



# EVERNOTE<sup>®</sup> FOR 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<sup>®</sup> for Mac<sup>®</sup> for your GTD<sup>®</sup> 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 plans, Next Actions lists, and Reference.

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

# 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<sup>®</sup> 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 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 captured by asking the key clarifying questions, clarifying what something is, and what you want to do about it.

**2. IMPLEMENTATION** You have installed at least the basic gear to support a GTD system, including ubiquitous 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”.

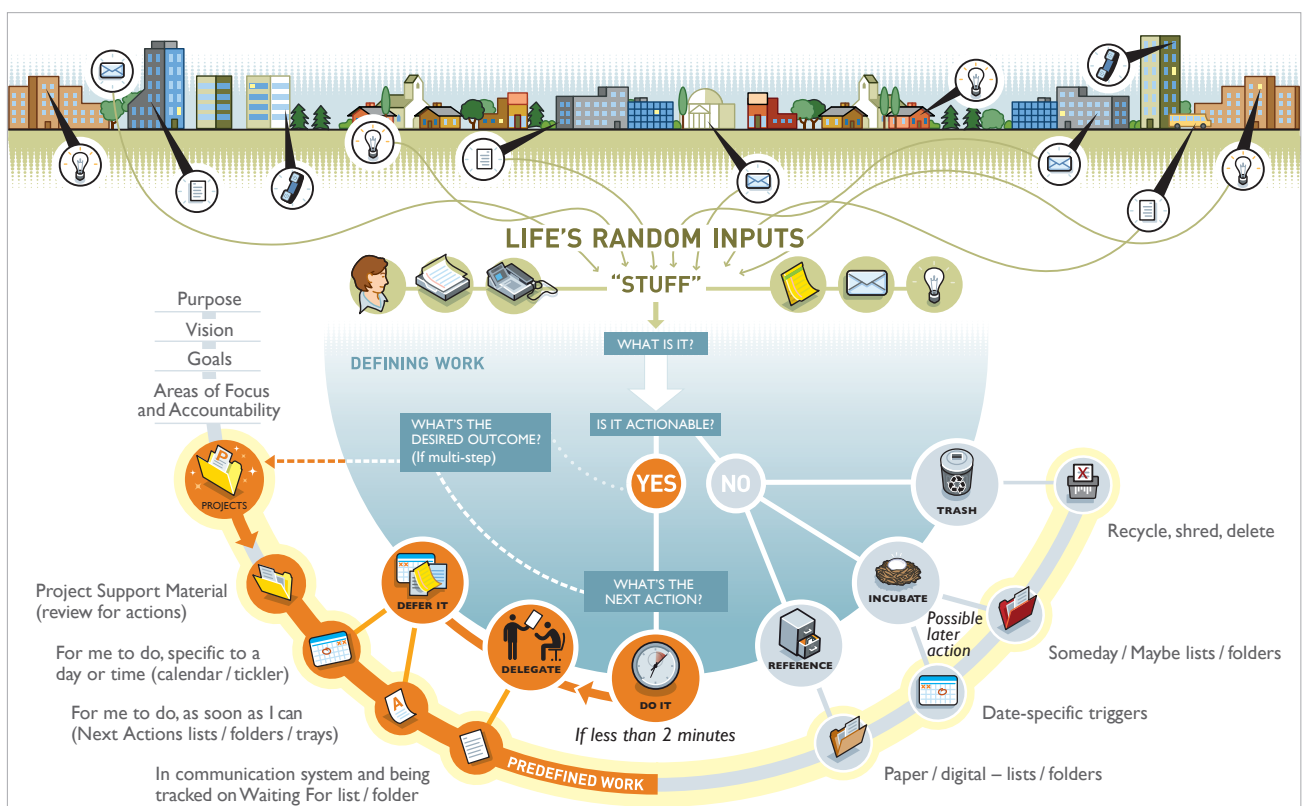
This Guide will leap forward to the Implementation stage, by configuring Evernote as an organizing tool for your projects, actions, and reference. Success at the implementation stage depends on your understanding of GTD. If you are committed to GTD and experiencing stress-free productivity, don't shortchange 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. Available from booksellers.

**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](http://gettingthingsdone.com/store) to learn more.

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## THE GTD WEEKLY REVIEW<sup>®</sup>

Any tool you use will take effort to keep clean and current, so that you can trust your action choices. The Evernote application is no exception. Rest assured, the Weekly Review<sup>2</sup> 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 action lists is current. The 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???

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



# APPLYING GTD TO EVERNOTE® FOR MAC

## 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     |

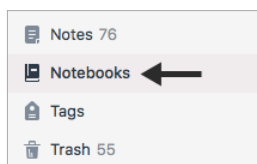
***When we refer to “Notebooks” throughout this Guide, we could just as easily be saying “lists”, and vice versa.***

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.

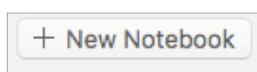
## SETTING UP LISTS IN EVERNOTE NOTEBOOKS

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. We encourage you to give these lists some time, in order to see the value in sorting by context, if this concept is new to you.

1. Click on the Notebooks tab in the sidebar of Evernote.



2. Click on the New Notebook button or use the keyboard shortcut (⌘ ⌥ N)



3. Each time you click the New Notebook button, it will create a new Notebook and give you a field to enter a new name (the default will be something with your Evernote account in the name). Pressing enter/return will save the new Notebook name. Click the New Notebook button to create the next one. Create ten new Notebooks, following the list of ten above so that you end up with each list having its own Notebook.

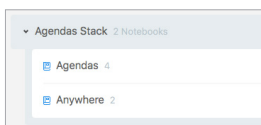
If you make a mistake when typing the Notebook name, or ever want to change the name, simply click on the Notebook name once (not double-click, which will open up the Notebook), and it will go into edit mode. The end result will be ten new Notebooks:

Agendas 4	10/3/16
Anywhere 2	10/3/16
Calls 5	10/5/16
Computer 10	7/14/16
Errands 4	7/14/16
Home 3	10/3/16
Office 3	3/16/16
Projects 9	12/21/16
Someday/Maybe 9	10/3/16
Waiting For 6	10/5/16

## STACKING YOUR NEXT ACTIONS NOTEBOOKS

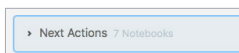
Let's create a stack for all of the Notebooks that are related to Next Actions for easy access and logical grouping.

1. Drag and drop the Anywhere Notebook into the Agendas Notebook. A new stack is created:



Continue this step with the remaining Next Actions-related Notebooks: Calls, Computer, Errands, Home, and Office. When you are done, all 7 Next Actions Notebooks will be in one stack, under the title "Agendas Stack".

2. Click on the name "Agendas Stack" and rename it to "Next Actions".



After stacking all of your Next Actions Notebooks, your Notebooks view will now look like this:

Next Actions 7 Notebooks		
Agendas	4	10/3/16
Anywhere	2	10/3/16
Calls	5	10/5/16
Computer	10	7/14/16
Errands	4	7/14/16
Home	3	10/3/16
Office	3	3/16/16

Now, let's talk about what goes on these lists...

## EXPLANATION OF THE COMMON GTD LISTS

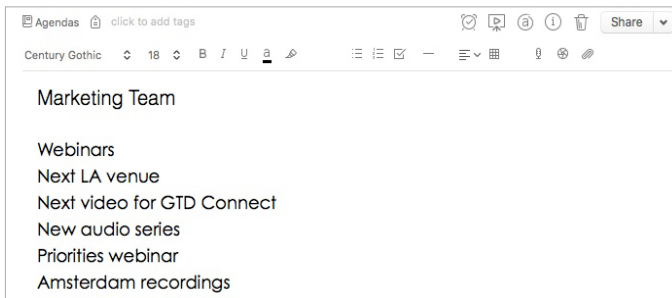
**AGENDAS** This list tracks the topics and agenda items for people you interact with regularly. For example, if you have a standing meeting with a particular team, and want to capture agenda items to bring up at the next meeting, this is the place to capture them. The Agenda list is not for tracking 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.

To create an agenda for a particular person, open the Agendas Notebook and click on the  button or use the keyboard shortcut (**⌘ N**).

Then, enter the name of the person or group for which you want to create an agenda (e.g., Boss, Spouse, Marketing Team). For example:

All Notes Agendas	
Title	
Accountant	
Boss	
Marketing Team	
Spouse	

To capture specific items for that Agenda list, enter those in the note field for the entry. The note will remain static, as long as you have a need for agenda items for that person, whereas the note field will be dynamic, as your agenda topics for them change.

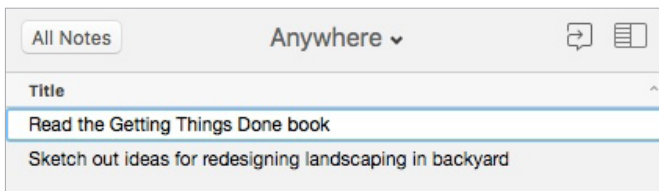


You could easily have a dozen people and meetings that you are tracking this way—your direct reports, your boss, your assistant, your spouse, the weekly staff meeting, the monthly board meeting, etc.

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

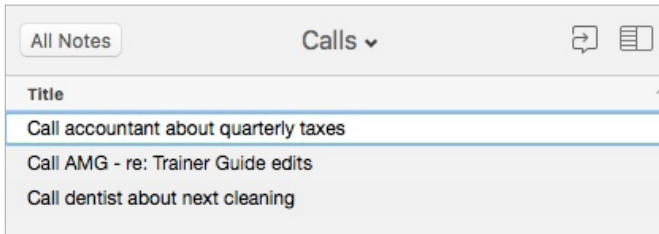
***Go ahead and capture any new Agendas as new notes within your Agendas Notebook, as placeholders, that would make sense for you. Tap the + New Note in Agendas button to add new items. The note is automatically saved.***

**ANYWHERE** An action that can be accomplished, without any restriction about where it's done, would go on this list. Notice on the example below that all the next actions on this Notebook start with a verb. That is the recommended best practice for all of your Next Actions notes, so that when it comes time to choosing what to do; you've already done the thinking about what your action is.



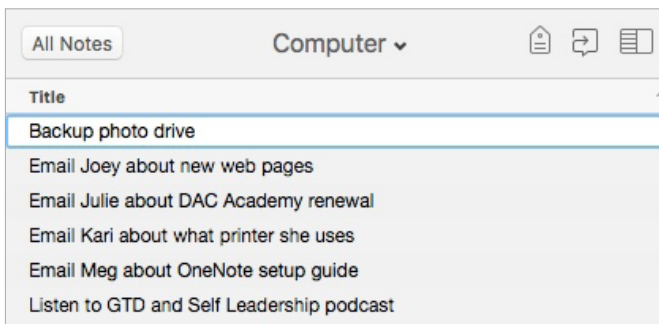
***Go ahead and capture any new items for your Anywhere Notebook that come to mind.***

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



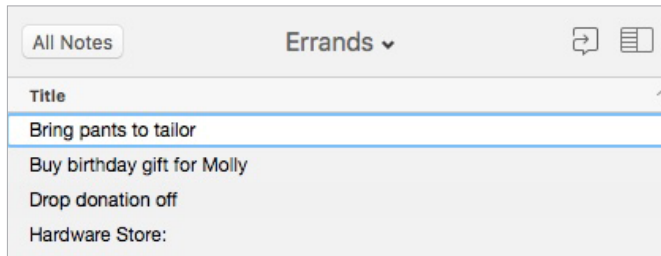
***Go ahead and capture any new items for your Calls Notebook that come to mind.***

**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 Notebook. This Notebook then comes into play whenever you are at your computer(s) with any discretionary time. Even if you only have a computer in the office, 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 Notebook 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.



***Go ahead and capture any new items for your Computer Notebook that come to mind.***

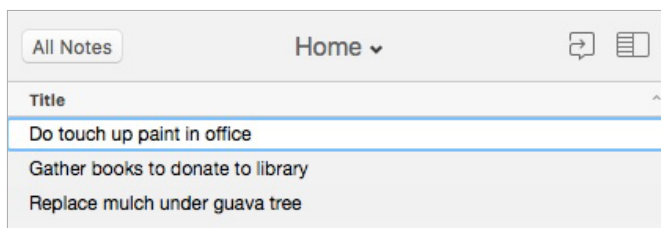
**ERRANDS** This holds reminders of things that you need to do when you are “out and about” (e.g., take something to the tailor, buy something at a store, etc.). If you are likely to think of more than one thing to do or get at one of those locations (like the hardware store), make “Hardware store” the Subject and put your running list of things to get/do there in the Notes field.



If you are a regular road warrior you might consider having two errands Notebooks—one for things you could do anywhere, in any city, and one for errands that need to be completed where you live.

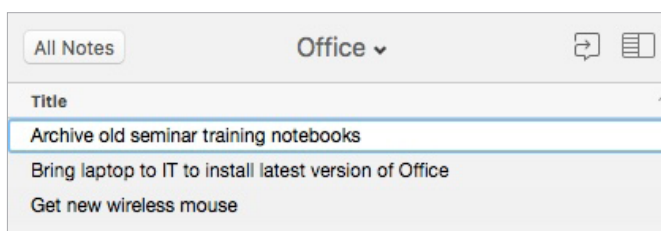
***Go ahead and capture any new items for your Errands Notebook that come to mind.***

**HOME** This Notebook 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.).



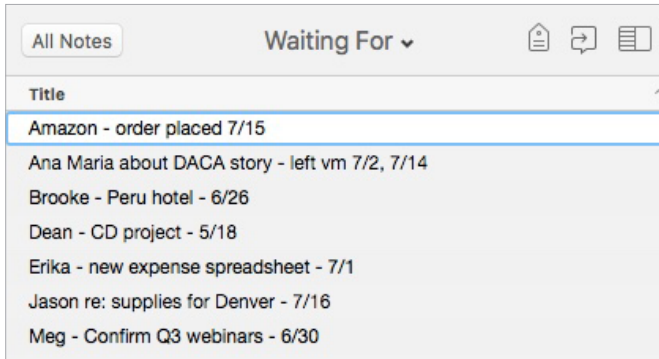
***Go ahead and capture any new items for your Home Notebook that come to mind.***

**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.



***Go ahead and capture any new items for your Office Notebook that come to mind.***

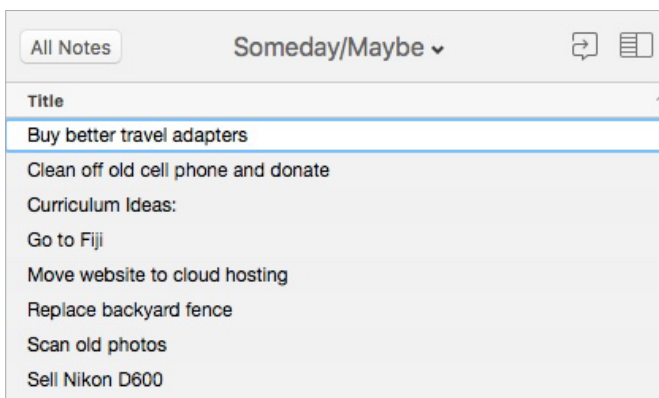
**WAITING FOR** This Notebook keeps track of all the actions, projects, and deliverables that you want to happen, but which are someone else's responsibility. It could be something you've ordered that hasn't come yet, something you've handed off to your assistant for which you're waiting on a response, 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 they have not responded. The Waiting For list should be reviewed as necessary (at least once a week in the Weekly Review) triggering appropriate actions on your part to follow up, light a fire, or just check the status.

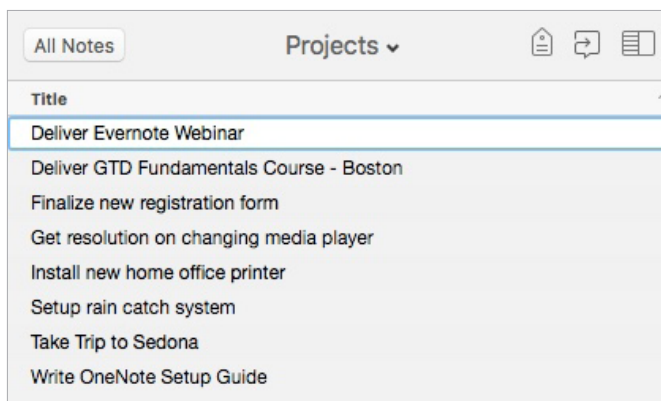
***Go ahead and capture any new items for your Waiting For Notebook that come to mind.***

**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 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.



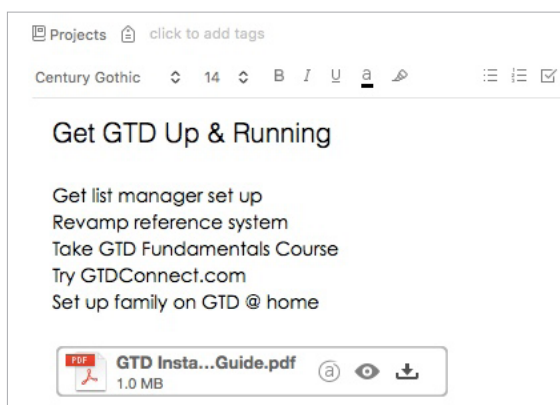
***Go ahead and capture any new items for your Someday/Maybe Notebook that come to mind.***

**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.



Any notes you have about the project, also known as your project plans, can be added to the Notes field for each project on the list. While this Notes field may not be robust enough to capture all of your project details, nor will it make sense to transfer everything to this location (such as all of the emails also related to the project), it will be useful for quick bullet lists of notes, files, milestones, and “future” actions you want to capture. The current Next Actions and Waiting Fors for the project are not tracked in this note field, but in those Notebooks.

Example of Project Plans captured in the notes field of a Note entry:



To insert attachments into the note field, click on the audio, snapshot, or file icons in your Evernote toolbar.



You can also insert links to other notes in Evernote. To do this, select the note you want to link to, select Note in your menu bar, and Copy Note Link. You can then paste this Note Link into the notes field of another Note. This can be helpful when you have supporting information in other Notes, related to your project, and want quick access to that information.

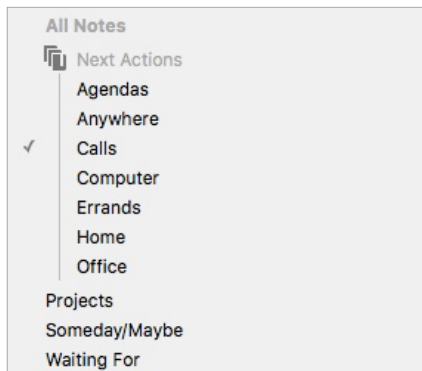
***Go ahead and capture any new projects for your Projects Notebook that come to mind.***



## 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, click on the entry from your list of Notes. Click on the Notebook name at the top of the note entry for the menu of Notebook choices. Select a new Notebook from the list. Or, to do this with shortcut keys, select the note and press (^ ⌘ M). Then select the new Notebook to assign the note to by using your arrow keys or typing the first letter of the Notebook name. Press enter to save your new selection.



## 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 was probably more repellent to 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 WEEKLY REVIEW TIES IT ALL TOGETHER

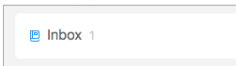
Rest assured, the Weekly Review is what ties the whole thing together, ensuring that you have actions on all the active parts of your projects on a consistent basis, largely based on those project support materials, so you can trust that what you are choosing from your Next Actions Notebooks is current.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

## CUSTOMIZING YOUR CONTEXTS

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

## CREATING AN INBOX NOTEBOOK IN EVERNOTE

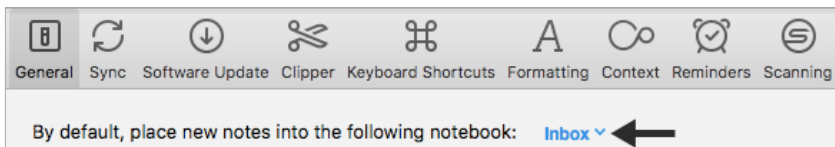
One additional Notebook we recommend in Evernote is called Inbox. This kind of Notebook can be used to capture Mind Sweep items that still need to be processed. For example, you may have a thought or idea on the fly, not know exactly what the next action is yet, but you don't want to lose the idea. Or, you may see something on the web you want to get back to and “clip” it into the Inbox. Sending it to the Inbox Notebook will store the idea until you are 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 the items in this Notebook down to zero on a regular basis.

***Go ahead and set up a new Notebook called Inbox.***

If you set up this Notebook, we also recommend changing the default setting for new notes to this list. Go to Preferences > General > select Inbox Notebook.



## THREE 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 three ways to do this:

### OPTION ONE: EMAIL DIRECTLY TO THE NOTEBOOK

When you create an Evernote account, you are assigned a unique email address, which is used for emailing information to your Evernote account. 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. 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 clarifying 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.



To:	myusername.uniquenumber@m.evernote.com
Cc:	
Bcc:	
Subject:	Blair

All Notes	Inbox ▾	🗨️ 📄
Title		
Blair		

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.

To:	myusername.uniquenumber@m.evernote.com
Cc:	
Bcc:	
Subject:	Blair @Calls



All Notes	Calls ▾	 
Title		
Blair		
Call accountant about quarterly taxes		
Call AMG - re: Trainer Guide edits		
Call dentist about next cleaning		

***We only recommend sending items directly into your Next Actions Notebooks if you have a clearly defined next action. This method is not for capturing unprocessed Mind Sweep items or anything that you still need to decide what it means and what you want to do about it.***

## OPTION TWO: USE WEB CLIPPING

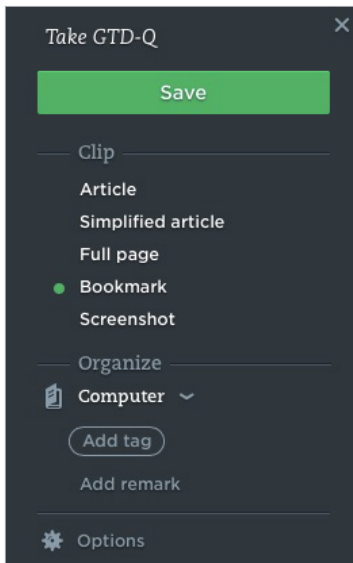
To enable the web clipping feature, download the Evernote Web Clipper under Preferences > Clipping. This feature can be handy when you see something on the Web that you want to capture into your GTD System—for example a Mind Sweep item for your Inbox, a next action for one of your Next Actions Notebooks, or a reference item for your Reference Notebooks (which we will talk more about in a later section).

***Install the Evernote Web Clipper application now.***


Once you install the Evernote Web Clipper, look for the icon in your browser toolbar: 

Let's say you want to capture a next action to take the free GTD-Q assessment:

1. Go to [GTDIQ.com](http://GTDIQ.com)
2. Click on the Evernote icon in your browser toolbar
3. The Web Clipper window will appear. Capture your next action in the top line of the Clipper box (e.g. Take GTD-Q), select a Notebook to organize the new entry to (e.g. Computer), and select to clip the article, simplified article, Full page, Bookmark, or Screenshot. You can also add a tag if that would be helpful.
4. Click Save when done.



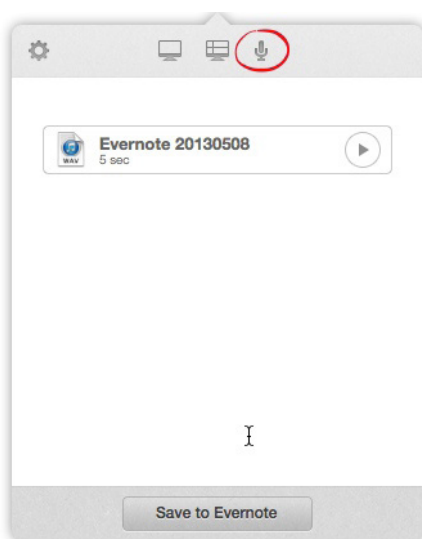
### OPTION THREE: USE QUICK NOTES

When you install the Evernote desktop application, you will also get a handy Quick Note feature that will install in your Mac OS toolbar. The icon looks like this  and will appear when Evernote is open.

#### ***Locate the Evernote Quick Note application now.***

1. Click on the icon to open a new Quick Note (^ ⌘ N). You can type directly into the note, drag items into the note, speak audio into the note, or do a screen shot. The note will automatically be sent to the default inbox for new, unassigned notes, which should be Inbox based on the setting you changed earlier. For example, try capturing an audio clip and saving it to Evernote.
2. Go to Evernote to see the results of your new Quick Note.

Quick Notes are particularly useful for those quick top of mind items. Get in the habit of capturing these as they show up, so your mind can stay present and focused.



## REVIEWING YOUR NOTEBOOKS

On a daily basis, we recommend reviewing your Next Actions Notebooks (the ones we set up as contexts, such as Calls, Computer, etc.) in Evernote, whenever you get a chance. On a weekly basis, in your Weekly Review, we recommend reviewing all of your actionable Notebooks in Evernote, 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 DUE DATES

Since Evernote was not built as a traditional list manager, it does not currently include typical list manager functions like assigning a due by date; and if a next action needs to be done ON a date, it should be going in your Calendar, not Evernote, as described on page 24. There are several ways to work around this. One of the easiest ways is to add the due date to the subject line. For example:

Erika - New expense report spreadsheet - due 6/1

Another option is to create a tag or (tags) that represent due dates. For example, “due this week”, “due soon”, or “before next trip” if you travel frequently. For example:





Title	Erika - New expense report spreadsheet
Notebook	Calls
Tags	Due soon


For those tags to work, it means you are actively reviewing the items under those tags with as much discipline as you are looking at your Next Actions lists. Again, use tags if they will benefit your system and not become a burden on your ability to capture new entries quickly and/or become slowed by the requirements of adding and maintaining those tags.

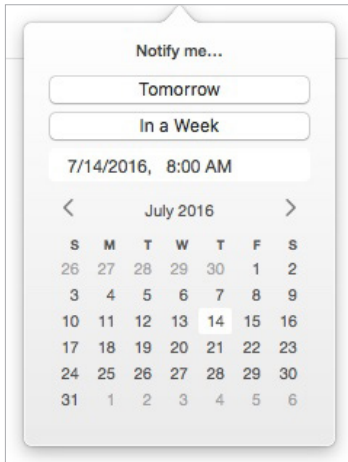
A third option is to assign a reminder to a note. To assign a reminder, select the alarm icon  at the top of the note window.

### Adding a reminder will mean:

1. Your notes with assigned reminders will be included in a special “Reminders” sort at the top of your Notebooks.

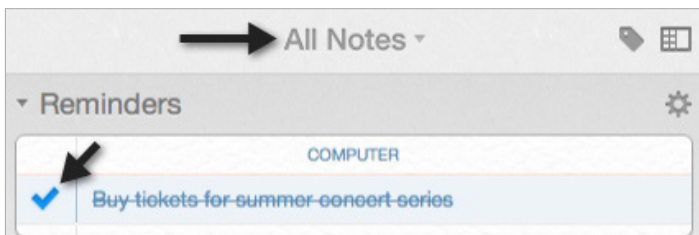
All Notes	Computer			
Reminders				
Add a reminder to Computer				
Email Julie about DAC Academy renewal				
Listen to GTD and Self Leadership podcast				
Backup photo drive				

2. You also have the option to add a date to the reminder, which means you will receive in-app  and email notifications on the day the note is due, on the day you specify. If you want to be notified a day before the note is due, trigger yourself a day earlier to give yourself “buffer” time to work on it.



What we like about the reminders feature is that it will give some people the additional peace of mind that they will be triggered about any timely notes coming due. It could replace the “due” soon tag we suggest above, as it would mean items that have a particular importance will sort in the reminders area of your Notebook view and an email will be sent if a date is assigned.

To view all notes with reminders assigned, go to the All Notes view:



To mark a reminder complete, select the check box next to the note. This does not mark the actual note complete—it will still be in the Notebook where you assigned the note. Checking off the reminder complete is only telling Evernote you are completing the reminder.

We suggest that if you do use due dates on your notes, or this feature of assigning a date through Reminders, that you do so sparingly. This will save you from unnecessary (and potentially unwanted) emails in your inbox. It will also build trust in your system that the items that truly need your timely action and attention will be highlighted.

If you are emailing yourself new notes, as we described on page 15, you can also add a reminder in the subject line of the email. The symbol to use to assign as reminder is an exclamation point. If you want to add an alarm to the reminder, you would add an exclamation point, followed by the word tomorrow, or a date with numeric year, month, day separated by slashes. Here are 3 different examples:

- Set as reminder: !
- Set as reminder for tomorrow: !tomorrow
- Set as reminder for a specific date: !2016/12/30

So to put it all together with a next action, assigning context, and setting a reminder, the subject line of your email could look like:

**Call David Allen @Calls !tomorrow**

That note will then be sent automatically to your Calls Notebook, with a reminder, with an alarm set for tomorrow.

Adding a reminder does not replace consistent reviews of your actionable Notebooks. We still suggest reviewing your Calendar frequently throughout the day, your Next Actions Notebooks daily or as often as you can, and your Projects Notebook weekly in your Weekly Review.

## MARKING ITEMS COMPLETE

Another challenge with Evernote not functioning as a traditional list manager, is the lack of a “mark complete” option on Notebook entries. We’ve found an easy workaround for that though. For those items you want to save, as a record of having completed it, save them to a new Notebook called Completed:



When you complete a project or next action, and want to store that item for the history of what you’ve completed, reassign it to the Completed Notebook. It’s unlikely you’ll want to keep a record of every next action you’ve completed and those can just be deleted, but having a record of the projects and the plans you captured in the Project note field, can serve as useful reference come end-of-year review time.

***Go ahead and create a Completed Notebook now, if you think you will ever want to save the history of what you have completed.***

## USING SHORTCUT KEYS

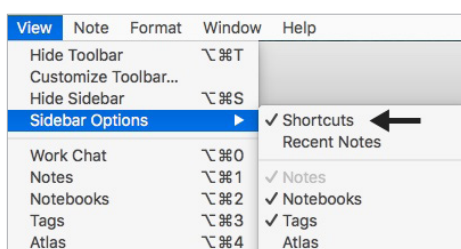
The ability to capture information quickly can greatly enhance your productivity. There are many functions you can perform in Evernote, using shortcut keys. Visit the Evernote Support site for a full list of shortcuts for Mac:

Mac OS X: [evernote.com/contact/support/kb/#/article/23168732](http://evernote.com/contact/support/kb/#/article/23168732)

## CREATING SHORTCUT VIEWS

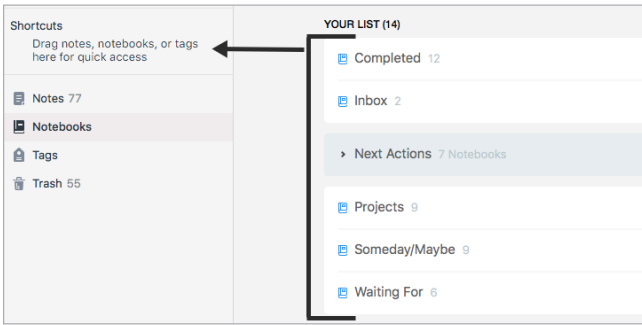
Now that you have created the bulk of your Notebooks, let’s create some useful Shortcut views to those Notebooks, for easy access.

1. Go to View > Sidebar Options
2. Be sure Shortcuts is checked

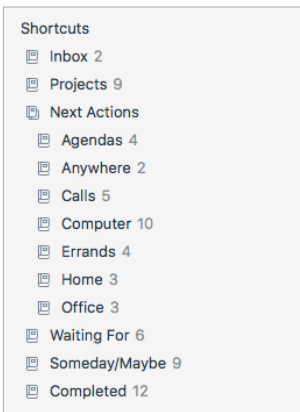




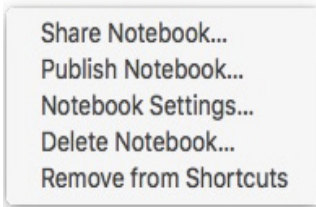
3. Go to your Notebook view and drag each of your Notebooks and the Next Actions stack to the Shortcuts bar.



When you are complete, your Shortcuts bar should look like this:



You can drag and drop a Notebook within the Shortcuts bar, to rearrange the order. You can remove Notebooks from the Shortcuts bar by right-clicking (or Ctrl + click) and selecting Remove from Shortcuts from the pop-up menu:



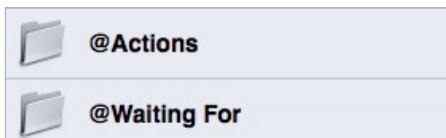
## INTEGRATING ACTIONABLE EMAIL WITH EVERNOTE

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 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

### OPTION ONE: USE THE EMAIL AS THE REMINDER

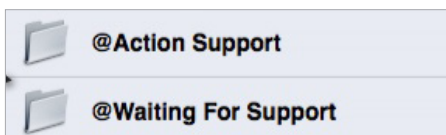
Create @Action and @Waiting For folders in your email program, and use them like an action list. You would not also put those reminders on your Calendar or Next Actions lists in Evernote—the email itself would be the only reminder. That means you need to scan these folders with as much discipline as 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.

### OPTION TWO: USE NEXT ACTIONS NOTEBOOKS IN EVERNOTE OR YOUR CALENDAR AS THE ACTION REMINDER

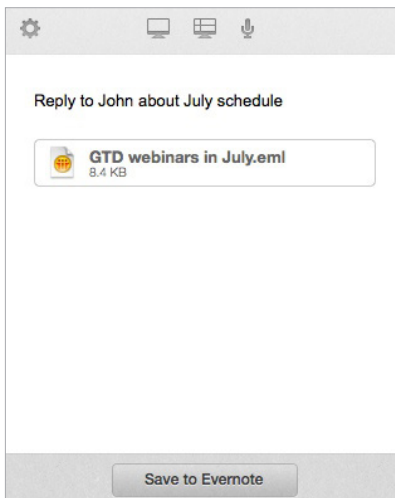
Create @Action Support and @Waiting For Support folders in your email program to hold supporting information for actions that are tracked on your Calendar or Next Actions lists. In this case, the folders only serve as storage buckets to hold the information you need to take the action. You would be reminded of the action when you review your Calendar or Next Actions Notebooks. It's one fewer place to look for actions or waiting for items, 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. But it does mean you have to take the time to go to Evernote Next Actions Notebooks and define the next action.

From some email programs, you can even create a new Evernote Quick Note entry from an email in your email program, and have it linked back to the original email, by dragging the email to the Evernote icon in your Toolbar/System Tray. This is particularly useful if you are using the @Action Support folder option, because you will have a direct link back to the original email in your email program when you see the item in one of your Next Actions Notebooks. To see if this option is available in your email program, click on the email in your email program and drag it to the Evernote icon .

If available for your email program, Evernote creates a link to the email in a new Quick Note. Add your next action to the top line and Save to Evernote. The Quick Note will be saved to your default Notebook (Inbox in this case), ready to be processed and assigned to one of your Notebooks.



If linking to the email is not available, simply forward the email to your Evernote account, as described on page 14.

***Go ahead and create either the @Action and @Waiting For or @Action Support and @Waiting For Support folders in your email program now.***

## 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 on page 3) 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 or Bring Forward file)?

**YES** What's the next action?

Do now, delegate to someone else, or defer to do myself later?

If **doing** now, handle it in the moment, as long as it takes less than 2 minutes.

If **delegating**, track the waiting for reminder (if you need to track this getting completed) in your @Waiting For folder in email or Waiting For in Tasks.

If **deferring**, track the action reminder in @Action folder in email, Calendar, or a Next Actions list.

If multiple actions, what's your desired outcome?

Track that outcome on your Projects list in Evernote.

On a daily basis, we recommend processing your email inbox down to zero as often as you can. On a weekly basis, in your Weekly Review, all of your inboxes are driven down to zero in the Get Clear steps.

## WHAT BELONGS ON YOUR CALENDAR

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 Next Actions Notebooks in Evernote, which can be done BY a specific day, or on ANY day. Your daily calendar page should represent the “hard landscape” for your day and will provide a trusted foundation at a glance for moment-to-moment orientation about “what’s next?”

## THE 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:

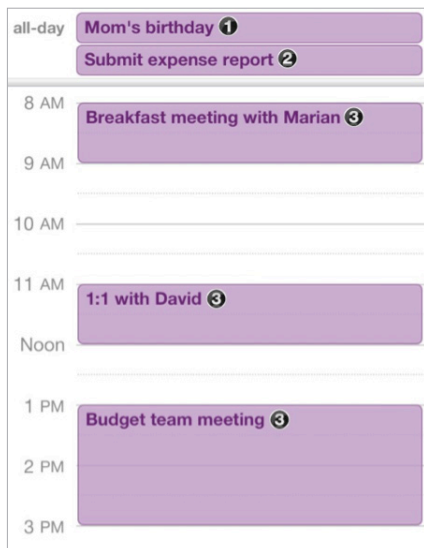
- Things that might disrupt your day (server shut-downs, office moves, etc).
- External events to be aware of (marathons, elections, heads of state visits, etc).
- Activities of other significant people of interest to you (kids, spouses, bosses, assistants, vacations, etc).

**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



## 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 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.

## USING EVERNOTE TO STORE REFERENCE INFORMATION

Evernote can manage a limitless number of potentially useful (and fun!) non-actionable simple reference lists and checklists that you would not want to combine with your Next Actions Notebooks.

This functionality is so totally open-ended and in one sense, so simple, the possibilities are infinite.

### Have you ever...

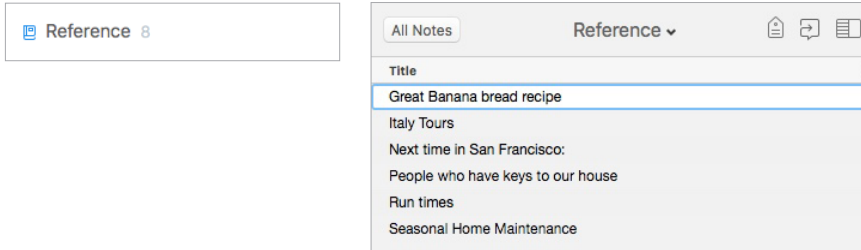
- had a wild idea you didn't know what to do with?
- wanted to remember the great restaurant you ate at in London?
- needed to remember all the things to check before you leave on a trip?
  - read something inspirational you wanted to keep and re-read every once in a while?
  - wondered where to put a suggestion about something to do the next time you visit a country?
  - needed 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 new Evernote Notebooks or lists within Notebooks to try:

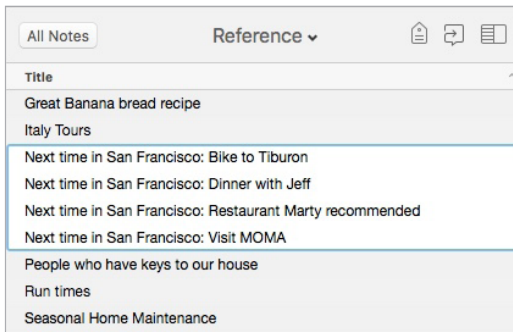
- Checklists
- Areas of focus
- Fun
- Ideas
- Inspirations and affirmations
- Great quotes
- Lists
- Might like to buy
- Might like to read
- Music to download
- Next time in...
- Travel
- Vacation ideas

You have a few options for how to set this up, depending on your preference. As we consistently suggest, be careful to not overcomplicate your system to the point where it becomes unwieldy to find or maintain the information. Read through the following options and be willing to experiment with the solution that will work best for you.

**Example One** Create reference as lists within one “Reference” Notebook:

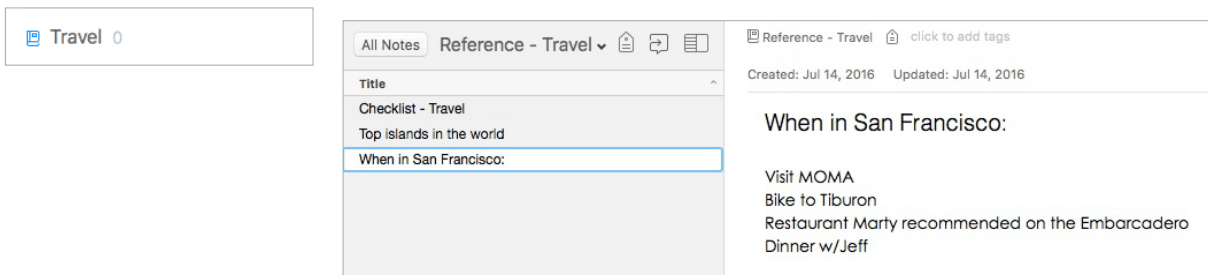


**Example Two** Create reference as individual notes within one reference Notebook:



In this example, we’ve also added tags to the individual notes (i.e., gear, travel, great quotes), for further sorting options. Tags can be used in any of these options described—it’s up to you to decide how much detail you want to capture and if a feature like tags would assist you in the future when retrieving the information again.

**Example Three** Create reference as lists within a specific Reference Notebook, such as Travel:



## SYNCING

Syncing Evernote between the web, your desktop, and mobile devices should be seamless. While the interface across the platforms will look slightly different, the basic user interface will be the same. If you create a new Notebook on your mobile device, it should automatically sync to your desktop or web versions of Evernote.

For assistance with syncing, read the support document on the Evernote website at [evernote.com](http://evernote.com).

# 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<sup>®</sup>.

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](http://evernote.com)

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

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

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