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FOR WINDOWS®

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TABLE OF CONTENTS

TABLE OF CONTENTS (CONTINUED)

FOCUS OF THIS GUIDE

Our focus with this Guide is to show you how to use OneNote® for Windows® for your GTD® workflow. Many people think of OneNote as a tool for storing your non-actionable reference information, but we have found it to also be useful for managing the actionable things as well. This Guide will focus on configuring and populating OneNote for your Project lists and plans, Next Actions lists, and Reference.

The instructions and screenshots show examples for the OneNote 2016 for Windows, but should apply to most recent versions of OneNote. The interface is different enough from the Mac version of OneNote that we chose to do a separate Guide for that platform.

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

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 OneNote. Even with your lists managed in OneNote, you'll still have your Calendar and Email in other programs.

Whatever configuration you choose in tools like OneNote, 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 OneNote. 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

To get the most out of OneNote 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 book[1] 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 phases 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 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 phases 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 OneNote 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. Available from booksellers or at gettingthingsdone.com

APPLYING GTD TO ONENOTE®

PROJECTS AND NEXT ACTIONS

USING ONENOTE TO MANAGE PROJECTS AND NEXT ACTIONS LISTS

Many people think of OneNote as a reference tool, but with some adaptations, it can be an excellent option for managing the projects and action lists in your GTD system. We recommend you create lists in OneNote Notebooks, Sections, and/or Pages to match the 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

There are 10 lists recommended in the Getting Things Done book 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 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

Let's set up the 10 suggested lists in OneNote now. You can always go back to customize these later, after you've experimented, to discover 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 WILL BE USING 4 DIFFERENT TYPES OF ENTRIES IN ONENOTE:

- Notebooks
- Sections
- Pages
- Notes

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 OneNote search function (Ctrl + E) to pull together related information.

USING PROJECT TAGS

You can also use tags for a specific project and search on that tag. For example, you could tag the project, and all of the related next action and waiting for items. Then, when you search on that tag, you can see everything related to the project in one quick view.

To create a project tag, go to the item you want to tag.

Under the Home tab > Tags in the ribbon, click on the more arrow next to the tags box and choose Customize Tags.
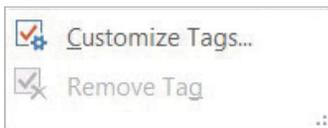
Click the New Tag button. In the window that appears, give your tag a name. You can also assign a symbol, and change the font if you want. Click OK twice to return to the item you want to tag.
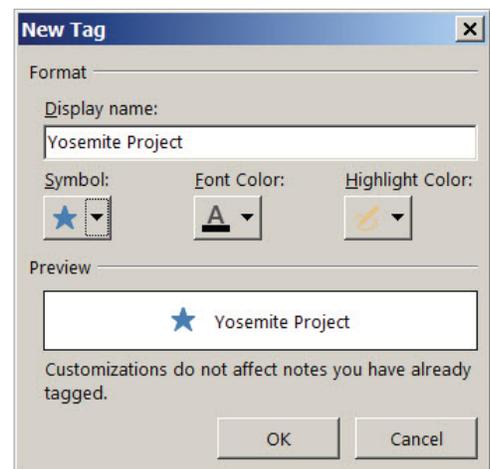
REVIEWING YOUR LISTS

On a daily basis, we recommend reviewing your Next Actions lists (the ones we set up as contexts, such as Calls, Computer, etc.), whenever you get a chance. On a weekly basis, in your Weekly Review, we recommend reviewing all of your actionable lists in OneNote, 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 OneNote was not built as a traditional list manager, it does not currently include typical list manager functions, like assigning a due by date. There are a few simple ways to work around this.

1. One of the easiest ways is to add the due date to the subject line. See example below:

2. 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. See example below:
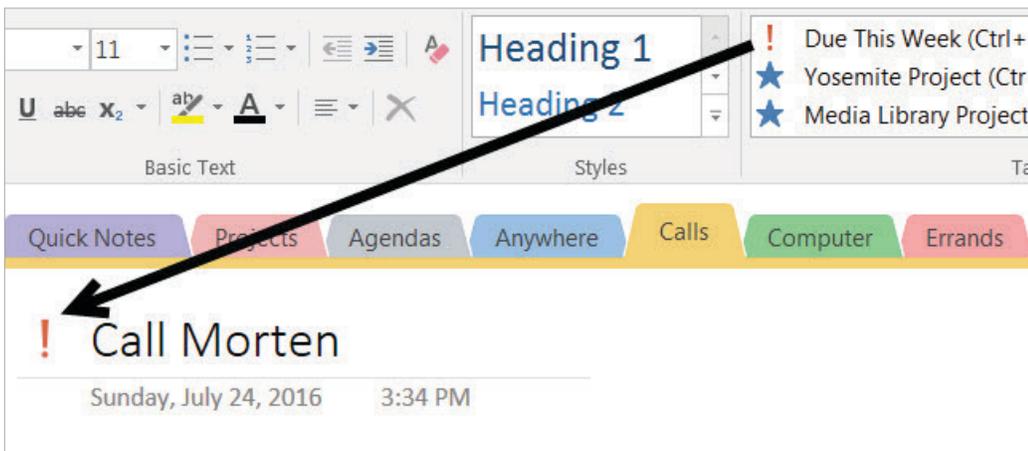
EMAILING TO ONENOTE

Another great feature in OneNote is the ability to email information into your OneNote Notebooks.

A few ways you might find this useful include:

• Sending Mind Sweep items to your Quick Notes

• Capturing a next action and sending it directly to a Next Actions list

• Forwarding project support to one of your Project Notebooks

• Creating a new project to add to your Projects list

• Capturing reference for your Reference Notebook

1. To get started, go to www.onenote.com/EmailToOneNote and follow the simple instructions for configuring this feature.

2. Select the email address to enable. Any emails you send from this address to "me@onenote.com" will be saved to a Notebook you choose. Save that email address to your address book as a new contact now so it's ready to go when you want to start sending emails. Name the new contact something easy to remember and type, like "onenote", for speedy addressing in the future.

3. Select the default Notebook and Section for your emails. We recommend Quick Notes as the default. Your destination Notebook must be shared on the web or your network. It won't work for Notebooks saved only locally on your computer.

4. Click Save.

5. Go to your email program and send an email to me@onenote.com from the email account you enabled in step 2.

A new Page will be created from your email with the subject line of your email becoming the title of the Page.
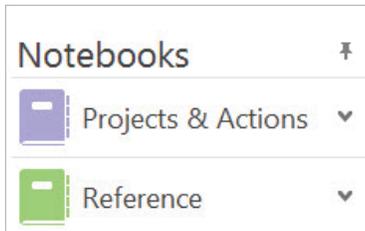
**Here are some possible new lists within your Reference Notebooks to try:**

- 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 lists and notes within one new Reference Notebook
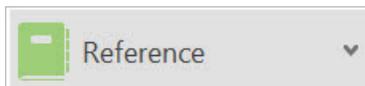
Creating individual notes:
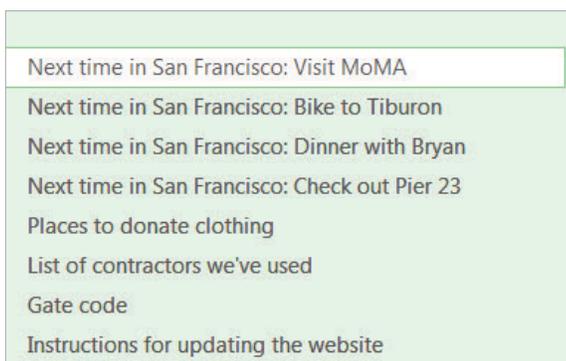
CONCLUSION

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 TECHNICAL SUPPORT WITH ONENOTE, PLEASE VISIT:

microsoft.com

FOR MORE INFORMATION ABOUT GTD, PLEASE VISIT:

gettingthingsdone.com
gtdconnect.com

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