gtd®

GOOGLE® APPS
FOR ANDROID™

Setup Guide

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FOCUS OF THIS GUIDE

EXPLANATION OF HOW TO BEST USE THIS GUIDE

WHAT YOU CAN EXPECT

Our focus with this Guide is to show you how to create a seamless GTD® system using the built-in applications available from Google on the Android platform.

This Guide covers four primary components of your workflow and the corresponding Google Apps on the Android platform that we recommend:

Email - Gmail
Calendar - Google Calendar
Project & Next Actions Lists - Google Tasks or Google Drive
Reference - Google Tasks or Google Drive

This Guide does not recommend or cover any third-party applications for Android. We wanted to create a Guide that is focused on the applications offered by Google, that we know will work well for many people on Android.

If you are new to Google desktop apps, this Guide should be an excellent starting point for you to build a solid foundation for optimizing your productivity. If you have already established your system using Google Apps, use this Guide to fine-tune or simplify your system and discover where you have underused features or overcomplicated your setup.

Don't worry about using every feature in your Google Apps. There is likely far more built in than you will ever need. Focus on what makes a difference for you. It's important to not overcomplicate your systems to the point where you can only maintain them 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.

This Guide does not focus on all of the technical aspects of Google, particularly syncing. There are simply too many variables for us to fairly and adequately address every user's needs. Google, your handheld device technical support, or your IT department will be your best resources for that.

The primary focus of this guide is about applying GTD to the applications available from Google Apps now—without requiring you to purchase or download anything new. You have a wealth of applications at your fingertips.

This Guide is based on the Android version 4.4 operating system, which was the most widely used platform at the time of publishing this Guide. If you are on a different version, you will find some differences in some of the instructions we provide and how your Android appears. For that reason, we've done our best to describe the function and purpose of the instruction, so you can easily adapt to how your Android is designed. Unfortunately, it's unrealistic to write a Guide like this for every potential operating system, model, and wireless carrier version. If something does not work the same for you, please refer to the manual for your specific Android device.

OK… let's get started!

UNDERSTANDING THE GTD BEST PRACTICES

AN OVERVIEW OF THE KEY BEST PRACTICES OF THE GTD METHODOLOGY

To get the most out of Google Apps 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 PHASES OF MASTERING WORKFLOW

- **Capture** – Capture 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 phases of mastering workflow. You understand a project versus a next action. You know how to transform what you've captured by asking the key clarifying 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 a GTD system, including ubiquitous capture tools, functioning reference systems for your non-actionable information, and seamless buckets with "clean edges" for tracking your projects and next actions.

3. **Behavioral Change** – The five phases 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 Google Apps as organizing tools 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. It's tempting to dive right into Implementation, but the Understanding phase ensures you'll have a firm grasp of the "why" of GTD.

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[1] The *Getting Things Done* book is available from any major bookseller or our Online Store.

CREATING PROJECTS AND NEXT ACTIONS LISTS

Let's go ahead and set up the 10 suggested lists in Google Tasks through your Android now. You can always go back to customize these later, as you discover what will work best for you. If this GTD lists concept is new to you, we encourage you to give them some time, in order to see the value in sorting by context.

Tasks are accessed through your Android browser on the Google website. There is no Android application for Google Tasks. In our testing, there are some limitations to Google Tasks on Android, as we will note throughout this section. For that reason, you may find it more useful as a viewer of Tasks, but not where you are doing any significant processing into or editing of your work like on your desktop. The built-in Tasks app on your Android is not related to Google Tasks at all and would not be functional or useful at all for the kind of project and next action list management we recommend.

If you prefer, you can create these initial lists through Google Tasks on your desktop browser instead of on Android, if that's easier for you. Our GTD & Google Apps For The Desktop Setup Guide has detailed instructions for setting these lists up on the desktop if you need assistance. The directions below are specifically for Android.

1. **Go to Google Tasks** at http://gmail.com/tasks or go to Gmail through your Android browser (not through the Mail app on your Android), tap the More menu and tap on the Tasks icon.

2. **Tap on New List** to create a new Task list. If your Tasks view opens to a specific list, you'll need to first tap on All Lists to return to the main list view, then tap on New List.
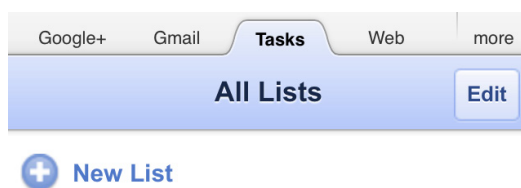
3. **Type "Projects"** as your first list name. **Tap anywhere** else on your screen to accept the new entry.

4. One at a time, **add the remaining recommended GTD lists** by tapping New List for each one:

   • Agendas
   • Anywhere
   • Calls
   • Computer
   • Errands
   • Home
   • Office
   • Waiting For
   • Someday/Maybe

CALENDAR

CALENDAR MANAGEMENT

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 context lists in Google Tasks, which can be done BY a specific day, or on ANY day. Your Day 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 Google Calendar is accessed through the Google Calendar app. Download it from the Google Play Store if you don't already have it. You can also use the built-in calendar app on your Android device or access it through your Android browser on the Google website, but the functionality will differ some from the instructions below.
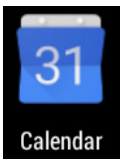
To Open the Calendar Application on your Android, find the Google Calendar icon.

If the icon for this application is not already easily accessible with one tap, like on your home screen when you open first turn on your device, then drag it there now.

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. These are entered as All Day Events in Google Calendar.

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. These are entered as All Day Events in Google Calendar.

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. These are entered with at least a start time in Google Calendar.

Examples:

- Meetings, appointments, time blocked to work on projects
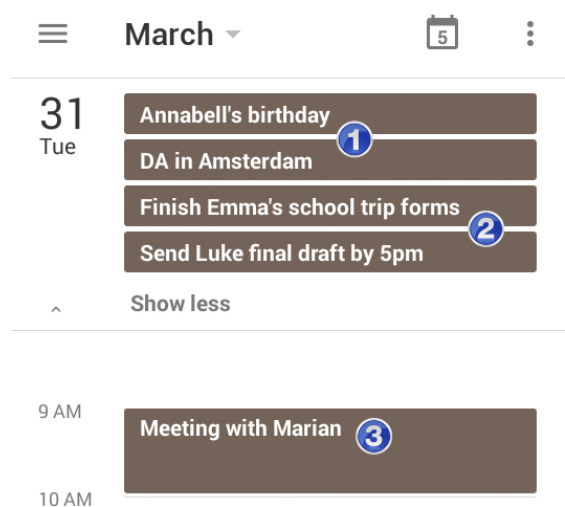
TWO OPTIONS FOR MANAGING ACTIONABLE EMAIL IN GMAIL

Option One: Use the Email as the Reminder

Create @Action and @Waiting For labels (essentially the same as the folder or tag concept in all other email programs), and use them like an action list. You would not also put those reminders on your calendar or Next Actions lists in Tasks—the email itself would be the only reminder. That means you need to scan these labels with as much discipline as you would your Next Actions lists and calendar, for reminders of your commitments. That won't be a habit just because you've created the label, so be sure to build in some other triggers for yourself, like a note on your daily calendar, to look at these labels.

> **Inbox**
> Sent Mail
> Drafts
> @Actions
> @Waiting For
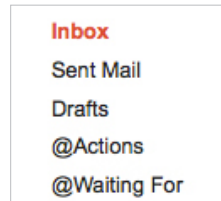
The @ symbol is a trick to push these labels to the top of your email structure for easy access.

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 (unless you go to the effort of forwarding the email to yourself and changing the subject line, but then losing conversation threads.) So if you use this method, 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.

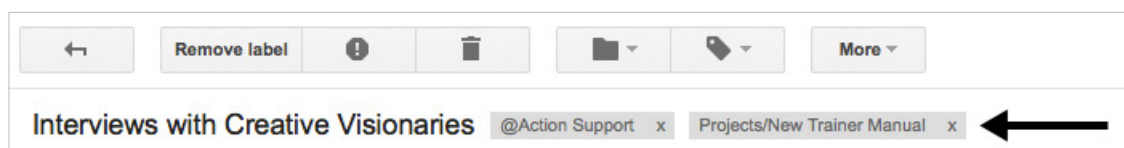### Option Two: Use Tasks or your calendar as the Action Reminder

Create @Action Support and @Waiting For Support labels in Gmail to hold supporting emails for actions that are tracked on your calendar or Next Actions lists. In this case, the labels 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 in Tasks. It's one fewer place to look for actions or waiting fors, whereas the first option adds an additional location to look for a complete view of your reminders.

> **Inbox**
> Sent Mail
> Drafts
> @Action Support
> @Waiting For Support
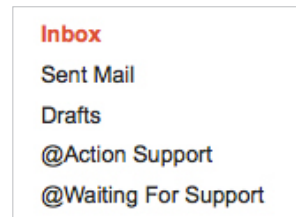
People often like this option because all of your reminders will be tracked in as few places as possible, and you will have clearly defined next actions on your Next Actions lists in Tasks. But it does mean you have to take the time to create a new Task and define the next action.

With either option, because Gmail allows multiple labels, you can also add additional labels to the email as needed. For example, if the email is related to a current project, you can add the @Action or @Action Support Label AND the project label.

Assigned labels while the email is still pending action:

←	Remove label	⊘	🗑	📁 ▾	🏷 ▾	More ▾

Interviews with Creative Visionaries   @Action Support x   Projects/New Trainer Manual x   ⬅

Once you have completed the action or waiting for, the @Action or @Action Support label would be removed and the email can then be deleted, filed for reference under a project or topic label, or archived.

Assigned labels once the email is no longer actionable and just needs to be stored as reference:

←	Remove label	⊘	🗑	📁 ▾	🏷 ▾	More ▾

Interviews with Creative Visionaries   Projects/New Trainer Manual x   ⬅