



GOOGLE® APPS FOR DESKTOP

Setup Guide

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TABLE OF CONTENTS

FOCUS OF THIS GUIDE

WHAT YOU CAN EXPECT FROM THIS GUIDE

1 FOCUS OF THIS GUIDE

UNDERSTANDING THE GTD[®] BEST PRACTICES

AN OVERVIEW OF THE KEY BEST PRACTICES OF THE GTD METHODOLOGY

- 2 WHAT IS GTD?
- 2 GTD'S FIVE PHASES OF MASTERING WORKFLOW
- 2 THREE STAGES TO INTEGRATING GTD
- 3 THE GTD WORKFLOW MAP
- 4 THE GTD WEEKLY REVIEW[®]

APPLYING GTD TO GOOGLE[®] APPS

SETTING UP GOOGLE APPS FOR GTD

PROJECTS AND NEXT ACTIONS

- 5 OPTIONS FOR ORGANIZING PROJECTS AND NEXT ACTIONS
- 5 THE MOST COMMON GTD LISTS
- 6 CREATING PROJECTS AND NEXT ACTIONS LISTS IN GOOGLE TASKS
- 9 CREATING A NEW TASK
- 10 USING DUE DATES
- 10 EXPLANATION OF THE COMMON GTD LISTS
- 15 OPTIONS FOR PROJECTS
- 17 LINKING BACK TO EMAILS
- 17 LINKING PROJECTS TO THEIR RELATED ACTIONS
- 18 THE GTD WEEKLY REVIEW TIES IT ALL TOGETHER
- 18 CUSTOMIZING YOUR LISTS
- 19 MARKING ITEMS COMPLETE
- 19 REVIEWING YOUR TASK LISTS

TABLE OF CONTENTS (CONTINUED)

PROJECTS AND NEXT ACTIONS (continued)

- 20 USING GOOGLE KEEP TO MANAGE LISTS
- 24 USING KEEP SHORTCUTS

CALENDAR

- 25 CALENDAR MANAGEMENT
- 25 THE THREE THINGS THAT BELONG ON YOUR CALENDAR
- 26 CREATING NEW CALENDAR ENTRIES
- 26 REVIEWING YOUR CALENDAR
- 26 CALENDAR VS. TASKS
- 27 CALENDAR SHORTCUTS

EMAIL

- 28 MANAGING EMAIL
- 28 GETTING YOUR INBOX TO ZERO
- 29 TWO OPTIONS FOR MANAGING ACTIONABLE EMAIL IN GMAIL
- 30 HOW TO ASSIGN LABELS TO AN ACTIONABLE EMAIL
- 31 TURNING AN EMAIL INTO A TASK IN GOOGLE TASKS
- 32 TURNING AN EMAIL INTO A NOTE IN GOOGLE KEEP
- 33 EMAIL SHORTCUTS

REFERENCE

- 34 MANAGING REFERENCE

CONCLUSION

FINAL THOUGHTS AND NEXT STEPS

- 37 ADDITIONAL RESOURCES

FOCUS OF THIS GUIDE

WHAT YOU CAN EXPECT FROM THIS GUIDE

Our focus with this Guide is to show you how to create a seamless GTD[®] system using the native applications available from Google[®], commonly referred to as Google Apps[™] or G Suite[™]. We will refer to them primarily as Google Apps throughout this guide.

This Guide covers four components of a GTD system and the Google Apps we recommend:

Email Gmail[™]

Calendar Google Calendar[™]

Project & Next Actions Lists Google Tasks[™], Google Keep[™], or Google Drive[™]

Reference Google Tasks, Google Keep, or Google Drive

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 under used 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.

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 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 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 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 Google Apps 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.

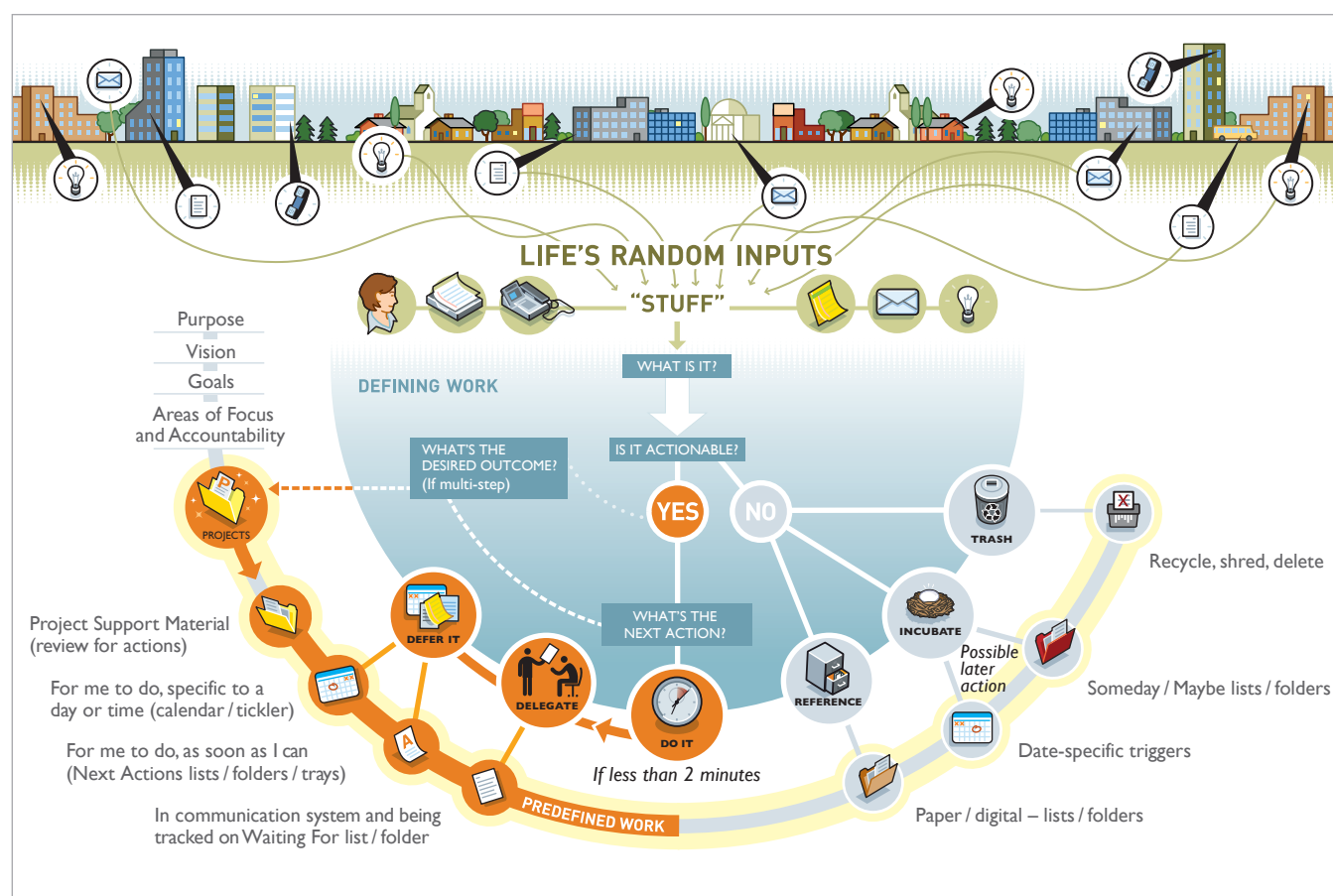
THERE ARE MANY WAYS TO GET A BASIC UNDERSTANDING OF GTD, INCLUDING:

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 a PDF download. Visit our online store at gettingthingsdone.com/store to learn more.

THE GTD WEEKLY REVIEW[®]

Any tool you use will take effort to keep clean and current, so that you can trust your action choices. Google Apps are no exception. Rest assured, the GTD Weekly Review² 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 Actions 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???

Now you're ready to apply GTD to Google Apps on your desktop!

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

APPLYING GTD TO GOOGLE APPS

PROJECTS AND NEXT ACTIONS

OPTIONS FOR ORGANIZING PROJECTS AND NEXT ACTIONS

You have several options for organizing your project and Next Actions lists in Google Apps: Google Tasks, Google Keep, or Google Drive. This Guide focuses primarily on Google Tasks, because it is closely integrated with Gmail. Google Keep is an interesting option to consider as well, and we share tips for setting up Keep at the end of this section. In the Reference section of this Guide we talk more about Google Drive. We encourage you to experiment with all three to see which is the best fit for you.

We recommend you customize the categories in Tasks to match the set of lists recommended in the *Getting Things Done* book, which we will describe in more detail over the following pages. With our method, categories will become your working “lists.”

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

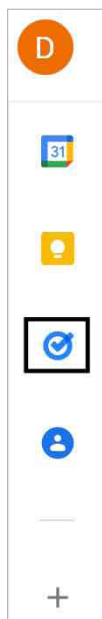
Sorting your next actions by context (lists 1–8) is recommended, because when you are choosing what to do, context will always be your first limitation. For example, if you are at work, you don’t want to see (and have to take the time to skip over) actions that require you to be at home to do. Contexts 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.

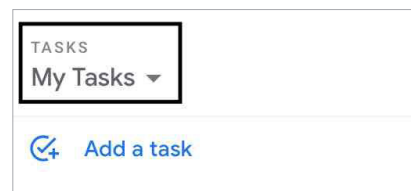
CREATING PROJECTS AND NEXT ACTIONS LISTS IN GOOGLE TASKS

Let's go ahead and set up the 10 suggested lists in Google Tasks now. You can always go back to customize these later, as you discover what will work best for you.

1. Open the Tasks application available through the Tasks icon in the right margin of Gmail or Google Calendar.

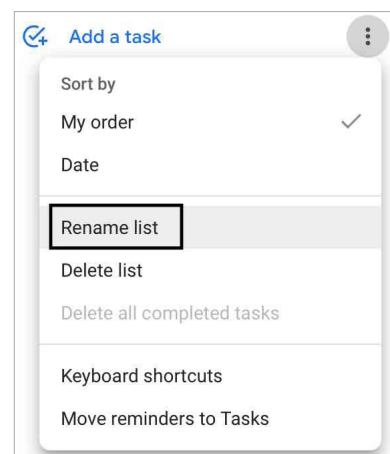


The Tasks window will expand in the right margin. If you are new to Tasks, the default list called My Tasks will appear, which we will rename to one of the 10 recommend GTD lists.

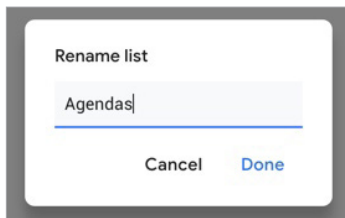


If you have used Tasks before and have created custom lists (as we will do in the next step), it will open to the last viewed List. If this is the case for you, change your list view to My Tasks using the down arrow ▼ next to the list name.

2. Click on the 3 dots ⋮ to the right of Add a task to rename the list My Tasks.

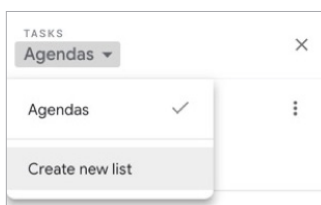


3. Change the name to Agendas.

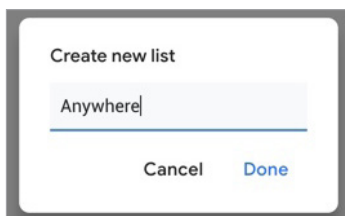


Click Done when complete.

4. For the remaining 9 lists, you will use a different method. To get started, click on the Agendas list name and choose Create new list from the drop-down menu.



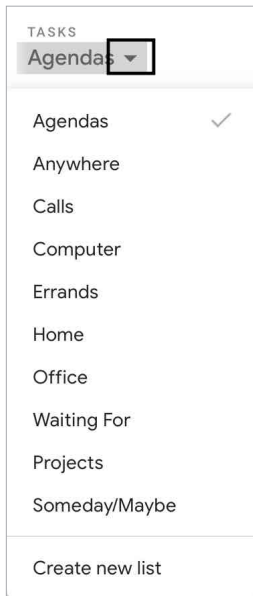
Add the next recommended list, called Anywhere. Click Done or press return to save the new list.



Add the remaining lists, repeating the step of clicking on Create new list from the down arrow each time.

Calls
Computer
Errands
Home
Office
Waiting For
Projects
Someday/Maybe

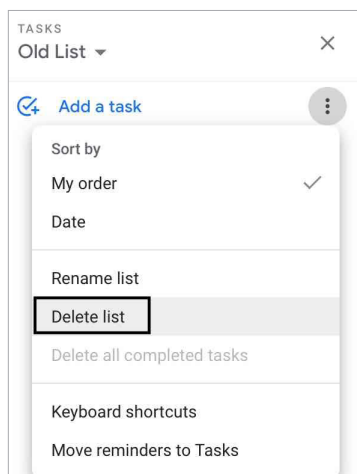
When you are complete, all of your lists will now appear under the down arrow for your Task lists. Use the scroll bar to navigate through your options.



To change the order of your lists, hover to the right of a list and click on the icon that appears. While holding your mouse down, drag the list to your desired location.



If you had previously setup Task lists and want to delete or rename those lists, that can easily be done through the 3 dots icon within each list. There is no central place to make changes to all Task lists. All changes to Task lists are made within each individual list. Deleting a list will also delete all items on that list, so tread lightly!



If you have old items that you're not sure if you can delete yet, and you want to make progress now on cleaning up Tasks, we recommend creating a list called "To Be Clarified" and move those old items to that list for now.

To move items to the To Be Clarified list, first create the list under the down arrow. Then, click on the 3 dots to the right of any list item and select a different list.

CREATING A NEW TASK

As we move on to describe each list and give you opportunities to populate your new lists, you'll want to be familiar with how to create a new Task.

Click Add a task at the top of any list



Or

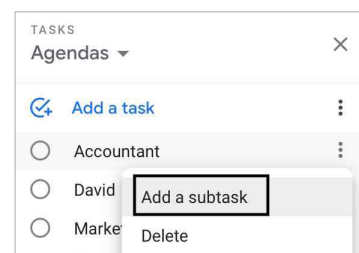
Click on any item in a list and press enter to generate a new blank Task entry.

Later, in the email section of the Guide, we describe how to create new Tasks from emails.

CREATING SUBTASKS

Google Tasks also offers a way to create subtasks. We are cautious about recommending nested lists for Next Actions, as our experience shows people can quickly overcomplicate their system this way. But, there are some useful applications for subtasks, such as serving as a bullet list for Agenda list items and creating Areas of Focus headers for projects. We'll show examples for these later in the Guide.

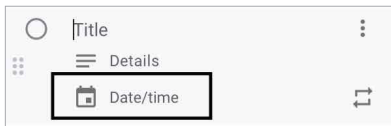
To create a subtask, click on the 3 dots to the right of the list item and choose Add a subtask.



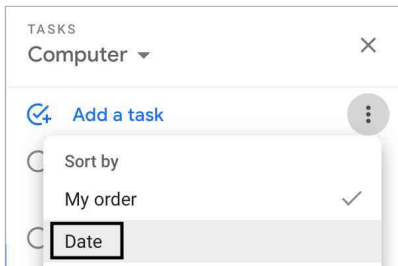
USING DUE DATES

Due dates are effective for your “hard landscape” items that will expire if not done by a specific date, or when you know that adding a due date will motivate you to complete that item. However, be careful you don’t get into the trap most people get into with due dates, which is to use them for nearly everything that needs to get done. It’s too easy to go numb to ALL of them when you start seeing the majority of your items grabbing your attention with a due date.

Due dates are added within each Task.



You can sort your lists by due date by clicking the 3 dots to the right of the list name and changing the sort to Date.



Now let’s talk about what goes on your new lists...

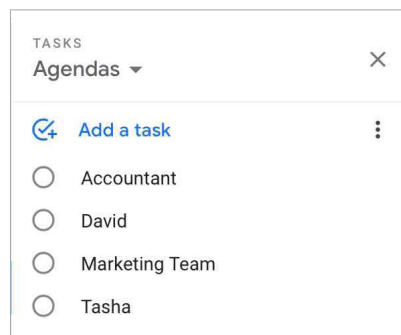
EXPLANATION OF THE COMMON GTD LISTS

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.

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.

You can create agendas two ways:

Option One: Add the person or team name in the subject line and use the details field to capture your agenda items. With this method, you only have one agenda entry per person or team.



The advantage with option one is that all of your agenda items are parked in one place, which can be easier to retrieve and/or print as one page before you go into a meeting.

Option Two: Add the person or team name in the subject line and create agenda items as subtasks. To add a subtask, right click or click on the 3 dots to the right of the task and choose Add a subtask.

- ☐ Marketing Team
 - ☐ GTD Summit
 - ☐ Partners conference
 - ☐ SEO changes
 - ☐ List of web designers

The advantage with option two is creating entries faster by simply creating a new Task, versus navigating to the agenda entry you need and adding your item to the details field, as described in option one. It also means you can take advantage of the Gmail feature allowing you to create a task from an email.

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

Take a moment now and capture any new Agendas that would make sense for you, such as a colleague or family member.

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 on this list start with a verb. That is the recommended best practice for all of your Next Actions lists, so that when it comes time to choose what to do you've already thought about what your action is.

Go ahead and capture any new items for your Anywhere list that come to mind. Don't worry about getting these lists complete yet—we primarily want you to populate a few entries to start, to build your foundation.

NOTE: 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 the Agendas list.

TASKS
 Anywhere ▾

- ☒ Add a task
- ☐ Read Ready For Anything
- ☐ Sketch ideas for garden redesign

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

TASKS

Calls ▾

×


Add a task

⋮

☐ Haircut

☐ Shea - next hike (805-646-8432)

☐ Blake in London office about next build

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 list. This list then comes into play whenever you are at your computer(s) with any discretionary time. Even if you do the majority of your work on the computer, 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 list 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.

TASKS

Computer ▾

×


Add a task

⋮

☐ Renew GTDConnect.com

☐ Give input on new website design

☐ Update board meeting notes

☐ Email Fred about summer projects

ERRANDS This holds reminders of things that 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 have notes for yourself about the item, remember the details field is a great place to park those.

TASKS

Errands ▾

×


Add a task

⋮

☐ Buy new bike helmet

☐ Pick up dry cleaning

☐ Buy this month's birthday cards
Taylor, Usha

HOME This list 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.).

TASKS

Home ▾

×


Add a task

⋮

☐ Scan old photos

☐ Fix guest bedroom door

☐ Do touch-up paint

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.

TASKS

Office ▾

×


Add a task

⋮

- ☐ Bring laptop to IT to check sound issues
- ☐ Purge old workshop materials

WAITING FOR This list 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. 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 the person has 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 or just check the status.

TASKS

Waiting For ▾

×


Add a task

⋮

- ☐ John - Updating training manual - 3/2
- ☐ Pet store - new dog bed order - 2/28
- ☐ Meg - Coaching options for Denver client - 2/25
- ☐ William - Next podcast - 1/30

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 of the Someday/Maybe list as their priorities shift. Your only commitment to items you put on the Someday/Maybe list is that you will review the choice regularly in your GTD Weekly Reviews. That should give you the freedom to capture actions or projects on this list, without the stress of feeling like you've made a commitment you may not have the resources to take on.

TASKS

Someday/Maybe ▾

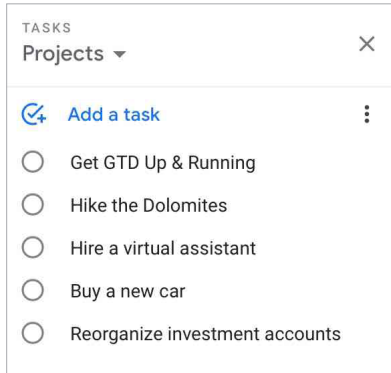
×


Add a task

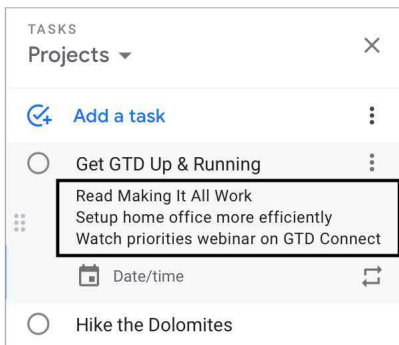
⋮

- ☐ Get new wifi printer for home office
- ☐ Hike the Camino
- ☐ Rebuild website
- ☐ Hire new marketing director
- ☐ Learn French

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 within the next 12 months. You could easily have 30 or more projects, personally and professionally. Projects should always have a defined end point.



Any notes you have about the project, also known as your project plans, can be added to the details field for each project on the list.



While this details field isn't robust enough to capture all of your project details (for example, you cannot file attachments, but you can add hotlinks to stored files), it will be useful for quick bullet lists of notes, milestones, web links, email links, and "future" actions you want to capture as text. The current Next Actions and Waiting For's for the project are tracked on those specific lists.

OPTIONS FOR PROJECTS

Like Agendas described earlier, converting tasks to subtasks is a way to create groupings and hierarchy within your lists. Subtasks are indented items in a list, creating a quick visual delineation of list items. For example:

- **Grouping projects into personal or professional**

TASKS

Projects ▾

×

 Add a task

⋮

☐ PROFESSIONAL

☐ Hire a virtual assistant

☐ Get GTD Up & Running
Read Making It All Work
Setup home office more ...

☐ PERSONAL

☐ Reorganize investment
accounts

☐ Hike the Dolomites

☐ Buy a new car

- **Grouping by Areas of Focus**

TASKS

Projects ▾

×

 Add a task

⋮

☐ FUN

☐ Hike the Dolomites

☐ Buy a new car

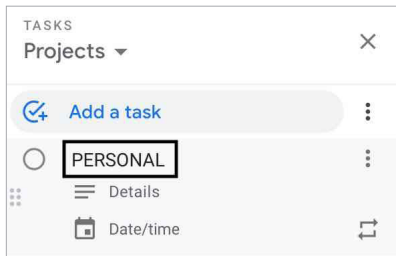
☐ DIRECTOR

☐ Hire a virtual assistant

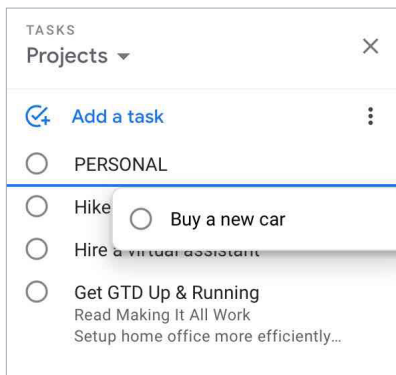
☐ PROFESSIONAL DEVELOPMENT

☐ Get GTD Up & Running
Read Making It All Work
Setup home office more ...

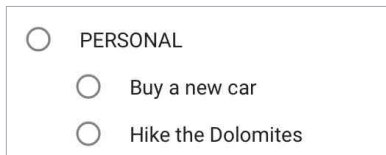
To create groupings (subtasks), create a new parent task, (e.g., “PERSONAL”).



Drag and drop all tasks that you want to group under that parent task.



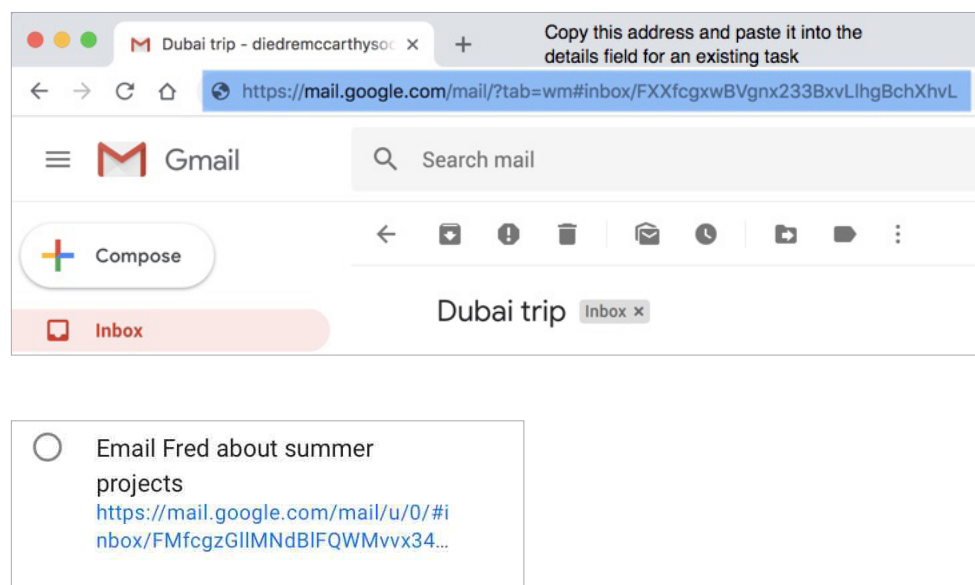
Then, click on each task you moved under the parent task, right click and choose indent or use the keyboard shortcut Ctrl +] on Windows or Command +] on Mac to convert it to a subtask by indenting it. FYI, the opposite bracket [un-indents it.



This is an optional way to sort Projects and by no means a requirement. Only do what will help you to make good decisions, moment-to-moment, and in doing your GTD Weekly Reviews. If it seems too complicated, or would require more work than you think you can maintain if you were sick in bed with the flu, stick with simple, un-indented lists.

LINKING BACK TO EMAILS

Did you know that each email in Gmail has a unique URL that will bring you directly to that email when you are signed into your Google account? That can be handy if you've pasted that email's unique URL in the details field of a project or task. To use this feature, open an email in Gmail. The URL you see in your browser window is the unique URL for that email. Copy and paste that email into the notes field of an existing project or task. (You can also test this out by opening a new browser window and pasting the URL to see that it goes to the email you intended.)

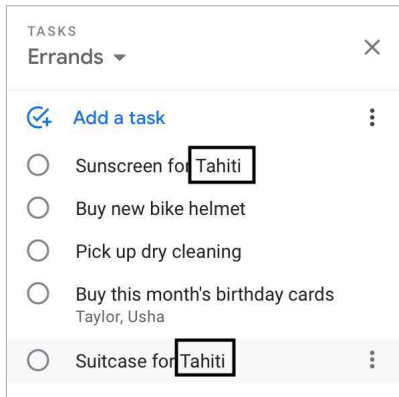


Of course, you won't need to copy the URL to create new Tasks. You can simply drag and drop the email from Gmail into a Task list or use the keyboard shortcut Shift + T. We cover more about this in the email section later in this Guide. Press Shift + ? to see a complete list of available shortcuts in Gmail and Google Tasks. (Be sure keyboard shortcuts are enabled in Settings, for this to work.)

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 Action 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? Probably more repelling than attractive for 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 naturally choose 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 to help those items stand out visually. For example, if you had a project to take a vacation to Tahiti, add the keyword “Tahiti” to every task entry that relates to that project:



Oddly, Google has not built a search function for Tasks, which would make searching Tasks more productive. But you can try using your browser search function (Typically Ctrl+F on Windows or Command+F on Mac) to search list-by-list in Tasks.



THE GTD WEEKLY REVIEW TIES IT ALL TOGETHER

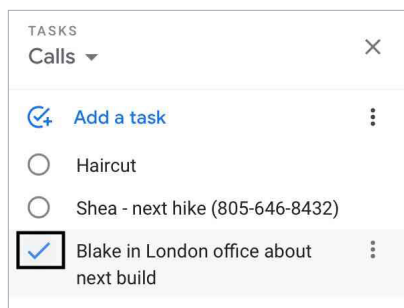
Rest assured that the GTD Weekly Review is what ties the whole thing together, ensuring that you have actions on all the active parts of your projects on a consistent basis, largely based on those project support materials, so you can trust that what you are choosing from your Action lists is current.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

CUSTOMIZING YOUR LISTS

The lists 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 list. Or, you may find you don't want to use as many contexts, and a simple list 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 lists that will work best for you.

MARKING ITEMS COMPLETE

When you complete an item on one of your lists, simply click in the circle to the left of the item.



To see completed items for each list, double click on the Completed view at the bottom of the list to expand the list of items.



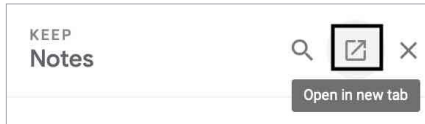
Marking an item complete or deleting it is up to you. For peace of mind, you may want to keep a record of everything you complete, in each lists completed tasks view, if that would be useful for you.

REVIEWING YOUR TASKS LISTS

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

USING GOOGLE KEEP TO MANAGE LISTS

Another option for managing your lists is in Google Keep. An icon for Keep  can also be found in the right margin of Gmail to launch a limited version in the sidebar. Unlike Tasks, which is only accessible through Gmail, Keep also offers a more feature-rich, full-size version through <https://keep.google.com> or by clicking on Open in new tab icon in the top right corner of the Keep viewer in Gmail.

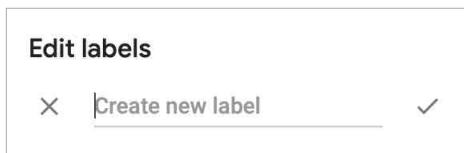


With our method, Projects and Next Actions Lists will be set up as Labels, and entries on those lists will be added as individual Keep Notes.

CREATING LISTS IN KEEP

To get started, open the full size version of Keep by clicking on the Open in a new tab icon. You will not be able to make these changes within the limited Keep viewer in Gmail.

First, create Labels to represent your list names. Click Edit labels in the left margin of Keep.



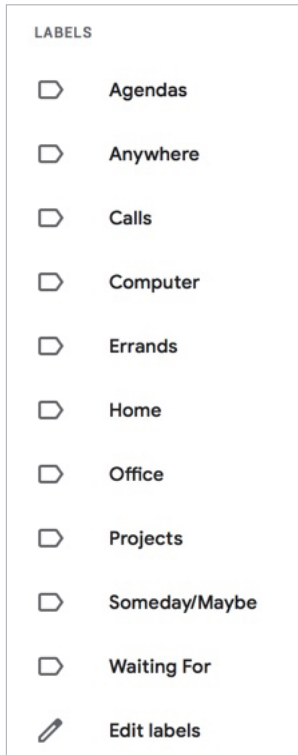
NOTE: If you don't see the Labels option, click  in the top left corner to expand the left margin.

Type your label name and then press enter or click the checkmark to save your new label.



Continue adding your label names. If you are adding the ones recommended in the *Getting Things Done* book, you would add:

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



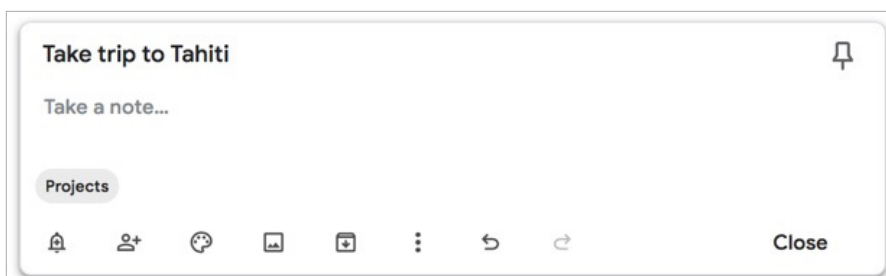
Click Done when finished adding all of your labels.

CREATING GOOGLE KEEP NOTES

Now, add individual items to your Projects and Next Actions Lists as Notes. To add a new Keep Note, start typing in the Take a note... field in the top of your screen, or use the keyboard shortcut c.



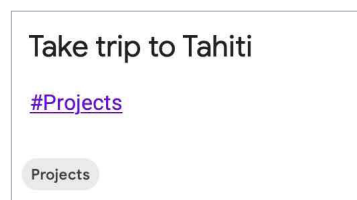
Enter a description for your project or next action in the title or description field below it. By default, your cursor will land on the description field.



If you were viewing a specific label when you create the note, it will automatically add that label. If you created the note from the all Notes view in the top left corner, no Label is assigned.

To add or change labels for a note, click  and select Add Label or Change Labels. You can also change labels by using the keyboard shortcut # to type the first few letters of the label name and select it from the picker list.

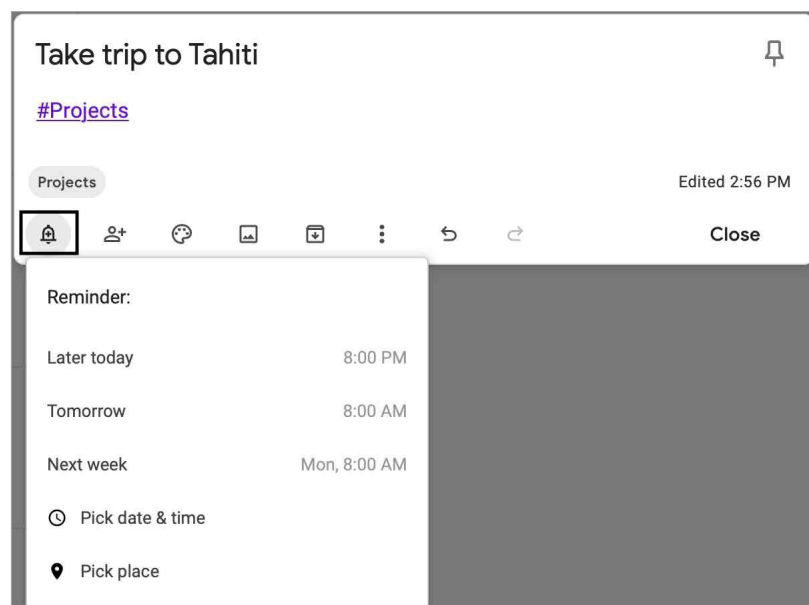
The label can go in the title or the description field for the note. Once you assign a label, it will appear in the note in a gray box:



Clicking on the label name will resort your view to only show you items with that label. To go back to all Notes, click on  Notes in the left margin.

ADDING REMINDERS AND DUE DATES IN KEEP

To assign a reminder, click on the Reminders icon on the note.



The Reminder will pop up on your Keep screen on the day and time you set. Keep Reminders will also appear on your Google calendar on the day and time they are due.

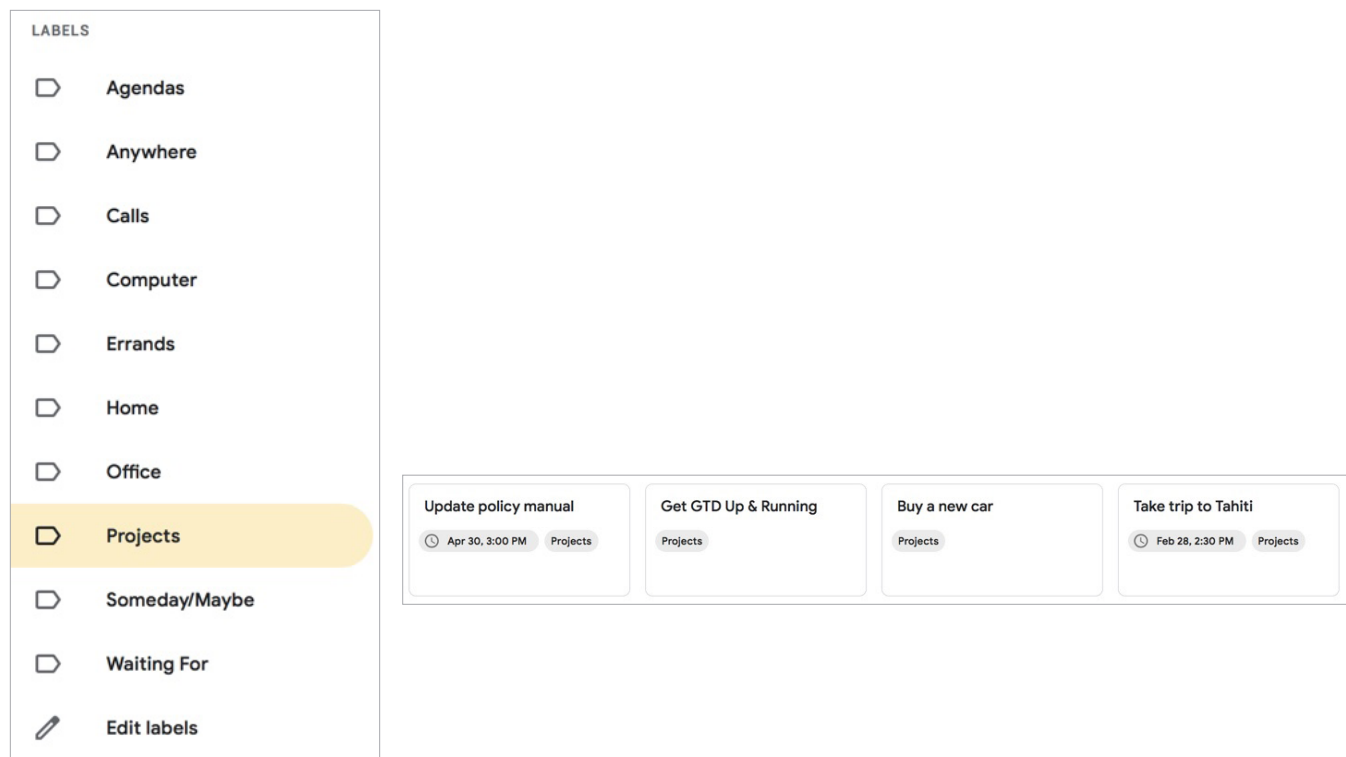
As we recommend for any reminders feature in an application—use them sparingly. Reminders don't replace regular daily and weekly reviews of your system. If you find yourself simply dismissing Reminders anytime you see them, then it's time to reassess how effective they are for you anyway.

There are other features of Google Keep Notes that you may find helpful to explore as well, such as sharing Notes, changing Note colors, adding images, adding checkboxes, archiving (marking complete) Notes, and more. It's not possible to add file attachments (other than images), but you can add hotlinks to documents in Google drive or other cloud services.



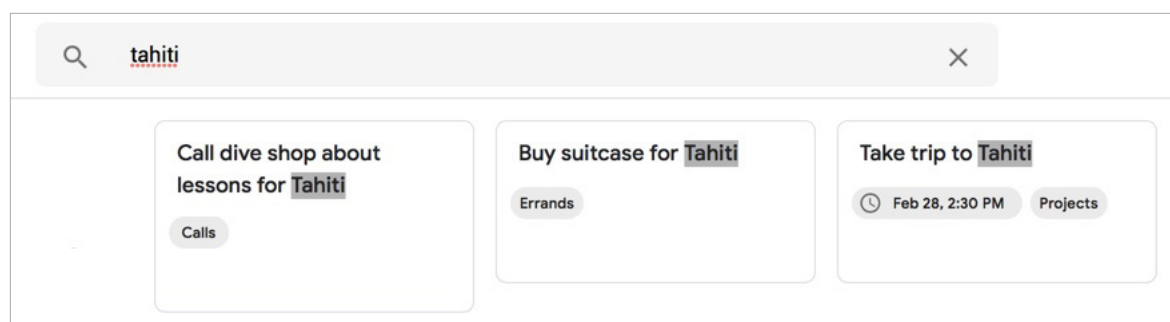
VIEWING LISTS IN KEEP

To view your lists, click on the label name under Labels in the left margin.



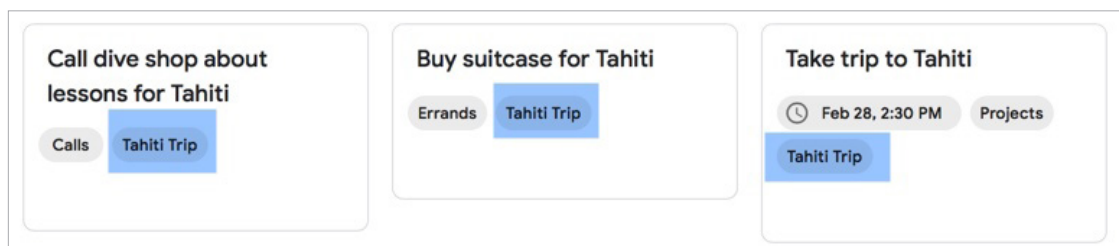
LINKING PROJECTS AND THEIR RELATED NEXT ACTIONS IN KEEP

A simple way to link your projects to their related actions is to search on a keyword for that project, such as “Tahiti.”



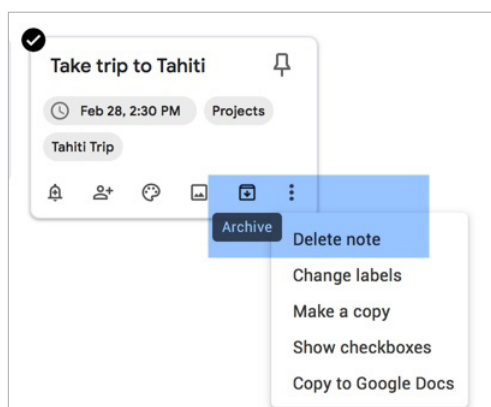
Labels will also serve to link your projects and their related next actions. While it would be overkill to do this for all of your projects, you may find it helpful for some key projects that have a lot of moving parts and it would be useful to quickly bring all of those parts together by viewing by that label.

For example, each next action on the project of Take trip to Tahiti could be labeled with “Tahiti Trip”. Each Note still has the Next Action list it relates to, but the Tahiti Trip tag gives you a quick and easy way to see all related actions for that project.



OPTIONS FOR COMPLETED ITEMS

To mark a Keep note complete, your choice is to delete it or archive it under the note options.



USING KEEP SHORTCUTS

Press Shift + ? to see a complete list of available shortcuts in Keep. (Be sure keyboard shortcuts are enabled in Settings, for this to work.)

We hope this has given you a good overview of Google Keep. Experiment to see if it's a better fit for you than Google Tasks. We'll also show some examples for storing reference in Keep, in the Reference section later in the Guide.

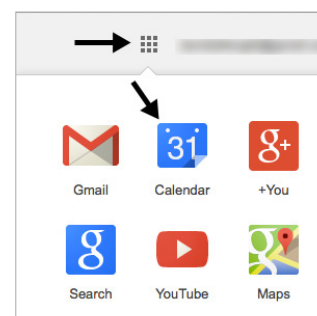
CALENDAR

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 or Keep, 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?”

Open the Calendar Application available through the shortcut window in your browser:

If you don’t see the Calendar icon, click More. This shortcut window is where you can also create and move around shortcuts for the Google Apps you use most often.



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.

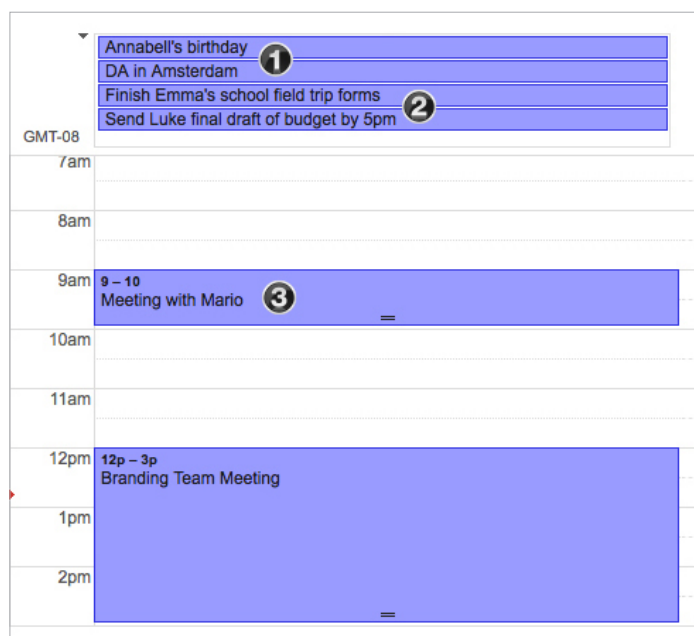
Examples:

- 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



CREATING NEW CALENDAR ENTRIES

There are many different ways to create new calendar entries in Google Calendar.

- Click once on a time slot on a calendar page to bring up a quick entry box,
- Use the keyboard shortcut Q, or
- Click the Create button in the top left corner of your calendar.

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.

CALENDAR VS. TASKS

Good guidelines for when to put something on your Calendar vs. on a Task list are:

- If it can only be done ON a day or at a specific time, it goes on the calendar.
- If it can be done BY a day, or any day as soon as you can get to it, it belongs on your Next Action lists in Tasks or Keep.

Of course, there are always exceptions to this, such as the case of an action reminder on your calendar to work on a project. That's often a smart way to block your calendar, but could be one of many days you block time for that project. So while it may not require that it be done on that day, it's a useful action to capture on a specific day, to motivate you to work on it and protect the time for yourself.

CALENDAR SHORTCUTS

Google offers some handy keyboard shortcuts for navigating through the Calendar. Here are some of the most useful ones:

- T – Go to today
- 1 or D – Day View
- 2 or W – Week View
- 3 or M – Month View
- C – Create event
- Q – Quick Add
- E – Edit event
- / – Search
- G – Go to date

Press Shift + ? to see a complete list of available shortcuts. (Be sure keyboard shortcuts are enabled in Settings, for this to work.)

We hope this has given you some useful GTD tips for managing your calendar!

EMAIL

MANAGING EMAIL

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.

GETTING YOUR INBOX TO ZERO

Getting your inbox to zero means you have made a decision about what each email means and what you want to do about it. Using the questions from the GTD Workflow Map (pictured earlier in the 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 file³)?

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 in Google Tasks or Keep.

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 Google Tasks or Keep.

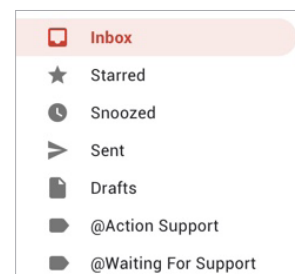
If multiple actions, what's your desired outcome? Track that outcome on your Projects list.

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

TWO OPTIONS FOR MANAGING ACTIONABLE EMAIL IN GMAIL

OPTION ONE: USE TASKS, KEEP, OR YOUR CALENDAR AS THE ACTION REMINDER

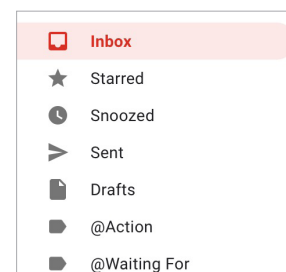
Create @Action Support and @Waiting For Support labels in Gmail to hold supporting emails for actions that are tracked on your Calendar or Next Actions lists. In this case, the labels only serve as storage buckets to hold the information you need to take the action. You would be reminded of the action when you review your Calendar or Next Actions lists in Tasks or Keep. 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.



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 or Keep. But it does mean you have to take the time to create a new Task or Keep note and define the next action.

OPTION TWO: 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 or Keep—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.

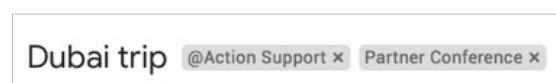


People often like this option for the quick win it gives in getting your inbox processed to zero. The downside with this option in email is that you have no place to capture the next action or due date that's associated with that actionable email (unless you go to the effort of forwarding the email to 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.

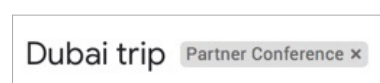
TIP: The @ symbol is a trick to push these labels to the top of your email structure for easy access.

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:



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



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.

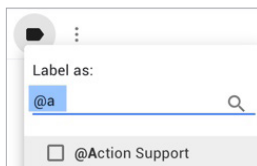
You can update your labels when you complete the action or include this in your GTD Weekly Review cleanup.

If you're not sure which option (One or Two described above) for managing actionable email is best for you, choose either to start and try it consistently for a few weeks to build productive new habits. If you find it's not working, try the other option. Whichever option you choose, work it consistently for a few weeks before giving up on it. You'll learn in that time whether it's going to be a fit for you and your workflow.

NOTE: The key with either option is that you never label an email that has a current Next Action or Waiting For with only a project or topic label as your sole reminder. Doing that forces you to dig through many emails to find your current actions. As long as the email is a pending action, it would get assigned @Actions/@Waiting For or @Action Support/@Waiting For Support until you complete the action.

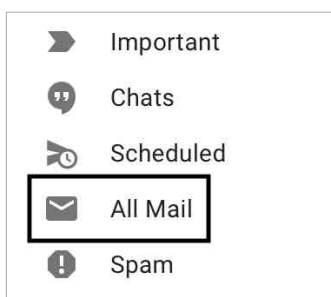
HOW TO ASSIGN LABELS TO AN ACTIONABLE EMAIL

1. From within an open email, **type the keyboard shortcut L**, or click on the Labels icon  to bring up the Labels menu. (Be sure shortcuts are turned on in Settings for this to work.)
2. **Type the first few characters of the label name** to choose it from the list, or manually go to the label using your arrow keys on your keyboard.



If the label does not already exist, type the name of the desired label into the blank field and select the (create new) option.

Add as many labels as you need for the email. When you are done assigning labels, type the keyboard shortcut E, or click on the Archive icon  to Archive the email. Archiving simply means it removes the Inbox label (which was automatically added when the email arrived in your inbox). The email will be moved out of the Inbox and only appear under the Labels you assigned to it. If you Archive an email without assigning any labels, it will only appear under the All Mail view:

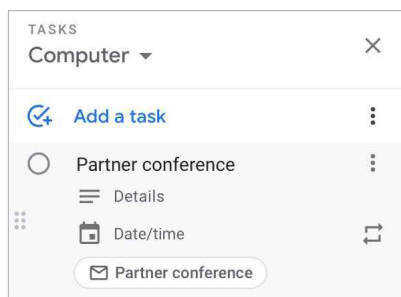


TIP: When composing a new message where you need to track a response, assign it to @Waiting For label before you send it. Click  at the bottom of the New Message window, select Label, @Waiting For, then Apply. This saves you remembering to open Sent Mail and assigning the @Waiting For label after you've sent the message.

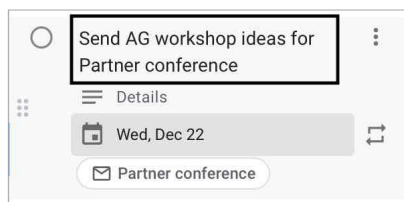
TURNING AN EMAIL INTO A TASK IN GOOGLE TASKS

Gmail has a useful function to turn emails into a new item in Google Tasks. To use this feature, follow these steps:

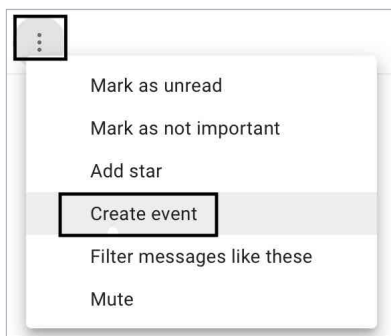
1. **Open the email** (can be currently assigned to any label, not just the inbox).
2. **Use the keyboard shortcut Shift + T or click the Tasks icon**  at the top of the message.
3. A new Task is created with a link to the email inside the Task. The subject line of the task is copied from the subject line of the email. The original email is still located in Gmail, assigned to the same label(s) you copied it from.



4. **Edit the subject line** to accurately reflect a project name with a clearly defined outcome or a next action with a clearly defined verb describing your next physical, visible step.



5. Click the 3 dots to the right of the new Task and **choose a list for the Task** if the list it was created under was incorrect (Gmail chooses the last viewed Task list as the default.)
6. **Go back to Gmail and file or delete the email.** If the email was located in your Inbox, archive it to the appropriate label other than the Inbox (such as @Action, @Action Support, a Project folder or All Mail) if you might need the original email in the future. This is an important step, as creating a new Task from the email only created a link to the email in Gmail.



Emails can also be turned into a new Calendar entry if there are calendar details in the email. Click the More icon  at the top of your Inbox. Choose Create event. A new event is created with today's date and the contents of the email are copied to the notes field for the calendar entry. Unlike email, new calendar entries created this way are not linked back to the original email.

TURNING AN EMAIL INTO A NOTE IN GOOGLE KEEP

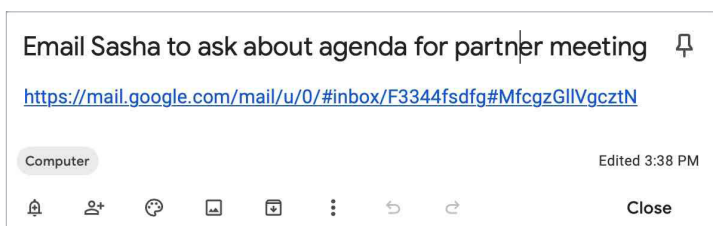
If you are using Google Keep for any of your data, such as action lists, project support, or reference, we recommend installing the Chrome browser extension. This extension will give you the ability to create a new Keep note from an email, with a link back to the original email stored in Gmail.

To install the extension:

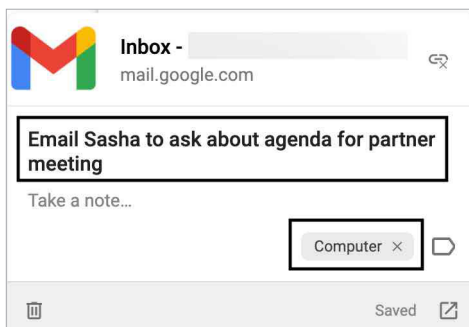
1. Go to <https://chrome.google.com/webstore/category/extensions>
2. Search for Keep.
3. Install the Extension in the same Google account where your Keep account is stored.

To use this extension:

1. Open an email.
2. Click on the Keep Extension in your Chrome browser window.
3. Add your Next Action (or project name if adding a new project), assign label(s).



Your new Note is automatically saved in Keep. View it in Keep to add any additional details.



EMAIL SHORTCUTS

Google offers some handy keyboard shortcuts for navigating through Gmail. Here are some of the most useful ones:

- C – Compose a new message. Shift + c to compose a message in a new window.
- E – Archive a message (which moves it to assigned labels or All Mail if no labels are assigned)
- R – Reply to a message
- # – Delete a message
- F – Forward a message
- L – Open the Labels menu
- Shift + T – Creates a new task from an email message
- V – Open the menu to move a message
- . – Open the More menu
- Tab then Enter – Send a message
- / – Search
- G then I – go to Inbox

Press Shift + ? to see a complete list of available shortcuts. (Be sure keyboard shortcuts are enabled in Settings, for this to work.)

We hope this has been a useful overview of Gmail and has given you some helpful GTD tips for being more productive!

REFERENCE

MANAGING REFERENCE

Reference lists will be as important to a functioning GTD system as your Project list, Next Actions lists and calendar. Reference can be comprised of a limitless number of potentially useful (and fun!) non-actionable simple reference lists and checklists that you want to keep. Reference can also include your project plans for your current projects.

This functionality of capturing reference 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 a place you traveled to?
- 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?
- wanted 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 categories and lists to play with:

- 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

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

There are a variety of Google applications for managing your Reference. From a GTD perspective, it needs to be a place that is easily accessible, sort-able, and retrievable in a logical, intuitive way.

Some people prefer to put all of their lists in Google Tasks, and not split them out between Tasks for projects and actions and another application for reference. By all means do that, if you think that would work better for your workflow. Simply set up these suggested reference lists in Google Tasks, like you did for Projects and Next Actions earlier in this section. Just be sure your reference lists are clearly delineated from your action lists.

People have also found it valuable to keep their Reference lists in Google Drive (<https://drive.google.com>) in a Reference Folder.

Example of reference lists set up in Google Drive:

My Drive ▶ Reference	
Name ↑	
 Birthdays/Anniversaries	
 House Maintenance Checklist	
 Next time visiting mom...	
 Places to donate stuff	
 Travel Checklist	
 When in Chicago....	

House Maintenance Checklist

- Change air filters
- Check for leaking sprinklers
- Trim back lavender
- Fertilize fruit trees
- Check smoke detector batteries

Travel Checklist

Check in for flight
Forward office phone to cell
Set Out of Office on email

PACK:
Laptop
Travel charger
Phone charger
Bluetooth headset
Passport
...

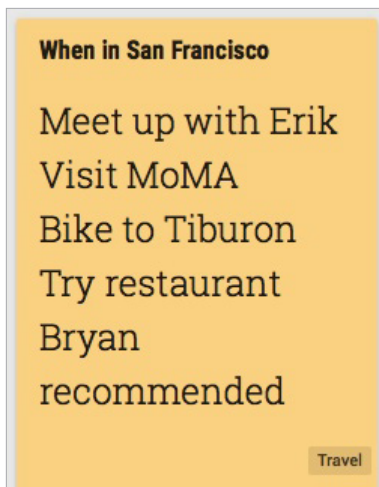
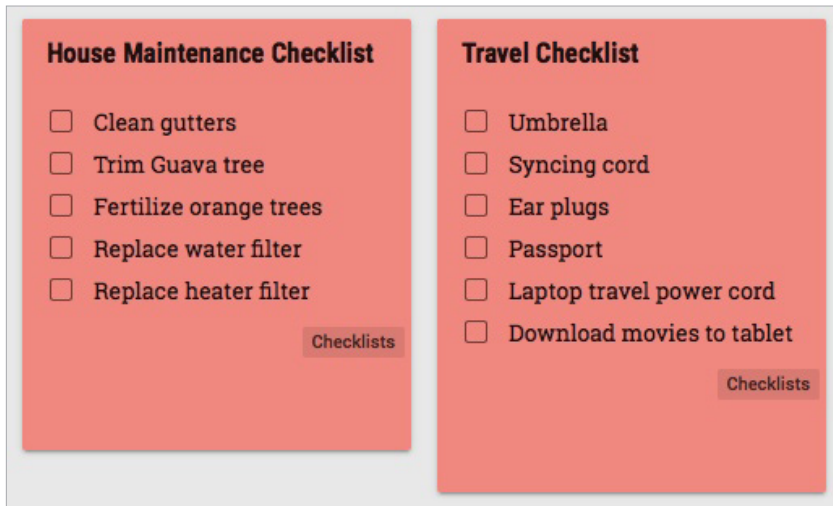
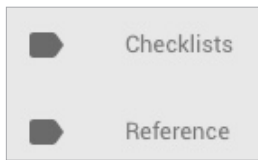
Places to donate stuff

Humane Society
Thrift Store on Montgomery
Thrift Store on Oak

You may also want to consider Google Keep (<https://keep.google.com>) for your reference.

An easy way to setup Google Keep for reference is to create your primary categories as Labels (e.g., Reference, Checklists, Travel, etc.) and the Notes could store lists.

Example of reference lists setup in Google Keep:



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.

PLEASE CONTACT GOOGLE FOR TECHNICAL SUPPORT WITH GOOGLE APPLICATIONS:

<https://support.google.com>

FOR MORE INFORMATION ABOUT GTD, PLEASE VISIT:

gettingthingsdone.com

gtdconnect.com