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IBM LOTUS NOTES®

Setup Guide

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INTRODUCTION

GTD®, the popular shorthand for Getting Things Done®, is the ground-breaking work-life management system and book[1] by David Allen that transforms personal overwhelm and overload into an integrated system of stress-free productivity.

Sophisticated without being confining, the subtle effectiveness of GTD lies in its radically common sense notion that with a complete and current inventory of all your commitments, organized and reviewed in a systematic way, you can focus clearly, view your world from optimal angles, and make trusted choices about what to do (and not do) at any moment. GTD embodies an easy, step-by-step, and highly efficient method for achieving this relaxed, productive state. It includes:

- **Capturing** anything and everything that has your attention
- **Clarifying** actionable things discretely into outcomes and concrete next steps
- **Organizing** reminders and information in the most streamlined way, in appropriate categories, based on how and when you need to access them
- Keeping current and "on your game" by regularly **reflecting** on the six horizons of your commitments (purpose, vision, goals, areas of focus, projects, and actions)
- Instilling the trust that what you are **engaging in** is the best thing for you to be doing in any given moment

GETTING THE MOST OUT OF LOTUS NOTES®

For many of our clients, Lotus Notes (we'll often to refer to it simply as "Notes" throughout this Guide) is a logical choice for organizing their project and action reminders, especially if they already use Notes for email and calendaring. This guide will walk you through applying the best practices of GTD to Lotus Notes 8.5. If you are using a different version of Lotus Notes, some of the instructions may not match your version exactly. We've done our best to address the intended functionality, so that you can easily adapt the instructions to your system. Consider these suggestions a starting point, customizable to fit your own needs and use.

Lotus Notes has built-in features that enable the structuring of a very powerful personal workflow system. The trick is to know which features to ignore and which to use, and how to customize that usage to fit with the best practices of Getting Things Done.

The Lotus Notes To Do function can be customized to be a simple but powerful list manager. The Lotus Notes Notebook application can be used to store some very useful reference material and checklists. Also, there are some simple things to do to manage email and the calendar that enhance their functionality and tie the whole inventory of your work together into a seamless and integrated dashboard for your workflow.

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

THE BEST PRACTICES OF GETTING THINGS DONE®

In order to understand our specific recommendations for Lotus Notes setup and usage and to maximize its potential in practice, it's important to clarify some simple but powerful productivity behaviors. These are fundamental to the success of the system.

1. DON'T LEAVE ANYTHING IN YOUR HEAD OR IN UNCLARIFIED STACKS

If your system contains only partial information, it won't give you the payoff of a system, and you won't be motivated to maintain it. For example, if your "Calls" list doesn't have every single call you need to make, your head will still have to keep remembering and reminding you about the rest of them. Trying to keep only some of them in Notes will be too much work for the minimal benefit you'll gain.

2. DECIDE THE NEXT PHYSICAL ACTION

If you don't determine the very next action needed on a task, a project, or an email, you won't know where to park the reminder, and the pressure of still needing to make a decision will cause you to avoid engaging with your lists.

3. REFLECT ON AND UPDATE THE CONTENTS OF THE WHOLE SYSTEM REGULARLY

A system is only as trustworthy and beneficial as it is current, consistent, and complete. The more the system can be kept up-to-date as you go along, the more "alive" and supportive it will be to allow your mind to focus on the work at hand. The world will probably come at you faster than you can keep it totally processed and organized, but you can't let it slip too long before you catch up. Reminders of projects and actionable items must be cleaned up and refreshed at least every seven days, in a process we call "The Weekly Review." [2]

A system is only as trustworthy and beneficial as it is current, consistent and complete.

THE NEED FOR SIMPLE LISTS

Once you have appropriately processed your "stuff", simple lists will store most of your reminders and reference information. These can be "flat" lists—not tied or related to other things, nor sorted by priority or urgency—just lists. You need a list of projects, a list of all the calls you need to make, a list of all the things you are waiting for to come back from other people, etc. You may also want lists of your key objectives for the year, books you might want to read, and all the things you might want to pack whenever you take a trip. The Lotus Notes To Do section can be a terrific list manager for your actionable items, and the Lotus Notes Notebook application can serve as a very functional catalog of checklists and reference material.

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[2] See the *Getting Things Done* book for a Weekly Review checklist.

USING LOTUS NOTES TO DO'S

NEW DEFINITIONS OF "CATEGORY" AND "TO DO"

Your Lotus Notes To Do application allows sorting of your entries by category. This is very GTD friendly, as we will use categories as a way to create a comprehensive set of project and context-related action management lists. The categories in Lotus Notes To Do's will represent the various contexts that define where you need to be, what tools are required, or the person they relate to (such as "Calls", "Computer", "Home", etc.), and a "New To Do" will be used to enter anything that goes on any of those lists. Assigning a category to a To Do will organize it in your lists. The end result is a powerful action list manager, with all of your work organized and tracked in a logical, intuitive, and trusted GTD system.

CLEAN UP THE LOTUS NOTES TO DO SECTION

You will not want to build a new configuration with old "stuff" still populating your lists.

1. In the top left corner of your Lotus Notes Inbox, switch to **To Do** by clicking on the **drop-down menu to the right of your name**.

2. Select **All To Do's** view.
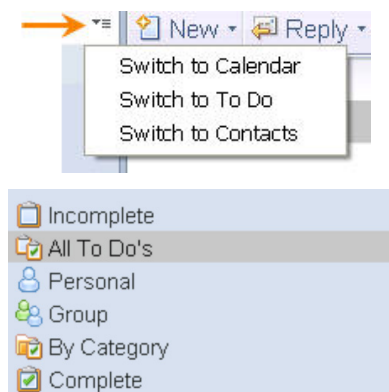
3. Strategies for cleaning up old items:

    A. Go through each To Do one-by-one and either select delete or mark complete. Note that marking complete will leave these items in the All To Do's view, but will add a check mark letting you know it's complete. We'll work more with the best working views later in this section.

    B. Print out your current To Do's view in hard copy and toss it into your hard copy Inbox to reprocess later into your new system. Then, select all entries **<Ctrl a>** and **Delete**.

    C. Leave the entries you have in there, but keep them uncategorized, i.e., with no Category assigned to them.
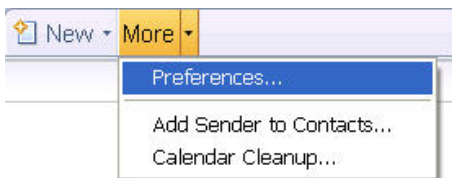
To do this:

1. Go to the **By Category** view in To Do's

2. Open up each entry and delete (or uncheck in earlier versions of Notes) any assigned categories. These entrieswill now show up in the Categories column with category listed as Not Categorized, which can function as an in-tray and should remind you to rethink what's still in there and process appropriately.

THE BEST CATEGORIES TO START WITH

*   If you are familiar with our methodology, you will recognize the suggested categories as the most common context lists we recommend for managing your actionable items.
*   If you are new to GTD, we recommend starting with the set described below. You can always change them as you become more familiar with how and why they work as we recommend. If you try to change them now, before even trying them, you may be missing out on the value of how they are structured.

SETTING UP YOUR CATEGORIES

1. From within the To Do view, click the menu button **More** (called Tools in earlier versions of Notes), **Preferences**.

2. Select the **Calendar & To Do tab, Display tab, Entries tab** (in earlier versions of Notes this is under Basics tab.)
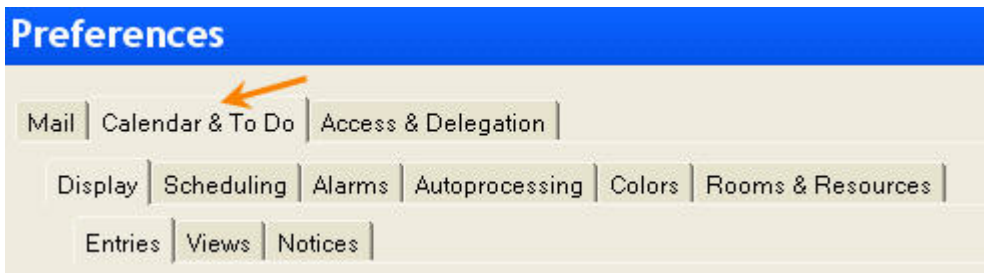
3. In the **Categories** box, enter the suggested category names below, one per line. Press **<Enter>** after each entry to go to the next line. Click **OK** when done.

A SUGGESTED SET OF GTD CATEGORIES TO GET STARTED IS:

-PROJECTS	ERRANDS
AGENDAS	HOME
ANYWHERE	OFFICE
CALLS	WAITING FOR
COMPUTER	SOMEDAY/MAYBE

SORTING TRICK ITEMS

Adding a dash before Projects will sort this category to the top of your lists. Adding a period before Projects Completed and Someday/Maybe will move those categories to the bottom of your lists. The end result, when you have your lists populated, will look like this:

Subject
▶ -PROJECTS
▶ AGENDAS
▶ ANYWHERE
▶ CALLS
▶ COMPUTER
▶ ERRANDS
▶ HOME
▶ OFFICE
▶ WAITING FOR
▶ .SOMEDAY/MAYBE

SOME THINGS TO BE AWARE OF

• Don't be surprised if you do not see the categories you just created in the To Do view. They will only appear when you have a To Do assigned to each category.

• Lotus Notes also provides a set of six categories for you that are not customizable. You will not see these when entering new categories as illustrated above, but when you go to assign a category to a To Do, you will see Holiday, Vacation, Projects, Clients, Phone Calls, Travel. You may wish to use some or all of these six in addition to what we suggest, or not at all. If you choose to use "Projects" and "Phone Calls" from the set of six that come with Notes, then you would not want to also create "- Projects" and "Calls" as separate categories.

• Please see the tip on page 23 on how to avoid having all of your To Do items appear on your calendar.

Congratulations! Your initial Task lists setup is now complete. Next we'll move on to populating them, so that you can work with them day-to-day.

CONCLUSION

We hope this instruction guide has been useful. It is intended as an adjunct to our core education of workflow mastery developed over many years—not a substitute. The most successful implementation of this guide builds on the understanding of the GTD best practices presented in our many learning tools, including the *Getting Things Done* book, our public and on-site courses, individual coaching, and our online learning center GTD Connect®.

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

FOR MORE INFORMATION, PLEASE VISIT:

www.gettingthingsdone.com
www.gtdconnect.com

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