

Getting Things Done with Backpack and 37Signals

Here's an article about [Getting Things Done](#) and how I use [Backpack](#) from [37Signals](#) to make it happen.

I've recently taken on some roles where I have a lot more loose-ends in my life and adopting Getting Things Done (GTD) has really helped manage everything. I'm also a huge fan of the [37Signals](#) suite of products ([Backpack](#), [Basecamp](#), etc.). That should be obvious from what we're doing over at [ChatPast](#) with integrating instant messaging and [37Signals](#) applications.

So using [37Signals](#) to implement Getting Things Done (GTD) was the obvious choice for me. After looking at both [Backpack](#) and [Basecamp](#), it seems that [Backpack](#) is the clear winner for implementing GTD. You'll see why shortly.

There have been some articles already written about Backpack + GTD. Brett Kelly wrote a nice one over at [Getting Things Done with 37signals' Backpack – Why I'm Switching Back](#). However, while this was helpful in showing me that I *could* implement GTD in Backpack, it didn't show me how to do it.

How should I organize my pages? Do I use reminders, the calendar, both or neither? There'll be TODO lists, but how do I correlate them to my actual work? What about check lists? Can I have templates for repeated ones? Answering these questions is the purpose of this article.

A Step-by-step guide to implementing GTD in Backpack

In this article we'll look at the major pieces of GTD and how to fit them into Backpack.

1. Inboxes - not just email, but all of them (there are many)
2. Check Lists
3. The Next Action List
4. "Open-Loops" (Projects in GTD parlance - not to be confused with Basecamp projects)
5. Reminders - Actions with Dates
6. Waiting-For Lists
7. Reference Material
8. Taking it with you
9. What about [Basecamp](#)?

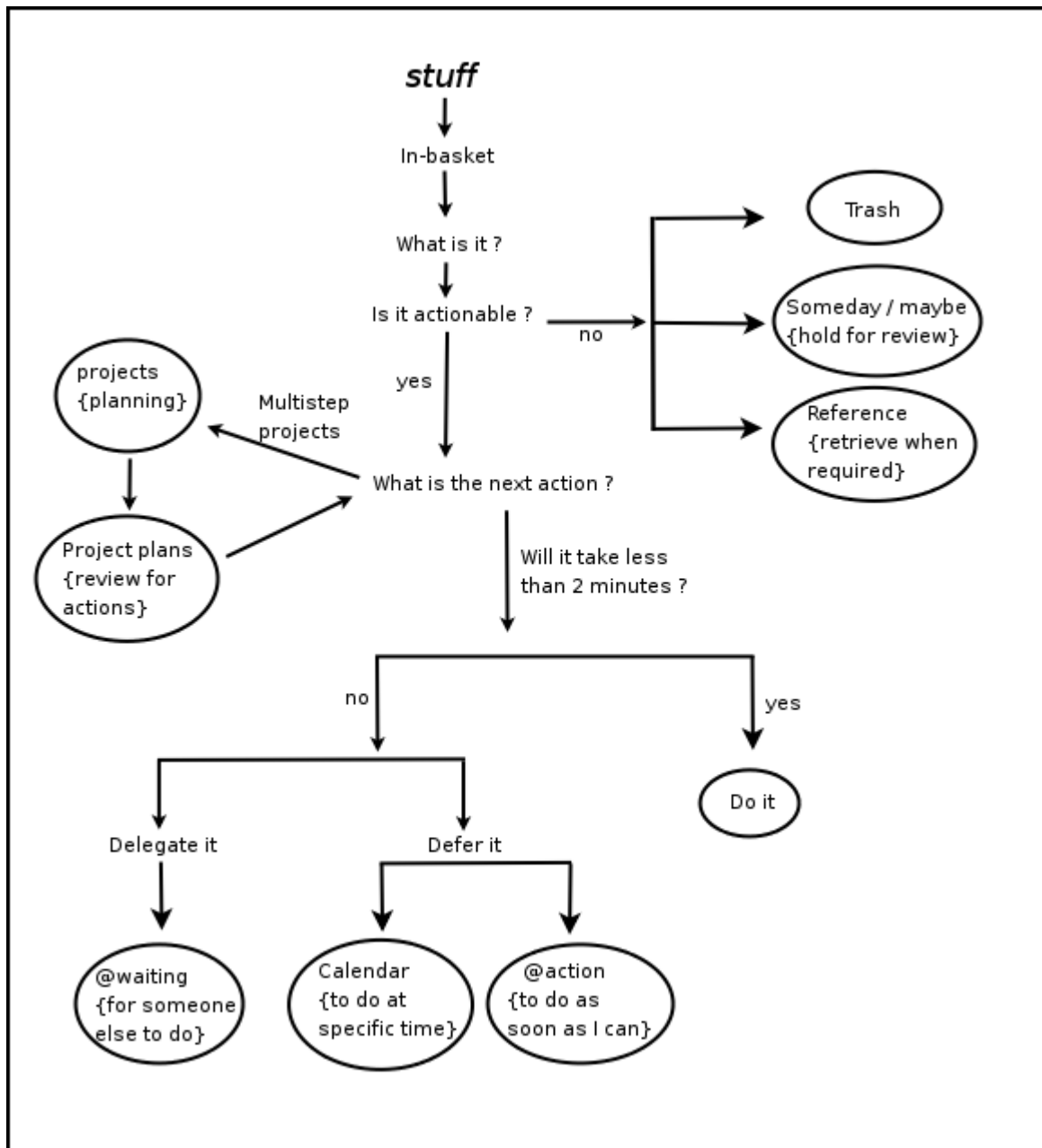
First, A Quick Review on GTD

I'm not going to give you full summary of GTD. If you haven't started using GTD yet, I recommend that you [read the book](#). Don't like reading? Listen to Scott Hanselman [interview Lane Newsom](#) about it or watch David Allen [speak about it at Google](#).

Here's enough to start seeing GTD manifest itself in Backpack. First a definition, what is Getting Things Done:

GTD is a work / life management technique which encourages you to make sure you have absolutely zero open items and actions that you are tracking in your head. You get everything that you are working on or waiting for written down. This frees your mind to be fully "in the moment" and focused on what you chose to do now as well as keeps you from forgetting anything you committed to doing.

At the heart of GTD is this decision-tree model:

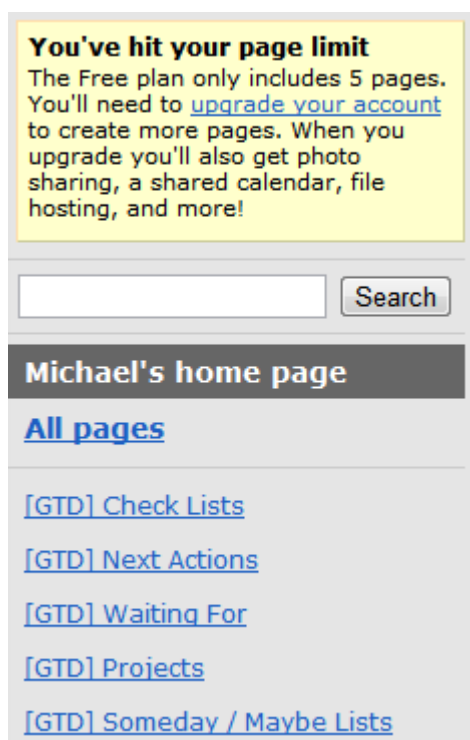


[image credit [Graham King](#)]

In our GTD in Backpack world, the 8 items ringing the workflow will mostly land in Backpack. The "Do It" one just gets done and saved nowhere - although I sometimes track these just for my personal record.

GTD in Backpack - The Basic Layout

In Backpack, I have 5 pages dedicated to GTD, which is convenient because as you see, you get 5 for free. (note: if you aren't familiar with Backpack yet, watch these [short videos](#) before going on.)



You can see that each page corresponded to a major component of GTD. They are further partitioned inside each page - more on that below.

1. Inboxes

With inboxes, I'm not talking about just your email inbox - although that's probably the biggest one for most people. GTD inboxes represent places that stuff that is new shows up and is waiting to be processed through the decision-tree model above.

I think you'd be surprised to see how many inboxes you truly have if you took a full account of them. GTD encourages you to do this for all sorts of things - take a full account and get them out of your mind.

That's one of the great uses of check lists in GTD + Backpack.

2. Check Lists

A check list is any set of steps you need to remember. Sometimes it's for one-off situations, others it's repeating. Processing all the new stuff in your varied inboxes is a repetitive action. So I made a check list for that. Check lists, as you can see below, are TODO lists in backpack. When they are repeated, I make a template like the actual list but with the title prefix [template]. Then I make a copy to "do" the check list each time.

Here is the check list I use several times a week to make sure that I don't forget to "process" one of my inboxes, which then feeds the other 8 types of containers ringing the workflow diagram.

Processing "in"

These check lists ensure that any notes around a given inbox are noted and that I stay on target and don't forget an inbox. I suspect these lists will fade from use as I get better with the process.

Processing "in" Checklist 1/28/2011

- Brainstorm: Write down mental actions and items not yet saved
- e-mail inbox
- [REDACTED] Weekly Staff Meetings Agenda
- [REDACTED] / Michael Working Agenda
- Basecamp: Milestones on existing projects
- Basecamp: Assigned TODOs on existing projects
- Instapaper "read later" folder
- Phone Camera Roll (for books, business cards, etc)
- iPhone/iPad notes app
- "Reopen.txt" assorted text files on desktop with transient actions.
- [REDACTED]
- voicemail

Add an item

- Jan 28 Notes emailed to self – from projects, client calls, etc.
- Jan 28 Physical paper notebook I use for meetings
- Jan 28 Twitter @mentions and messages inbox

You would see a very similar looking TODO list at the bottom of the [GTD] Check Lists page with the title '[template] Processing "in" Checklist'.

3. Next Action Lists

The Next Action Lists are pretty straight forward. As you saw above, there is a page entitled "[GTD] Next Actions". Here I track my next action for each item or project I have open. Again the page is partition internally:

Personal

Next Actions

- Ins: Contact [redacted] from AAA for Ins Info 2
- House: Return title form
- House: [redacted]
- House: Find 1/1/11-1/15/11 paystub
- House: Write Letter of explanation for credit inquiries for past 18 months 1

[Add an item](#)

- Jan 27 House: Start mortgage app from BoA
- Jan 27 House: Send [redacted] 2010 W-2
- Jan 25 Home: Tell neighbors about trashcan policy. (5 min) (at-home)

[View all 7 completed items](#)

[Company Name]

Next Actions

- Sch - [redacted]
- Sch - [redacted]
- Custom
August [redacted]

Notice that I have a personal and business one (actually several). One rule of GTD is that if your home life is a mess, it'll affect your business life and visa versa. So manage it all here. Note also that you can add comments and attach files to the items to track additional info you might need.

If the next action came from an ongoing project (see below), then I've tried to put the name of the project as a prefix, for example **House**: in my personal items.

Finally, you'll see that I don't use the GTD contexts as most people might. In my world there is so much overlap for the contexts that they become meaningless. Traditional contexts might include calls, at computer, errands, at office, at home, agendas, read / review. However, I work at home with internet always on and a computer at my desk. I also do reading here. So those contexts basically all mean the same thing and thus I don't use them.

4. Projects

As you saw in the basic structure, projects get their own page (internally partitioned). Thus I have a page entitled '[GTD] Projects'. This one is pretty simple. I keep track of all the 'open-loops' that require 2 or more actions to complete. Each one gets its own TODO list within Backpack and those lists are partitioned by work and personal.

Add to page: [List](#), [Note](#), [Writeboard](#), [Divider](#), [Tags](#)




[GTD] Projects

Personal

Buying House


- Notice: Give notice to [redacted] (30 days)
- schedule movers
- reserve truck (for personal moving part)
- move utilities
- change address
- schedule cleaners of new house
- schedule cleaners of old house
- get deposit from [redacted]

[Add an item](#)

-  Jan 18 Get updated quote from BoA
-  Jan 18 Schedule drilling and oil tank testing.
-  Jan 18 ✨ Verify that we have permission to drill test holes in garage.

[View all 6 completed items](#)

Car Repair

- Saab Optional mechanical repairs at dealer 
- Van oil leak (when we have the money)

[Add an item](#)

-  Jan 28 Saab Required mechanical repairs at dealer 
-  Jan 14 Van broken wipers

5. Reminders

By far, the biggest GTD "bang for the buck" that you get from Backpack come in the form of reminders. However, their effect takes some exploring to see their full potential. First, let's look at the reminders I have upcoming. Usually I have more than this, but they seem to have thinned out for the weekend.

Newsroom Pages Calendar **Reminders** Writeboards Journal

Set a reminder

When?

Reminders from the last 24 hours

Waiting: Response from [redacted] -RE John as editor [Snooze](#) | [Delete](#)

Follow up with [redacted] -RE intros [Snooze](#) | [Delete](#)

Today

Date Action: Mail rent check in about 3 hours


Reminder: Bring girls to birthday party and get gift stuff in about 3 hours

Mon Jan 31

Waiting: [redacted]

Fri Feb 4

Date Action: Confirm home inspection finalized with Bank

 **Subscribe to iCalendar:** If you use Apple iCal, Mozilla Calendar, or another iCalendar format, you can subscribe to your reminders and they'll be added to your calendar. [Details](#) on the iCalendar format.

iCalendar: [webcal://\[redacted\]](#)

In my reminders, you'll see I need to finalize the home inspection details for a house I'm buying on Feb 4th. By putting it into my reminders, I can rest assured that I'll remember it on the day that I can do something about it.

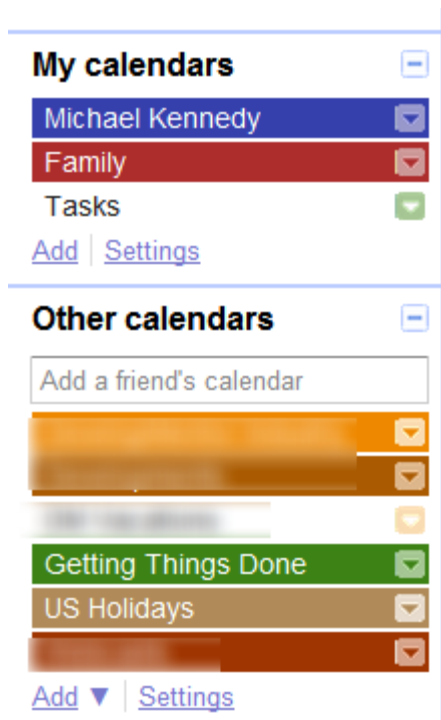
What about calendars? I make extremely heavy use of calendars for GTD. But not within Backpack. I use Google calendar, which then I sync to Outlook, my iPhone, my iPad, and I can also access via the web. If this had been an appointment, I would have skipped the reminders and just put it on my calendar. But it's an action with a date, so it goes in the reminders.

Getting Notified of Reminders

The first place to leverage reminders is to have them show up as text messages on your phone. To do this, go to "My Info" in backpack, in the section "Mobile phone reminders", check the checkbox for "Send text message reminders to my mobile phone".

Next, you'll want to see these reminders in your calendar (but not as appointments!). That's where the crazy URL starting with iCalendar: `webcal://domain.backpackit.com/ical/...` comes in. You can subscribe to this in Outlook or, as in my case, in Google calendar.

In my calendar, then have all these actions + dates show up alongside my day.



I think I had to replace 'webcal:' with 'http:' in order to add this to Google Calendar though.

6. Waiting-For Lists

Waiting lists are for situations where I know I'll need to follow up on something but no necessarily by any particular date - in that case a reminder doesn't make sense for me. But several times a week, I'll scan the list and close those loops if they other person hasn't responded by then. Here's how that looks in Backpack:




Add to page: [List](#), [Note](#), [Writeboard](#), [Divider](#), [Tags](#)

[GTD] Waiting For

Personal

Buying House

[Add an item](#)

-  Jan 29 Response to home inspection extension from sel
-  Jan 18 BoA Sellers to allow tank inspection (1/14/11)
-  Jan 9 Inspection report from Andrew(1/7/11)

Note that the dates I manually typed in are not the due dates. They are the creation dates (Backpack doesn't track this). So I know how long I've been waiting.

7. Reference Material

One of the huge advantages that Basecamp has over other systems that are just simple TODO lists is the ability to attach rich reference material and additional information to the TODO item that represents a next action, or waiting item, and so on.

Comment on this list item

numbers for the week

**Leave a comment**
text reference here...

Attach files
 No file chosen
[Close](#)

You can add comments to any TODO item. For basic information, this can be simple text. For example, if you needed to renew your insurance, you could attach the phone number and policy number to the TODO item so you don't have to look it up.

For non-textual information, you can also attach files (pictures, word docs, whatever) to the TODO item. Note that file attachments are a paid feature, so you can't use this option if you're on the free version of Backpack.

8. Taking it with you

One of the key tenants of GTD is that you should have your info with you nearly all the time. You might be thinking that using Backpack means you will only be able to get to it when you're on the web.

If you have an iPhone, iPad (or even iPod touch), you can always have an offline copy available using an app called Satchel found in the [Extras section](#).

Here's a few screenshots from the **iPhone**:



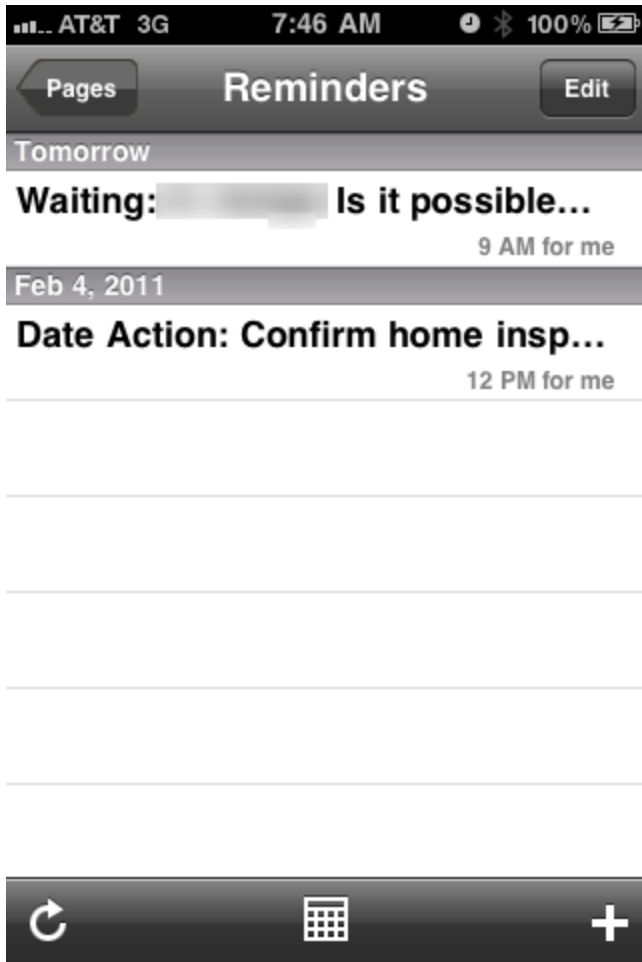
Accounts All 6 Pages By Tag Edit

Search

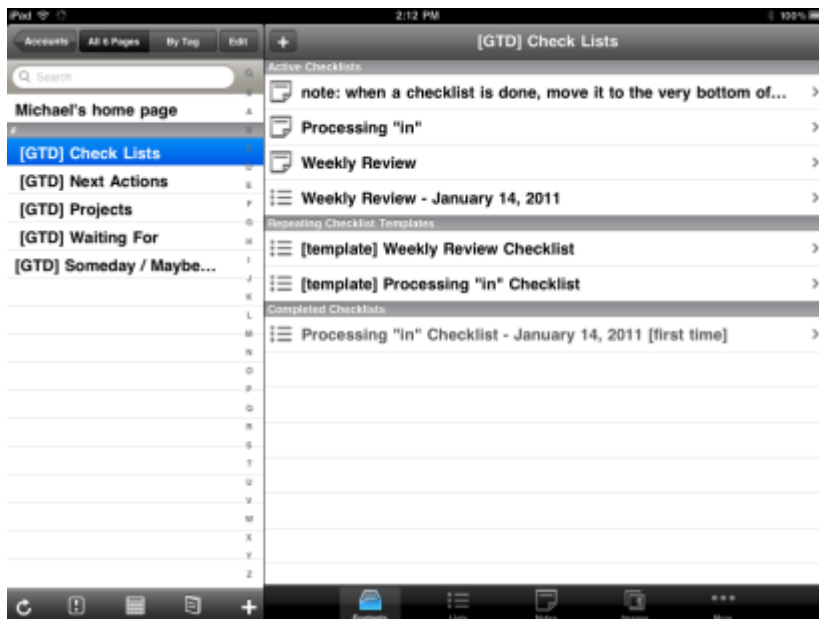
- Michael's home page
 - #
 - [GTD] Check Lists
 - [GTD] Next Actions
 - [GTD] Projects
 - [GTD] Waiting For
 - [GTD] Someday / Maybe...
- A
B
C
D
E
F
G
H
I
J
K
L
M
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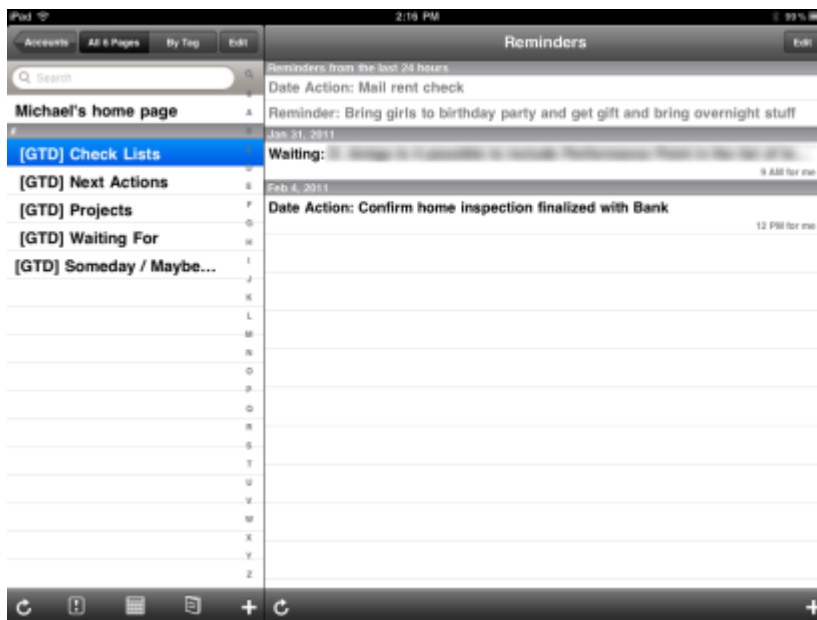
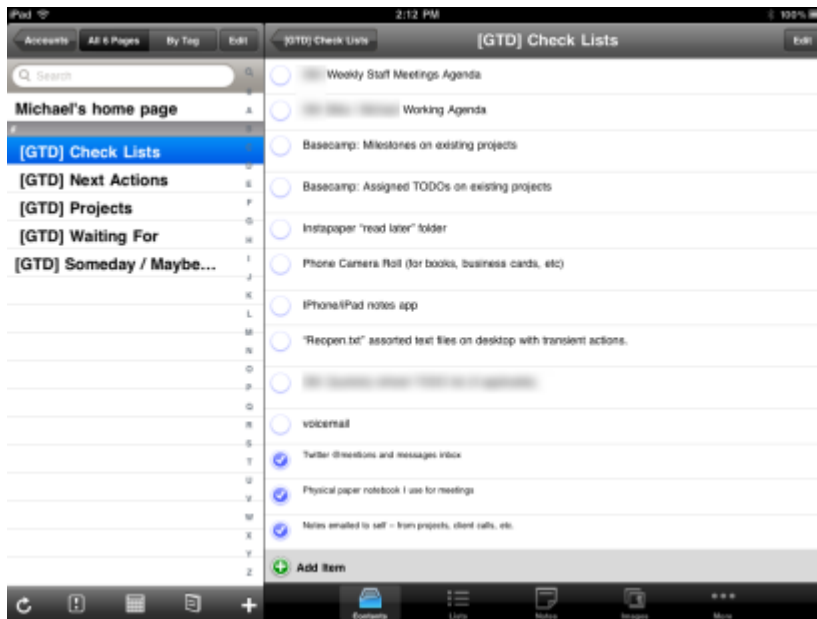
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- e-mail inbox
- Weekly Staff Meetings Agenda
- Working Agenda
- Basecamp: Milestones on existing projects
- Basecamp: Assigned TODOs on existing projects
- Instapaper "read later" folder

+ Add Item



Here's a few screenshots from the iPad (click to enlarge):





9. What about Basecamp?

Some projects are either shared by a team of people or are truly massive with many steps, artifacts, milestones, and files. These projects are better managed outside of Backpack. In that case I use the paid version of Basecamp and simply add a note to the project entry page as you can see here.

- ChatPast ---

Software

[managed in basecamp project.]

[Add an item](#)

Accounting

[blurred text]

[Add an item](#)

Conclusion

If you've been thinking of using Backpack for GTD, I hope this has given you something to work with. I certainly don't promise to be a GTD expert. But this setup works well for me and I think it will for you too.

Thanks!

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