

gtd[®]

iPAD[®]

Setup Guide

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FOCUS OF THIS GUIDE

Our focus with this Guide is to show you how to create a seamless GTD[®] system using the built-in applications on the iPad[®].

If you are new to the iPad, this Guide should be an excellent starting point for you to build a solid foundation for optimizing your productivity using the built-in applications. If you already have an established system in the iPad, 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 applications available that do similar functions. You do not need to use all of the built-in applications to be successful with GTD on the iPad. By all means, experiment with the applications that will work best for you. For example, you may find there is a more robust Reference application that you would prefer to use, such as Evernote[®], instead of or in addition to the built-in iPad Notes application. Or, you may find that the Reminders app for list management does not work as well for you as another one for your lists.

Whatever tools you choose, 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. 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 your applications. There is likely far more built in than you will ever need. Focus on what makes a difference for you.

We should note that this Guide does not focus on all of the technical aspects of the iPad and all of the options for syncing. Apple Support or your IT department will be your best resource for that.

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

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 your iPad 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 ground breaking work-life management system and bestselling book¹ 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** 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 phases 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 a GTD system, 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 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 your iPad 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.

¹*Getting Things Done: The Art of Stress-Free Productivity*; Viking, New York; 2001, 2015 hardback or paperback. Available from booksellers or at gettingthingsdone.com

APPLYING GTD TO YOUR IPAD[®]

PROJECTS AND NEXT ACTIONS

USING THE REMINDERS APPLICATION TO MANAGE PROJECT AND NEXT ACTION LISTS

The Reminders application is an excellent option for managing the lists in your GTD system. The Reminders application simply comes with one list named “Reminders.” We recommend you customize the lists in Reminders 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 MOST COMMON GTD LISTS

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

Next Action Lists:

- | | |
|-------------|----------------|
| 1. Agendas | 5. Errands |
| 2. Anywhere | 6. Home |
| 3. Calls | 7. Office |
| 4. Computer | 8. Waiting For |

Incubation List:

9. Someday/Maybe

Outcomes List:

10. Projects

Sorting your next actions by context (lists 1–8) 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 see (and have 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. We’ll most commonly refer to these as “Next Actions.”

Alternatively, you could group your next actions into one list called Next Actions, instead of sorting by context. Give the context-grouped lists a try if the concept is new to you. You might find it’s surprisingly effective and easy to maintain.

When all of your old Reminders have been moved to your new lists, delete the Reminders list entirely. Do this by tapping on Edit in the top right corner, and tapping Delete List. Confirm your deletion. This is also how you will delete or change the names of any of the suggested 10, should you find you want to make adjustments.

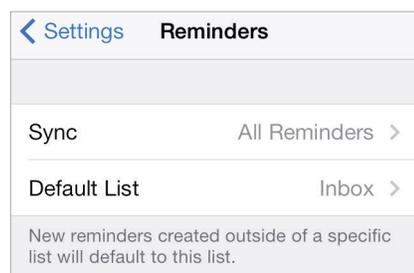
Delete List

CREATING AN INBOX LIST IN REMINDERS

One additional list you may want to consider in Reminders is a list called Inbox. This kind of list 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. Assigning it to the Inbox list will store the idea until you 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 this list down to zero on a regular basis.

If you set up this list, we also recommend changing the setting for unassigned Reminders to this list. Go to Settings on your iPad (not in Reminders) > Reminders > select Inbox list.



REVIEWING YOUR REMINDERS LISTS

On a daily basis, we recommend reviewing your Next Action lists in Reminders, as often as you can. On a weekly basis, in your Weekly Reviews, we recommend reviewing all of your lists in Reminders, 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.

CONCLUSION

ADDITIONAL RESOURCES

We hope this instruction guide has been useful. It is intended as an adjunct 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, our public and on-site courses, individual coaching, and our online learning center GTD Connect[®].

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

FOR TECHNICAL SUPPORT WITH YOUR IPAD AND THE BUILT-IN APPLICATIONS, PLEASE VISIT:

<http://www.apple.com/support>

FOR MORE INFORMATION ABOUT GTD, PLEASE VISIT:

gettingthingsdone.com

gtdconnect.com

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