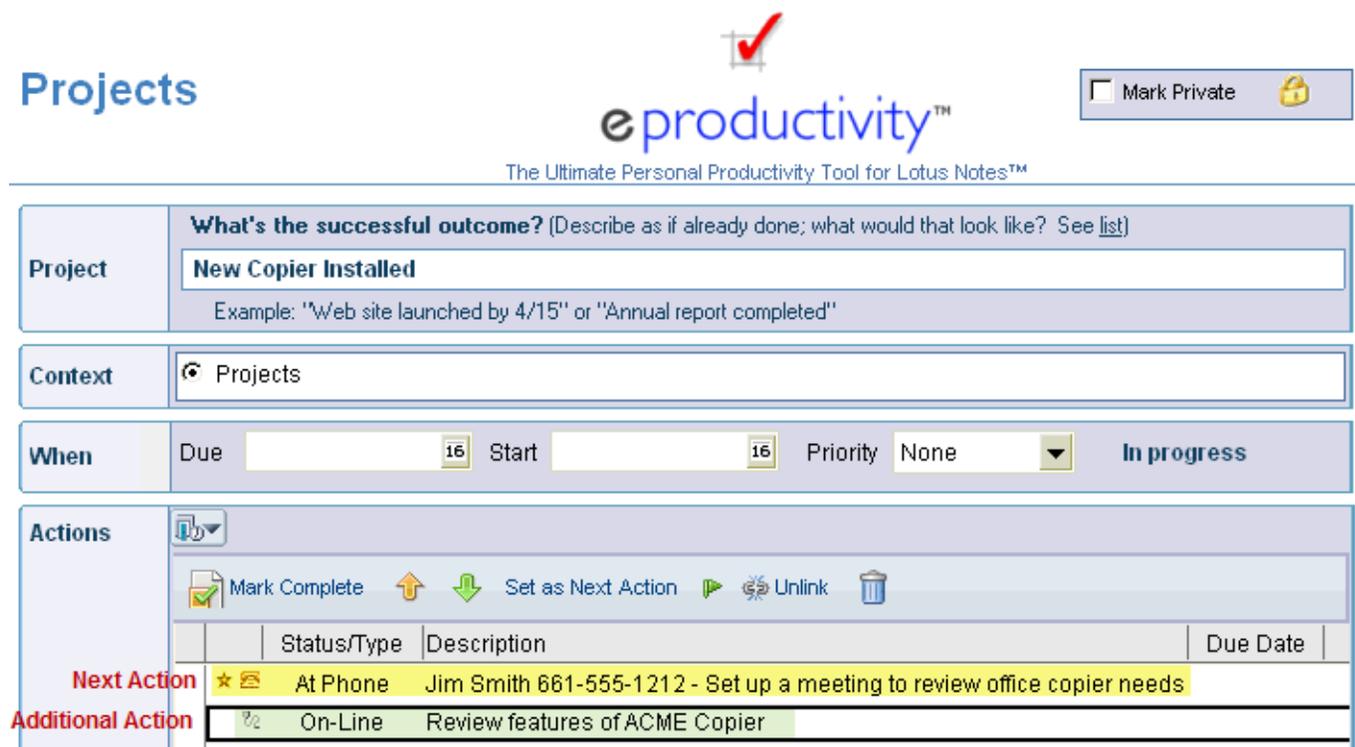
There are several ways to see the links between Projects and Actions :

First, we can open the Project to view its contents .

10. Click on  Projects to view a list of projects



11. Double-click on "New Copier Installed" Project in the view. *This will open the Project and display any linked Actions:*

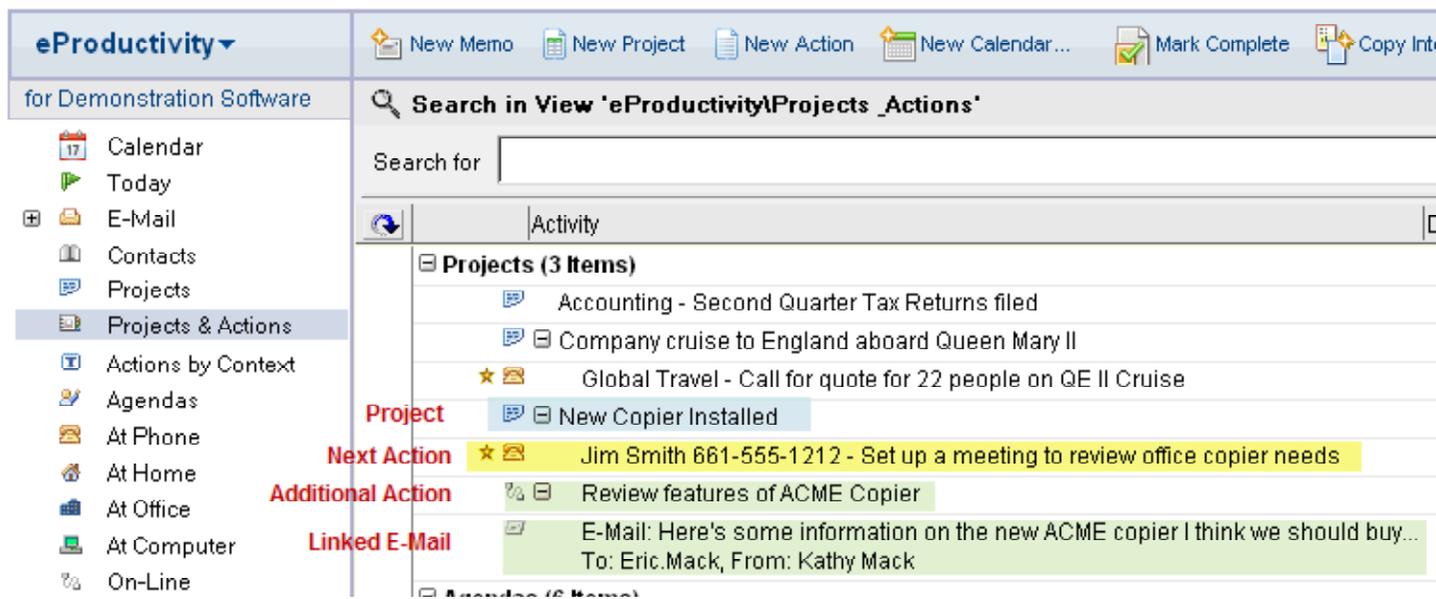


Notice that we now have two linked actions to this Project. The "Next Action" is to make a phone call, but we also have an "Additional Action" which is to go on-line and view the web site of the ACME copier..

12. Click  to exit this Project

Another way to view Projects and their linked Actions is with the "Projects & Actions" view, available in the left-hand navigator.

13. Click  to display a list of Projects and their linked Actions.



eProductivity for Demonstration Software

Calendar Today E-Mail Contacts Projects **Projects & Actions** Actions by Context Agendas At Phone At Home At Office At Computer On-Line

New Memo New Project New Action New Calendar... Mark Complete Copy Into

Search in View 'eProductivity\Projects _Actions'

Search for

Activity

Projects (3 Items)

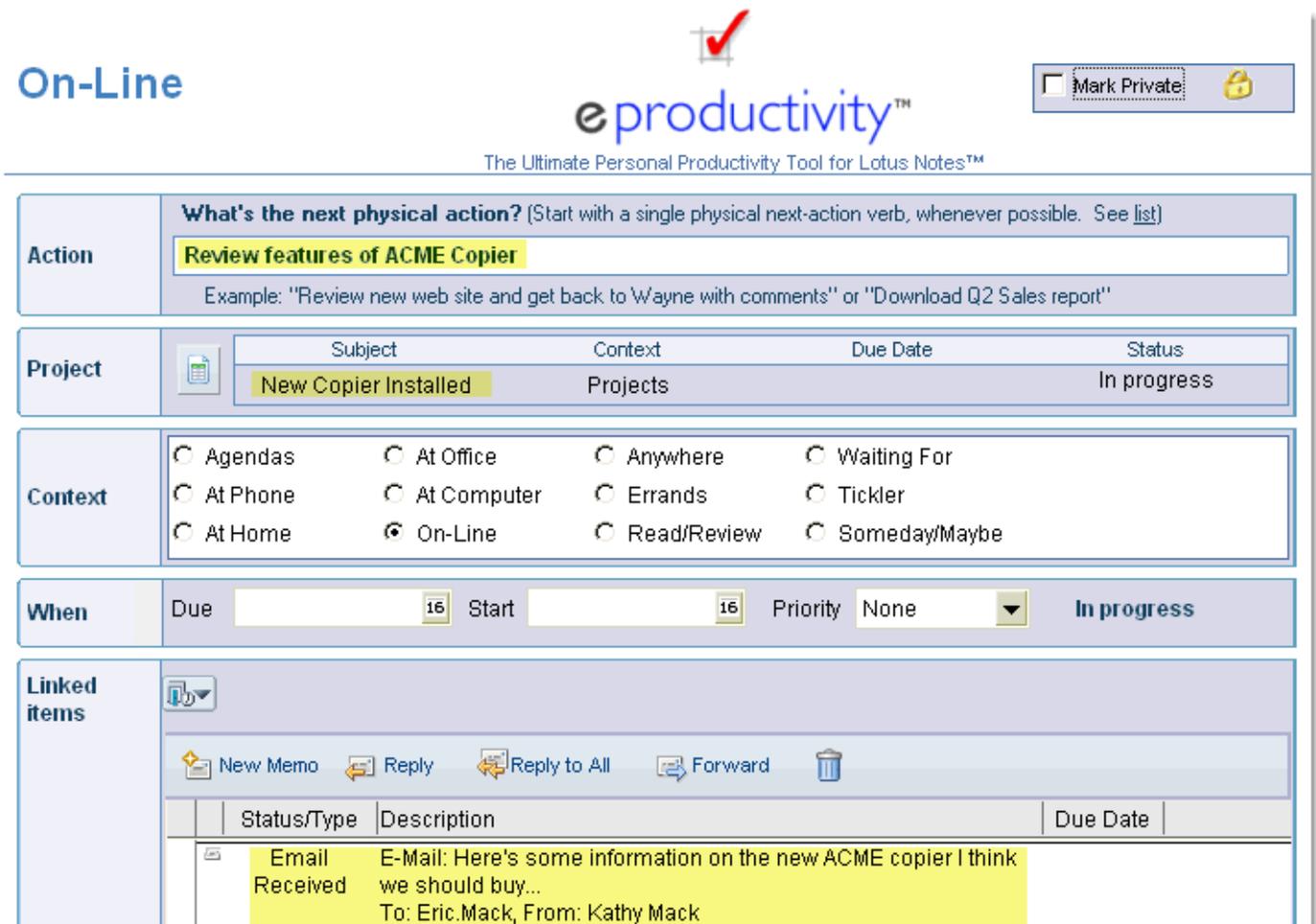
- Accounting - Second Quarter Tax Returns filed
- Company cruise to England aboard Queen Mary II
- Global Travel - Call for quote for 22 people on QE II Cruise
- Project** New Copier Installed
- Next Action** ★ Jim Smith 661-555-1212 - Set up a meeting to review office copier needs
- Additional Action** 📄 Review features of ACME Copier
- Linked E-Mail** 📧 E-Mail: Here's some information on the new ACME copier I think we should buy... To: Eric.Mack, From: Kathy Mack

Finally, you can open the Action itself to view the linked (parent) Project.

14. Click  On-Line to display a list of web sites we need to visit

15. Double-click on action called "Review features of ACME Copier" to open it

Notice that the Action shows what the parent Project is and the linked e-mail is shown below...



The screenshot shows the eproductivity™ interface. At the top, there is a header with the text "On-Line" on the left, the eproductivity™ logo in the center, and a "Mark Private" button with a lock icon on the right. Below the header is a sub-header: "The Ultimate Personal Productivity Tool for Lotus Notes™".

The main content area is divided into several sections:

- Action:** A text input field containing "Review features of ACME Copier". Below it is an example: "Example: 'Review new web site and get back to Wayne with comments' or 'Download Q2 Sales report'".
- Project:** A table with columns: Subject, Context, Due Date, and Status. The row shows "New Copier Installed" under Subject, "Projects" under Context, and "In progress" under Status.
- Context:** A grid of radio buttons for selecting a context: Agendas, At Office, Anywhere, Waiting For, At Phone, At Computer, Errands, Tickler, At Home, On-Line (selected), Read/Review, and Someday/Maybe.
- When:** Fields for Due (16), Start (16), Priority (None), and a status indicator "In progress".
- Linked items:** A section with a toolbar containing "New Memo", "Reply", "Reply to All", "Forward", and a trash icon. Below the toolbar is a table with columns: Status/Type, Description, and Due Date. The row shows "Email Received" with the description "E-Mail: Here's some information on the new ACME copier I think we should buy..." and "To: Eric.Mack, From: Kathy Mack".

Note: If you click on the button to the left of the project title, the parent Project will be displayed

You have now learned how to create an action and link it to an existing Project. You have also learned how to view this Project and its Actions in a number of different ways.

When you are done, press ESC to exit this email, then click  E-Mail to view the next email in the in-box...



eproductivity™

The Ultimate Personal Productivity Tool for Lotus Notes™

Mark Private

Projects

Project

What's the successful outcome? (Describe as if already done; what would that look like? See [list](#))

Agreements finalized with Michael

Example: "Web site launched by 4/15" or "Annual report completed"

Context

Projects

When

Due Start Priority **In progress**

Actions

	Status/Type	Description	Due Date		
	Waiting For	Michael will send document for review (08/27/08)			
	Appointment	Meeting to review License agreements	08/27/2008	11:15 AM	12:15 PM
	Email Received	E-Mail: Details of the proposed contract changes; we should meet to discuss (see attached) To: Eric.Mack, From: Michael			
	Contact	Paul Delano			

Details

[Click to attach files](#)

This project that has several items linked to it:

- A Waiting For item
- An Appointment
- The Original E-Mail
- A Contact record

Everything the user needs to manage this Project is available, all in one place!

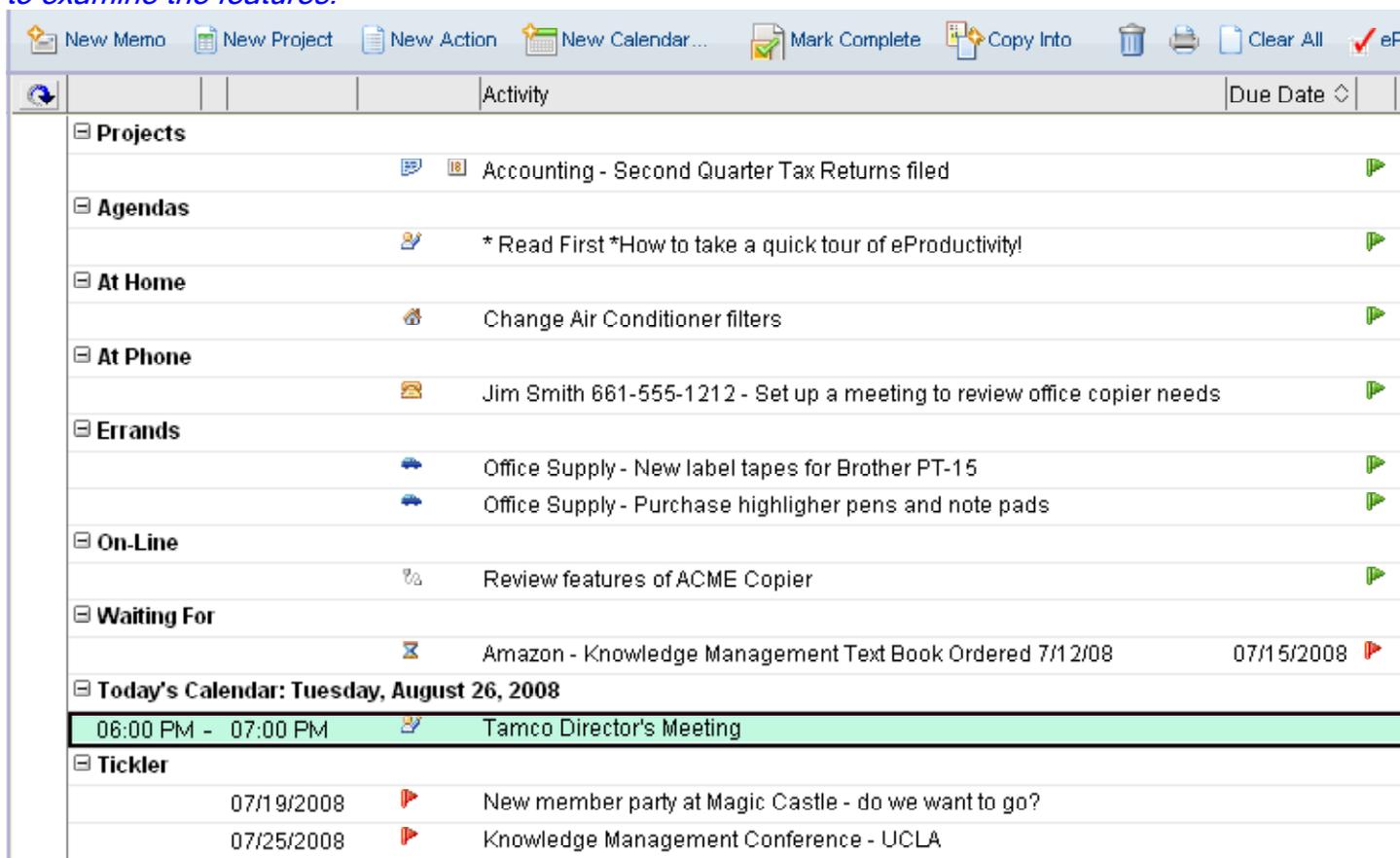
How to use the "Today" view to flag actions you are committed to doing ...

"It's easier to work your system when you can see everything you are committed to do , all in one place." This is the reason for the "Today" view.

As you plan your day, you may flag actions that you are committed to completing today, and they will appear on the "Today" view. You may then use the "Today" view, as your daily dashboard.

Steps

1. Press the ESC key to close this e-mail and return to your in-box. *(You can only drag and drop from the in-box view)*
2. Click  Today in the left-hand navigator to display the "Today" view. *Take a moment to examine the features.*



Activity	Due Date
Projects	
Accounting - Second Quarter Tax Returns filed	
Agendas	
* Read First *How to take a quick tour of eProductivity!	
At Home	
Change Air Conditioner filters	
At Phone	
Jim Smith 661-555-1212 - Set up a meeting to review office copier needs	
Errands	
Office Supply - New label tapes for Brother PT-15	
Office Supply - Purchase highlighter pens and note pads	
On-Line	
Review features of ACME Copier	
Waiting For	
Amazon - Knowledge Management Text Book Ordered 7/12/08	07/15/2008
Today's Calendar: Tuesday, August 26, 2008	
06:00 PM - 07:00 PM	Tamco Director's Meeting
Tickler	
07/19/2008	New member party at Magic Castle - do we want to go?
07/25/2008	Knowledge Management Conference - UCLA

The "Today" view will show you today's scheduled events, any current tickler items, and any past-due Waiting For items, as well. In addition, you will see any current items due. (Any item with a Due Date of today will appear automatically - you do not have to flag it for today.) Finally, you will see the items you have flagged for the Today view.

While at your computer, you can work from this view, otherwise, click  to print a paper copy of your daily dashboard.

HOW TO USE THE TODAY FLAGS AND VIEW

How to flag existing actions to appear in the Today view :

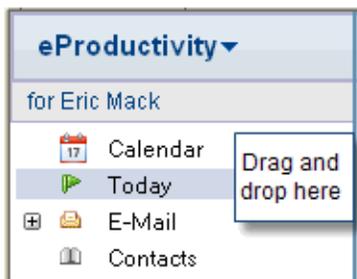
Note: You may flag items from any eProductivity view; however, most people find that the "Actions by Context" view is the most useful for doing daily planning.
(Click  Actions by Context to display this view.)

From an action: You may click the green Today flag . A green "Today" flag will appear on the action form, like this: 

From a view: There are two ways to flag items in a view so that they will appear on the "Today" view.

Use the "Today" flag: select one or more actions from your current view and click the green Today flag . A green "Today" flag will appear in the view, like this: 

Drag and drop items: select one or more actions from your current view and drag and drop them onto the "Today" section of the navigator:



When you do, A green "Today" flag will appear next to the item in the view, like this:



Tip: You can also flag projects to appear on the "Today" view.

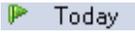
How to create new items and flag them to appear in the Today view all in one step :

Create an action and, before saving, click on the green today flag .

Now, when you click Save and Close, the action will appear on your list by context as well as in the Today view.

Repeat the above steps for each action you want to create.

How to remove items from the Today view :

Click  in the left-hand navigator

You may now use the  or  action buttons to mark items complete or delete them.

You may use the  button to remove one or more flagged items from your Today list.

Click the  button to remove all flagged items from your Today list.

I use the  button when I want to start over, perhaps because I have new priorities, and create a new list of things I want to accomplish today.

Note: Removing flagged items from the "Today " view does not delete them, it only removes them from this one view. These items remain on their original lists.



Eric Mack
01/03/08 03:58 PM

To Eric.Mack@ICA.com
cc
bcc
Subject Your weekly reviews just got easier, with the eProductivity Weekly Review Coach

Your weekly reviews just got easier , with the eProductivity Weekly Review Coach

David Allen teaches that the most important aspect of the GTD methodology is to stay current with *regular reviews* of your commitments across various horizons of focus. Many find this review challenging to do consistently, especially when they allow urgent things to get in the way of the important. By completing a thorough review each week, you will feel a greater sense of control and perspective.

Your weekly reviews just got easier with the Weekly Review Coach

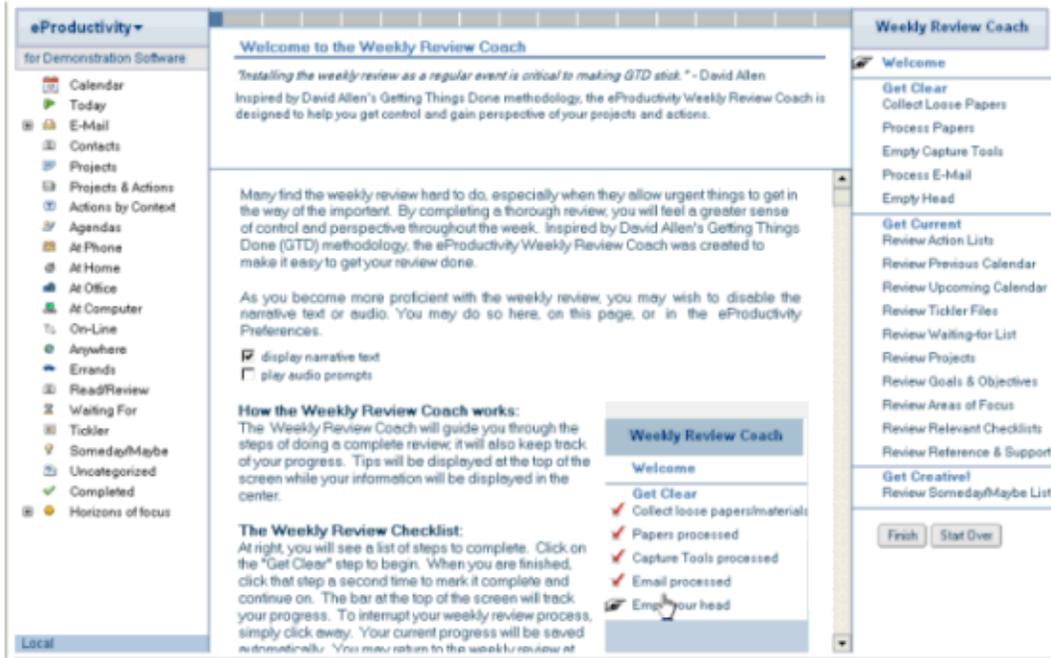
The eProductivity Weekly Review Coach will guide you through the process of completing your review. It is fully integrated into eProductivity, which means that it can display the relevant information you need to see, when you need to see it, so that you can complete your review with ease.

Steps

1. Press the ESC Key to close this email. (*All documents must be closed to start the Weekly Review Coach*)
2. Click the  button and select .

Follow the on-screen, and you'll soon be on your way to completing your weekly review!

3. Complete each of the steps of the Weekly Review until you have completed every step.



Congratulations! You've completed a weekly review!

Now, let's track your weekly review progress over time by opening the Weekly Review Logs.

4. Click the  button and select **View Weekly Review Logs**. A screen like this will appear.

Started	% Completed	Finished	Time
Weekly Review Logs			
02/27/2008 02:24:16 AM	100%	✓	09:46:08 AM 7h 21m
02/27/2008 02:18:42 AM	100%	✓	02:19:12 AM 0h 0m
02/27/2008 02:10:42 AM	100%	✓	02:17:44 AM 0h 7m
02/26/2008 10:48:50 PM	100%	✓	10:49:13 PM 0h 0m
02/20/2008 11:59:16 AM	19%		12:02:45 PM 0h 3m
02/20/2008 11:13:50 AM	81%		11:25:22 AM 0h 11m
02/20/2008 11:10:09 AM	44%		11:25:29 AM 0h 15m
02/19/2008 09:58:21 AM	31%		09:59:21 AM 0h 0m
02/18/2008 12:01:22 PM	25%		02:22:38 PM 2h 21m
02/18/2008 10:45:43 AM	6%		11:13:27 AM 0h 27m
02/18/2008 10:20:14 AM	19%		10:41:03 AM 0h 20m

5. Review a specific weekly review summary scorecard by double-clicking on any of the weekly review events in the log.



eProductivity™
The Ultimate Personal Productivity Tool for Lotus Notes™

Weekly Review Summary for Eric Mack 07/03/2008

How I felt after completing this weekly review:
I feel fantastic!

Overall Progress					
Steps Completed	Finished	Completed	Started	Ended	Elapsed Time
16	Yes	✓	07/03/2008 06:56:39 PM	07/03/2008 08:18:40 PM	1h 22m 1s
Progress	Completed	Started	Ended	Elapsed Time	
Get Clear					
Collect Loose Papers	✓	07/03/2008 06:56:48 PM	07/03/2008 06:56:49 PM	0h 0m 1s	
Process Papers	✓	07/03/2008 06:56:49 PM	07/03/2008 06:56:51 PM	0h 0m 2s	
Empty Capture Tools	✓	07/03/2008 06:56:56 PM	07/03/2008 06:56:57 PM	0h 0m 1s	
Process E-Mail	✓	07/03/2008 06:56:57 PM	07/03/2008 06:57:00 PM	0h 0m 3s	
Empty Head	✓	07/03/2008 06:57:00 PM	07/03/2008 06:57:01 PM	0h 0m 1s	
Get Current					
Review Action Lists	✓	07/03/2008 06:57:04 PM	07/03/2008 06:57:05 PM	0h 0m 1s	
Review Previous Calendar	✓	07/03/2008 06:57:05 PM	07/03/2008 06:57:07 PM	0h 0m 2s	
Review Upcoming Calendar	✓	07/03/2008 06:57:07 PM	07/03/2008 06:57:10 PM	0h 0m 3s	
Review Tickler Files	✓	07/03/2008 06:57:10 PM	07/03/2008 08:18:21 PM	1h 21m 11s	
Review Waiting-for List	✓	07/03/2008 08:18:21 PM	07/03/2008 08:18:21 PM	0h 0m 0s	
Review Projects	✓	07/03/2008 08:18:21 PM	07/03/2008 08:18:22 PM	0h 0m 1s	
Review Goals & Objectives	✓	07/03/2008 08:18:22 PM	07/03/2008 08:18:23 PM	0h 0m 1s	
Review Areas of Focus	✓	07/03/2008 08:18:23 PM	07/03/2008 08:18:25 PM	0h 0m 2s	
Review Relevant Checklists	✓	07/03/2008 08:18:25 PM	07/03/2008 08:18:26 PM	0h 0m 1s	
Review Reference & Support	✓	07/03/2008 08:18:26 PM	07/03/2008 08:18:27 PM	0h 0m 1s	
Get Creative!					
Review Someday/Maybe list	✓	07/03/2008 08:18:29 PM	07/03/2008 08:18:30 PM	0h 0m 1s	
Congratulations!					

6. Press the ESC key to exit the report and view



Eric Mack

01/03/08 04:49 PM

To Eric.Mack@ICA.com

cc

bcc

Subject Learn about the eProductivity Journal, our gift to you for evaluating eProductivity!

The eProductivity-enabled Journal is one of the most powerful personal productivity tools at your disposal. With the personal journal and your eProductivity-enabled mail file you can easily file non-actionable reference material from your e-mail inbox simply by dragging and dropping from e-mail into the journal. You can also use the eProductivity Quick Capture and Quick Paste features to collect and reuse frequently needed reference material.

[View a quick tour.](#)

As our thank you for evaluating eProductivity, you may download and use the eProductivity Journal, free of charge. We hope that you enjoy this tool and that it will be come a valuable part of your personal productivity toolkit.



Eric Mack
01/03/08 04:49 PM

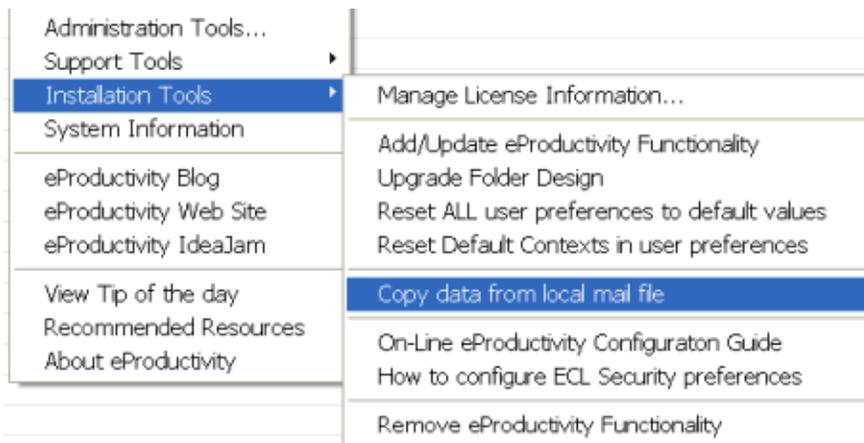
To Eric.Mack@ICA.com
cc
bcc
Subject Would you like to experiment with eProductivity and your own information? Here's how...

The next step to eProductivity is to practice organizing some of your own data (e-mail, calendar, and projects & actions). We have provided a tool to allow you to copy some of your own e-mail, tasks, and calendar entries into this database so that you may process them using eProductivity.

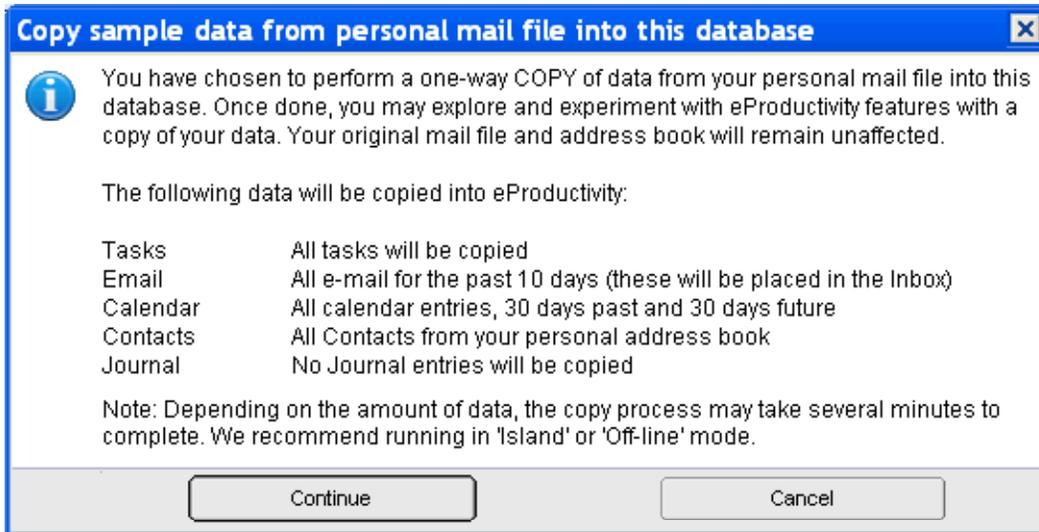
Here's how you can copy your live data into this demonstration database so that you can process it and explore eProductivity without affecting your live data:

1. Press the ESC Key to close this email and return to the e-mail in-box.

2. First, click on the  button and then click  and , as shown below



3. Follow the prompts to copy sample data from your personal mail file into this demonstration database. (*Data in your personal mail file will not be affected.*)



Now that you have some of your own sample information to play with, process your inbox and explore organizing your email, projects, and actions with eProductivity.

If you have any questions, please use the 'Send feedback' option.



Eric Mack
01/03/08 04:52 PM

To Eric.Mack@ICA.com
cc
bcc

Subject Please take a moment to share your eProductivity experience with us...

Thank you for exploring eProductivity! We value your feedback. Please take a few minutes to share your experience with us...

In return for your detailed feedback, we'll send you an evaluation key to unlock your preview so that you may continue to explore eProductivity. We will also enter your name into a drawing for a free license.

When you are ready to experience eProductivity on your live mail file, let us know; we would be happy to send you a full evaluation package.

The feedback survey will take approximately 5 minutes to answer all ten questions. Please be as detailed as possible in your responses and don't hesitate to make recommendations to us. In fact, we want your comments and suggestions and I commit to personally read and review each one.

Sincerely,

Eric Mack

How to send us your feedback evaluation :

1. Click  and then  to bring up the feedback form.
2. Select "Evaluation Feedback" to display the ten survey questions:
3. Scroll down the page and type in your responses in the space provided. *Please be as detailed as possible.*
4. When you are done, click  to send us your feedback.

Thank you!