COGNITIVE PRODUCTIVITY

WITH macOS®

7 PRINCIPLES FOR GETTING SMARTER WITH KNOWLEDGE

Luc P. Beaudoin

CogZest™

Cognitive Productivity with macOS

7 Principles for Getting Smarter with Knowledge

Luc P. Beaudoin

This book is available at
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Discontinuities

Cognitive Productivity

To all the researchers, software designers, developers, quality assurance specialists, managers, technical writers, investors and others who contributed to the excellent software described in this book.

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Part 1: Self-Governance

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Introduction

This book presents seven principles to help you process high-caliber knowledge with macOS technology in a way that makes you a more effective person.[1] It seems fitting, then, to start this book by acknowledging some of the previous work upon which you can build a foundation of self-improvement. This entire book can be read as a modernization of the mental aspect of the late Steven Covey's seventh habit[2] of highly effective people. (If you haven't read *Seven Habits of Highly Effective People* yet, start by reading the dynamic summary on its website[3]). That part of the seventh principle basically says: regularly read and learn.

Covey's book, however, dedicates only *one* page to the essential and complex topic of self-regulated learning. It was written before the world wide web. It does not tell you how to read with information technology. And it is not informed by cognitive science[4].

Mortimer Adler's *How to Read a Book* remains one of the most popular and helpful books to teach adults how to read better. However, that book was published in the early 1970s. It doesn't deal with information technology nor the world wide web. And it certainly wasn't based on cognitive science, a term that wasn't even coined when the book was written. (Compare my blog post, A Review of Mortimer Adler's How to Read a Book — 42 years later[5].)

The current book is based on a broad cognitive science-based analysis of self-regulated learning: *Cognitive Productivity: Using*

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[1] As defined in *Cognitive Productivity*, *meta-effectiveness* is the abilities and dispositions to use knowledge to become more effective. For a compelling exposition of effectiveness and its importance, see E Tory Higgins' 2011 book *Beyond Pleasure and Pain.*

[2] https://www.stephencovey.com/7habits/7habits-habit7.php

[3] https://www.stephencovey.com/7habits/7habits.php

[4] https://en.wikipedia.org/wiki/Cognitive_science

[5] https://cogzest.com/2014/09/review-of-how-to-read-a-book-by-mortimer-adler/

Knowledge to Become Profoundly Effective[6]. Part three of the original *Cognitive Productivity* book provides many practical recommendations. However, those are conveyed with text and images.

The current book is unique in that it is the first extensive screencast-rich book to help knowledge workers use macOS and knowledge resources to become smarter. It extrapolates from cognitive science without presenting the science itself.

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[6]https://leanpub.com/cognitiveproductivity/

Principle 1: *Lead* Yourself with Knowledge

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Consider Covey's Three Habits of Independence

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Principle 2: Manage Your Cognitive Life Mindfully

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Manage Your Projects

Cognitive projects typically involve some of the following types of information:

1. planning information: the project's rationale, objectives, and constraints; decisions; action items; and knowledge gaps; and
2. communications: e-mail.

If the project involves creating a public document, presentation, screencast, or other knowledge resource, then the project typically requires at least some of the following:

1. a content specification: its title, thesis, argument, a summary, its key concepts, topics, examples, and references;
2. ancillary materials: figures, tables, etc.;
3. links and/or aliases to related resources;
4. resources;
5. an outline;
6. notes;
7. the current draft;
8. previous drafts;

9. comments from reviewers, which may be in separate files, or inline annotations of previous drafts; and
10. the resource in output format (e.g. pdf or html).

Experts develop and reliably use high quality schemas, templates and habits. Applying this principle to cognitive productivity with macOS, it is a good idea to

1. create a project folder template in Finder that contains the types of files you typically use to manage a project; and
2. use personal project management software like OmniFocus or Things.

Then, whenever you start a significant project, you

1. replicate the project folder in Finder; and
2. create a new project in your personal project management app.

The next set of screencasts explains these tips.

Using Project Folder Templates in Finder

When creating a substantial knowledge resource (such as a presentation or document), it is often helpful to create a folder in the Finder for ancillary files and folders. Rather than create only the files that you need, from scratch, each time you start a project, you might find it helpful to have a template folder with all the files that will be the basis of any new project. When starting a new project, you would create a new folder for that project, and replicate all the files from a template folder into your new project folder.

As the next screencast demonstrates, my project folder template includes the following files and folders.

- a folder of *aliases* to this project folder. In this folder I store aliases to key files in the project folder. Some of the aliases are named to be easily found by my launcher (LaunchBar);
- a folder of **Communications**, **correspondence**. Here is where I store some of the information I receive from others about the project;
- a folder of **Figures and Tables**. If I create a drawing or a spreadsheet for my document, I would normally store them here. This folder also contains an OmniGraffle template for the figure, since I tend to draw in OmniGraffle. Using this consistent naming strategy allows me quickly to access the Figures folder when I am in the project's Finder folder;
- an "elements" file which contains rhetorical elements (I use OmniOutliner so the default filename is **ELEMENTS-ELEMENTS.ooutline**);
- a **md.txt**, this is a markdown file where I will do most of my writing for the project. For many reasons, I recommend writing in Markdown. If you need convincing, check out Brett Terpstra's "Why Markdown? A two-minute explanation"[7]. Another big reason is that I love being able to write inline comments using XML syntax. Most Leanpub books, including this one, are written in Markdown;
- an OUTLINE-OUTLINE.ooutline which is an outline for the project;
- a **PLAN-PLAN.ooutline** which would include some of my planning for the project (the rest of my planning typically goes in OmniFocus, also discussed in this book);
- a folder for **Previous** information (e.g., to keep previous drafts),
- a **Resources and Research** folder for PDFs and .webloc files related to this project (or aliases to them),
- a folder for **Reviews and comments** about this project received from others;
- **rtf-.rtf**, which serves the same purpose as the md.txt file above, for the rare times that I write in RTF;

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[7]http://brettterpstra.com/2011/08/31/why-markdown-a-two-minute-explanation/

- a **spad**-.**ooutline**, this is a scratch pad file for unstructured, "random" thoughts about the project;
- a **tidbits**-.**txt**, this is typically for snips of text that I have moved out of the main main md.txt or RTF.rtf file. I also use this for text that is in progress but too messy to clutter up the main document;
- a **TITLE**-.**txt**, this is for the current title of the document.

Afterwards, you would batch rename all these files (using the "Rename" command that is available in the Finder's File menu). For instance, if the project is for part2 of this book, I might use the Finder to substitute every occurrence of "-" with "-bkGTL-part2-".

You're probably wondering why the duplicated content in file-names, e.g., "*PLAN-PLAN*". This makes it very quick and easy to access files in this folder using the keyboard in the Finder. (Again, avoiding the mouse when you can is usually saves time.) Since the word "PLAN* also following the name means I can easily find the document using a launcher by typing the name first. E.g., I can type "bkGTLp2plan" in a launcher. A similar effect could be used by defining aliases, which you would store in the alias folder mentioned above.

The following screencast shows you how to do all this.

**Cognitive Productivity
with macOS®**
7 Principles for Getting Smarter with Knowledge

**Setting up and Using Template Folders
in Finder**

Luc P. Beaudoin, Ph.D. (Cognitive Science)
(CogZest, CogSci Apps Corp)

https://leanpub.com/cognitive-productivity-macos

View this Video at https://youtu.be/CQo8n8IKoN4[8].

Systematically Setting up Knowledge-Building Project Folders in Finder

Using Outliners to Create: OmniOutliner

Several tips presented in this book, including the ones in this principle, involve using OmniOutliner, the Mac's most versatile, flexible outliner, which is also available for iOS. Most knowledge products people create —documents, presentations, videos, screencasts, seminars, workshops, etc. — have a hierarchical structure, made of sections and subsections. Outliners are designed to help you think in a hierarchical way.

One of the most powerful writing strategies is to create an outline before you actually begin writing. A good outliner, like OmniOutliner, is useful for far more than creating outlines of end-documents. As you can see in this section, outlining is useful for *all kinds of thinking*. For example, it is useful for planning, creating specifications, and gathering ideas. As we will see in the Principle "Delve", outlines are excellent tools for creating "meta-docs", notes about what you process.

Rather than re-invent the wheel by giving you my own screencast overview of OmniOutliner, I recommend if you are unfamiliar with OmniOutliner that you check out this video about OmniOutliner[9] made by its developer, OmniGroup.

I've created OmniOutliner templates that are illustrated in this book. They are available as part of the Leanpub book package and as an extra, stand-alone, Leanpub package.

Planning in OmniOutliner ("Plan" documents)

Experts spend a greater proportion of their time planning relative to executing than non-experts. Upfront planning allows them to create more productively: better products in less time. The following screencast illustrates how to use OmniOutliner for planning.

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[9]https://vimeo.com/86374535
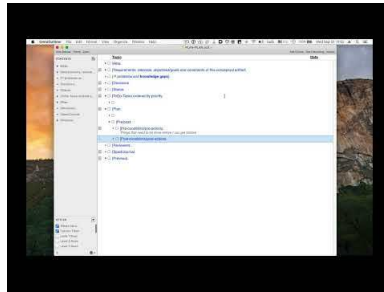
View this Video at https://youtu.be/sGyZnS_ZaRs[10].

Setting up and Using Template Folders in Finder

Developing a Resource Specification in OmniOutliner ("Elements" of your Conceptual Artifact)

When creating a substantial knowledge resource, you typically need to consider a large collection of rhetorical "elements", many of which are the same as what you look for when you process someone else's document. Here are some examples

- the title;
- opening quotations;
- the thesis and argument;
- what is new in the document;
- the rationale, justification, importance and relevance of the document;
- a list of topics to discuss;
- principal and ancillary information (summary or abstract, principles, concepts, major claims, minor claims, examples, references); and
- supporting materials.

Whether you frequently or only occasionally create knowledge resources, having a template for this information can really help. The following screencast illustrates this. It uses OmniOutliner, but you might prefer Markdown or some other format.
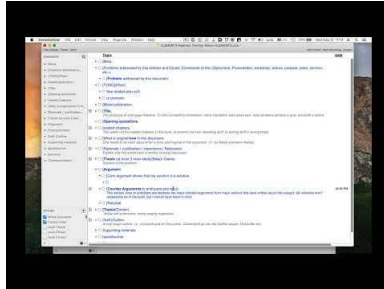
View this Video at https://youtu.be/wVEL9AdhZw4[11].

Using OmniOutliner to Specify the Requirements of your Creative Projects

Outlining in OmniOutliner ("Outlines")

Finally, when writing substantial documents, for most people, it helps to create an outline of the target document. The following screencast illustrates how to do this with OmniOutliner.
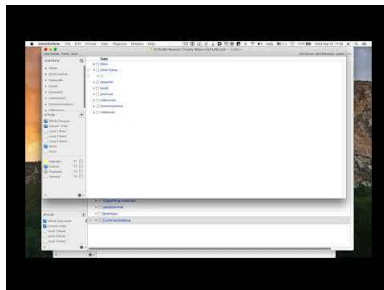
View this Video at https://youtu.be/ZQN0MGEdMbE[12].

Using OmniOutliner to Outline Your Creations

Managing Projects with OmniFocus

Many personal project management solutions are available for macOS, ranging from simple todo lists (like TaskPaper[13]), to Things[14], to the most sophisticated and powerful personal project management app for Mac and iOS, OmniFocus Pro.

When choosing project management apps, consider the following requirements:

- **scalability and efficiency**: the app must allow you to efficiently create, edit, access, and search through hundreds, and even thousands, of projects;
- **perspectives**: you should be able to define as many perspectives on your projects as you like, and to have a dozen or more project windows open at any given time, being able to toggle between each one within two seconds;
- **ontology**: it should support arbitrarily nested folders, projects, and actions, all of which are easy to collapse, expand, filter and search;
- **task properties**: you need to be able to define a large collection of task properties, such as due dates and repetition intervals, flags and statuses. Tags are helpful but not strictly necessary;
- **iOS syncing** if you often need to consult your projects without your Mac, then obviously you need syncing, whether it is with iCloud or not; and
- **secure server solution**: whether through iCloud or a proprietary database, it is essential that task data be secure. (Imagine the consequences of your most sensitive task lists being displayed for all to read on the Internet.) This means only storing data with the most trustworthy service providers. It also means following best practices, such as enabling and

[13]https://www.taskpaper.com
[14]https://culturedcode.com/things/

using multi-factor authentication, promptly applying security updates, and keeping abreast of security.

There are, in addition, several desiderata, some of which, unfortunately, are not supported by any app that meets the hard requirements above. For example: automatic detection of activity type, time tracking, and integration with issue tracking systems —such as Bugzilla. I've discussed these criteria in relation to mySelfQuantifier on CogZest.com[15].

In this book, I illustrate OmniFocus Pro because it is the most sophisticated app that meets the hard requirements listed above. In 2016, its security improved considerably. OmniFocus Pro may be more than you need. But you should at least study, and, I suggest, *try* OmniFocus to know what you are missing.

OmniFocus is somewhat complicated. Therefore, you should only migrate to it when you have a couple of light weeks ahead of you during which you can learn the ropes.

If you are not conversant with OmniFocus, then check out the videos about OmniFocus[16] made by its developer, OmniGroup.

What was lacking on the Internet before this book and its precursor, *Cognitive Productivity: Using Knowledge to Become Profoundly Effective*[17], was an exposition of how to use OmniFocus for *knowledge-building*[18] *projects*.

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[15]https://cogzest.com/projects/mySelfQuantifier/
[16]https://www.omnigroup.com/video/omnifocus/
[17]https://leanpub.com/cognitiveproductivity/
[18]https://en.wikipedia.org/wiki/Knowledge_building
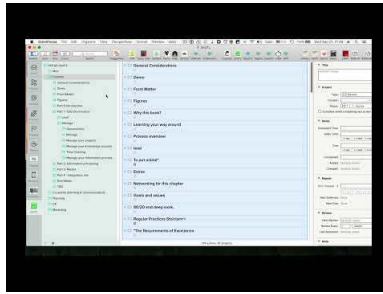
View this Video at https://youtu.be/WsuqLQWHIuk[19].

Using OmniFocus to Plan and Manage your Creative Work
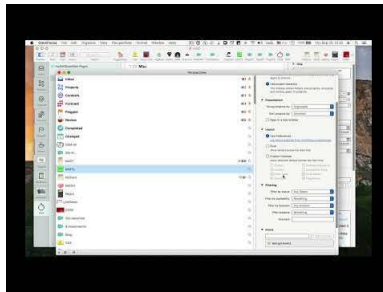
View this Video at https://youtu.be/FKYAAaifGks[20].

Advanced OmniFocus Tips for Creative Professionals

If OmniFocus Pro is too complicated for you, then consider OmniFocus Standard, or its main competitor, Things[a].

[a]https://culturedcode.com/things/

If you or your organization needs help making productive use of OmniFocus, check out Learn OmniFocus[21]. They offer articles, videos, interactive live sessions, and private consulting/training. Learn OmniFocus is run by Tim Stringer[22].

[21]https://learnomnifocus.com
[22]https://technicallysimple.com/about-tim-stringer/

If you want something even simpler, then consider using markdown-enabled plain text editors, such as TaskPaper[23] or even Bear app[24]. (Compare the Sweet Setup's review of Bear App as a GTD app[25].)

Manage Your Knowledge Sources

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Naming and Tagging Files for Later Use

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[23]https://www.taskpaper.com
[24]http://www.bear-writer.com
[25]https://thesweetsetup.com/apps/best-personal-gtd-app-suite

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Managing Web Content: Overview

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Accessing Linked Items with Hookmark

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The Utility of a Knowledge Resource

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CUP'A: Caliber, Utility, Potency and Appeal: Values

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