gtd®

EVERNOTE®
FOR MAC®

Setup Guide

LICENSE AGREEMENT

David Allen Company, Inc. owns the intellectual property rights, including but not limited to all copyright and trademark rights, in these materials and the associated support materials collectively, the "Program Materials." The Program Materials are and remain the property of David Allen Company. Upon completion of the David Allen Company program supported by the Program Materials, David Allen Company grants you, as an individual, a license to use this copy of the Program Materials. Neither you nor your employer nor any other party are granted any ownership rights, copyrights, trademark rights, or any other rights whatsoever in or to the Program Materials. As examples, neither you nor your employer nor any other party may: (a) reproduce, in any form or by any means, the Program Materials; (b) prepare derivative works of the Program Materials; (c) distribute copies of the Program Materials for sale or to persons who have not completed the David Allen Company program supported by the Program Materials; (d) perform or display the Program Materials publicly; or (e) authorize others to do any of the foregoing.

What is a copyright?
Copyright is a form of protection provided to authors of original works by the laws of the United States and international treaties to which the United States is a party. The copyright laws of the United States give the owner to the copyrights to a work the exclusive rights to:

1. Reproduce the copyrighted work in copies however produced (e.g., photocopying, scanning, faxing, electronically);

2. Prepare derivative works (e.g., translations, revisions, abridgements, dramatizations, video adaptation, any form in which the work may be transformed or adapted);

3. Distribute copies for sale;

4. Perform or display the work publicly; and

5. Authorize others to do any of the above.

What is the copyright policy of the David Allen Company?
It is the policy of the David Allen Company to reserve all copyrights to itself and to vigorously pursue any unauthorized use of its work.

What is a mark?
A mark is any word, name, phrase, design, symbol, or device or any combination of the same, used to identify goods (trademarks) or services (service mark) from a single source.

What is the policy of the David Allen Company with respect to its marks?
It is the policy of the David Allen Company to restrict to itself, and those persons licensed by it, all use of its marks and to vigorously pursue any unauthorized use of its marks.

Which are the marks of the David Allen Company?
Getting Things Done®, GTD®, Natural Planning Model®, GTD Weekly Review®, and Horizons of Focus® are marks owned by the David Allen Company (DAC).

As the purchaser of the Program Materials, you are entitled to a single-user license. If you wish to have additional copies of any of the Program Materials, add to your license, or obtain further information about the David Allen Company's other license opportunities, please contact DAC's Legal Department at +1.805.646.8432 for details.

If you have any questions regarding copyrights or marks of the David Allen Company or if you are interested in obtaining a license to use the marks or words of the David Allen Company, please contact DAC's Legal Department at +1.805.646.8432 for details.

Evernote® is a registered trademark of Evernote Corporation.
Mac® is a registered trademark of Apple, Inc.

TABLE OF CONTENTS

FOCUS OF THIS GUIDE
WHAT YOU CAN EXPECT FROM THIS GUIDE

UNDERSTANDING THE GTD® BEST PRACTICES
AN OVERVIEW OF THE KEY BEST PRACTICES OF THE GTD METHODOLOGY

APPLYING GTD TO EVERNOTE® FOR MAC
USING THE POWER OF EVERNOTE FOR YOUR WORKFLOW

TABLE OF CONTENTS (CONTINUED)

FOCUS OF THIS GUIDE

Our focus with this Guide is to show you how to use Evernote® for Mac® for your GTD® workflow. Many people think of Evernote as a tool for storing your non-actionable reference information, but we have found it to also be useful (and fun!) for managing the actionable things as well. This Guide will focus on configuring and populating Evernote for your Project lists and plans, Next Actions lists, and Reference.

The instructions and screenshots will show examples for the Mac OS X desktop version of Evernote. The interface is so different for the Windows version of Evernote, that we chose to do a separate Guide for that platform. Some of the features shown, such as sending emails to your Evernote account, will require an Evernote Plus or Premium account to take advantage of.

If you are new to Evernote, this Guide should be an excellent starting point for you to build a solid GTD foundation for optimizing your productivity using the built-in features. If you already have an established system in Evernote, use this Guide as an opportunity to fine-tune or simplify, if you have found you've underused or overbuilt your setup.

We are aware that there are many features and ways to configure your GTD system in Evernote. This is not a technical Guide, nor will it cover all the instructions for how to use Evernote. We'll leave that to our friends at Evernote to share with you through their excellent support material. This Guide will focus on the methods we have found work well for GTD for a wide range of people. It's also important to note that no one tool will handle all of your needs for GTD, including Evernote. Even with your lists managed in Evernote, you'll still have your Calendar and Email in other programs.

Whatever configuration you choose in tools like Evernote, be careful not to overcomplicate it to the point where you can only maintain it when you are at your peak of mental clarity. It's too easy to be out of that mindset and have the whole system fall apart. Your GTD tools should be complex enough to manage your workflow, but simple enough that if you were sick in bed with the flu you could still easily maintain them.

Don't worry about using every feature in Evernote. There is likely far more built in than you will ever need. Focus on what makes a difference for you.

OK…let's get started!

> *Be careful not to overcomplicate your systems to the point where you can only maintain them when you are at your peak of mental clarity.*

3. Each time you click the New Notebook button, it will create a new Notebook and give you a field to enter a new name (the default will be something with your Evernote account in the name). Pressing enter/return will save the new Notebook name. Click the New Notebook button to create the next one. Create ten new Notebooks, following the list of ten above so that you end up with each list having its own Notebook.

If you make a mistake when typing the Notebook name, or ever want to change the name, simply click on the Notebook name once (not double-click, which will open up the Notebook), and it will go into edit mode. The end result will be ten new Notebooks:

STACKING YOUR NEXT ACTIONS NOTEBOOKS

Let's create a stack for all of the Notebooks that are related to Next Actions for easy access and logical grouping.

1. Drag and drop the Anywhere Notebook into the Agendas Notebook. A new stack is created:
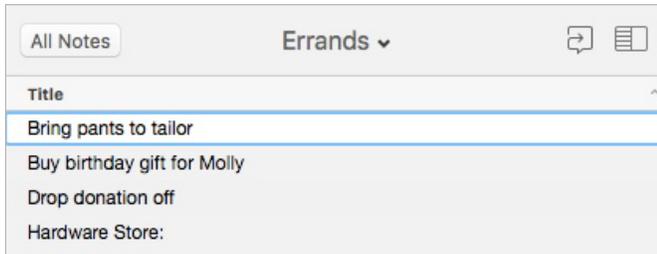

Continue this step with the remaining Next Actions-related Notebooks: Calls, Computer, Errands, Home, and Office. When you are done, all 7 Next Actions Notebooks will be in one stack, under the title "Agendas Stack".

2. Click on the name "Agendas Stack" and rename it to "Next Actions".
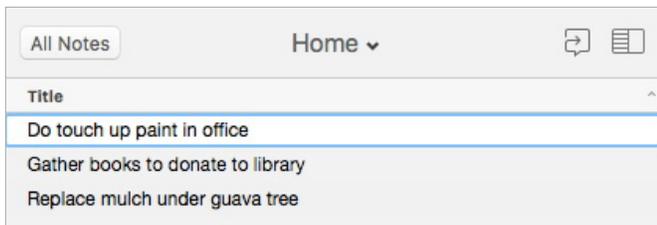

APPLYING GTD TO EVERNOTE   6

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

All Notes	Errands ⌄		
Title			⌃
Bring pants to tailor			
Buy birthday gift for Molly			
Drop donation off			
Hardware Store:			

If you are a regular road warrior you might consider having two errands Notebooks—one for things you could do anywhere, in any city, and one for errands that need to be completed where you live.
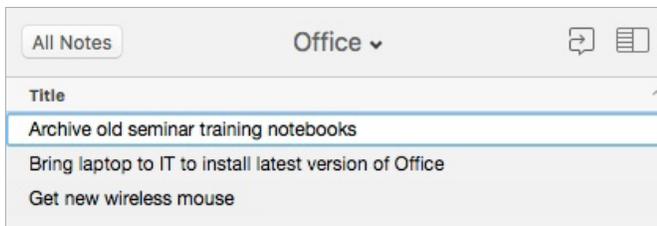
Go ahead and capture any new items for your Errands Notebook that come to mind.

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

All Notes	Home ⌄		
Title			⌃
Do touch up paint in office			
Gather books to donate to library			
Replace mulch under guava tree			

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

OFFICE These are the next actions that require you to be at your office, such as calls that you have to make from your desk because of the materials or equipment (like your laptop) you need for the call, purging old hard copy files, scanning documents on the office scanner, etc.

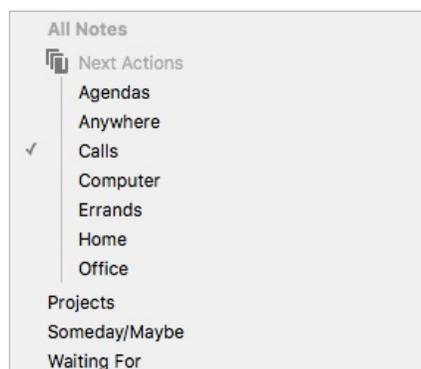| All Notes	Office ⌄		
Title			⌃
Archive old seminar training notebooks			
Bring laptop to IT to install latest version of Office			
Get new wireless mouse			

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

MOVING ITEMS BETWEEN NOTEBOOKS

When you are working your GTD system, you'll be moving items between Notebooks frequently. For example, you may have a next action in your Calls Notebook to make a call. If you get their voice mail, but need to track that the person calls you back, that item would get reassigned to the Waiting For Notebook. Or, you may have a Project that has changed in priority and becomes a Someday/Maybe, or vice versa.

To change the Notebook assigned to an entry, click on the entry from your list of Notes. Click on the Notebook name at the top of the note entry for the menu of Notebook choices. Select a new Notebook from the list. Or, to do this with shortcut keys, select the note and press (^ ⌘ M). Then select the new Notebook to assign the note to by using your arrow keys or typing the first letter of the Notebook name. Press enter to save your new selection.

```
All Notes
  Next Actions
    Agendas
    Anywhere
  ✓ Calls
    Computer
    Errands
    Home
    Office
Projects
Someday/Maybe
Waiting For
```

LINKING PROJECTS TO THEIR RELATED ACTIONS

Sorting next actions by context, not by project, can initially seem awkward. Some people are used to having multiple files, piles, notepads, documents, and spreadsheets related to a project, with next actions for the project buried amongst all of that information. Next Actions lists don't replace project plans—we would just call that data "project support", and in our experience, it rarely works to have current next actions buried among project support for day-to-day action management. Think of the last time you had 20 minutes free and decided to work on a key project. How easy was it to dig through your project support to find the immediate next actions based on the tools, people, and places available to you in the moment? It was probably more repellent to you, especially if you knew there was still thinking to do from the project support.

When your next actions are already defined and sorted by context, you can move more quickly, more easily, and more in sync with how you are naturally choosing what to do first—by context. Then project support remains the parking lot for actions that are incubated for future action. You can always add a keyword for the project in your next action or waiting for description. That way, you can rely on the powerful Evernote search function to pull together related information. Or, you can choose to use a tag for a specific project and sort by that tag. Just be careful that whatever additional criteria you add for creating new entries does not become a burden or requirement. You may find tags useful for one project, but overkill for another. It's easy to let a feature like tags become unwieldy, so watch it carefully to ensure it's helping your productivity and not hindering it.
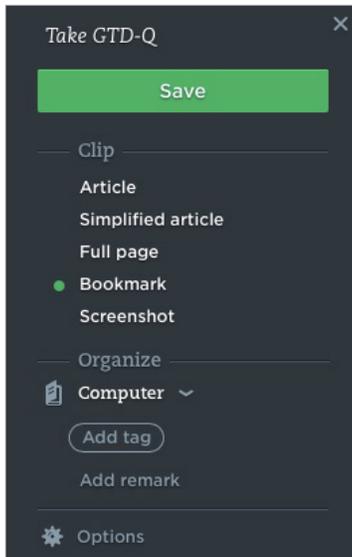
OPTION THREE: USE QUICK NOTES

When you install the Evernote desktop application, you will also get a handy Quick Note feature that will install in your Mac OS toolbar. The icon looks like this 🐘 and will appear when Evernote is open.

Locate the Evernote Quick Note application now.

1. Click on the icon to open a new Quick Note (^ ⌘ N). You can type directly into the note, drag items into the note, speak audio into the note, or do a screen shot. The note will automatically be sent to the default inbox for new, unassigned notes, which should be Inbox based on the setting you changed earlier. For example, try capturing an audio clip and saving it to Evernote.

2. Go to Evernote to see the results of your new Quick Note.

Quick Notes are particularly useful for those quick top of mind items. Get in the habit of capturing these as they show up, so your mind can stay present and focused.