gtd®

EVERNOTE®
FOR WINDOWS®

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® 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 project support, Next Actions lists, and Reference.

The instructions and screenshots will show examples for the Windows desktop version of Evernote. The interface is so different for the Mac® 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.*

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
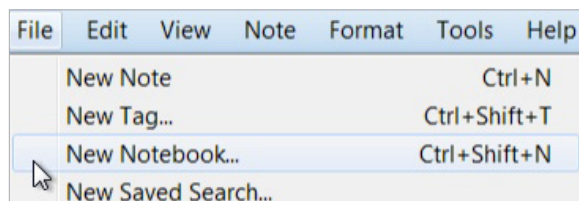9. Someday/Maybe
10. Projects

> *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 (Ctrl Shift N).

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.

Viewing 9 notes in Someday/Maybe ▾

Title	Reminder Time
Move website to new hosting	
Hike Mt Whitney	
Curriculum Ideas:	
Sell Nikon D600	
Buy better travel adapters	
Go to Fiji	
Scan old photos	
Replace backyard fence	
Clean off old cell phone and donate	

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.

Viewing 9 notes in Projects ▾

Title	Reminder Time
Deliver Evernote Webinar for GTDConnect.com	10/20/2016 1:45 PM
Write OneNote Setup for Windows Guide	
Get GTD Up & Running	
Deliver GTD Fundamentals Course - Boston	11/4/2016 8:00 AM
Finalize new registration form	
Take Trip to Sedona	11/23/2016 1:45 PM
Get resolution on changing media player	
Install new home office printer	
Setup rain catch system	

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 (Plus or above), 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 Basic/free account.) You will need to pay for a Plus or Premium to use this feature beyond the 5 emails. For this emailing feature alone, we think the paid accounts are well worth it.

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 above.

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 (see the map on page 3) and move that item out of the Inbox Notebook and into the appropriate Notebook, with a clearly defined next action.
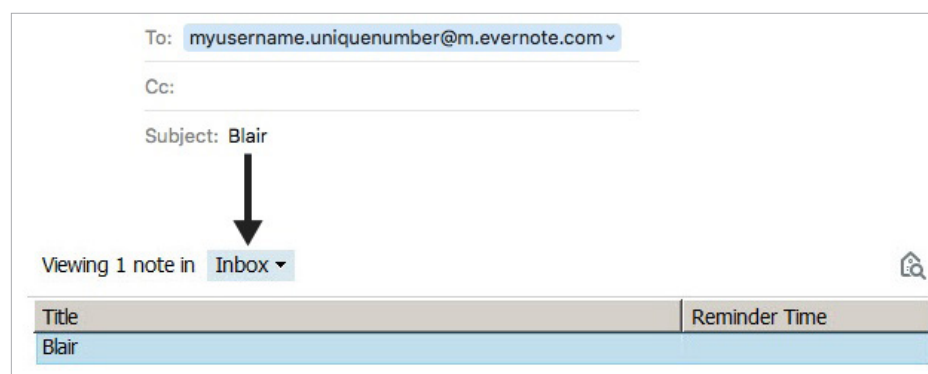
Sometimes you'll also want to add things directly to a specific Notebook. You can do that too, with one small change. For example, let's say Blair comes to mind and you know you want to call her as the next action. Create a new email, addressed to your unique Evernote account. In the subject line, type 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.