gtd®

THINGS®

Setup Guide

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FOCUS OF THIS GUIDE

Our focus with this Guide is to show you how to use Things® 3 on your Mac desktop for your GTD® workflow. The Guide is packed with our best practices for configuring and populating Things for your Projects, Next Actions, Waiting For, Someday/Maybe, and Reference lists. We'll also cover strategies for managing your calendar and email.

If you are new to Things, this Guide is an excellent starting point for you to build a solid GTD foundation for optimizing your productivity. If you already have an established system in Things, use this Guide as an opportunity to fine-tune or simplify, if you have found you've underused or overbuilt your setup.

This is not a technical Guide, nor will it cover all the instructions for how to use Things. We'll leave that to the folks at Things to share with you through their excellent support material.

There are many ways you could configure Things for GTD. This Guide focuses 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 Things. Even with your lists managed in Things, you'll still have your calendar and email in other programs.

Whatever configuration you choose in tools like Things, 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 have a complicated system fall apart when you're not at your best. 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 available feature in Things (or any of your tools for that matter). There may be more offered than you will ever need. Focus on what makes a difference for you.

OK…let's get started!

> *Be careful not to overcomplicate your systems to the point where you can only maintain them when you are at your peak of mental clarity.*

APPLYING GTD TO THINGS®

SETTING UP THINGS FOR GTD

USING THINGS TO MANAGE YOUR KEY LISTS

Things is an excellent option for managing the Projects, Next Actions, Waiting For, and Someday/Maybe lists in your system. We appreciate the simplicity and flexibility of this tool for implementing GTD. We suggest you create lists in Things to match the common set of lists recommended in the *Getting Things Done* book, which we describe in more detail over the following pages.

THE MOST COMMON GTD LISTS

HERE ARE THE 10 LISTS THAT ARE A GOOD STARTER SET FOR MOST PEOPLE:

1. Agendas
2. Anywhere
3. Calls
4. Computer
5. Errands
6. Home
7. Office
8. Waiting For
9. Someday/Maybe
10. Projects

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 the office, 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.

Let's set up the 10 suggested lists in Things now. You can always go back to customize these later, after you've experimented, to discover what works best for you. We encourage you to give these lists some time, especially if the concept of sorting by contexts is new to you.

We recommend doing this initial setup on your desktop and not your mobile device.

While there are a number of ways one could set up Things, there is one method, in particular, we have found to work well for many users of Things, which is:

- Setup all lists using "Projects" type of entry.

- For additional sorting into topic folders, create "Areas".

- Use tags, if needed and sparingly, for areas of focus, linking key projects to their related actions, or specific topics.

On page 30 we explore another method of using tags for contexts instead of the Projects area if you want to experiment with your setup. We recommend reading ahead to page 30 before starting your setup, so you have a good overview of what's possible.

Things is so elegantly functional for GTD, if you simply started by setting up all of your lists as Project entries (and didn't dive into using Areas or tags,) you would have a very functional system by our standards.

USING SHORTCUT KEYS

The ability to capture information and facilitate tasks quickly, through shortcut keys, can greatly enhance your productivity. Things offers many shortcut keys for common functions in the app. Here is a short list of the most common ones:

Create a new to-do: Spacebar, + ✚ within each list, or Command + N

Create a new checklist in an open to-do: Command + Shift + C

Create a new project (what we call list): Command + Option + N

Create a new heading in a list: Command + Shift + N

Create a new list item using Quick Entry: Control + Spacebar

Deadline (due date) +1 day: Control + Period

Deadline (due date) +1 week: Shift + Control + >

Go to Inbox: Command + 1

Go to Today view: Command + 2

Go to Upcoming view: Command + 3

Go to Anytime view: Command + 4

There are *many more useful shortcuts* available as well, on the Things Support site. Again, if these shortcuts don't work for you, it could be that another program you have installed is using them. You can select different ones in Things Preferences.

USING SIRI

If you're an iPhone user on at least iOS 11, you can use Siri to add new and view existing items in Things.

For example:

To add something to your Computer list, say "Add to my Computer list in Things." Siri will ask you what the new to-dos should be. Say "Email Singapore office about next meeting." If you have multiple new To-Do's to add, separate them with the word "and". For example, "Email Singapore office about next meeting and Email Kyle that I need updated budget."

For more instructions and examples on using Siri with Things, view the *helpful support doc* on the Things website. Now, we'll go into greater detail 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 add a tag to an entry, click on the tag icon in any entry.
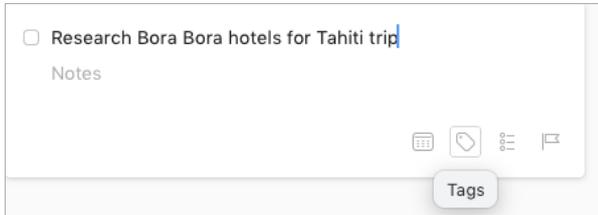
Type the first few letters of the tag name to select an existing tag, or type the full keyword if you want to create a new tag. Press enter/return to save the tag assignment.
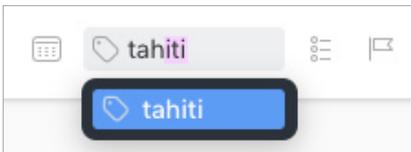

To then search on that tag, click on the tag name to see all items with tag *within that list.*

Click on a tag in any entry to see all entries assigned to that tag
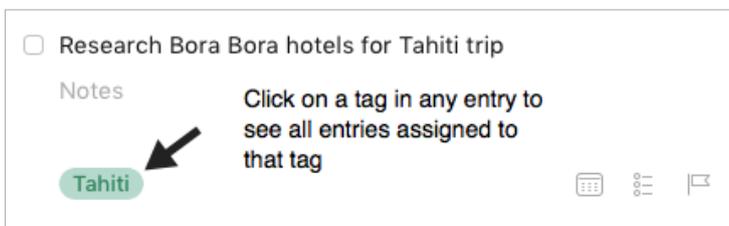
To search for all items with that tag in all lists, you will need to use Quick Find as we described earlier.

OTHER USES FOR TAGS

Other useful ways to use tags would be to link items to related people, teams, or Areas of Focus[3]. For example, if you wanted to see everything related to your Business Development Area of Focus role, because that would help drive your decisions about what to work on, you could create a tag for that.
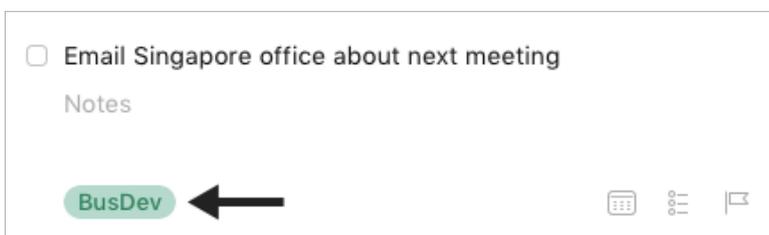
Be careful that whatever additional criteria you add for creating new entries, like creating and adding tags, do not become a burden or requirement. You may find tags useful for one entry, but overkill for another. It's easy to let a feature like tags become unwieldy, so watch it carefully to ensure it's helping your productivity and not hindering it. Use tags sparingly and judiciously.

[3] See the *Getting Things Done* book or our GTD Methodology Guides in our online store for more coaching on defining your Areas of Focus.
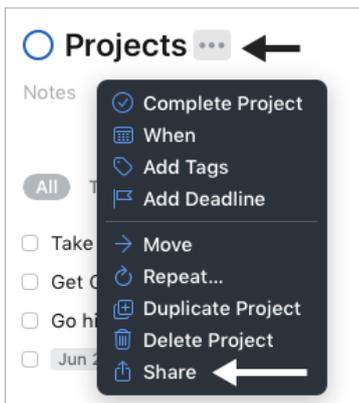
SHARING FROM THINGS

Things isn't just for managing your workflow; you can also use it for sharing your list data with friends, family, and coworkers. You can share lists and items on lists. While the sharing feature in Things is not a true collaboration tool (it's really more for viewing), and is very basic in functionality, there are some practical uses:

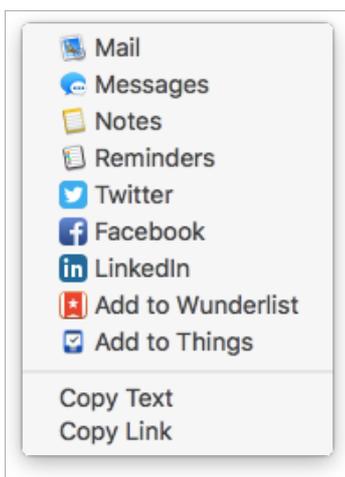- Sending your boss your current Projects list,
- Sending a colleague a project on your list, with related project notes,
- Sending your errands list to your partner/spouse/roommate,
- Sending your admin a snapshot of your Today view.

To share an entire list:

1. Go to the list.
2. Click the ellipses next to the list name.
3. Click Share.

4. Select a method for sharing, such as via email.

EMAIL

INTEGRATING ACTIONABLE EMAIL WITH THINGS

Managing email is the most difficult habit for many to change. The master key is working from a regularly empty inbox.

It takes less mental 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. 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 decided about what each email means and what you want to do about it. Using the questions from the GTD Workflow Map (pictured earlier in this 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 file[4])?

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 on your Waiting For list in Things.
Defer it	If needing to do it later, track the action reminder in @Action folder in email, Calendar, or on a Next Actions list.

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

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

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.

FOR TECHNICAL SUPPORT WITH THINGS, PLEASE VISIT:

culturedcode.com/things

FOR MORE INFORMATION ABOUT GTD, PLEASE VISIT:

gettingthingsdone.com
gtdconnect.com