

GTD 

AND

Lotus Notes

Getting Things Done.



DavidAllen

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Many people in our client organizations have expressed interest in optimizing Lotus Notes® as their personal organizing system, utilizing the David Allen Company workflow management best practices. This is a manual for setting up Lotus Notes and using it effectively in that context.

This information will provide the greatest value if you have some familiarity with our workflow mastery model. Many of the suggestions herein will be intuitive and common sense to anyone, but maximum power in using Lotus Notes lies in the understanding and implementation of our total approach. The complete delineation of these high-performance methods of personal productivity can be found in David Allen's book, Getting Things Done - The Art of Stress-Free Productivity.<sup>1</sup>

The following recommendations come from thousands of hours of one-on-one coaching with professionals at all levels, many of whom work in a Lotus Notes environment. This manual provides a tested basic set of formats and behaviors that have proven to work as a starting point for many people. We suggest you try it out and then tweak the system to fit your own needs and preferences. Much room remains for experimentation and no two clients of ours end up with exactly the same configurations and procedures in place.

The setup instructions work with Lotus Notes 6.5 for Windows. If you have a different version, there will be some slight differences in the location of dialog boxes and menus.

## Notes has the ingredients for a personal management tool

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

The To Do function can be simplified to be a powerful list manager, and as such can be effective in organizing reminders in a way that works in real time. It can also be used to store useful reference materials and checklists, thereby adding sophistication to your personal management system. Also, there are some simple things to do to manage email and the calendar that will enhance their functionality and tie the whole inventory of work tracking together into a seamless, integrated system.

## The principles that optimize the management of work

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, and Lotus Notes cannot do them for you. They are basic disciplines in managing work flow that must become part of your ongoing work habits in order to generate

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<sup>1</sup>*Getting Things Done: the Art of Stress-Free Productivity*; Viking, New York; 2001, hardback. Available from booksellers or at [www.gettingthingsdone.com](http://www.gettingthingsdone.com)

the appropriate contents for your lists. If you don't engage in these behaviors, don't fault the organizing software! The lists will be incomplete and not give you enough payoff of relaxed control to keep you motivated to maintain them.

### 1. Don't leave anything in your head or in unprocessed 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. (e.g., 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, and trying to keep only some of them in Lotus 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 To Do or project or an email, you won't know where to park the reminder, and the decision-still-needed pressure will cause you to avoid engaging with your lists. (e.g., "Set meeting with the team" needs to be further delineated as "Call Ana Maria to set meeting" on your Calls list, or "Email team for best meeting dates" on your Computer list, or "Talk to Jessie re: team meeting" on your Agendas for Assistant list.)

### 3. Review 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. The reminders of projects and actionable items must be cleaned up and refreshed at least every seven days.<sup>2</sup>

## 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, and 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 like 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 can serve as a very functional catalog of checklists and reference material.

## "Portabilizing" your lists

Another key success factor to using Lotus Notes for personal management is having an easy way to publish the lists into some portable format (and the behavior of actually doing that when needed). Any personal organizer will function at a much higher level when it contains everything that might be needed for a

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<sup>2</sup>See our Web site [www.davidco.com](http://www.davidco.com) for *The Weekly Review* (a free download in our online store.)

reminder anywhere (vs. some at the office, some at home, some in your briefcase, some in your head, etc). It will need to contain a list of errands you need to run when you're out and about, things to talk with your spouse about when you're with them, and things to do at home when you have some time in that environment. If you subliminally know that your lists may not be with you when you might use them (such as your Calls list being available whenever you have free time and a phone), you won't be motivated to keep them populated and current.

### **There are two ways to make this work:**

#### *1. Synchronize to a PDA*

You can set up Lotus Notes to synchronize with a Palm®, Pocket PC® or BlackBerry® handheld device. Typically, the Notes Calendar, Address Book, To Do Lists, Personal Journal and email will all synchronize to these handheld devices. You may need assistance from your Notes Administrator to configure the synchronization. See section 7 in this guide for synchronization options.

In our experience, any PDA can work as long as you work it. Whatever system you use very soon has to be on "automatic," i.e., you're just using it, not thinking about how to use it, and not trusting your head more than the tool.

#### *2. Print your lists into hard copy*

Instead of using a PDA, some people choose to print out appropriate action-reminder lists into hard copy, including their Calendar and To Do lists, to carry with them when they leave their computer. They then hand-edit those lists as they move around, (in meetings, at home, or traveling) updating Lotus Notes when they are back at their workstations. This can work fine, and in some cases better for some people, because of the additional visibility and note-adding capability of paper lists.

### **Get very friendly with your keyboard**

The ease of making entries as things occur to you, will make or break the usage of Lotus Notes for action management. The system should work almost as quickly as you think, or it won't hold up to keep you current. Subliminal resistance to your data entry process usually creates a barrier for using any digital tool as a total system. The faster you are at the keyboard, the more you will be able to use Lotus Notes as a highly leveraged personal productivity device. It is not just an arithmetic curve—it is at least geometric. As your capture/process/think tool and behaviors come closer to matching the speed with which your mind can shift its focus and generate new ideas, they will foster and facilitate that thinking at an increasing rate and quality. When the techniques in this manual are just being used and no longer thought about consciously, you will have entered a very different world of personal productivity. It's hard to imagine the power of it until you've tasted it.

Using the speed key combinations (instead of the mouse) for the small number of regular commands for creating and storing new entries will make the process at least four times faster. Learn and use both the standard Windows® and the Lotus Notes-specific key combinations.

If you aren't using them already, make the standard universal Windows speed key combinations habitual. The ability to cut and paste portions of emails, telephone numbers, and documents as attached notes to items on your lists will provide tremendous usefulness to your system. Switching between open applications to follow through on your workflow thoughts as you have them makes you more productive.

### Standard Windows speed-key combinations

- <Ctrl> a - Select the whole document
- <Ctrl> c - Copy whatever is selected to the clipboard
- <Ctrl> x - Cut whatever is selected to the clipboard
- <Ctrl> v - Paste what's in the clipboard to the cursor location
- <Ctrl> p - Print
- <Ctrl> z - Undo
- <Ctrl> w - Closes the current window
- <Ctrl> q - Closes the current application
- <Alt> <Tab> - Switch between open Windows applications

### **Lotus Notes-specific speed keys (for Windows users only)**

One of the most useful Notes shortcuts to learn is <Ctrl> m to create a new email memo from anywhere within Lotus Notes. The F9 key will refresh your current view, document or workspace.

Lotus Notes also provides shortcuts, called extended accelerators, for each bookmark, window tab, action button, and the Window menu. Press and hold down the <Alt> key to display the extended accelerators, then press the number or letter that corresponds to the function you want to navigate to. For example, <Alt> f will move you to the File menu:



To quickly move to one of the bookmarks in your bookmark bar in Lotus Notes, press and hold down the <Alt> key, then the letter b on your keyboard, followed by the corresponding number that appears on your bookmark bar. For example, <Alt> b + 1 will bring you to your email Inbox (or to whichever bookmark in your bookmark bar is tagged as number 1).

