



# EVERNOTE<sup>®</sup> FOR WINDOWS<sup>®</sup> AND MAC<sup>®</sup>

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**Setup Guide**

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## FOCUS OF THIS GUIDE

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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 (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 desktop versions of Evernote. Some of the features shown, such as sending emails to your Evernote account, will require a paid 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 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

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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<sup>1</sup> 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.

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

# 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  | 6. Home          |
| 2. Anywhere | 7. Office        |
| 3. Calls    | 8. Waiting For   |
| 4. Computer | 9. Someday/Maybe |
| 5. Errands  | 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.








## 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.

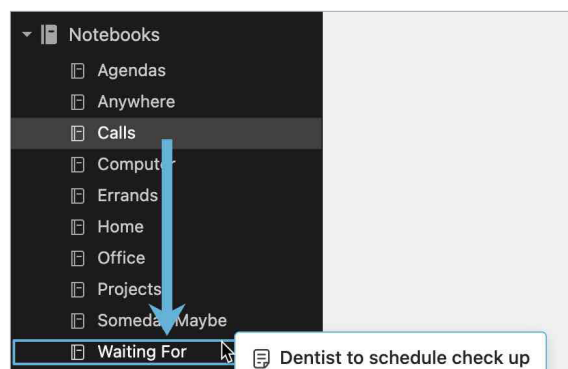


 Agendas		
4 notes		   
TITLE	TAGS	REMINDER DATE
Boss	Goals	
Spouse	Fun, Home	
Accountant	Finances	
Marketing Team	PR, Website	

## 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.



## 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).

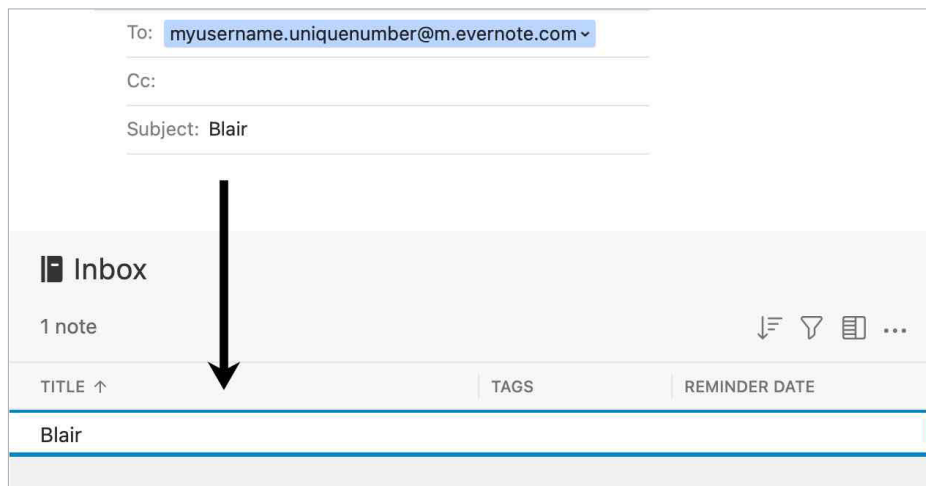
When you create an Evernote account, you are assigned a unique email address, which is used for emailing information to your Evernote account. To find this unique email address, look under your Evernote Account information. You should see an email address that looks something like this:

*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.

## 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

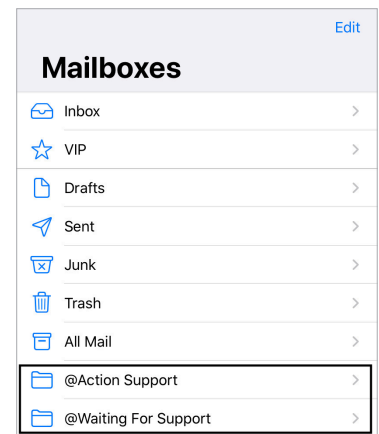
#### YOU HAVE TWO EASY OPTIONS FOR MANAGING ACTIONABLE EMAIL WITH EVERNOTE

##### 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.

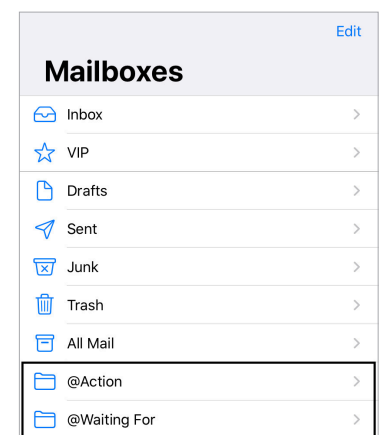
You would be reminded of the action when you review your calendar or Next Actions lists. It's one fewer place to look for actions or waiting fors, whereas the second option described below adds an additional location to look for a complete view of your reminders.

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.***

# CONCLUSION

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## 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](https://evernote.com)

### FOR MORE INFORMATION ABOUT GTD, PLEASE VISIT:

[gettingthingsdone.com](https://gettingthingsdone.com)

[gtdconnect.com](https://gtdconnect.com)