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EVERNOTE®
FOR WINDOWS® AND MAC®

Setup Guide

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FOCUS OF THIS GUIDE

Our focus with this Guide is to show you how to use Evernote® for Windows® or 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 for managing the actionable things as well. This Guide will focus on configuring and populating Evernote for your Project lists and project support, Next Actions lists, and Reference.

The instructions and screenshots will show examples for the desktop versions of Evernote. Many of the features shown, such as sending emails to your Evernote account, creating more than 50 notes, and having more than one Notebook, will require a paid account. This is a recent change to Evernote that severely limits the free version.

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 the team 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.*

UNDERSTANDING THE GTD BEST PRACTICES

To get the most out of Evernote as a tool for your GTD practice, let's review the fundamentals of the Getting Things Done® approach, so you understand how the methodology and tools will intersect.

WHAT IS GTD?

GTD is the shorthand brand for "Getting Things Done", the groundbreaking work-life management system and bestselling book[1] by David Allen, which provides concrete solutions for transforming overwhelm and uncertainty into an integrated system of stress-free productivity.

GTD'S FIVE STEPS OF MASTERING WORKFLOW

CAPTURE   Collect anything and everything that's grabbing your attention.

CLARIFY   Define actionable things into concrete next steps and successful outcomes.

ORGANIZE   Sort information in the most streamlined way, in appropriate categories, based on how and when you need to access it.

REFLECT   Step back to review and update your system regularly.

ENGAGE   Make trusted choices about what to do in any given moment.

THREE STAGES TO INTEGRATING GTD

1. UNDERSTANDING You understand the distinct differences in the five steps of Mastering Workflow. You understand a project versus a next action. You know how to transform what you've collected by asking the key processing questions, clarifying what something is, and what you want to do about it.

2. IMPLEMENTATION You have installed at least the basic gear to support your GTD practice, including ubiquitous collection tools, functioning reference systems for your non-actionable information, and seamless buckets with "clean edges" for tracking your projects and next actions.

3. BEHAVIOR CHANGE The five steps of Mastering Workflow are second nature to you. You have changed the way you think and work and are achieving stress-free productivity on a regular basis. When you "fall off" you know what to do to get "back on."

This Guide will leap forward to the Implementation stage, by configuring Evernote as an organizing tool for your projects, actions, and reference. Success at the implementation stage depends on your understanding of GTD. If you are committed to GTD and experiencing stress-free productivity, don't shortchange yourself by skipping the "Understanding" stage.

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[1]*Getting Things Done: The Art of Stress-Free Productivity*; Viking, New York; 2001, 2015 hardback or paperback.


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

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

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

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

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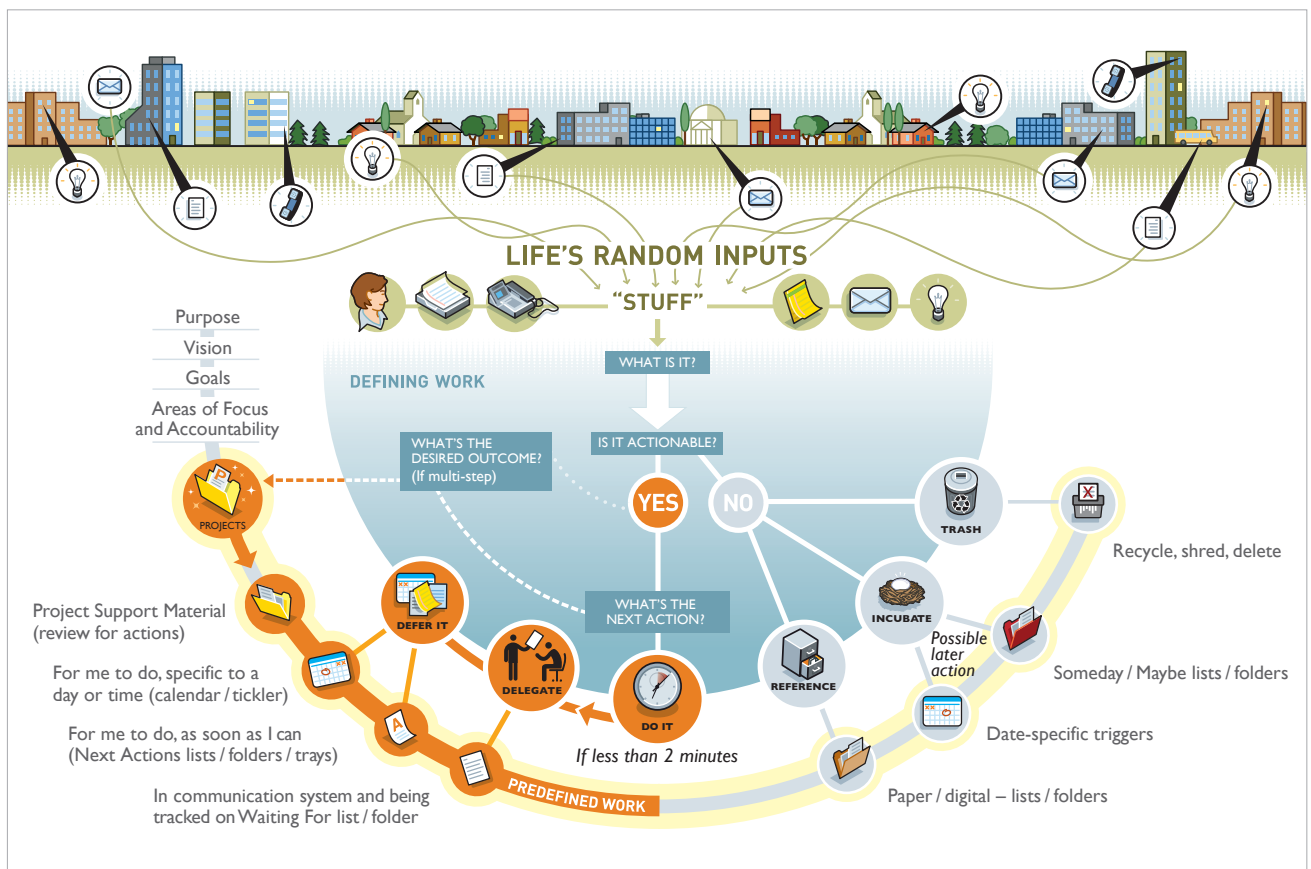
We recommend getting the full Workflow Map, with all of the GTD models, which comes as PDF download. Visit our online store at gettingthingsdone.com/store to learn more.

THE GTD WEEKLY REVIEW® CHECKLIST

Any tool you use will take effort to keep clean and current so that you can trust your action choices. Evernote is no exception. Rest assured, the GTD Weekly Review[2] is what ties this whole thing together, ensuring that you have actions for all the active parts of your projects on a consistent basis so you can trust that what you are choosing from your next action lists is current. The GTD Weekly Review steps include:

GET CLEAR

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

Get "IN" to Zero
Clarify completely all outstanding paper materials, journal and meeting notes, voicemails, dictation, and emails.

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

GET CURRENT

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

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

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

Review Waiting For List
Record appropriate actions for any needed follow-up. Check off received ones.

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

Review Any Relevant Checklists
Use as a trigger for any new actions.

GET CREATIVE

Review Someday/Maybe List
Review for any projects which may now have become active, and transfer to "Projects." Delete items no longer of interest.

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

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

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APPLYING GTD TO EVERNOTE®

PROJECTS AND NEXT ACTIONS

USING EVERNOTE TO MANAGE PROJECT AND NEXT ACTIONS LISTS

Many people think of Evernote as a reference tool, but with some adaptations, it can be an excellent option for managing the project and action lists in your GTD system. We recommend you create Notebooks in Evernote to match the set of lists recommended in the *Getting Things Done* book, which we will describe in more detail over the following pages. The Evernote Notebooks you create will organize lists of items for your GTD system.

THE MOST COMMON GTD LISTS

There are 10 lists recommended in the *Getting Things Done* book that are a good starter set for most people.

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

> *When we refer to "Notebooks" throughout this Guide, we could just as easily be saying "lists", and vice versa.*

Sorting your next actions by context (lists 1–7 above) is recommended, because when you are choosing what to do, context will always be your first limitation. For example, if you are at work, you don't want to be seeing (and having to take the time to skip over) actions that require you to be at home to do. Contexts should map to the people, places, and tools you need to get work done.

SETTING UP LISTS IN EVERNOTE NOTEBOOKS

Let's go ahead and set up the ten suggested lists in Evernote Notebooks now. You can always go back to customize these later, after you've experimented, to discover what will work best for you. If this concept is new to you, we encourage you to give these lists some time in order to see the value of sorting by context.

1. Select File, New Notebook, or use the keyboard shortcut (Alt Shift N on Windows or Shift Command N on Mac) or click the green New Notebook link within the Notebooks section.

2. Create ten new Notebooks, following the list above so that you end up with each list having its own Notebook. Due to Evernote limitations, you will need a paid version to create more than one Notebook.
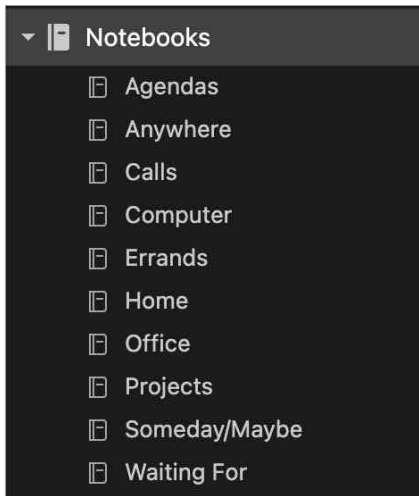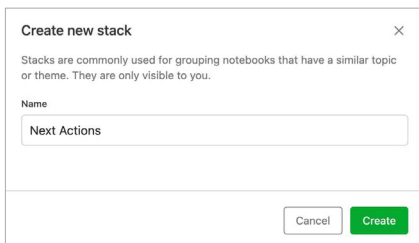

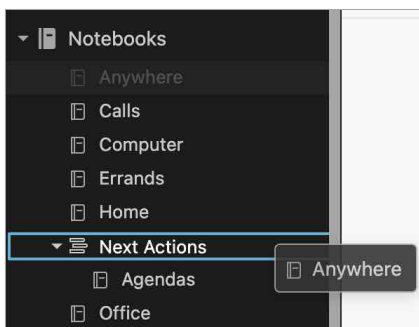## STACKING YOUR NEXT ACTIONS NOTEBOOKS

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

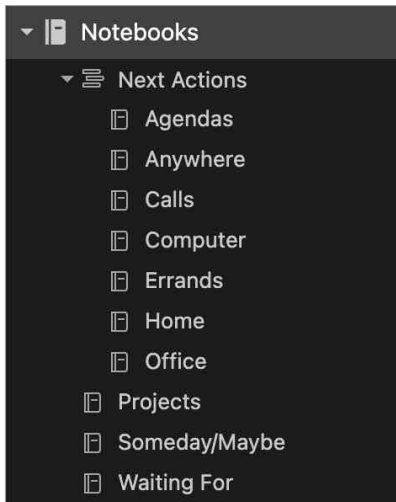1. Right-click on the Agendas Notebook, select Add to stack, New stack.

Name your new stack Next Actions:

2. Now, drag and drop your remaining Next Actions-related Notebooks (Anywhere, Calls, Computer, Errands, Home, Office) to this stack.

After stacking all of your Next Action Notebooks, your Notebooks view will now look like this:

> ▼ 🗂 Notebooks
>   ▼ 📑 Next Actions
>   📄 Agendas
>   📄 Anywhere
>   📄 Calls
>   📄 Computer
>   📄 Errands
>   📄 Home
>   📄 Office
>   📄 Projects
>   📄 Someday/Maybe
>   📄 Waiting For

NOTES VERSUS TASKS

There are now two options for adding items to your lists: Notes or Tasks. For years we have used the Notes for all entries and that is still our recommendation throughout this Guide. Even though Tasks would seem like it's a logical way to setup Evernote, we still believe Notes are a more effective method for your GTD lists. Here are the primary reasons why:

- To use the full functionality of Evernote Tasks, you must be a paid Evernote user, which excludes many GTD users. The features reserved only for paid users include the all Tasks view, adding due dates, and using reminders. Whereas Notes allow all users to add a reminder, which can serve as a due date.

- Tasks do not allow any additional information added to the entry, whereas Notes have an extensive canvas for adding other information, including file attachments, tags, URLs, images, etc.

- Tasks need to be added to an existing note, so there is no time savings to using a Task versus adding a new Note.

- Even for paid users, the all Tasks view does not allow any sorting by context. It can only be viewed by the Note it's embedded within, which doesn't support GTD's context-based approach to Next Actions.

We can assure you that our approach using Notes has worked well for many years, is easy to set up, and will support you in creating an intuitive, sustainable GTD system.

Now, let's talk about what goes on these lists…

EXPLANATION OF THE COMMON GTD LISTS

AGENDAS This list tracks the topics and agenda items for people you interact with regularly. For example, if you have a standing meeting with a particular team, and want to capture agenda items to bring up at the next meeting, this is the place to capture them. The Agenda list is not for tracking next actions that you need to take related to that person or team (for example, a call you need to make to that person, which would instead go on your "Calls" list). Once you're on the call, you may refer to the Agenda list for that person, but it's the Calls list that is triggering the action to make the phone call, not Agendas.

Click on New Note in the toolbar or use the keyboard shortcut (Ctrl N on Windows or Command N on Mac).

Then, enter the name of the person or group for which you want to create an agenda in the Title field (e.g., Boss, Spouse, Marketing Team). For example, here is the Agenda list in Side list view. We have customized the view to only show Title, Tags, and Reminder date. To change your view and columns, click the View options icon.

Agendas
4 notes

TITLE	TAGS	REMINDER DATE
Boss	Goals	
Spouse	Fun, Home	
Accountant	Finances	
Marketing Team	PR, Website	

To capture specific items for that Agenda list, enter those in the note field for the entry. The Note will remain static, as long as you have a need for agenda items for that person, whereas the note field will be dynamic, as your agenda topics for them change.

Marketing Team

Partner summit
Next video for GTD Connect
New audio series
Priorities webinar
Amsterdam trip

You could easily have a dozen people and meetings that you are tracking this way—your direct reports, your boss, your assistant, your spouse, the weekly staff meeting, the monthly board meeting, etc.

Some people have so many items for just one person or team that they create an entire Notebook for them, rather than park them as an entry under the Agendas Notebook. Just be careful you don't create so many Notebooks that it becomes difficult to find what you need and keep them current.

Go ahead and capture any new Agendas as New Notes within your Agendas Notebook, as placeholders, that would make sense for you. Click the New Note button in the toolbar, while viewing the Agendas Notebook, to add new items. The Note is automatically saved.

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

📘 Anywhere		
2 notes		↓= ▽ 🗐 ⋯
Notes		Reminders
TITLE ↑	TAGS	REMINDER DATE
Read the Getting Things Done book 🔔	GTD	12/29/2021, 09:00 AM
Sketch out ideas for new deck		

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

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

🔲 Calls		
4 notes		↓= ▽ 🗏 ···
Notes		Reminders
TITLE ↑	TAGS	REMINDER DATE
Ana Maria – re: Trainer Guide edits		
Call accountant about quarterly taxes		
Dentist to schedule check up		
Jeff about London proposal 🔔		1/20/2022, 09:00 AM

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

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

🔲 Computer		
9 notes		↓= ▽ 🗏 ···
Notes		Reminders
TITLE ↑	TAGS	REMINDER DATE
Backup photo drive 🔔		12/15/2021, 09:00 AM
Email Franz about DAC Academy renewal 🔔		12/30/2021, 09:00 AM
Email Jacob about new web pages		
Email Sarah about OneNote setup guide		
Listen to GTD and Leadership podcast		
Read article DA sent about distractions		
Read Email Best Practices for Teams		
Read Where do your good ideas flow?		
Review newsletter template 🔔		12/21/2021, 09:00 AM

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

ERRANDS This holds actions 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.

Errands		
4 notes		
Notes	**Reminders**	
TITLE ↑	TAGS	REMINDER DATE
Bring pants to tailor		
Buy birthday gift for Molly 🔔	friends	2/3/2022, 09:00 AM
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.).

Home		
3 notes		
TITLE ↑	TAGS	REMINDER DATE
Do touch up paint in home office		
Gather books to donate to library		
Replant front garden		

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.

Office		
2 notes		
TITLE ↑	TAGS	REMINDER DATE
Archive old seminar training notebooks		
Bring laptop to IT to fix webcam		

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

WAITING FOR This Notebook keeps track of all the actions, projects, and deliverables that you want to happen, but which are someone else's responsibility. It could be something you've ordered that hasn't come yet, something you've handed off to your assistant for which you're waiting on a response, or something your boss is supposed to be finding out before you can move forward on a key project.

Waiting For		
5 notes		
Notes		Reminders
TITLE ↑	TAGS	REMINDER DATE
Ana Maria about Academy story	Clients	
Brooke – hotel 🔔	Sedona Trip	12/15/2021, 09:00 AM
CPA – new expense spreadsheet	Finances	
Jack – Set up partner webinar		
Robert – Confirm Q4 webinars		

We suggest adding the date you started waiting in the description of the item. This can be helpful when deciding when it's time to follow-up again, if they have not responded. The Waiting For list should be reviewed as necessary (at least once a week in the GTD Weekly Review) triggering appropriate actions on your part to follow up, light a fire, or just check the status.

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

SOMEDAY/MAYBE These are the things you might want to do at some point in the future, but with no commitment to move on them at present. They could represent next actions or projects that were current at one time or not. Many people find they triage things onto and off the Someday/Maybe list when their priorities shift. Your only commitment to items you put on the Someday/Maybe Notebook is that you will review the choice regularly in your GTD Weekly Reviews. That should give you the freedom to capture onto this list, without the stress of feeling like you've made a commitment you may not have the resources to take on.

Someday/Maybe 9 notes		
TITLE ↑	TAGS	REMINDER DATE
Buy better travel adapters		
Clean off old cell phone and donate		
Curriculum Ideas:		
Go to Fiji	Travel	
Hike Mt Whitney	Fitness	
Move website to new hosting		
Replace backyard fence	Home	
Scan old photos		

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

PROJECTS The Projects list tracks any of your desired outcomes that will require more than one action step to complete, which you expect to be done over the next 12–18 months. Projects should always have a defined end point.

Projects 7 notes		
Notes		Reminders
TITLE ↑	TAGS	REMINDER DATE
Finalize new registration form		
Get GTD Up & Running 🔔		2/28/2022, 09:00 AM
Get resolution on changing media player		
Hike the Dolomites 🔔	Dolomites	3/4/2022, 09:00 AM
Install new home office printer		
Reorganize garage		
Update OneNote Setup Guide		

Any notes you have about the project, also known as your project plans, can be added to the notes field for each project on the list. While this notes field may not be robust enough to capture all of your project details, nor will it make sense to transfer everything to this location (such as all of the emails also related to the project), it will be useful for quick bullet lists of notes, files, milestones, and future actions you want to capture. The current Next Actions and Waiting Fors for the project are not tracked in this note field, but in those Notebooks.

Example of Project Plans captured in the details field of a Note entry:
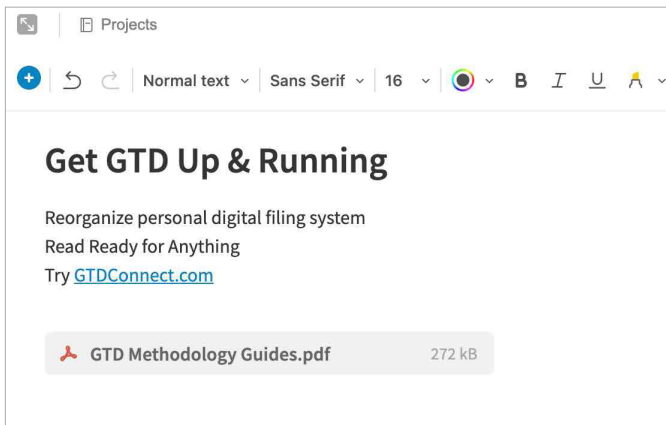
To insert attachments into the details field, click on the + icon in the toolbar for the Note.
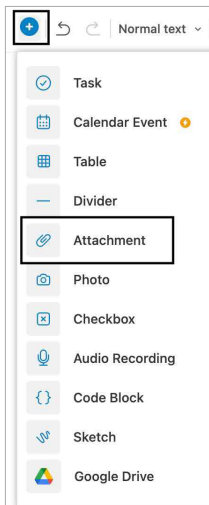
You can also insert links to other Notes in Evernote. To do this, select the Note you want to link to, select Note from the menu bar, Copy internal link, Copy App link. You can then paste this Note Link into the notes field of another Note. This can be helpful when you have supporting information in other Notes, related to your project, and want quick access to that information.

You may also have projects that warrant their own Notebook to organize Notes with related project support. Don't be afraid to experiment with creating new Notebooks—just keep in mind the goal of easily retrieving and maintaining what you set up.

Go ahead and capture any new projects for your Projects 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, simply drag and drop it from one Notebook to another.
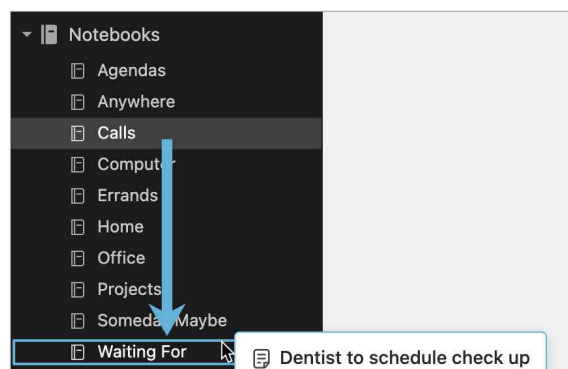
LINKING PROJECTS TO THEIR RELATED ACTIONS

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 probably repelled 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.

THE GTD WEEKLY REVIEW TIES IT ALL TOGETHER
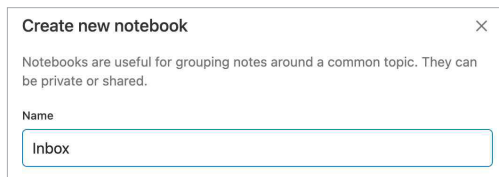
Rest assured, the GTD Weekly Review is what ties the whole thing together, ensuring that you have actions on all the active parts of your projects on a consistent basis, largely based on those project support materials, so you can trust that what you are choosing from your Next Actions Notebooks is current. See the *Getting Things Done* book for a GTD Weekly Review checklist.

CUSTOMIZING YOUR CONTEXTS

The Notebooks we have suggested should serve as a starting point. You may need more of these, or fewer. For example, some people find they want to break out Computer into more specific lists, such as a list just for Email. Executive support staff can often use a context called Meetings to Schedule. Some managers find a Projects–Delegated list useful as a high-level Waiting For Notebook. Or, you may find you don't want to use as many contexts, and a simple Notebook called Next Actions or Next Actions-Work and Next Actions-Personal would suffice for your action lists. Be willing to experiment to find the set of Notebooks that will work best for you.

CREATING AN INBOX NOTEBOOK IN EVERNOTE

One additional Notebook we recommend in Evernote is called Inbox. This kind of Notebook can be used to capture Mind Sweep items that still need to be processed. For example, you may have a thought or idea on the fly, not know exactly what the next action is yet, but you don't want to lose the idea. Or, you may see something on the web you want to get back to and "clip" it into the Inbox. Sending it to the Inbox Notebook will store the idea until you are ready to fully process it (through the questions on the GTD Workflow Map) to decide what it means and what you want to do about it.

To make this list work, you'll need to treat it with the same rigor you would your email and paper inboxes. Meaning, process the items in this Notebook down to zero on a regular basis.

After you set up this Notebook, we also recommend changing the default setting for new Notes to Inbox by clicking on the Inbox Notebook, clicking on the 3 dots for More actions, and choosing Set as default notebook.
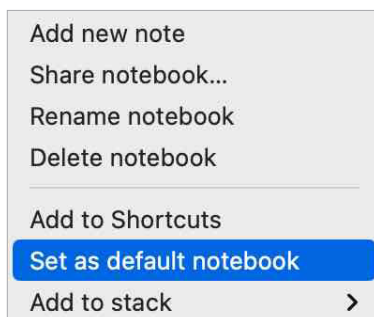
Go ahead and set up a new Notebook called Inbox.

TWO OPTIONS FOR SENDING ITEMS TO YOUR EVERNOTE NOTEBOOKS

One of the powerful features of Evernote is being able to send information to the application, without having to launch it. There are two ways to do this:

OPTION ONE: EMAIL DIRECTLY TO THE NOTEBOOK

A great feature to use if you have a paid Evernote account is to email yourself Evernote Notes. Please be aware, if you have a Free Evernote account, you can only email 5 items total (not per day or month–total number as long as you have a Free account).

When you create an Evernote account, you are assigned a unique email address, which is used for emailing information to your Evernote account. To find this unique email address, look under your Evernote Account information. You should see an email address that looks something like this:

myusername.uniquenumber@m.evernote.com

Find and add your unique Evernote email address to your address book(s) now. Name the contact something easy to remember and type, like Evernote, for speedy addressing in the future.

If you email to that address from any email program, upon syncing it will automatically go into your Inbox Notebook, with the default setting you changed earlier.

For example, let's say "Blair" comes to your mind, but you don't know what you want to do about Blair yet. It's simply an unprocessed Mind Sweep item at this point. Send an email to your Evernote account with "Blair" in the subject line. When you are ready to process the Blair item, you would ask yourself the GTD processing questions shown earlier in the Guide and move that item out of the Inbox Notebook and into the appropriate Notebook, with a clearly defined next action.
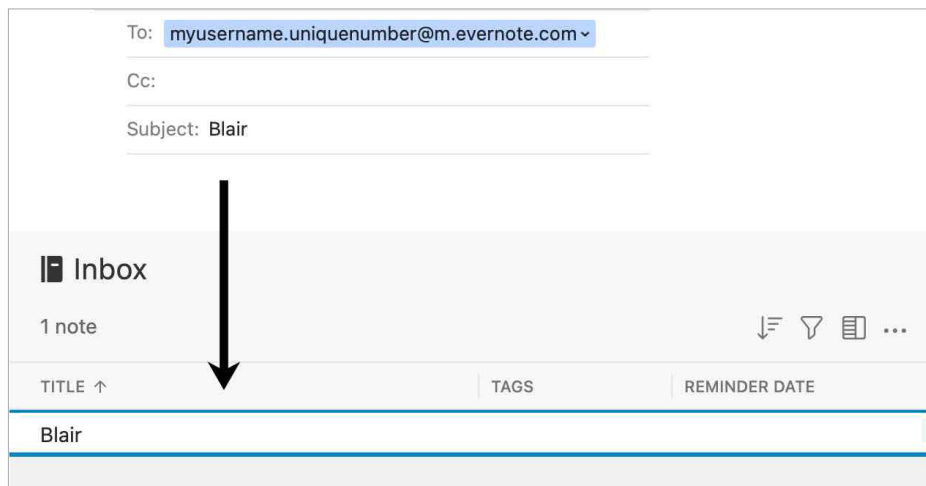
Sometimes you'll also want to add things directly to a specific Notebook. You can do that too, with one small change. For example, let's say Blair comes to mind and you know you want to call her as the next action. Create a new email, addressed to your unique Evernote account. In the subject line, type the next action "Call Blair" but add the name of the Notebook with the @ symbol before sending. For example, "Call Blair @Calls". Instead of going to the Inbox as in the first example, this item will go directly into the Calls Notebook.
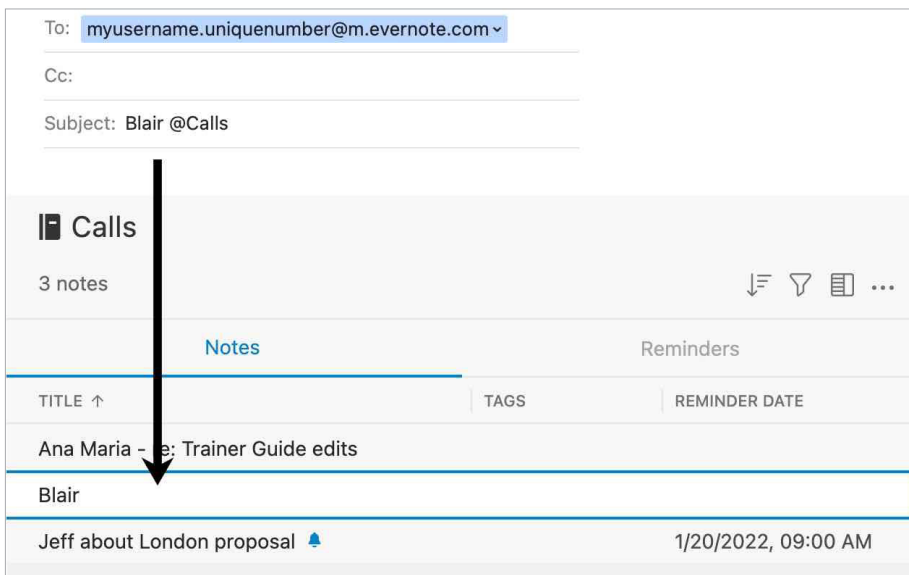
You can even add a tag and a reminder date to your email and Evernote will parse it appropriately. For example:

Email Subject: [Title of note] ![optional date for reminder] @[notebook name] #[tag name]

So for a call to make by November 3rd, that should go in your Calls Notebook and be tagged Clients, you would type:

Call Blair !2016/11/3 @Calls #Clients

> **We only recommend sending items directly into your Next Actions Notebooks if you have a clearly defined next action. This method is not for capturing unprocessed Mind Sweep items or anything that you still need to decide what it means and what you want to do about it.**

OPTION TWO: USE WEB CLIPPING

The Evernote Web Clipper a browser extension for Chrome, Safari, Internet Explorer, Firefox, Opera, and Microsoft Edge. Download it if it's not already installed for you. This feature can be handy when you see something on the Web that you want to capture into your GTD System—for example a Mind Sweep item for your Inbox, a next action for one of your Next Actions Notebooks, or a reference item for your Reference Notebooks (which we will talk more about in a later section).

Let's say you want to capture a next action to take the free GTD-Q assessment:

1. Go to GTDIQ.com

2. While viewing that web page where you want to clip information, click the Evernote icon in your browser window.

3. The Web Clipper window will appear. Capture your next action and assign the appropriate Notebook. Or, send to your Inbox Notebook to process later.
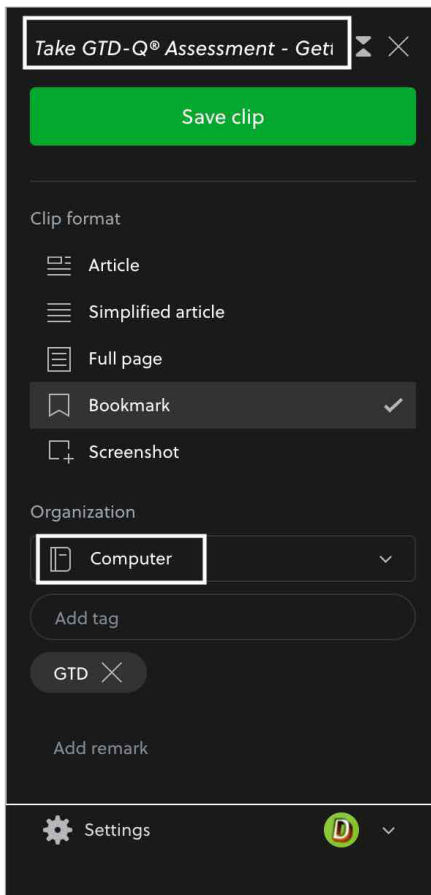
The Web Clipper app is also a fantastic option for creating new Notes from your web-based email, such as Gmail, iCloud mail, or Outlook.com.

REVIEWING YOUR NOTEBOOKS

On a daily basis, we recommend reviewing your Next Actions Notebooks (the ones we set up as contexts, such as Calls, Computer, etc.) in Evernote, whenever you get a chance. On a weekly basis, in your GTD Weekly Review, we recommend reviewing all of your actionable Notebooks in Evernote, including Next Actions, Waiting For, Someday/Maybe, and Projects. This will be valuable time spent to acknowledge what you've completed, capture any new Next Actions, and ensure each Project is moving forward.

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USING DUE DATES AND REMINDERS

There are a few easy ways to mark Evernote Notes with a date. One of the easiest ways is to add the due date to the subject line. For example:

Erika - new expense spreadsheet - due 10/1

Another option is to create a tag or (tags) that represent due dates. For example, "due this week", "due soon", or "before next trip" if you travel frequently. For example:

Computer		
9 notes		
Notes		Reminders
TITLE	TAGS	REMINDER DATE
Review newsletter template	Due Soon	
Email Jacob about new web pages	Due Soon	

For those tags to work, it means you are actively reviewing the items under those tags with as much discipline as you are looking at your Next Actions lists. Again, use tags if they will benefit your system and not become a burden on your ability to capture new entries quickly and/or become slowed by the requirements of adding and maintaining those tags.

A third option is to assign a reminder to a note. To assign a reminder, select the alarm icon [🔔+] [🔔+ Add tag] at the bottom of the Note window.

Adding a reminder will mean:

1. Your Notes with assigned reminders will be included in a special "Reminders" sort at the top of your Notebooks. Click the [📄] icon to experiment with different views.

Computer		
2 notes		
Notes		**Reminders**
2 reminders		⚙
TITLE	TAGS	REMINDER DATE ↑
Backup photo drive 🔔		12/15/2021, 09:00 AM
Email Franz about DAC Academy renewal 🔔		12/30/2021, 09:00 AM

2. You also have the option to add a date to the reminder, which means you will receive in-app and email notifications on the day the Note is due, on the day you specify. If you want to be notified a day before the Note is due, trigger yourself a day earlier to give yourself "buffer" time to work on it.

Tomorrow, 9:00 AM
In 2 days, 9:00 AM
In 1 week, 9:00 AM
No date

What we like about the reminders feature is that it will give some people the additional peace of mind that they will be triggered about any timely Notes coming due. It could replace the "due" soon tag we suggest above, as it would mean items that have a particular importance will sort in the reminders area of your Notebook view and an email will be sent if a date is assigned.

To view all Notes with reminders assigned, click on Notes in the Evernote margin.

If you are emailing Notes to your Evernote Inbox, as described earlier in the Guide, adding an exclamation point and reminder date to the subject line of your email will add a Reminder to your Evernote entry. For example:

Email Subject: [Title of note] ![optional year/month/day for reminder] @[notebook name] #[tag name]

We suggest that if you do use due dates on your Notes, or this feature of assigning a date through Reminders, that you do so sparingly. This will save you from unnecessary (and potentially unwanted) emails in your inbox. It will also build trust in your system that the items that truly need your timely action and attention will be highlighted.

Adding a reminder does not replace consistent reviews of your actionable Notebooks. We still suggest reviewing your calendar often throughout the day, your Next Actions Notebooks daily or as often as you can, and your Projects Notebook weekly in your GTD Weekly Review.

MARKING ITEMS COMPLETE

Another challenge with Evernote Notes not functioning as a traditional list manager, is the lack of a "mark complete" option on Notebook entries. We've found an easy workaround for that though. For those items you want to save, as a record of having completed it, save them to a new Notebook called Completed:

[🗏 Completed]

When you complete a project or next action, and want to store that item for the history of what you've completed, move it to the Completed Notebook. It's unlikely you'll want to keep a record of every next action you've completed and those can just be deleted, but having a record of the projects and the plans you captured in the Project note field, can serve as useful reference come end-of-year review time.

Go ahead and create a Completed Notebook now, if you think you will ever want to save the history of what you have completed.

USING SHORTCUT KEYS

The ability to capture information quickly can greatly enhance your productivity. There is a wealth of functions you can perform in Evernote, using shortcut keys. Visit the Evernote Support site for a full list of shortcuts: evernote.com/contact/support (search on "shortcuts")

ADDING SHORTCUTS

As the number of Notebooks and Notes you create becomes larger, you may find the Shortcuts view helpful for quick access to your most frequently used items.

To create a shortcut to a Notebook, individual Note, Tag, or Stack, you can choose Note > Add to Shortcuts, right-click and choose Add to Shortcuts, drag and drop it into Shortcuts, or click the three dots.
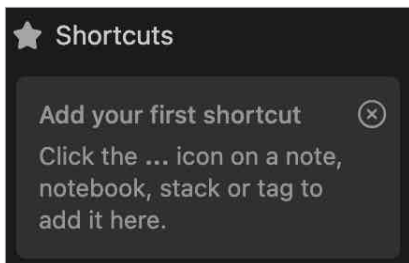
You can change the order of anything in your Shortcuts view through drag and drop. We recommend keeping your Inbox Notebook at the top of the Shortcuts view. Here is an example of a Shortcuts view with a mix of key Notebooks, Notes, and Tags.
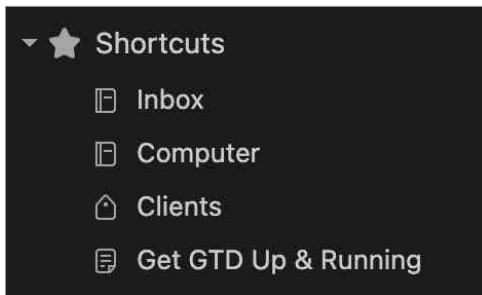
EMAIL

INTEGRATING ACTIONABLE EMAIL WITH EVERNOTE

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

TWO OPTIONS FOR MANAGING ACTIONABLE EMAIL

YOU HAVE TWO EASY OPTIONS FOR MANAGING ACTIONABLE EMAIL WITH EVERNOTE

Option One: Use Evernote or your calendar as the action reminder
Create @Action Support and @Waiting For Support folders in your email program to hold supporting information for actions that are tracked on your calendar or Next Actions lists. In this case, the folders only serve as storage buckets to hold the information you need to take the action.

You would be reminded of the action when you review your calendar or Next Actions lists. It's one fewer place to look for actions or waiting fors, whereas the second option described below adds an additional location to look for a complete view of your reminders.

People often like this option because all of your reminders will be tracked in as few places as possible. But it does mean you have to take the time to go to Evernote and define the next action.
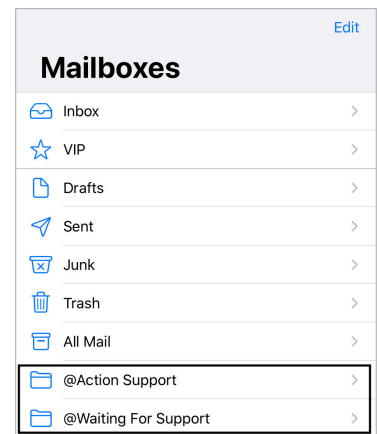
Option Two: Use the email as the reminder Create @Action and @Waiting For folders, and use them like an action list. You would not also put those reminders on your calendar or Next Action lists in Evernote—the email itself would be the only reminder. That means you need to scan these folders with as much discipline as you would your Next Actions lists and calendar, for reminders of your commitments. The @ symbol is a trick to push these folders to the top of your email structure for easy access. If the @ symbol does not work in your email program, try another symbol.

People often like this option for the quick win it gives in getting your inbox processed to zero. The downside with this option in email is that you have no place to capture the next action or due date that's associated with that actionable email. So you'll inevitably be doing some "re-deciding" about emails you already decided about, if the next action is not apparent by the subject line.
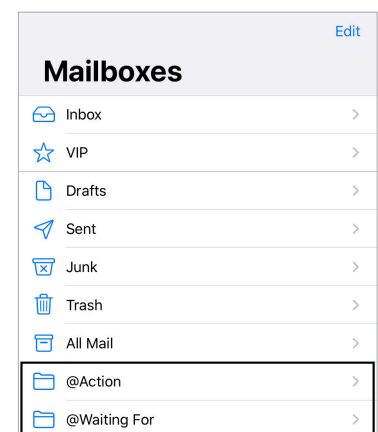
Go ahead and create either the @Action and @Waiting For or @Action Support and @Waiting For Support folders in your email program now.

GETTING YOUR INBOX TO ZERO

Getting your inbox to zero means you have decided about what each email means and what you want to do about it. Using the questions from the GTD Workflow Map (pictured earlier in this Guide) you would simply ask:

WHAT IS IT?

IS IT ACTIONABLE?

NO Is it trash, to file as reference, or to incubate (add to your Someday/Maybe list, calendar, Tickler/Bring Forward file[3])?

YES What's the next action?

Do now, delegate to someone else, or defer to do myself later?

Do it now If it takes less than 2 minutes, handle it in the moment.

Delegate it If you need to track this getting completed, track the waiting for reminder in your @Waiting For folder in email or Waiting For list in Evernote.

Defer it If you need to do it later, track the action reminder in @Action folder in email, calendar, or on a Next Actions list in Evernote.

If multiple actions, what's your desired outcome? Track that outcome on your Projects list in Evernote.

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

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CALENDAR

WHAT BELONGS ON YOUR CALENDAR

Your calendar is a critical component in your GTD system for reflecting the action choices that need to be done ON a specific day versus those that you see on your Next Actions Notebooks in Evernote, which can be done BY a specific day, or on ANY day. Your daily calendar page should represent the "hard landscape" for your day and will provide a trusted foundation at a glance for moment-to-moment orientation about "what's next?"

THE THREE THINGS THAT BELONG ON YOUR CALENDAR

1. **DAY-SPECIFIC INFORMATION**   Information you want to know or be reminded of that day—not necessarily something to do.

    Examples:

    - Things that might disrupt your day (server shut-downs, office moves, etc).
    - External events to be aware of (marathons, elections, heads of state visits, etc).
    - Activities of other significant people of interest to you (kids, spouses, bosses, assistants, vacations, etc).

2. **DAY-SPECIFIC ACTIONS**   Things that need to happen during the day, but not at a specific time.

    Examples:

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

3. **TIME-SPECIFIC ACTIONS**   Things that need to happen on a specific day and time.

    Examples:

    - Meetings, appointments, time blocked to work on projects

Calendar showing all three types of entries:

	1 FYI: David Allen in Tokyo
	Mom's birthday
	Send updated spreadsheet to Jose **2**
	Submit expense report
9 AM	
	Update meeting with Marian **3**
10 AM	
11 AM	
	Marketing Team Meeting
12 PM	

REVIEWING YOUR CALENDAR

On a daily basis, we recommend reviewing your calendar for day- and time-specific actions, any chance you get. On a weekly basis, in your GTD Weekly Review, we recommend reviewing your calendar backward for any "Oh, that reminds me…" items, and forward for any "I need to start prepping for…" items to capture.

REFERENCE

USING EVERNOTE TO STORE REFERENCE INFORMATION

Evernote can manage a limitless number of potentially useful (and fun!) non-actionable simple reference lists and checklists that you would not want to combine with your Next Actions Notebooks.

This functionality is so totally open-ended and in one sense, so simple, the possibilities are infinite.

Have you ever…

- had a wild idea you didn't know what to do with?
- wanted to remember the great restaurant you ate at in London?
- needed to remember all the things to check before you leave on a trip?
- read something inspirational you wanted to keep and re-read every once in a while?
- wondered where to put a suggestion about something to do the next time you visit a country?
- needed to remember everything you need to handle when you put on a special kind of event?
- wanted to keep track of all the articles, blog posts, or essays you might want to write?
- wanted to have a list of clients and prospects to review occasionally?
- wanted a place to keep track of the possible gifts to give special people in your life?
- needed a place to capture great team building and staff recognition ideas?
- needed a quick emergency contact list?

To get started, here are some possible new Evernote Notebooks or lists within Notebooks to try:

- Checklists (e.g., GTD Weekly Review, Packing, Home Maintenance)
- Areas of focus
- Higher Horizons of Focus® [4]
- Fun
- Ideas
- Inspirations and affirmations
- Great quotes
- Lists
- Might like to buy
- Might like to read
- Music to download
- Next time in…
- Travel
- Vacation ideas

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

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

Example One Create reference as lists within one "Reference" Notebook:


Example Two Create reference as individual Notes within one reference Notebook:

When in San Francisco: MOMA	Travel
When in San Francisco: See Jeff	Travel
When in San Francisco: Stay in Union Square	Travel
Wifi password: QQr%77*L76	

In this example, we've also added tags to the individual Notes (i.e., gear, travel, great quotes), for further sorting options. Tags can be used in any of these options described—it's up to you to decide how much detail you want to capture and if a feature like tags would assist you in the future when retrieving the information again.

Example Three Create reference as lists within a specific Reference Notebook, such as Reference-Travel:
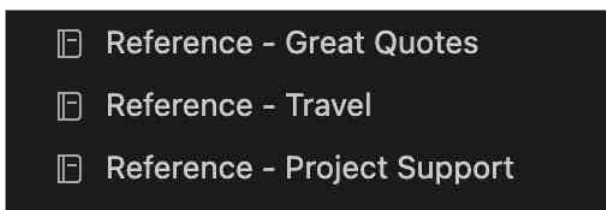
Go ahead and capture any useful Reference now.

CONCLUSION

ADDITIONAL RESOURCES

We hope this instruction guide has been useful. It is intended as a supplement to our core education of workflow mastery developed over many years—not a substitute. The most successful implementation of this guide builds on the understanding of the GTD best practices presented in our many learning tools, including the *Getting Things Done* book, the courses and individual coaching offered by our global partners, and our online learning center GTD Connect®.

Please visit our website to take advantage of the many support tools and training available to assist you in getting your GTD system up and running.

FOR TECHNICAL SUPPORT WITH EVERNOTE, PLEASE VISIT:

evernote.com

FOR MORE INFORMATION ABOUT GTD, PLEASE VISIT:

gettingthingsdone.com
gtdconnect.com