

Reviewing Your System

Part I: Built-In Review



Overview

The Review process can be one of the more daunting aspects of the workflow, though it does not need to be.

In this section we will examine:

- The importance of review
- Questions to consider when developing a project
- The default review system
- Notification preferences
- A process of review
- Setting review frequency
- Scheduling reviews

The Importance of Review

Review is a profoundly important aspect of the workflow. It is the fourth of five workflow stages in *Getting Things Done*. It is also integrated as a component of Agile Results, another workflow methodology. In fact, I think that any methodology worth its salt will include some component of review.

Any task management solution based on the GTD method invites getting things off the mind. In fact, this is the compass heading with which we build our systems. Whenever an idea appears, there is a welcoming Inbox or "bucket" ready to catch it. Assignments of place and time come afterwards as project, tag, defer/due dates, and so forth are added.

We don't have to do things as soon as they come to mind. Instead of being afraid we'll lose an idea, we can set it aside. Later, when we process and review our ideas, we can put them where they best belong. We can massage projects and tasks into bite-size and doable pieces. Gradually, creating an album or writing a book no longer feels impossible.

To make the system work, we must recognize review as a regularly repeated process. As noted earlier, without repetition, there is no rhythm. Beyond my pithy repetition of this statement itself, I also suggest that review establishes the very scope and structure of a system. Whatever we review becomes a part of that system.

So much of creative work is the building of a supportive system. Rather than focusing on our goals, we consider the systems that would get us to those goals.

Repetition is the medium of our systems.

Questions to Consider When Developing a Project

Review is a key process in actualizing the things we want to do. If something hasn't happened yet, we ask ourselves "Why not?":

- Do tasks need further breakdown?
- Is a particular task better considered a project?
- Would a project benefit from being assigned to a Navigation project? (See Volume 3 - *Navigation - A Central System.*)
- Does the next task make sense in the project at this point?
- Have I established a reasonable next action?
- Can I visualize myself doing a task?
- Is a next action actually scheduling a time for a task itself?
- Are tasks clear and well written?
- Are tasks specific enough?
- Are tasks actual actions?
- Is there something else that needs to happen before a presently active task?
- Is what I am waiting for a task or project in itself?
- What will this project look like when it is done?
- Have I taken into account how things stand presently?
- Are a tasks' tags well described?

- Is a tag appropriate for the task to which it is assigned?
- What next action can I write to realistically get this off my mind?
- Would a task benefit from being set to repeat so it can be done a little at a time?

Review occurs at a micro level in the very first moments of associating a tag and project with a task. The review process continues every time we pay attention to a project and think about what needs to happen to bring it closer to completion. We can ask of any forming intention, be it action, project, or vague thought:

- What is the present state?
- What is the vision?
- What is a next action?

What we write in the Inbox is like a wish. We wish to learn something new (e.g. learn a new language), or we wish to avoid anxieties (e.g. work on retirement finances). Review keeps us on course by clearing the path to build those wishes.

How we feel about our projects inevitably changes. Task wording may need improvement. Some projects stall out. Other tasks become redundant or even in the way. In order to actually feel on top of work, projects need active and regular consideration.

The robust nature of a review stems from the nature of GTD itself. When done well, we build a trusted system that holds our wishes and desires. If we don't trust it, those thoughts come back to mind. Review, then, is a major part of how we keep these projects and tasks off our mind.

Knowing that our systems hold so much of what is dear to us, it becomes clear why review can be so daunting.

A Therapeutic Process

For a moment, let us look at a therapeutic process. I will describe its relation to review shortly.

There is a sentiment that we hide things in an unconscious part of our minds, and that we have to go digging around finding them. By some magical means, when we turn hidden thoughts into words, we feel better.

There are ideas that we repress and avoid. But finding these is not always the stuff of therapy. Instead, it is more fruitful to think about what is preventing us from looking at them in the first place.

Meaningful projects, especially, are often fraught with worries. Some worries are realistic. Some are hold-overs from younger days.

How does this relate to review?

Rather than brute force through a project that is not moving forward, we can ask a different question. It is a subtle, but significantly different approach:

“What is preventing this project from moving forward?”

Many times it has nothing to do with internal conflicts. But sometimes it does. Even by way of a system as adept as OmniFocus, our minds can find methods for procrastination. For example, we can assign some tasks to rarely seen tags. Or we may assign due dates without actually creating usable next actions.

But when we review, we can consider what is the feeling that we are trying to avoid. If worried, we can ask,

“What is the worry?”

or if something is difficult, we can ask,

“What about this is difficult?”

These questions help make better next actions.

Even more profoundly, we can ask,

“What does this project mean to me?”

When thoughts come to mind, some part of us is often asking us to work on something we find meaningful (even if it doesn't consciously look that way). By asking ourselves what is meaningful about a project, we find a way to ground the work.

For these reasons, review is more than just a simple procedure. Meanwhile, OmniFocus can, at least, display our projects at regular times. We can then actively consider them, rather than bury them away.

Time for Review

*To put one brick upon another,
Add a third and then a fourth,
Leaves no time to wonder whether
What you do has any worth.*

- Philip Larkin³⁰

Review takes time. It is therefore of particular importance to schedule more than adequate time to review. Decisions made in a depth of reflection permeate our days. Treating our times of reflection as precious honors that time, the time that surrounds it, ourselves, and, therefore, the people with whom we interact.

30. To Put One Brick Upon Another, Philip Larkin - <http://allpoetry.com/poem/8495609-To-Put-One-Brick-Upon-Another-by-Philip-Larkin>

Built-In Review

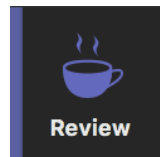
There are two main variants of Review one can use in OmniFocus. These are:

1. The built-in review system
2. A customized scheduled review

When put together, they offer solid grounding. We will examine the first now. A user-built review system to round out the edges will be discussed in Volume 4 when other OmniFocus functionality has been covered.

To enter Review mode, either:

- Select the Review Perspective tab from the left:

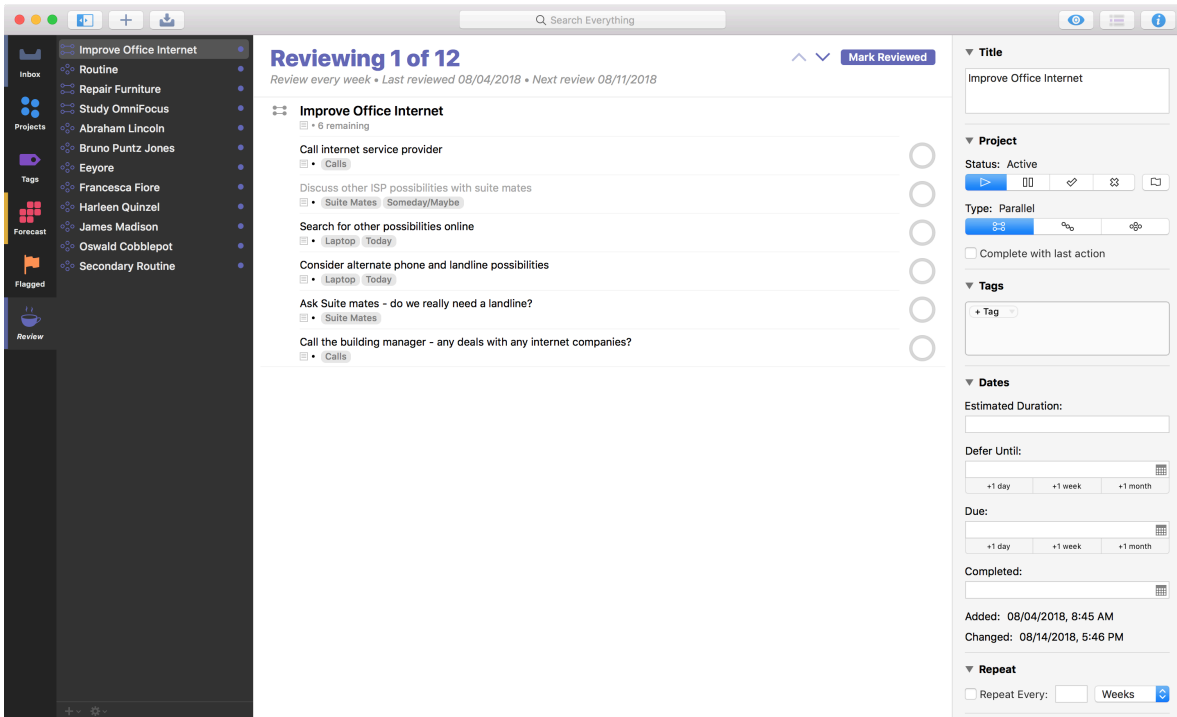


- Select the Review Perspective from the Perspectives menu (Menu > Perspectives > Review):

Perspectives	
Show Perspectives	^ ⌘ P
Add Perspective...	
Inbox	⌘ 1
Projects	⌘ 2
Tags	⌘ 3
Forecast	⌘ 4
Flagged	⌘ 5
Review	⌘ 6
Changed	⌘ Z
Completed	

- Type **(Command-6)**

The Review Perspective appears:



Note that only one project can be selected and viewed at a time. This limit is helpful in restricting focus to evaluate each project separately.

Let us examine the perspective's view settings.

- Type **(Shift-Command-v)** or select the view icon:

Review

Revert Save

In Review, show projects:

Active
does not include on-hold and deferred projects

Remaining
includes on-hold and deferred projects

In Review, show actions:

Remaining
includes blocked, deferred, and on-hold items

All
includes completed and dropped items

Sort projects:

By review date

Unsorted

Show folders in the outline

Layout:

Use Preferences
[use layout settings from OmniFocus preferences](#)

Fluid
show details below the item title

Custom Columns
show selected details beside the item title

<input type="checkbox"/> Project	<input type="checkbox"/> Estimated Duration
<input checked="" type="checkbox"/> Tags	<input type="checkbox"/> Completion Date
<input checked="" type="checkbox"/> Defer Date	<input checked="" type="checkbox"/> Note Button
<input checked="" type="checkbox"/> Due Date	<input checked="" type="checkbox"/> Flag Button

The view settings are divided into several sections:

- **“In Review, show projects:”** offers “Active” and “Remaining”, focusing on which projects are displayed. This can be helpful if you prefer to review in stages. For example, you can first review everything that is presently ongoing. Afterwards, you can change the view setting to review everything that has been placed on hold. In either stage, you can selectively decide if there are too many ongoing projects or if something that has been on hold warrants activation. I tend to stick with the “Remaining” option.
- **“In Review, show actions:”** offers “Remaining” and “All”, focusing on which tasks are displayed. If you would like to see items that you have completed or dropped in addition to tasks that have yet to be done, select “All”. Again, I tend to stick

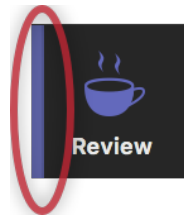
with the “Remaining” option.

- **“Sort projects:”** offers “By review date” and “Unsorted”. As we will see, OmniFocus allows you to set a frequency as to how often you may want to review a particular project. If it has been quite some time since a review, you may wish to have those most out-of-date listed towards the top. Selecting “By review date” would offer this option. My own preference is “Unsorted”. While the term “Unsorted” suggests that there is no rhyme or reason to presentation, this is not the case. It instead lists the projects in the order manually placed in the Projects perspective. In this way, I can review items grouped by their Areas of Responsibility and, therefore, in the order I have given them importance or priority.
- **“Show folders in the outline”** shows the folders in which a project may rest. This can be particularly helpful when several projects share the same name. I have projects titled “Administration” sitting at the top of several folders. The title is given to administrative projects from which I can govern the other projects within their respective folders. (See Volume 5 - *Managing School and Other Clear Scale Work.*) While I can tell which “Overview” project I am looking at from its content, this takes time and consideration I would prefer to devote to the actual review process. The “Show folders in the outline” quickly clarifies where I am in my set of projects.

The layout is the now familiar setup we have seen in other perspectives. I tend to keep it at the Fluid setting here.

Notification Preferences

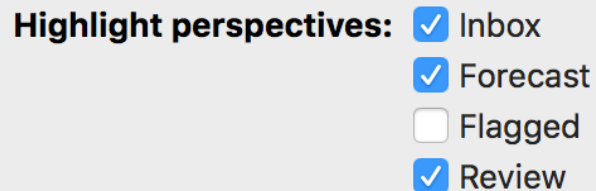
Notice the purple colored marker along the left side of the Review Perspective tab:



You may have noticed similarly-located markers along other perspective tabs. To set these preferences:

- Go to preferences (**Command-,**)
- Go to the Badges tab

Notice the section called “Highlight perspectives”:



These settings provide signals that there are actions and projects that warrant attention within that perspective:

- **The Inbox** is highlighted when unsorted tasks await.
- **The Forecast Perspective** is highlighted when actions or projects are due within the time frame specified in the “Due Soon’ is in the next” section of the Dates & Times tab in Preferences.
- **The Flagged Perspective** is highlighted when there are remaining tasks

assigned flags.

- **The Review Perspective** is highlighted when it is time for a project or several projects to be reviewed.

Review Process

What exactly entails a good review frequency may be dependent upon the person. However, an excellent rule of thumb suggested by David Allen is “whatever it takes to get it off of your mind.” Whenever we make a commitment to ourselves via some trusted system, be it a piece of paper or a complex program, there are at least several important points to consider to help keep it off the mind:

- The system must feel genuinely trustworthy
- Next Actions should be considered doable and placed in a working list, be that by tag, perspective, flag, etc.
- Any working list should be one that we would normally see when the time is appropriate
- We have some idea of what the project will look like when it is complete or at least that it is developing
- The project should be seen for review as often as needed

Turning these into questions, we can ask:

1. Is this system trustworthy? If not, why not? Do I need to make better backups?

If the system itself is untrustworthy, it will become immediately apparent as “psychic RAM” will quickly be filled.

2. Is there a next actionable task? Can it actually be readily done? Can you visualize yourself doing it?

This is the art of strong task writing. The review process helps to hone this skill. Consider where is the project now? What direction would I like it to head? And what is a next action to move in that direction?

3. When do I anticipate looking at this next action's tag?

In other words:

- Will I see the next action at a time and place that it can be done, with minimal distraction?
- If not, how can I make the conditions so that it is seen at a time and place that it can be done? (The answers may then become next actions instead).

4. What will this project look like when it is done?

Writing an answer to this in the note field of a project can be helpful in imagining it to completion. It is a nice exercise that can help realize a change or addition needed in the tasks of the project. If there is no endpoint to the project, consider whether it is better suited as an Area of Responsibility, as a folder housing other projects, or as a Single Action maintenance project.

5. When do I think I'll need to see this project again?

The default review schedule is once per week. However, this may be changed in the preferences. In addition, a specific review schedule may be assigned to each project. Scheduling review frequency will be described shortly.

Keep in mind that answering the above questions is not about developing a project from start to finish. Depending upon a project (e.g. Plan Music Album Release), we can

spend a lot of time tracing the ins and outs of the folders, projects, tasks and their dependencies.

Fully mapping a project, then, can be a large task in itself. For example:

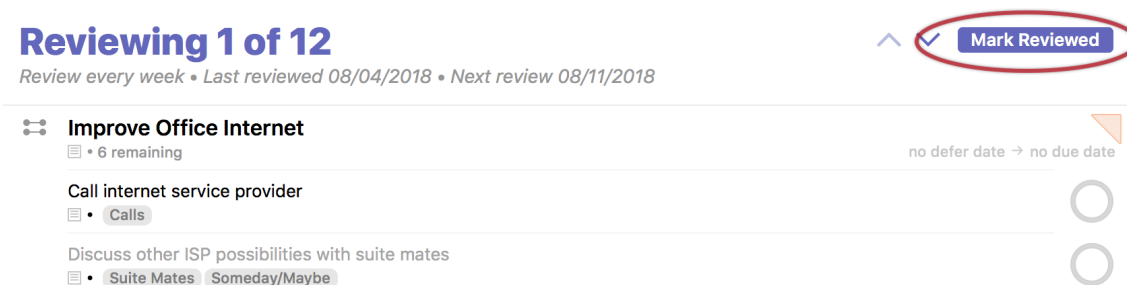
- “Develop: album release” @Laptop

As long as I am confident that there is a time when I will see this task when appropriate, then this can work well.

As an aside, also consider that the more projects you have On Hold, the greater the focus available for those that are Active. A regular habit of reviewing your system provides an excellent trusted support for this process. You will know that every week, for instance, you can review what is On Hold and what is Active and change their states as desired.

When a project is sufficiently reviewed and the answers to the above questions seem settled, mark the project as reviewed by one of two methods:

- Select “Mark Reviewed” from the central window near the tool bar.



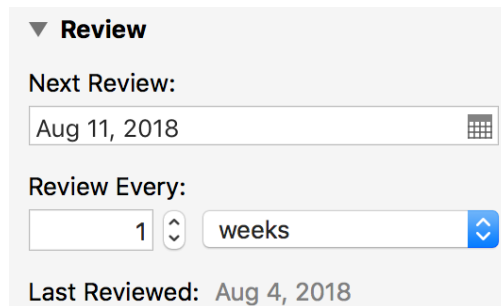
Or,

- Type (Shift-Command-r)

The project will be marked as reviewed and its review date automatically advanced forward by its assigned review schedule.

Setting Frequency for Reviews

As projects accumulate, it is easier to look at things only as often as necessary and avoid reviewing a task too often. The frequency of review for any individual project may be adjusted using the Inspector (Option-Command-i):



The screenshot shows a 'Review' section in a software interface. It includes a 'Next Review' date field set to 'Aug 11, 2018', a 'Review Every' field set to '1' with a unit dropdown menu set to 'weeks', and a 'Last Reviewed' date field set to 'Aug 4, 2018'.

Keeping the Inspector open during review allows adjustments to the review frequency settings for each project. For example, a project such as “Leisure Books to Read” may not necessarily need frequent review. Consider setting it to once ever several months.

Though it would seem that simply hitting Reviewed (Shift-Command-r) every week would be easy for such a project, there is a subtle but significant grab for attention that can be avoided. Looking at a list of 30 projects, even if most are simple, is more harrowing than looking at 5 that are known to require some real attention.

Though the 30-project scenario may contain 5 projects requiring significant attention and a bunch of others that can simply be stamped “Reviewed”, which 5 of those 30 require particular care is not clear until examined. Each of those 30 would ask for the limited resource of attention and would require at least some mental processing prior to being considered reviewed.

Consider each review of a task as a grab for attention, and keep the frequency as low as is reasonable, but high enough that it is still off the mind when not seen.

In the example above, a project that lists leisure readings may not need to be very high, e.g. every other month. It is low enough that it does not have to be seen too often, but

high enough that it will be seen with enough frequency to be useful. Other projects may not need to be seen for several months, if not longer.

For projects that have high priority, consider setting their frequency of review to match. I've had times where one or a few projects were reviewed on a daily basis.

Review Scheduling

Review may be set for a specific time every week or at any time the program is visited. As the built-in review system allows an individual review schedule for each project, we can even review daily with different sets of projects appearing at each visit. Alternatively, we can just review whenever the indicator appears in the tabs.

Whether or not one frequency is better than another is personal preference. If you find yourself annoyed with daily reviews or forgetting to do a periodic review, then setting aside the weekly time may be more prudent. The GTD recommendation is weekly.

Personally, I've gone back and forth between daily and weekly reviews. Currently, I use the default OmniFocus review system daily while maintaining a customized weekly review. We'll examine creating your own later in this text.

As I'll suggest in the next section, consider making it a part of your daily settling habit.

Adjusting Review While Inbox Processing

A common pain point in productivity is the Inbox. While I can say, “clear it regularly”, and I do, it can be difficult to do so for several reasons.

One may be a worry that you’ll never see the task again. If it is in the Inbox, you may rationalize, at least it will stay where it can be seen. Unfortunately, this is a problematic workflow that creates clutter. The Inbox grows large and unwieldy. Important matters get lost. Eventually, you must again rely on memory to think of what’s important. The Inbox, as a vital tool that could help you defer decision, decays and becomes useless.

But still, the worry of losing the task remains. It is a legitimate concern. What will happen to your tasks if you don’t see them?

You may fear that the assigned project or tag are overflowing, used more as storage tanks than working lists, or they are rarely seen. Also, OmniFocus places these cleaned-up tasks at the end of any project, after the set of tasks already there. This may not make sense in the context of the project.

We’ve looked at [*one means of addressing this by using Quick Open.*](#)

However, doing this may become distracting if we are processing the Inbox. A useful principle when clearing the Inbox is to do things that take 2 minutes or less and only address items that take longer than 2 minutes. Starting to go through a project could quite easily take longer than 2 minutes, if not tens of minutes depending on the complexity of the project.

Well, isn’t this getting more complicated? You might shrug and return to the original, let’s-just-leave-things-in-the-Inbox method. But there is another reasonable way to handle this:

Actively adjust and use the Review date and frequency.

While clearing a task in the Inbox:

- Assign a reasonable project and tag
- Before clearing it, consider, “Do I trust that I will see this when and where I need to?”
- If not, open the project to which it is being assigned (**Command-o**)

The task will now be waiting for you at the bottom of that project. Instead of adjusting the task,

- Select the project title
- Enter the inspector (**Option-Command-i**)
- Set the review date and frequency:

▼ **Review**

Next Review:
Aug 11, 2018

Review Every:
1 weeks

Last Reviewed: Aug 4, 2018

- Set the review date for today

It may seem that we are only passing the buck of reviewing the project to our future self. That is because we are. The point is to set the work of reviewing the project aside while we complete the work of processing the Inbox.

When done processing the Inbox, we can then decide what to do next.

There is, of course, a major matter that remains: actively doing your reviews. We can see how the habits of clearing the Inbox and the projects awaiting review interrelate. It

is difficult to rely on one habit without the other. But when we are able to do both, we can develop a smoothly working system.

Review is all about trusting that we will see something when and where we want to see it. That is one of the prime reasons why review is the heart of a solid system.