

# **Using Bonsai to Implement Getting Things Done**



**By LJ Moss**

A copy of this document may be obtained at  
<http://simpleproductivityblog.com>.



# Table Of Contents

Introduction and Assumptions .....	5
Basic Setup.....	5
Assumptions.....	5
Outline Overview .....	5
Creating the Outline.....	5
Categories .....	6
Categories from To Do .....	6
Additional Categories for Processing .....	6
Areas of Focus .....	7
Other Keywords.....	7
Bonsai Preferences.....	8
Global Settings.....	8
Outline Preferences.....	9
The Overall Outline .....	11
Setting Up the Overall Outline .....	11
First Level.....	11
Second Level.....	11
Additional Areas Under Someday .....	12
Third Level.....	12
Filters - Overall.....	12
Processing Filters .....	13
Processing Filters.....	13
Thinking Filters.....	27
Thinking Filters.....	27
Review Filters.....	38
Review Filters.....	38
Working List Filters .....	46
Working List Filters.....	46
Capturing and Processing.....	52
Using the Outline: Capturing and Processing.....	52
Capturing.....	52
Processing.....	53

Thinking .....	58
Using the Outline: Thinking .....	58
2.1 Start this week.....	58
2.2 Due this month.....	59
2.3 Current P&S (Projects and Somedays).....	59
2.4 Projects.....	60
2.5 Project Priority .....	60
2.6 Project Setup.....	61
Review .....	62
Using the Outline: Review.....	62
3.1 NA.....	62
3.2 Need NA .....	63
3.3 NA Not linked.....	64
3.4 Linked .....	65
Working Lists .....	66
Using the Outline: Working Lists.....	66
Flat NA linked.....	66
Flat Projects .....	66
Someday/Maybes.....	67
Summary .....	68
Summary.....	68

# Introduction and Assumptions

Bonsai is the heart of my productivity system. I use it to track the essentials of my Getting Things Done hybrid system. It has even kept me going on the occasion of the failure of my PDA.

## *Basic Setup*

### **Assumptions**

This system is based on a Bonsai implementation using both the desktop version and the PDA version. I will assume that you have both versions of the software installed. I am currently using Bonsai version 4.1.2.

I am also assuming that you have your contexts set up in your To Do list. By contexts, I mean those discrete areas where you do work. David Allen prefaces his contexts with "@". I do not do this, since I find it distracts me. Some sample contexts might be "Phone", "Computer", "Home", "Work", or "Errands."



## **Outline Overview**

My GTD system contains three outlines within Bonsai:

- Overall: this outline lives on both my desktop and my PDA. It is my main working outline.
- Completed: this outline lives only on my PC, and contains the items that I have completed and moved from the Overall outline. I keep this around so that I know when I completed things. It has come in handy more than once.
- CompletedTrx: this is the outline I use as a temporary holding place for items I have completed on the Palm. I use this when I do my review on the PDA, rather than the desktop. When I am at my PC, I transfer all items from this outline into the Completed outline.

## *Creating the Outline*

To create the outlines, I use the Palm system. This allows me to quickly populate the categories with my task list categories. If you choose to enter the categories in Bonsai by hand, you must make sure the names match your to-do/task categories exactly, or the items will not link to the proper category. Here are the steps for creating the new outline:

1. Start Bonsai on your PDA.
2. From the Outline menu, choose New.
3. Enter the name of your overall outline.
4. Make sure "To Do" is selected in the categories drop down.
5. Optional: enter a category for the outline.

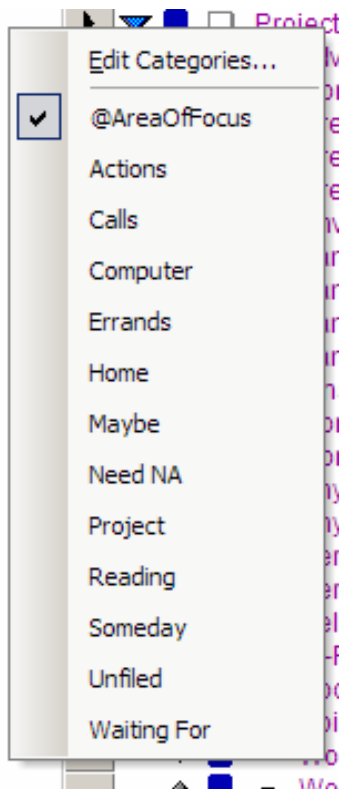
6. Click on OK



## Categories

### *Categories from To Do*

My to-do categories (contexts) are as follows:



- Actions: for agenda items, and things I can do anywhere. I have very few of these, so I put them in one category.
- Calls: for phone calls.
- Computer: for tasks I need to perform at the computer.
- Daily: for items that repeat daily. These are my habit-practicing items. I delete this category in Bonsai.
- Errands: for items that I need to do outside of the house.
- Home: for items I must do at home.
- Reading: for keeping track of my current reading.
- Waiting for: for items that I am waiting on something or someone until I can take the next action.
- Work: for items I have to do at work.

### *Additional Categories for Processing*

In addition, I add the following categories in Bonsai in order to process items:

1. @Area of focus: these are my main levels in the outline. More about how I determine these later.
2. Maybe: for items I might want to do.
3. Need NA: for projects that need a next action.
4. Project: for projects.
5. Someday: for items I definitely want to do in the near future.



## **Keywords**

Keywords make it easy for me to classify my items into my Areas of Focus. I also use Keywords to note items that are only one item long, i.e. a Single Next Action (SNA).

### ***Areas of Focus***

My areas of focus were generated over a several month span. I started by working through the Covey roles, listing those roles that I play in life. I then modified the areas using Steve Pavlina's [article](#) on setting focus. I was able to determine what areas my life would need to spread around in order to achieve some semblance of balance, without overload. These are a work in progress, but I've stuck with this particular list now for a few months, and I'm pretty satisfied with them.

My Areas of Focus are:

- Adventure: for items that push my boundaries
- Consumer: for items I wish to purchase
- Creativity: this includes all of my crafting, music, etc.
- Family: for my family roles, including parent, daughter, etc.
- Financial: things that impact my finances
- Home: for things applying to my home
- Partner: while this could have been wrapped up in family, making sure I focus on my partner is essential.
- Physical: including things like health, appearance, etc.
- Self Improvement: for reading, growth, etc.
- Service: for service to the community and organizations
- Social: for making sure I have a social life
- Spiritual: for spiritual growth issues
- Work: for all things that I do in my profession.

### ***Other Keywords***

In addition to my Areas of Focus, I have two other keywords, classified under Type: AOF (Areas of Focus) and SNA (Single Next Action). These two play an important part in my filters.



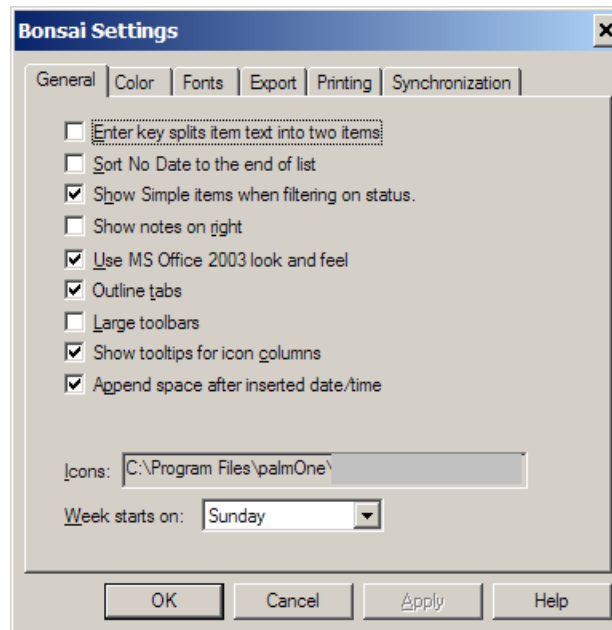
# Global Settings/Preferences

## *Bonsai Preferences*

### Global Settings

There are a few items that need to be set in the Global Settings area to make this work.

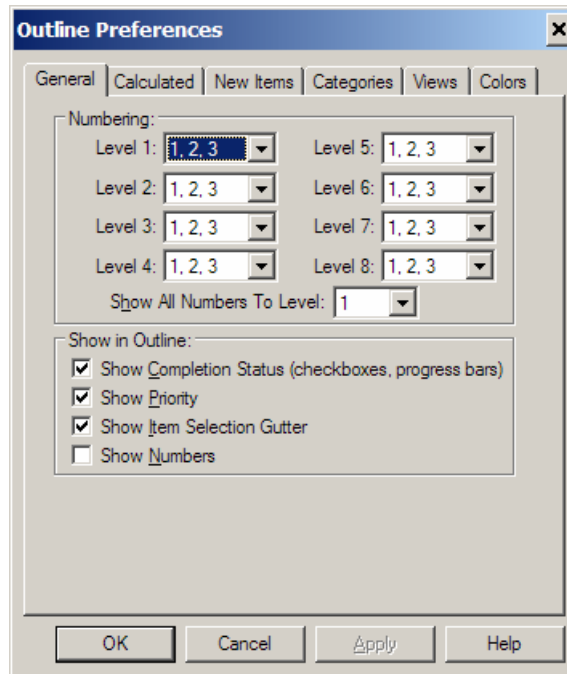
- Show Simple when Status Filter: checked
- Reapply filter while editing (this is available on the Palm)



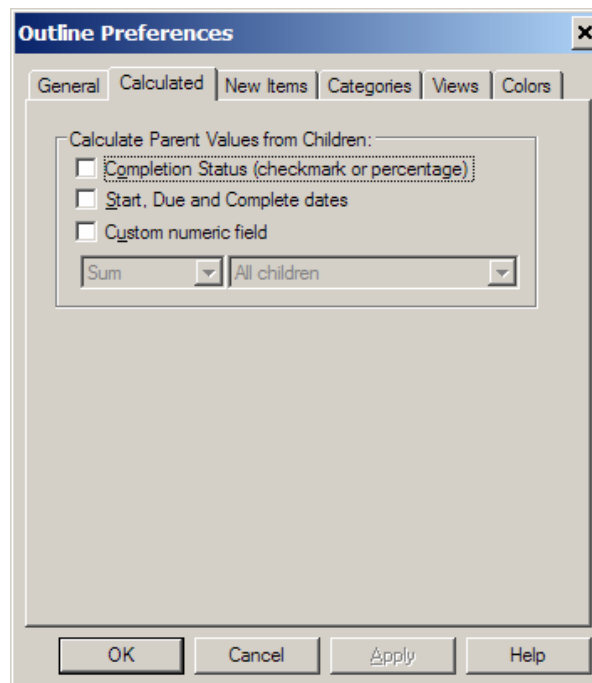
## Outline Preferences

I have the following outline preferences set to make processing work:

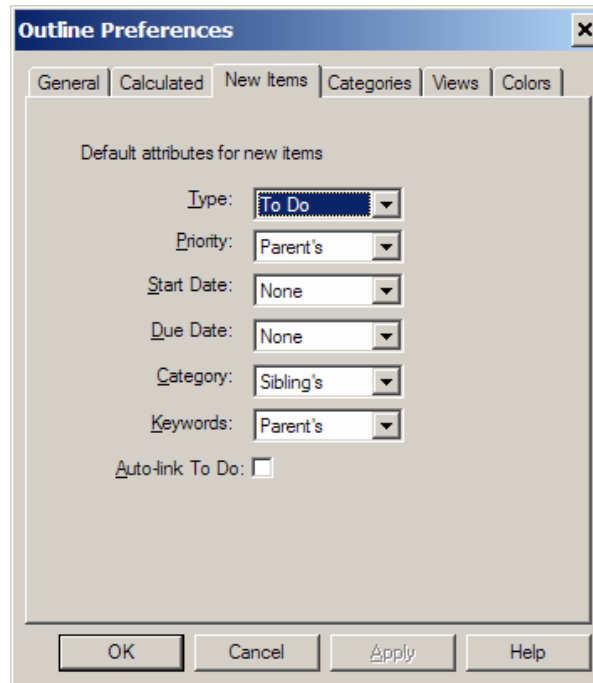
- Show completion status: checked
- Show Priority: checked (more about why later)



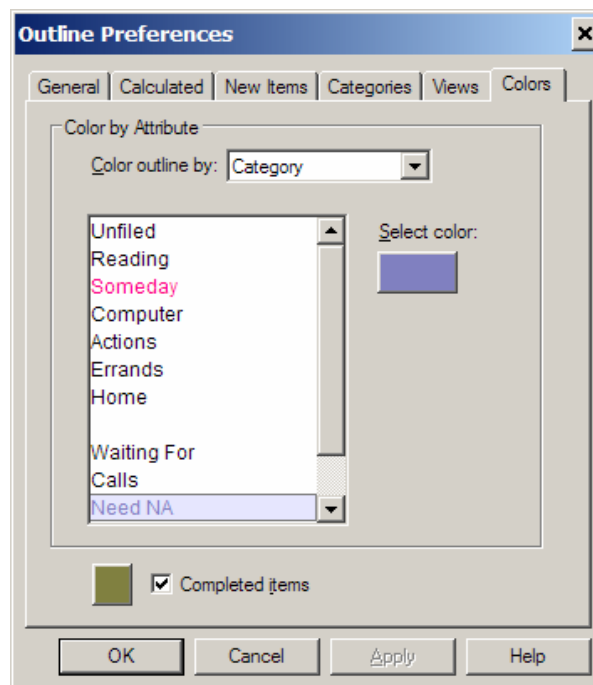
- Calculate Parent Values: all unchecked



- Insert New Items As: Type: To Do; Priority: Parent's; Category: unfiled; Keywords: Parent's



- Colors by category: I have everything set to black except Someday: fuchsia; @Area of Focus: purple; Project: blue.
- Color completed items: checked, color a light brown. This is for a visual aid on things that are completed.



- Icons: I have set up icons matching my To Do icons wherever possible (I use Agendus, which permits this). In addition, I also have set up Someday as a question mark, Need NA as an exclamation point, and Project as a yellow flag.



# The Overall Outline

## Setting Up the Overall Outline

### First Level

In the first level of the outline, I have three items:

1. Processing. Category: unfiled; Keywords: none.
2. Projects. Category: @Area of Focus; Keywords: none.
3. SomedayMaybe. Category: @Area of Focus; Keywords: none.

C...	Outline		Start	Due	Compl...	Created	Keyword
	Processing		--	--	--	12/13/2004	
	Projects		--	--	--	12/4/2006	
	SomedayMaybe		--	--	--	12/4/2006	

### Second Level

Underneath both Projects and Someday Maybe, I have the same list of items. There is one entry for each of my Areas of Focus, and in some cases, there are expansions on the item. This is primarily to allow me to find things quickly. All are categorized as @Area of Focus. Here are some examples:

- Creativity. Keywords: Creativity.
- Creativity-Writing. Keywords: Creativity
- Family. Keywords: Family
- Family-Parent. Keywords: Family
- Family - Partner. Keywords: Partner
- Financial. Keywords: Financial
- Home-Inside. Keywords: Home
- Home-Outside. Keywords: Home
- Self-Improvement. Keywords: Self-Improvement
- Self-Improvement-Reading. Keywords: Self-Improvement
- Service-Environmentalism. Keywords: Service
- Service-OrgComputers. Keywords: Service
- Service-OrgWeb. Keywords: Service

The screenshot shows the 'Nataru Bonsai' software interface. The top part is a menu bar with 'File', 'Edit', 'View', 'Item', 'Outline', 'Window', and 'Help'. Below the menu bar is a toolbar with various icons. The main area is divided into two parts: a tree view on the left and a table on the right. The tree view shows a hierarchy starting with 'Processing' and 'Projects'. Under 'Projects', there are several sub-items like 'Creativity', 'Family', 'Financial', etc. The table on the right has columns: 'C...', 'Start', 'Due', 'Compl...', 'Created', and 'Keywords'. It lists various tasks with their start and due dates, completion status, and creation dates. Some tasks have keywords like 'Area of Focus|Creativity'.

C...	Start	Due	Compl...	Created	Keywords
Processing	--	--	--	12/13/2004	
Projects	--	--	--	12/4/2006	
- Creativity				12/4/2006	Area of Focus Creativity
- Creativity-Writing				12/4/2006	Area of Focus Creativity
- Family				2/16/2007	Area of Focus Family
- Family-Parent				2/10/2004	Area of Focus Family
- Family-Partner				3/12/2004	Area of Focus Partner
- Financial				6/3/2005	Area of Focus Financial
- Home-inside				5/24/2004	Area of Focus Home
- Home-outside				5/24/2004	Area of Focus Home
- Physical-Health				5/31/2005	Area of Focus Physical
- Self Improvement-General				12/3/2006	Area of Focus Self Improvement
- SI-Reading				2/3/2006	Area of Focus Self Improvement
- Social				12/12/2004	Area of Focus Social
- Spiritual				3/12/2004	Area of Focus Spiritual
- Work-Employee				3/12/2004	Area of Focus Work
SomedayMaybe	--	--	--	12/4/2006	
Processing	--	--	--	5/31/2007	
- Adventure				5/31/2007	Adventure Area of Focus
- Consumer				6/3/2007	
- Creativity				5/31/2007	Area of Focus Creativity
- Creativity-Writing				5/31/2007	Area of Focus Creativity
- Family				5/31/2007	Area of Focus Family
- Family-Parent				5/31/2007	Area of Focus Family
- Family-Partner				5/31/2007	Area of Focus Partner
- Financial				5/31/2007	Area of Focus Financial
- Home-inside				5/31/2007	Area of Focus Home
- Home-outside				5/31/2007	Area of Focus Home

When things are not sub-classed, it is the catch-all category. When things do not have a catch-all category, it is because I know I can sub-class all items.

### Additional Areas Under Someday

There is one Area of Focus that does not appear under Projects, but does under SomedayMaybe. This is *Consumer*. I use this area to track things I might wish to purchase at some point.

### Third Level

The third level is where the projects live. Projects, according to David Allen, are anything requiring more than one action to complete.



## Filters - Overall

The filters play a crucial role in processing the system. I have them named with numbers so they automatically sort in the appropriate order for a weekly review. The following list contains items that are modified within the filters; all other options should be left as default.

I have divided the filters into four areas to make posting a bit easier:

1. Processing (indicated by a 1.)
2. Thinking (indicated by a 2.)
3. Review (indicated by a 3.)
4. Working lists (no number prefix)



## Processing Filters

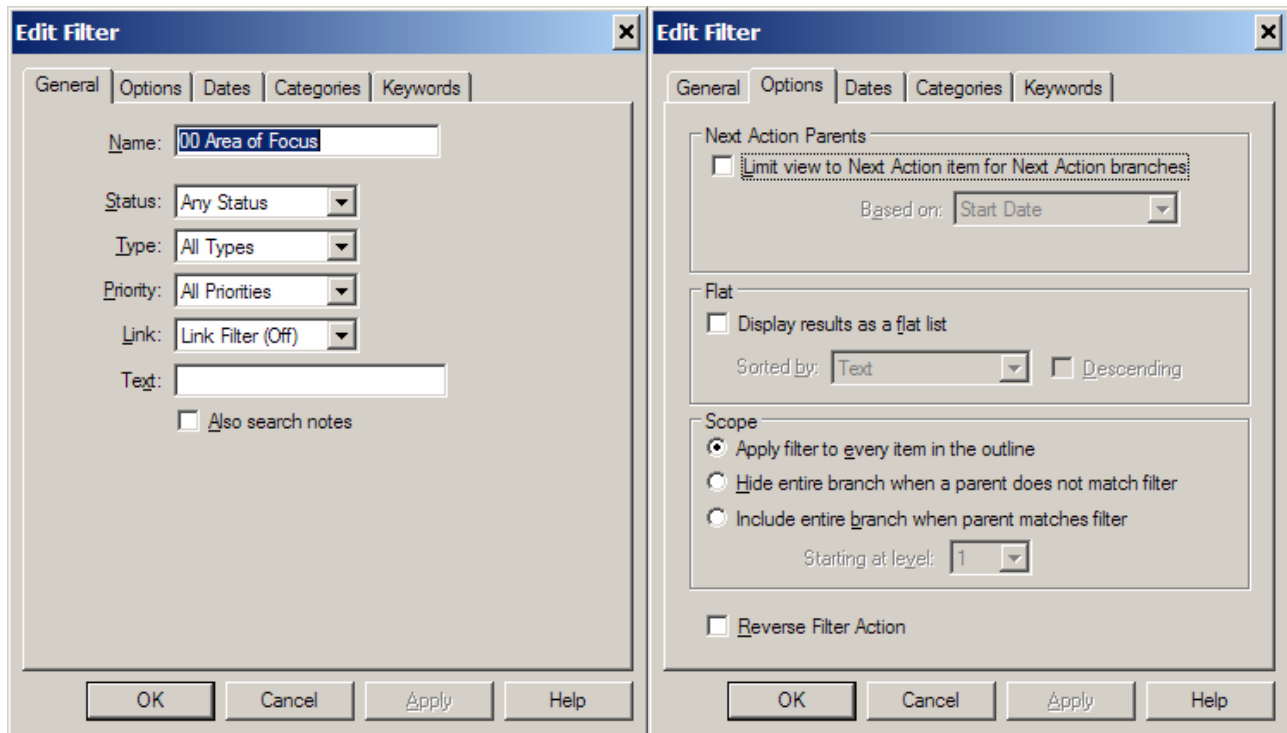
### Processing Filters

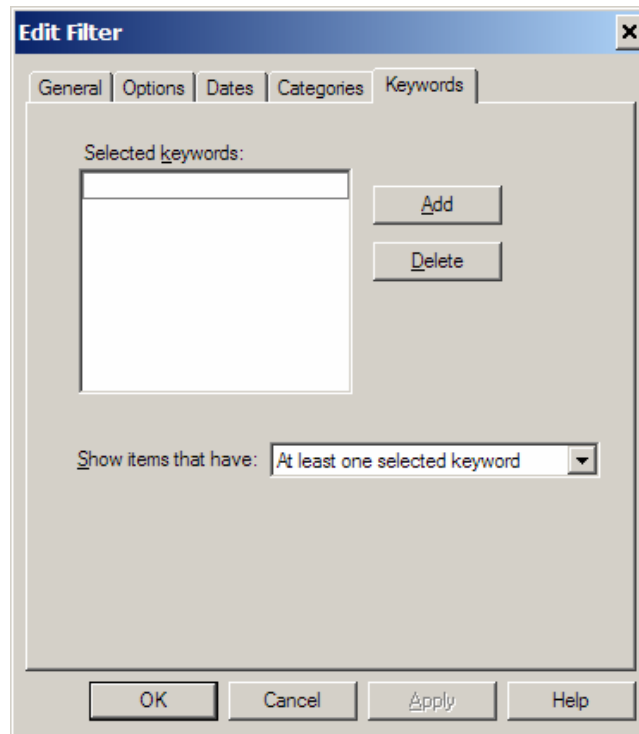
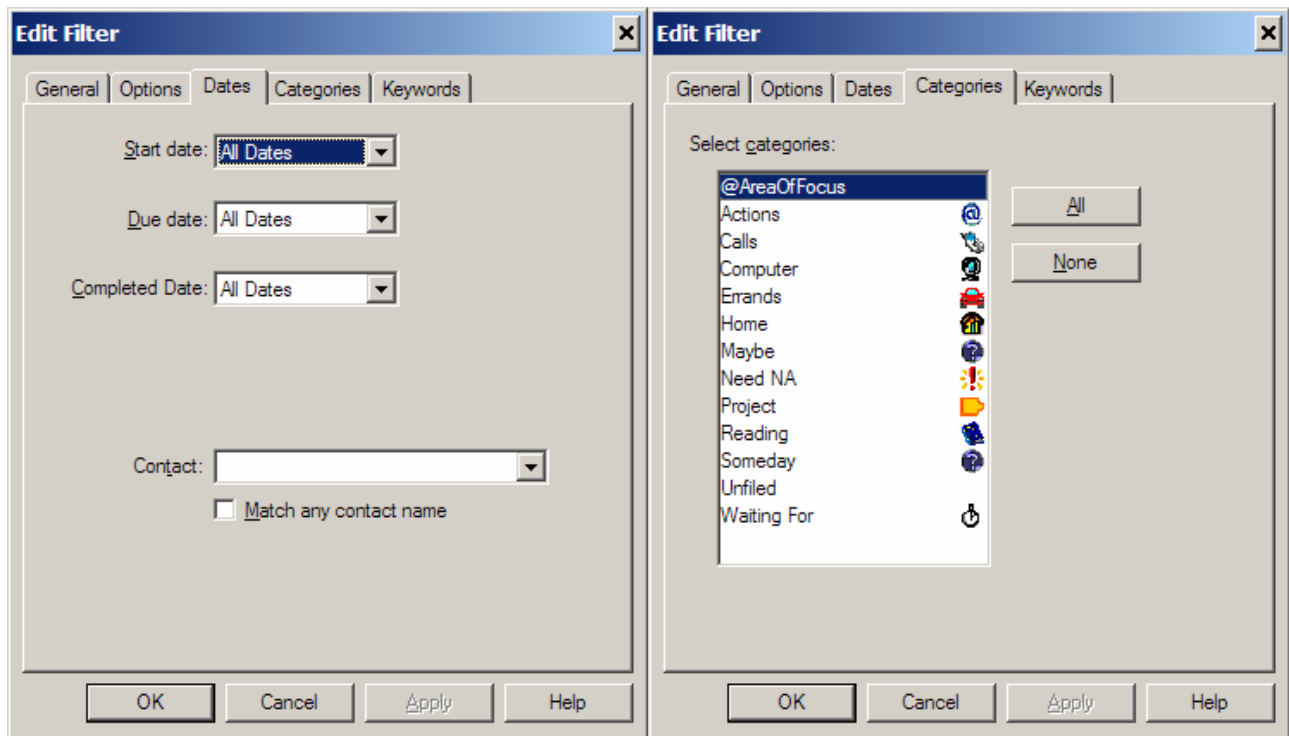
Processing filters are the ones I use to get items into the system and filed appropriately. Below are the specifics for each of the filters.

### 00 Areas of Focus

This filter shows me my areas of focus. From here I can make sure that I have matching areas under both the Current and Someday/Maybe levels of the outline. I can also split areas where necessary, or consolidate them.

- Categories: @AreaOfFocus

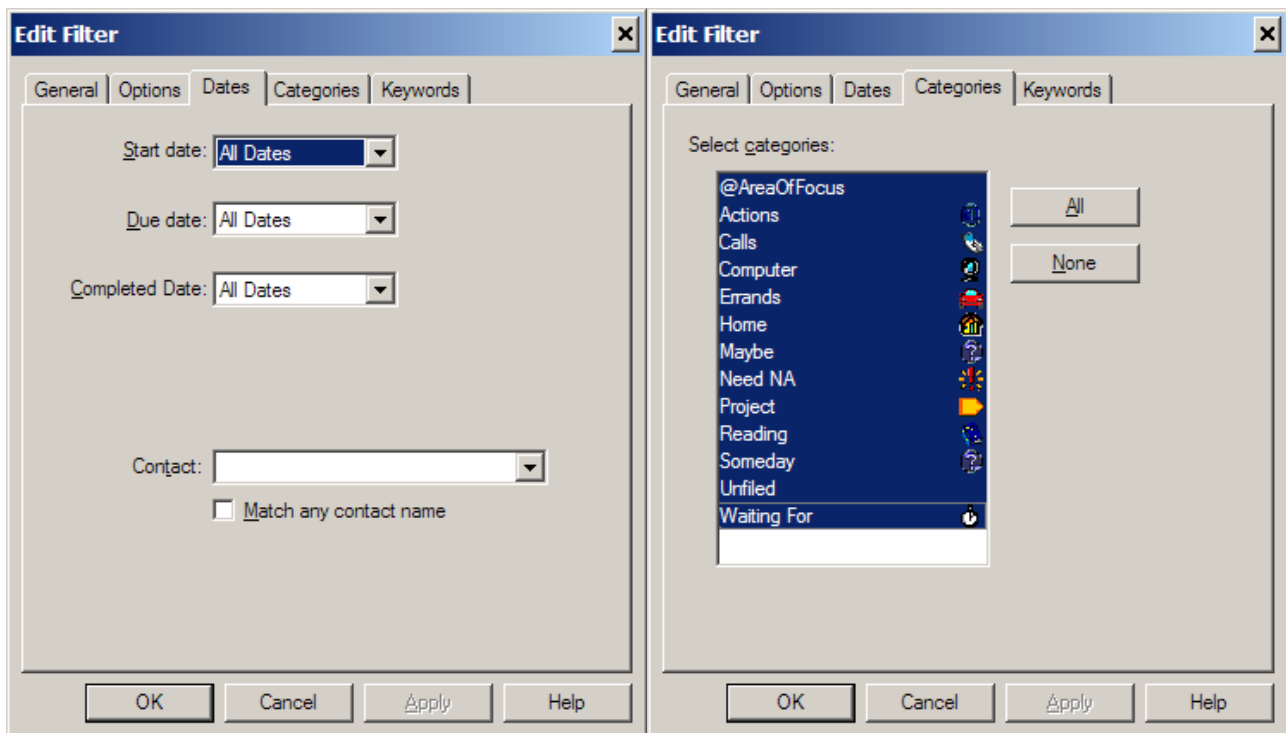
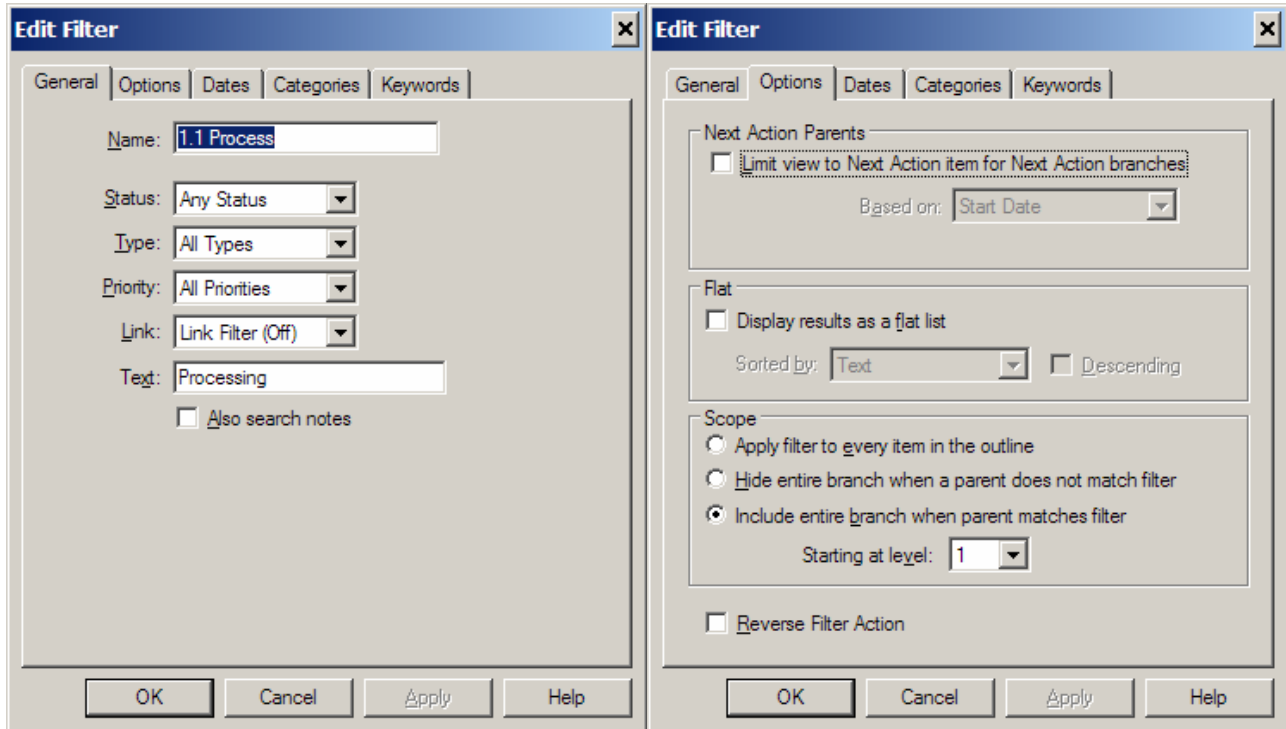


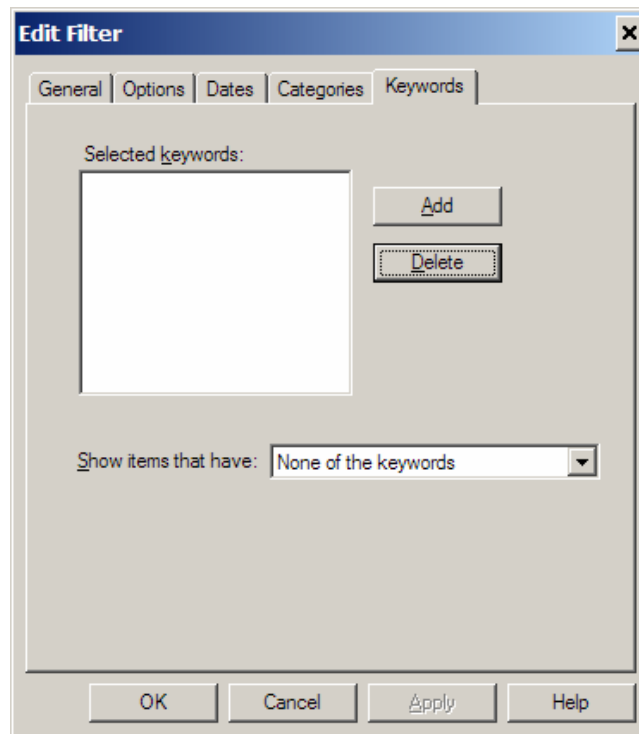


## 1.1 Process

This filter show me what has to be taken from the in box (Process top level item) and entered into the other parts of the outline. An empty "in box" would be to have this category be empty.

- Text: Processing
- Scope: Parent shows all children, starting at level 1

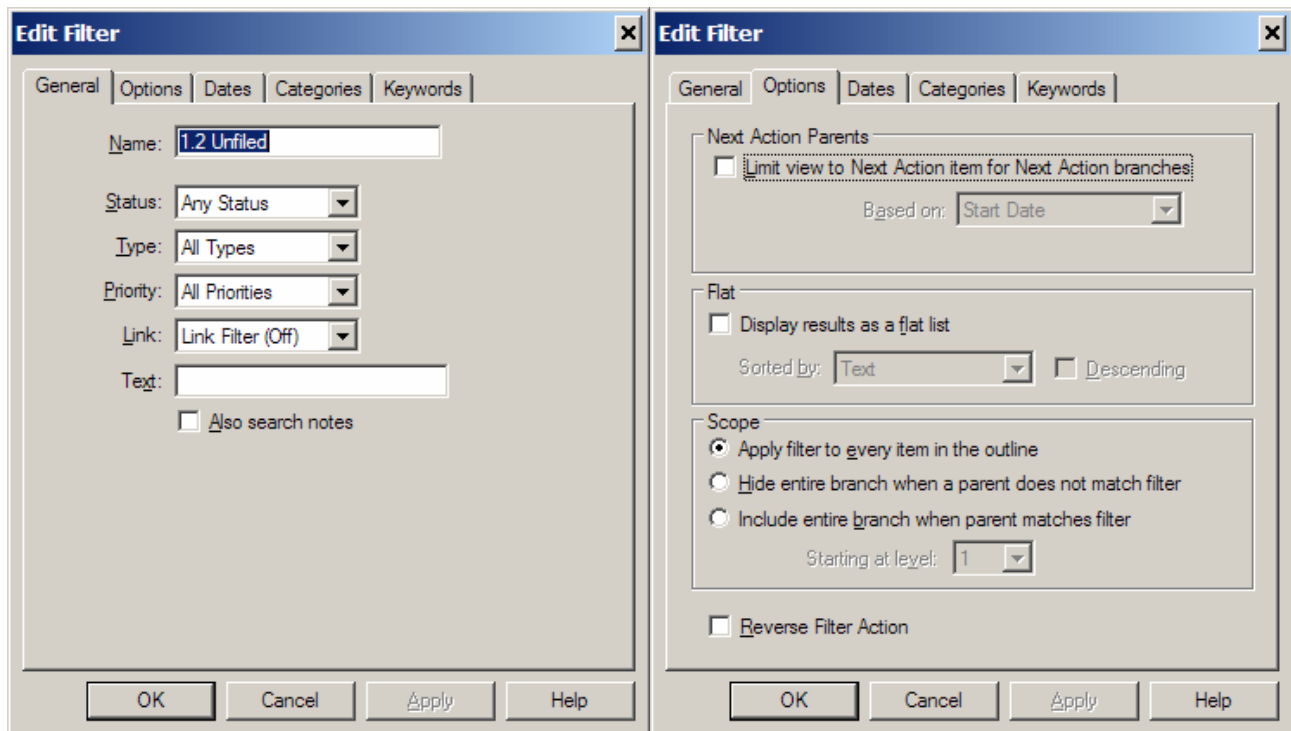


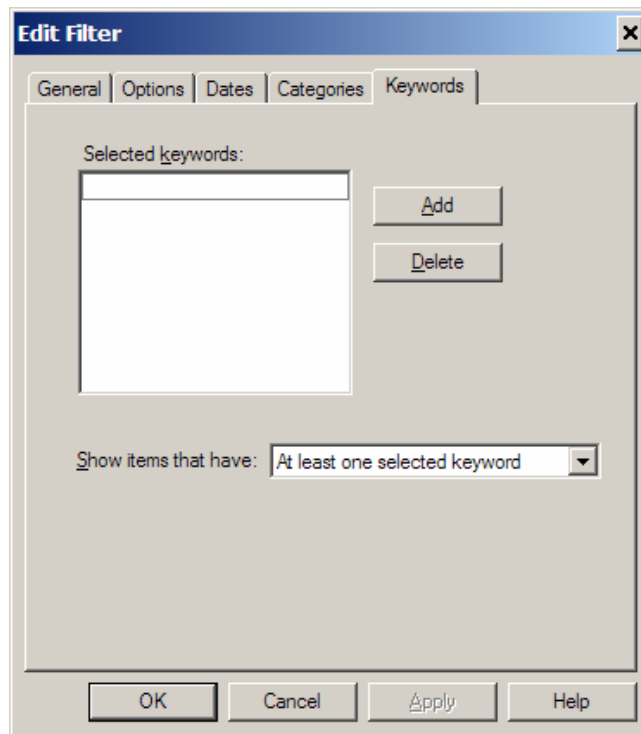
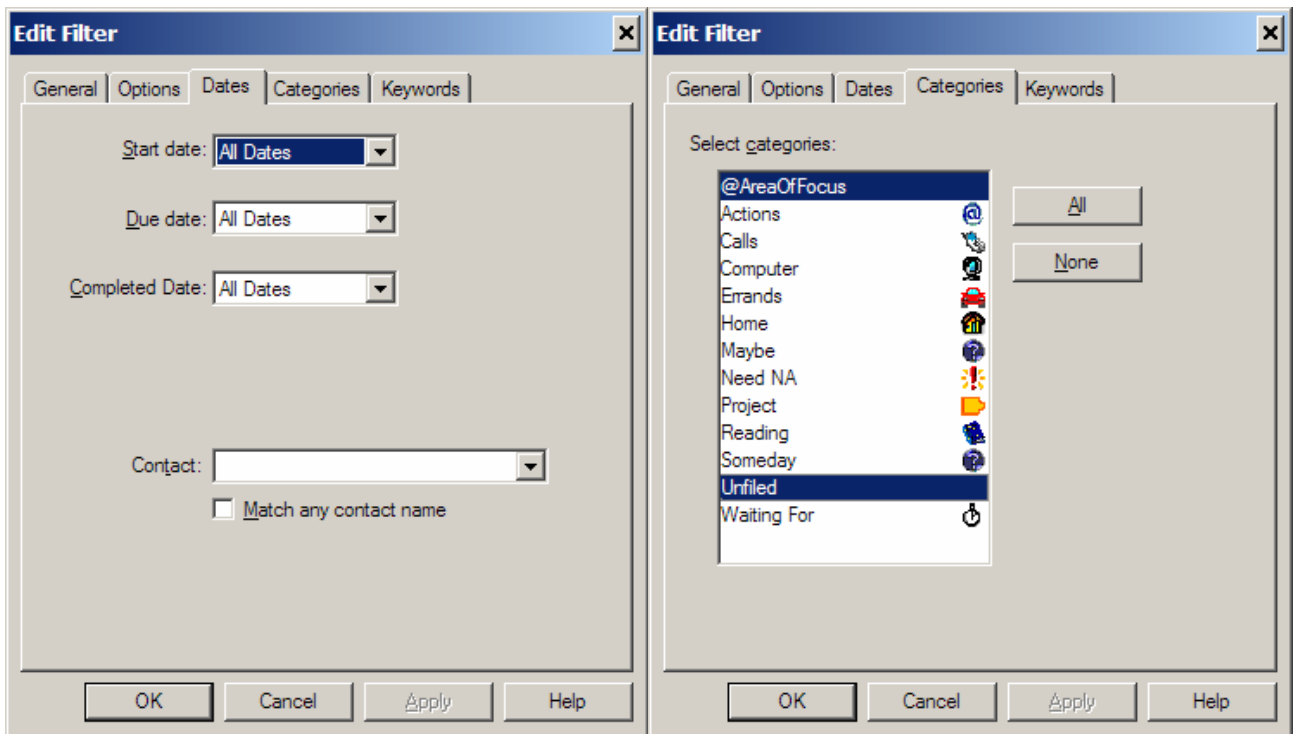


## 1.2 Unfiled

This filter helps me capture any item that has not been assigned a category/context.

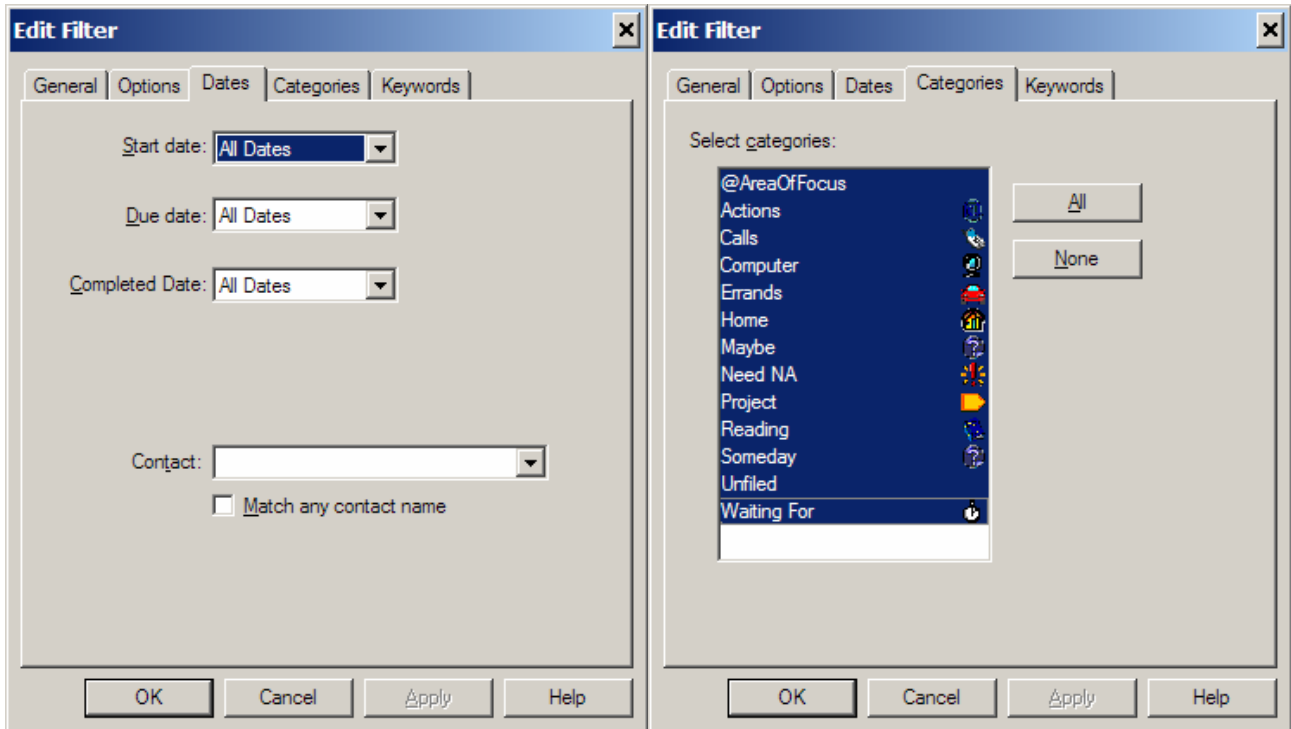
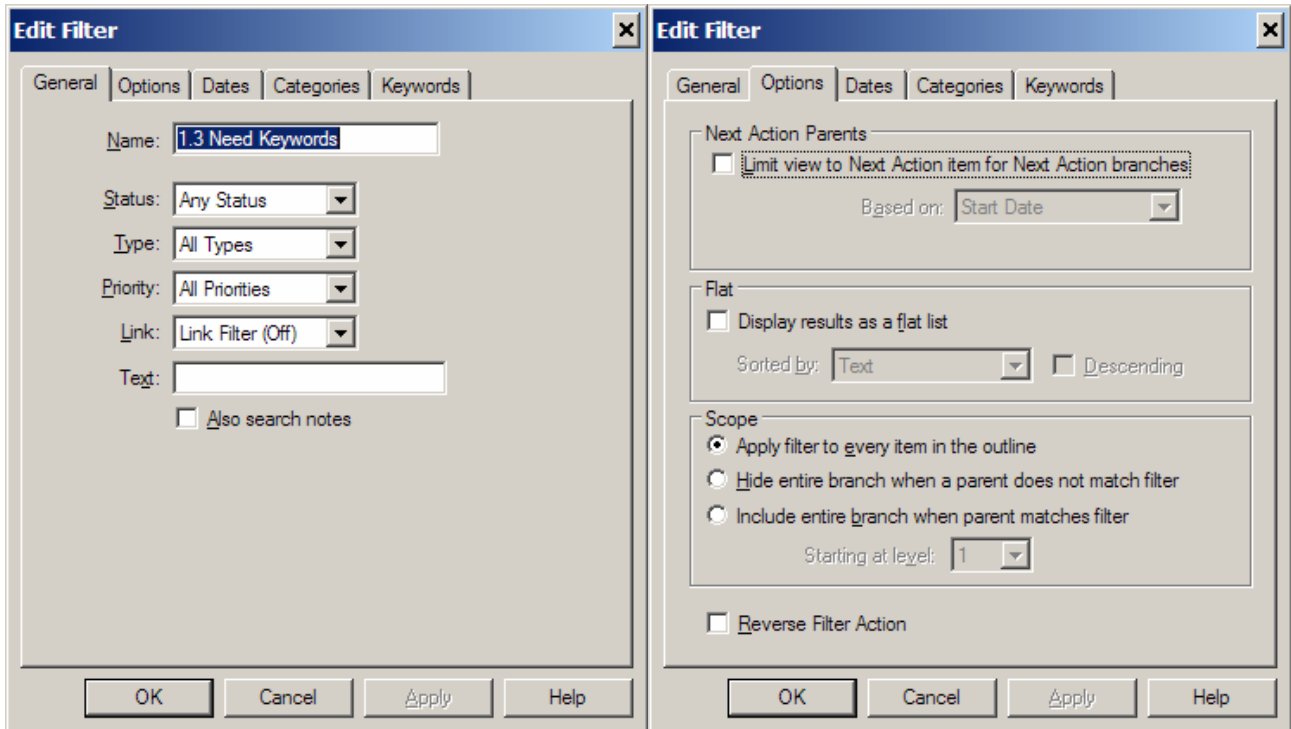
- Categories: Unfiled

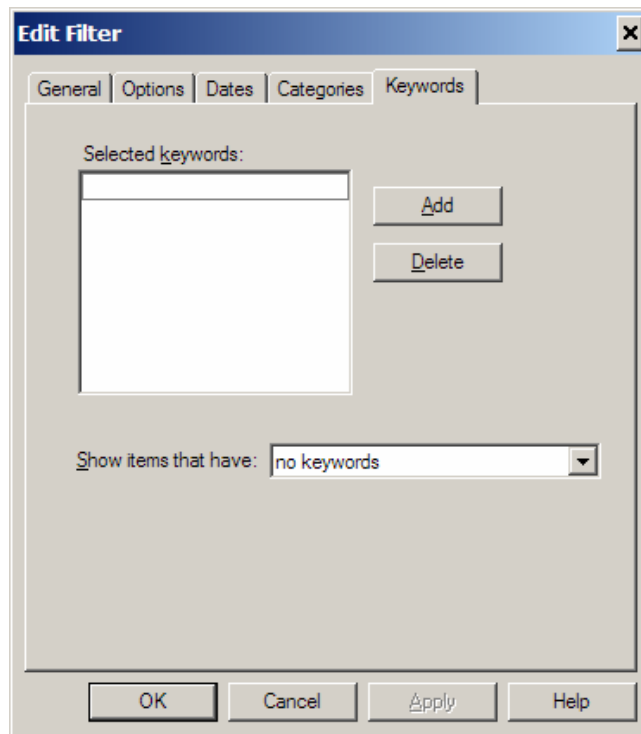




### 1.3 Need Keywords

- Show items that have: no keywords

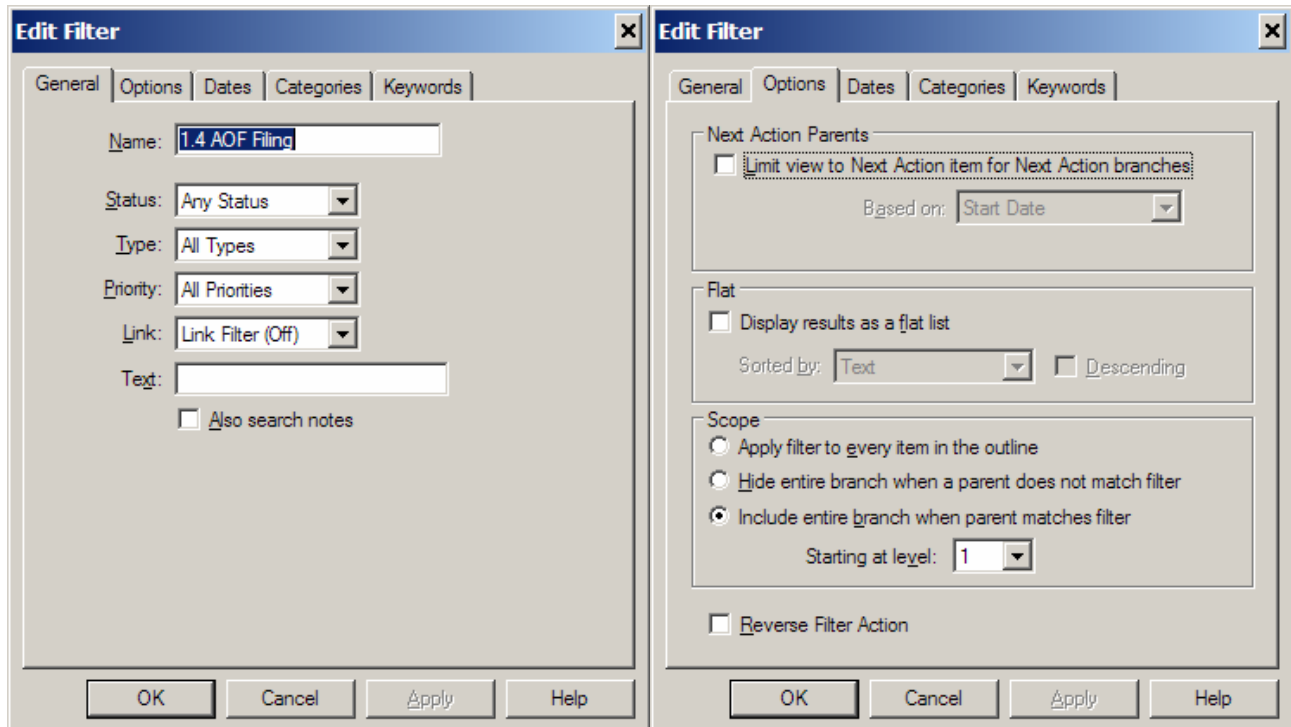


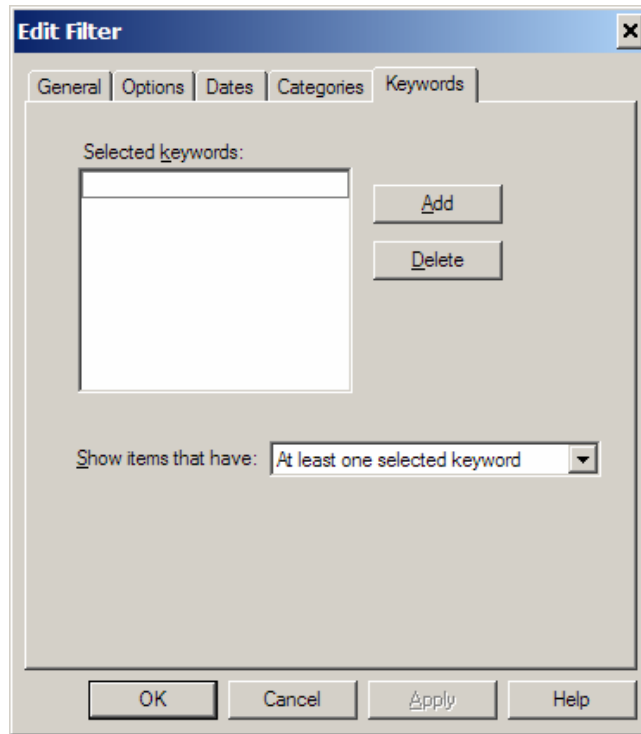
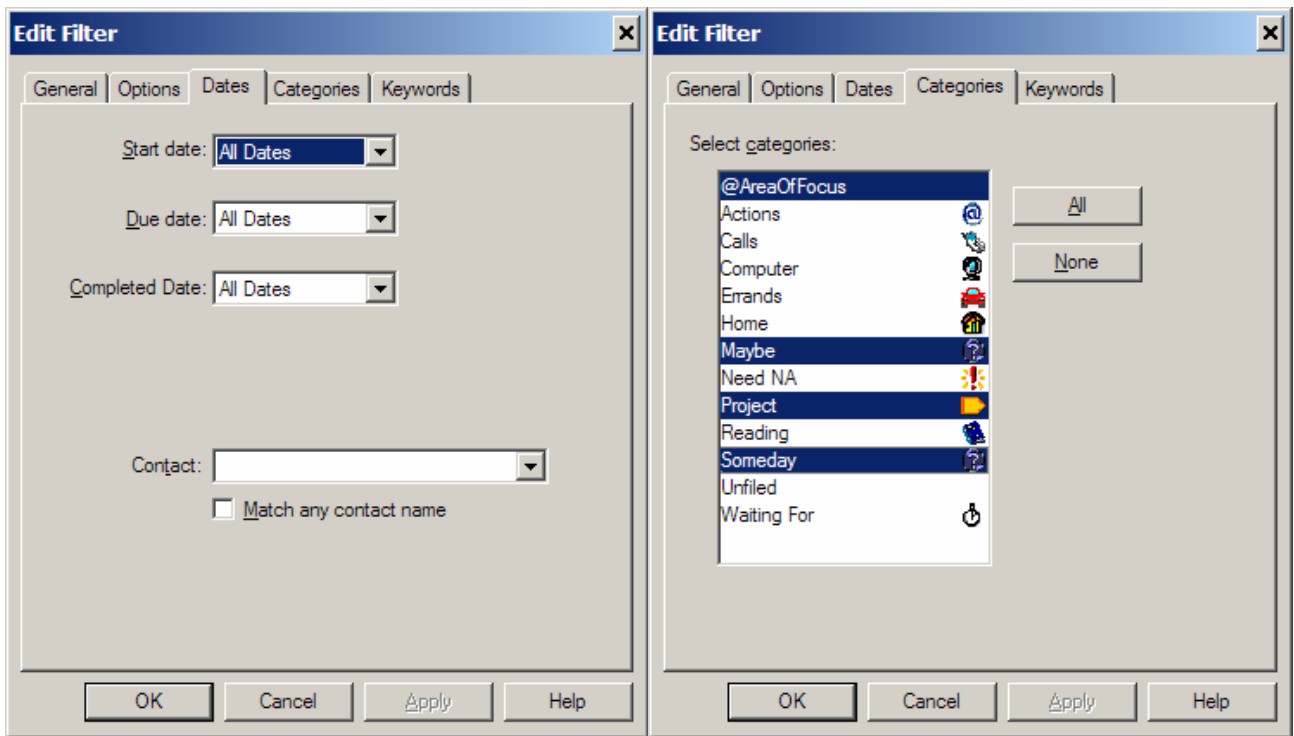


## 1.4 AOF Filing

This one allows me to file the non-SNA items into the outline

- Scope: parent shows all children, starting at level 1
- Categories: Someday, Project, @AreaOfFocus, Maybe

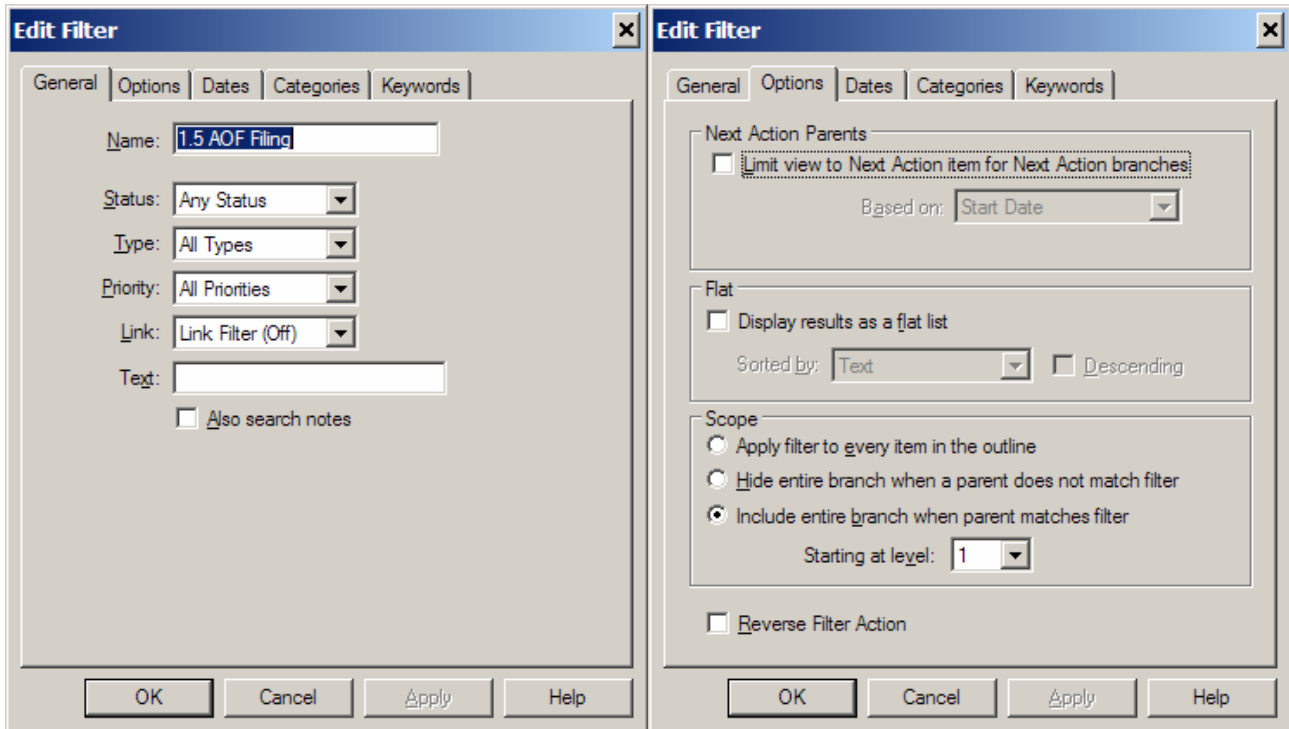


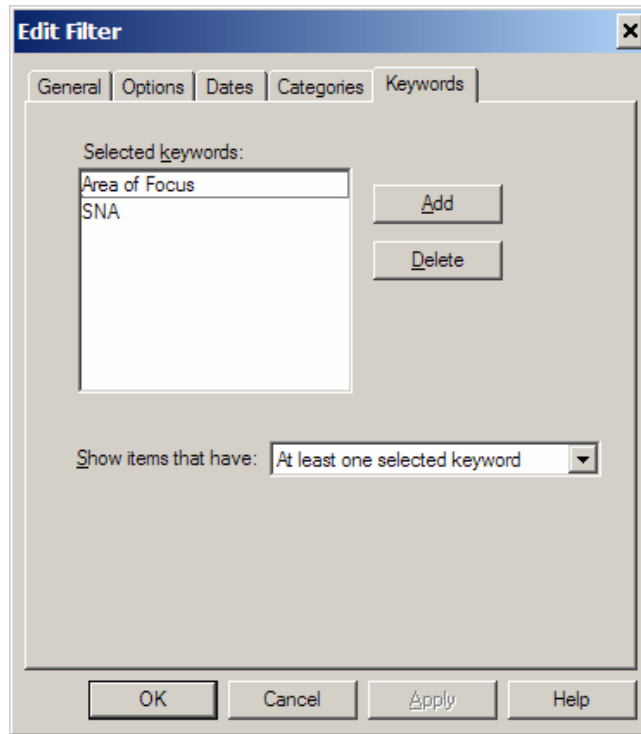
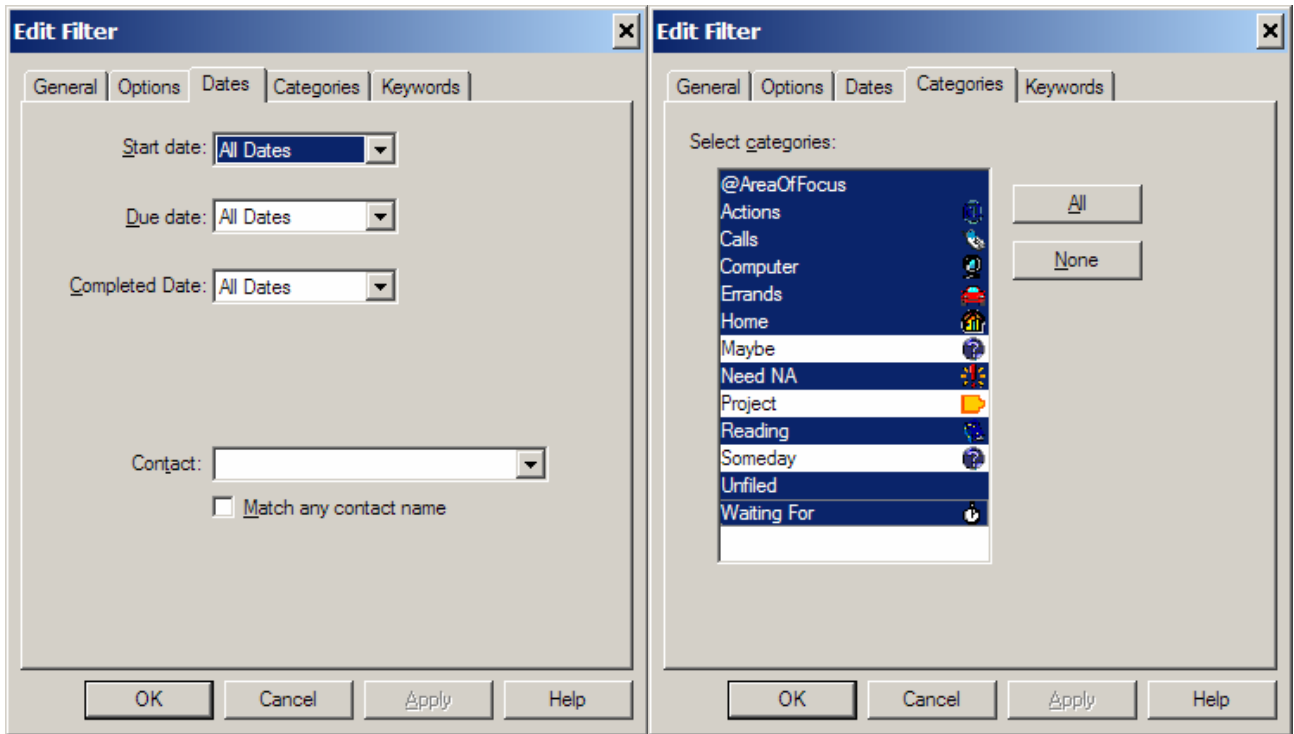


## 1.5 AOF Filing-SNA

This is for capturing those items in processing that are not a project, someday or maybe...i.e. the SNAs

- Scope: parent shows all children, starting at level 1
- Categories: all except Someday, Maybe, Project
- Keywords: Area of Focus, SNA
- Show items that have: at least one selected keyword

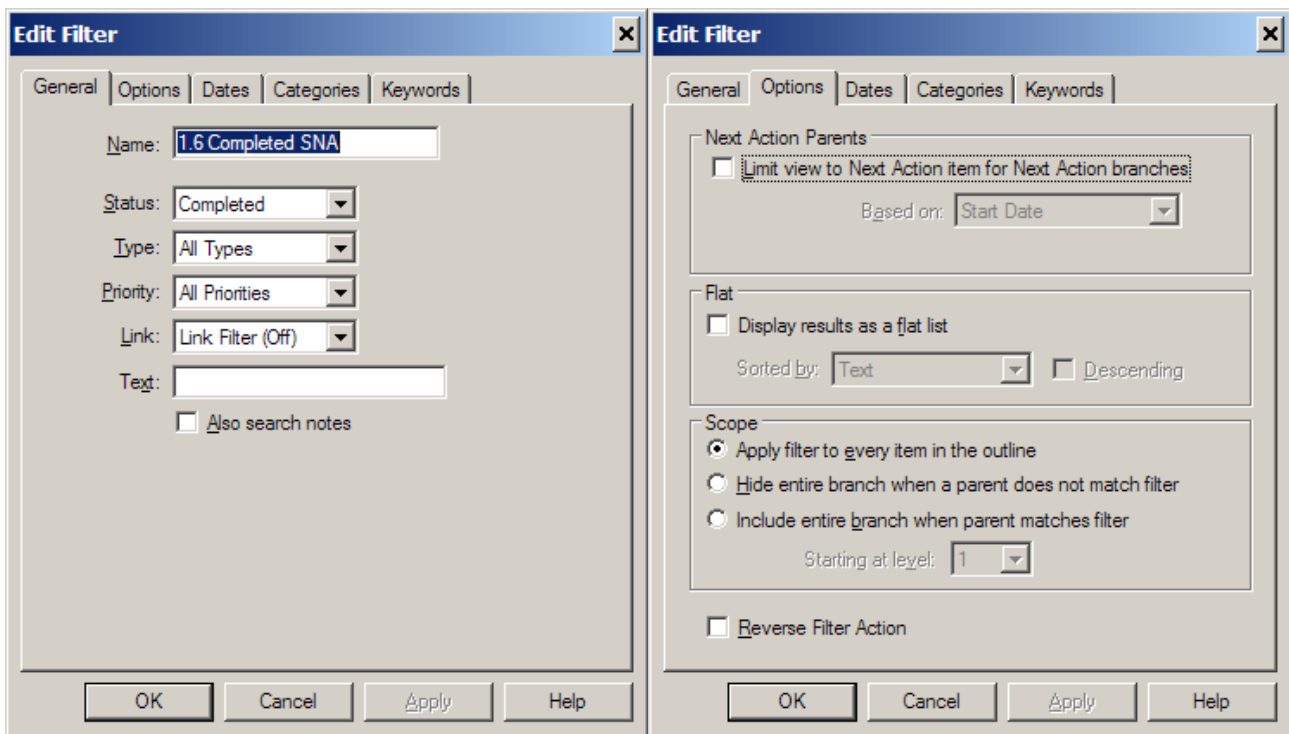


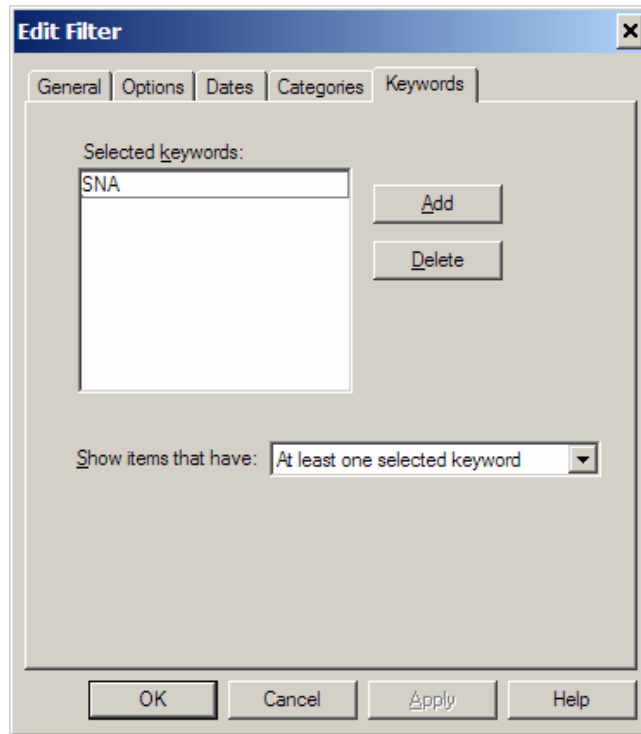
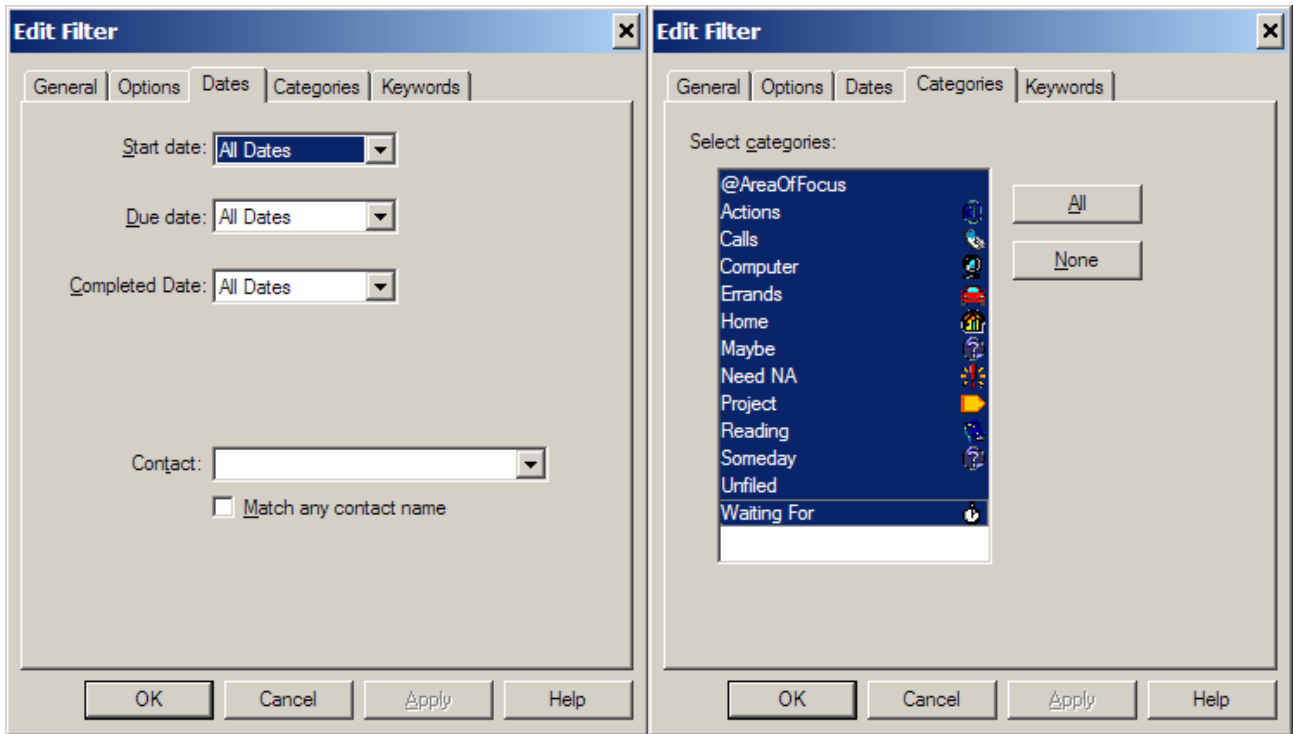


## 1.6 Completed SNA

I use this outline to show me which items have been completed so I can move them to my Completed outline.

- Status: completed
- Categories: all
- Keywords: SNA
- Show items that have: at least one selected keyword

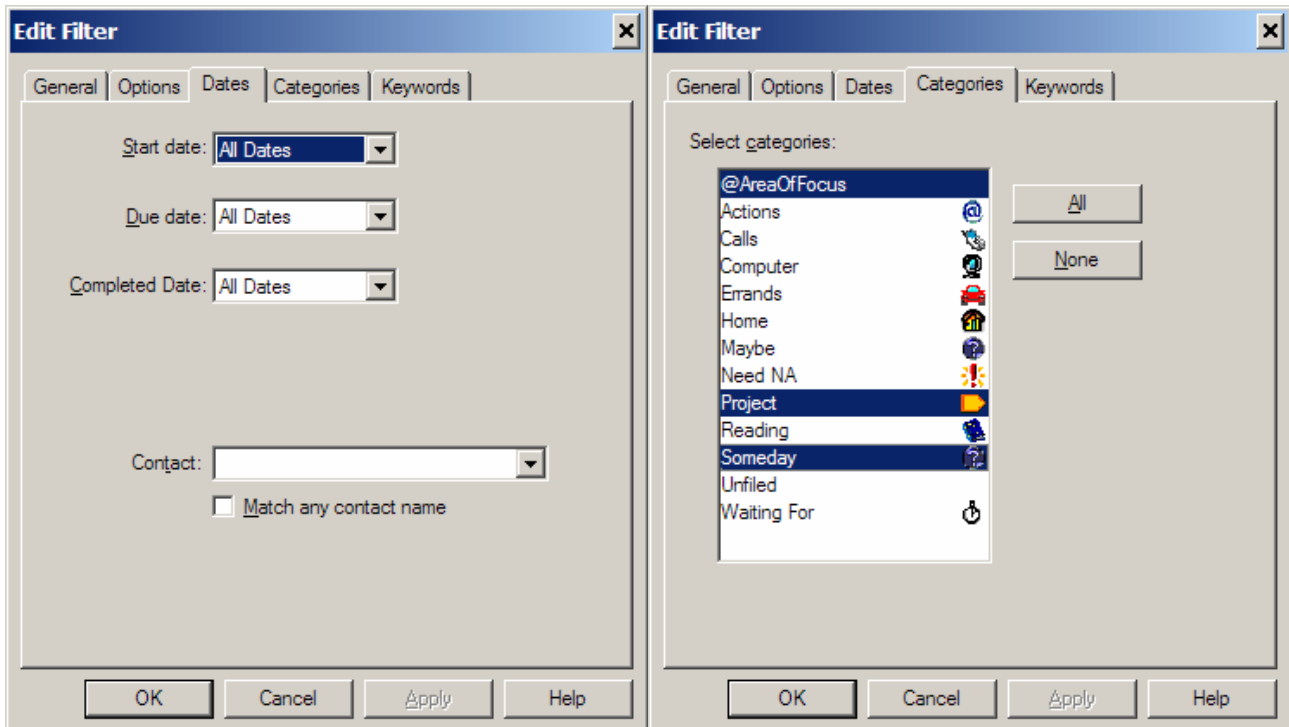
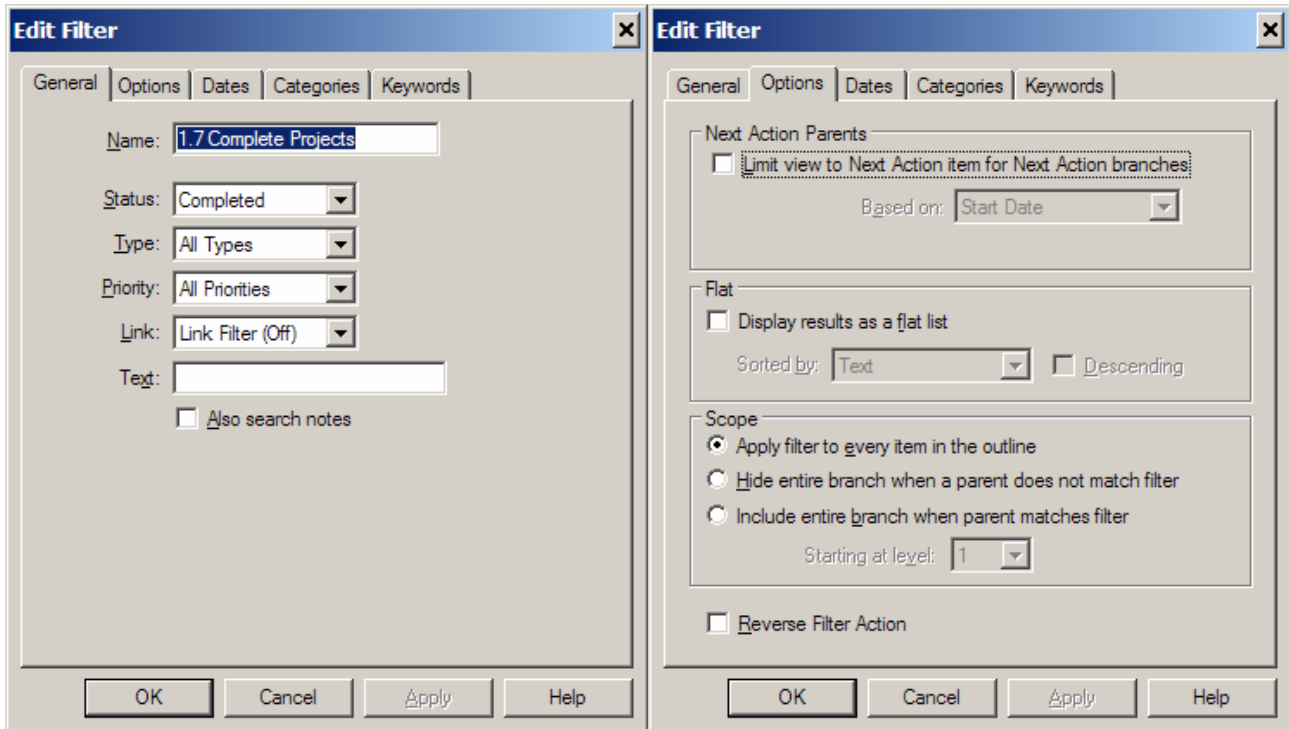


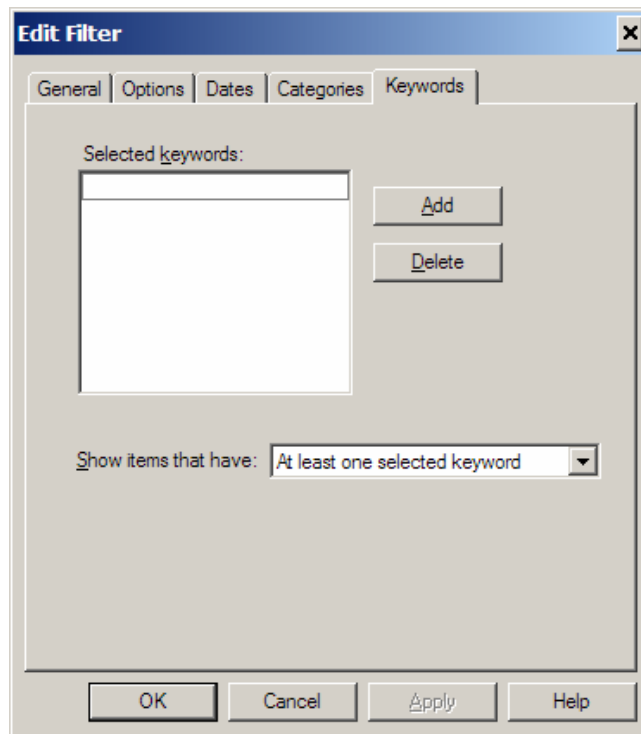


## 1.7 Completed Projects

This filter allows me to see what has been completed and move them out to my Completed archive.

- Status: Completed
- Categories: @AreaOfFocus, Project, Someday





# Thinking Filters

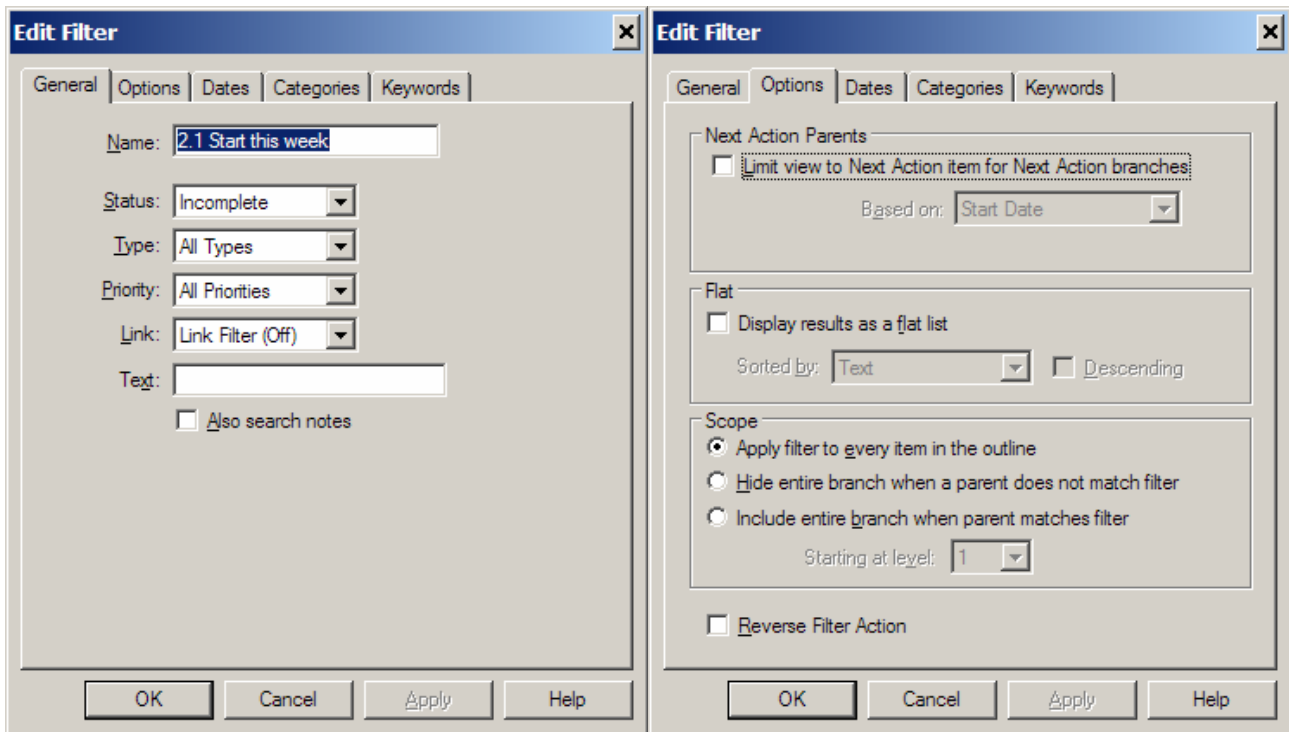
## Thinking Filters

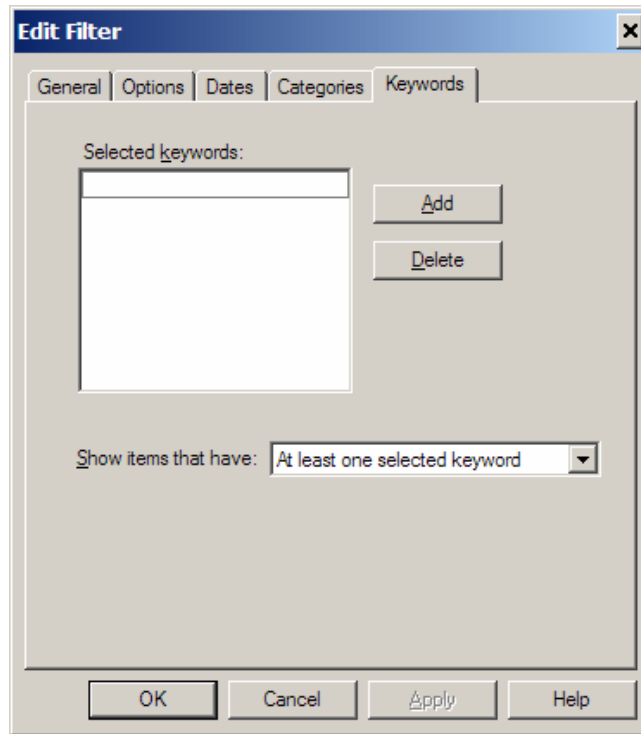
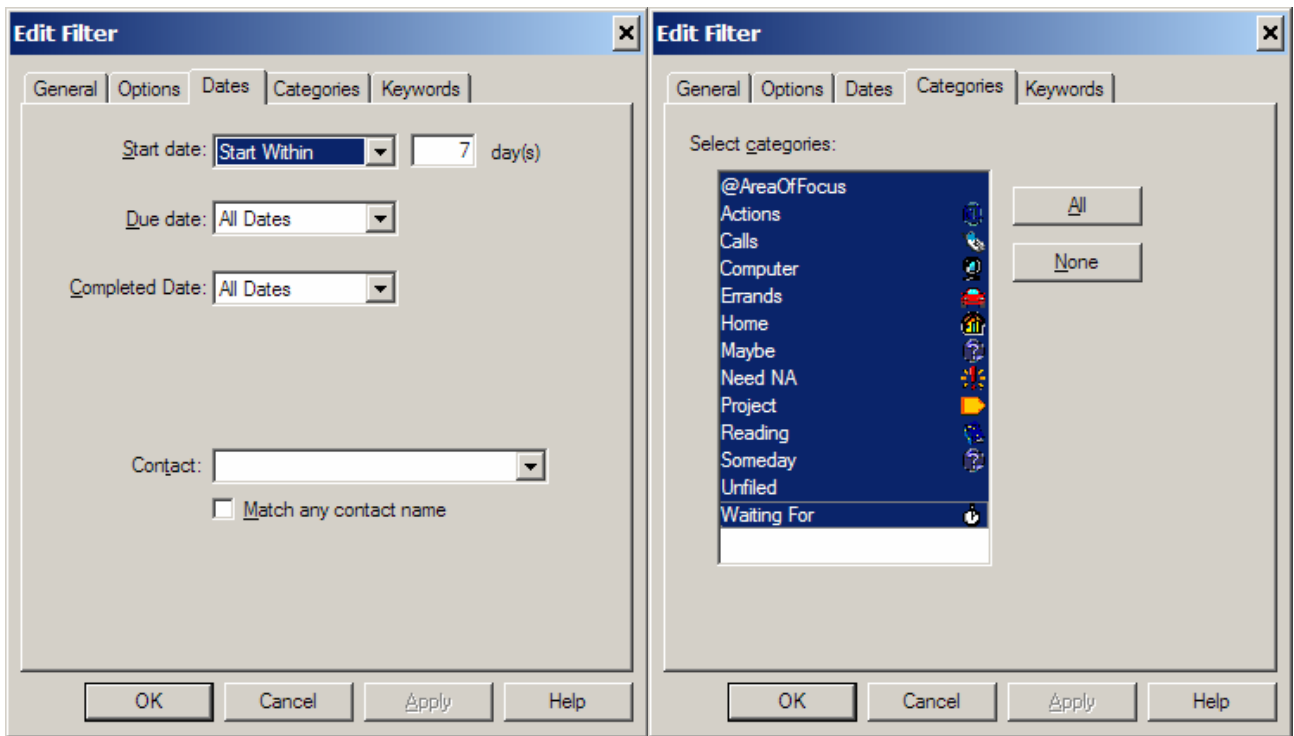
Thinking filters are the ones where I sit down and think about items. This means defining an outcome for a project and looking at due dates to determine if something needs to be moved to a front burner.

### 2.1 Start This Week

This filter allows me to see things that need to start this week. I use start dates to determine when I need to look at something again, or for appropriate lead time for things that have fixed due dates.

- Status: Incomplete
- Start Date: within 7 days

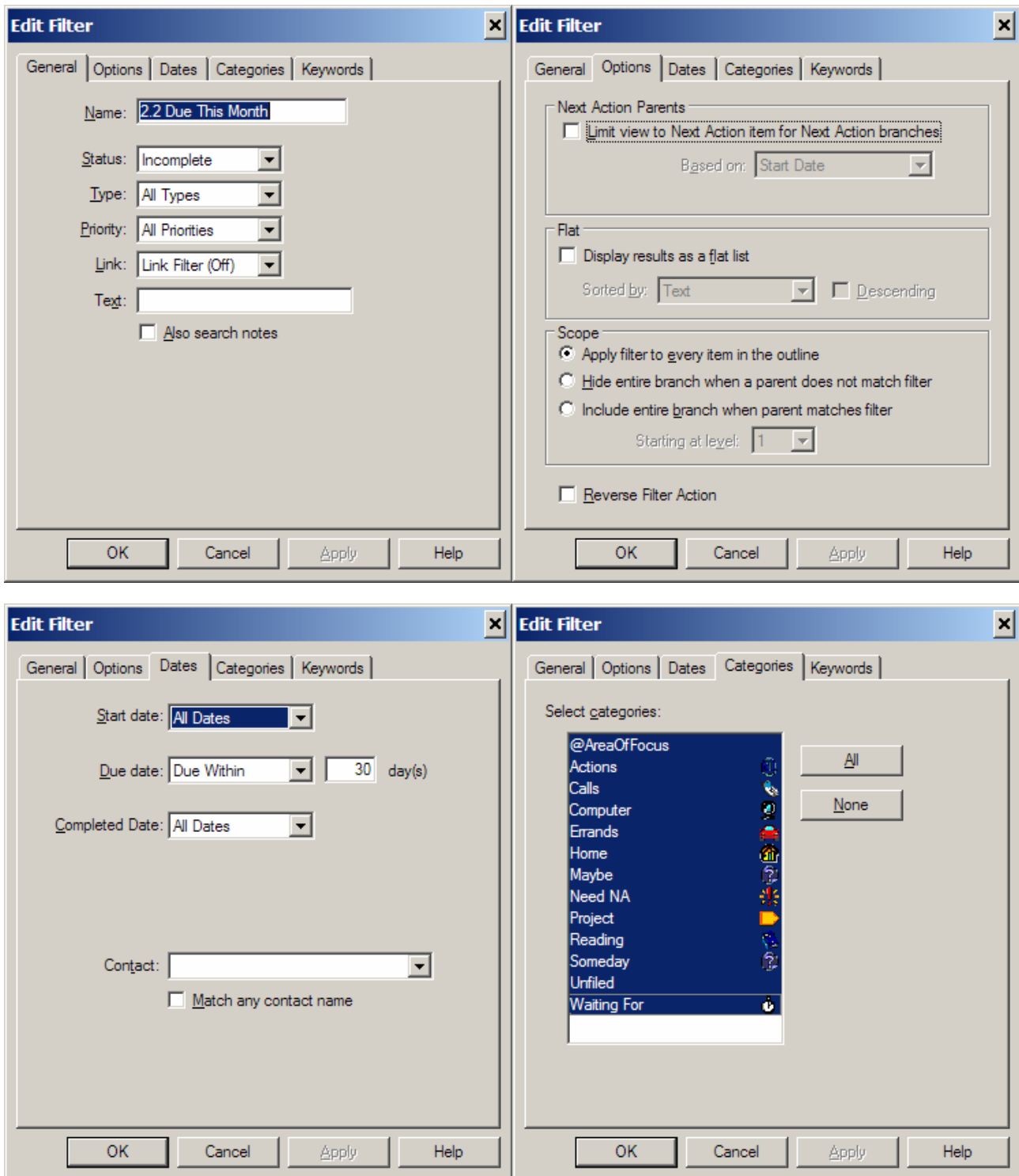


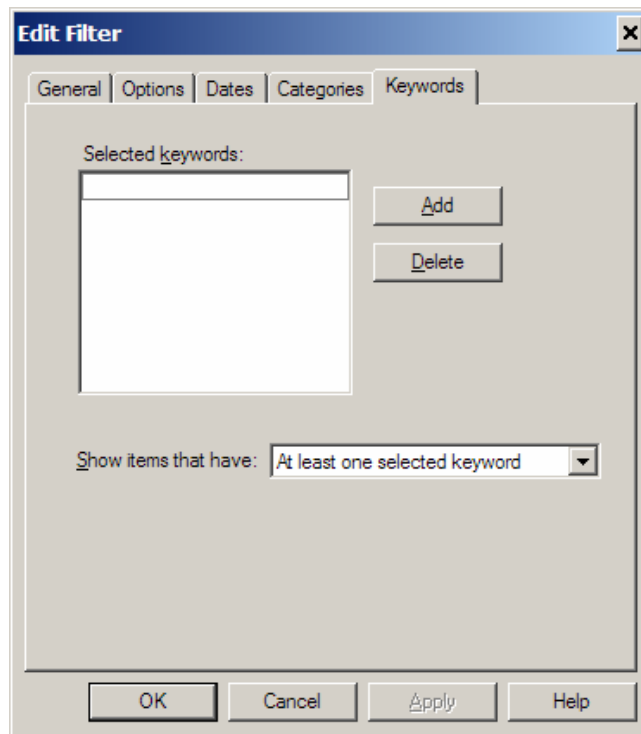


## 2.2 Due This Month

This one allows me to see items that are coming up with fixed due dates that may need to be moved into project status.

- Status: incomplete
- Due Date: within 30 days

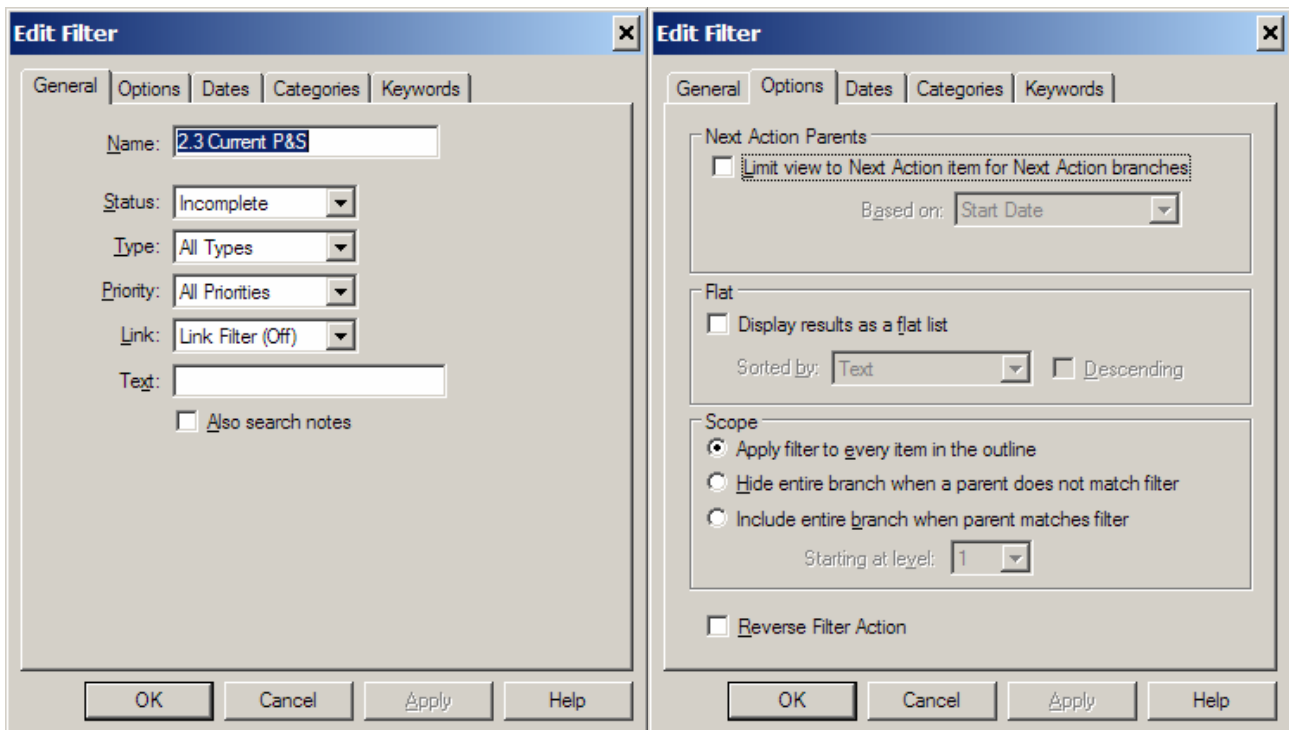


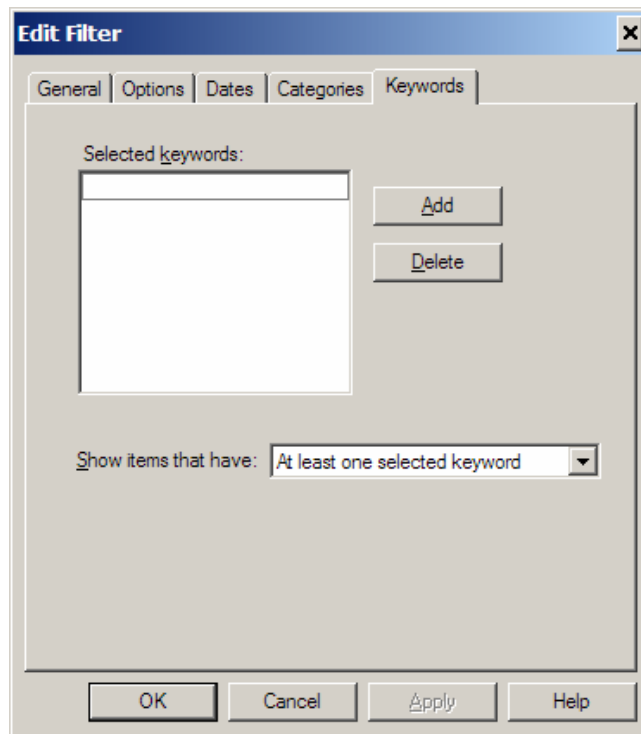
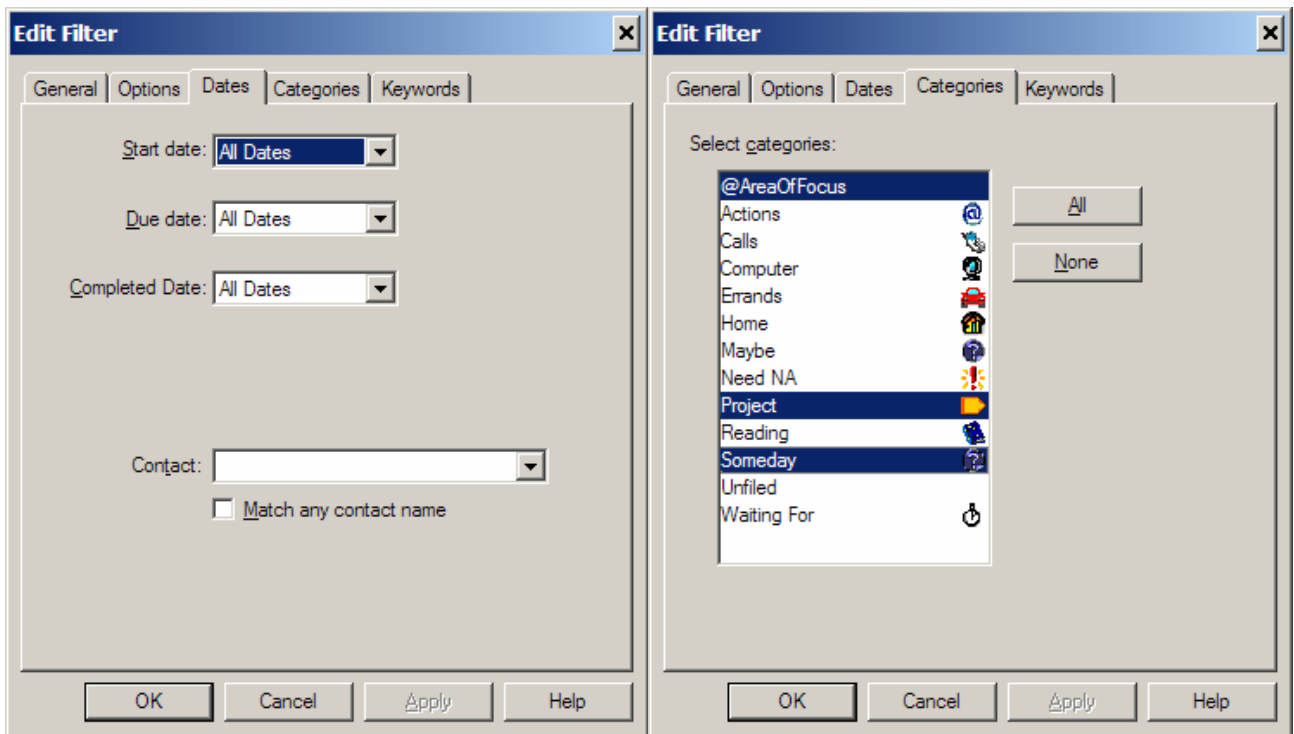


## 2.3 Current P&S

P&S was shortened so that I could edit the filter on the PDA. It used to be Projects And Somedays.

This one I use to look at my current workload. Active projects I consider as ones I will move forward on in the next week. Somedays are the ones that are "queued". I can move projects back and forth freely between the two categories using this filter.

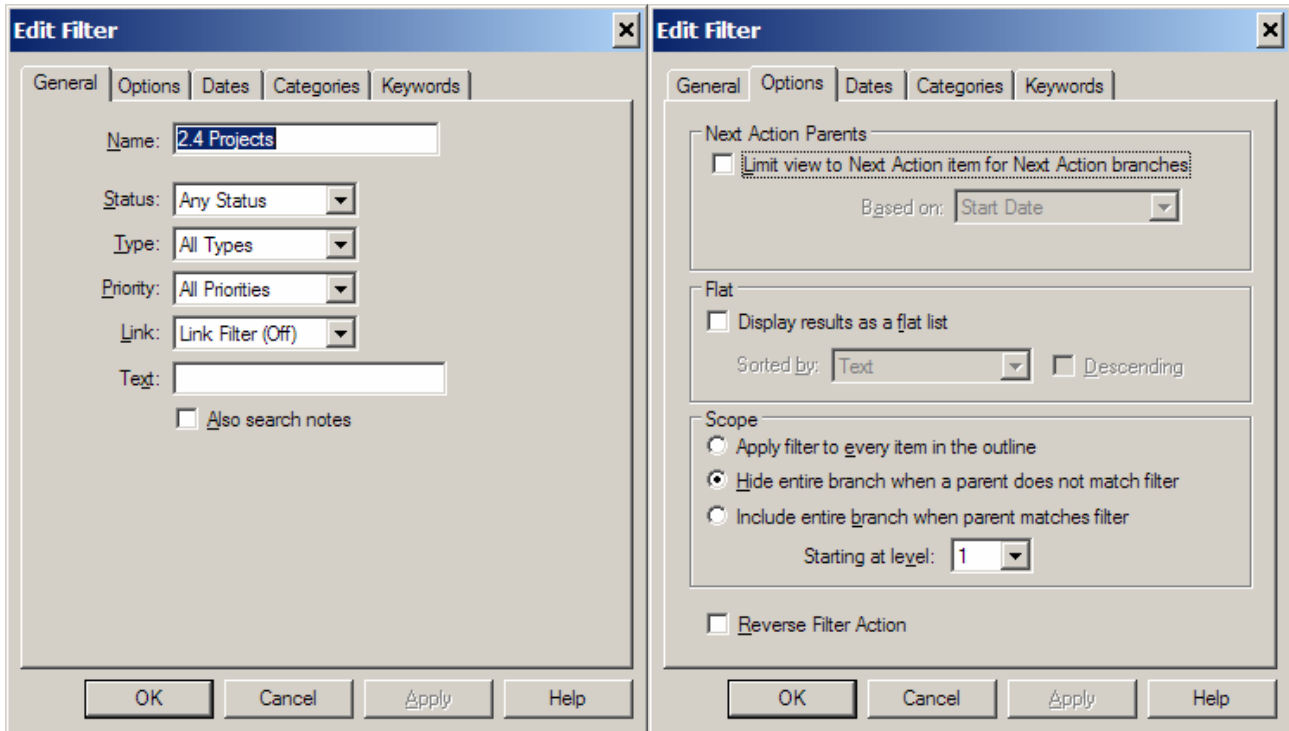


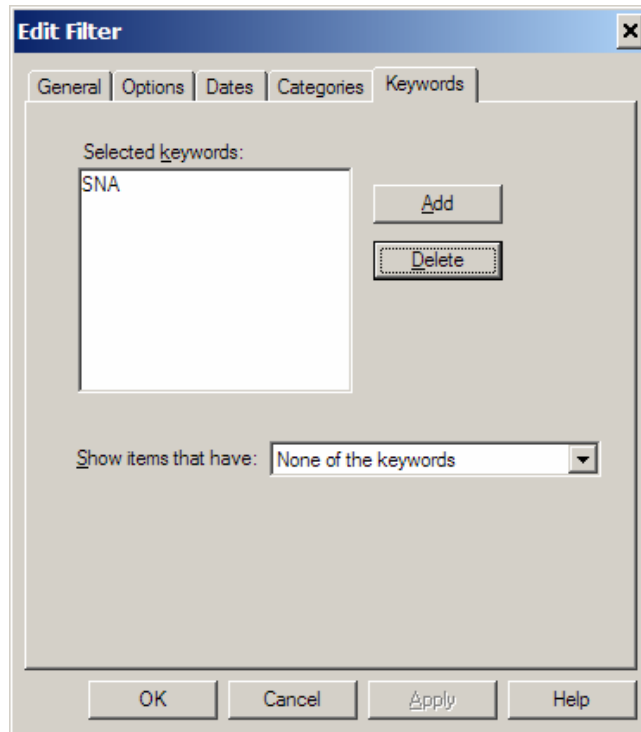
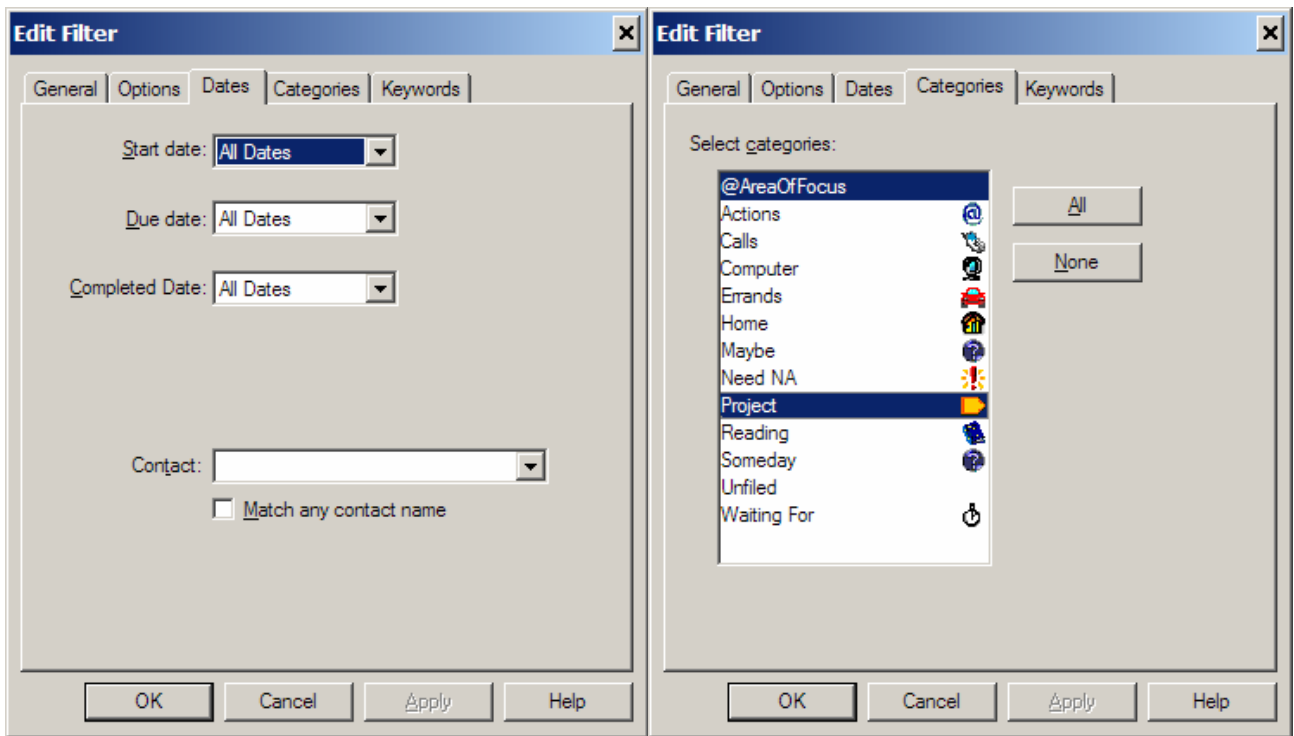


## 2.4 Projects

Active projects are ones that I have committed I will move forward on in the next week.

- Scope: filtered parent hides branch, starting at level 1
- Start Date: all dates
- Due Date: all dates
- Completed Date: all dates
- Categories: @AreaOfFocus, projects
- Keywords: SNA
- Show items that have: none of the keywords

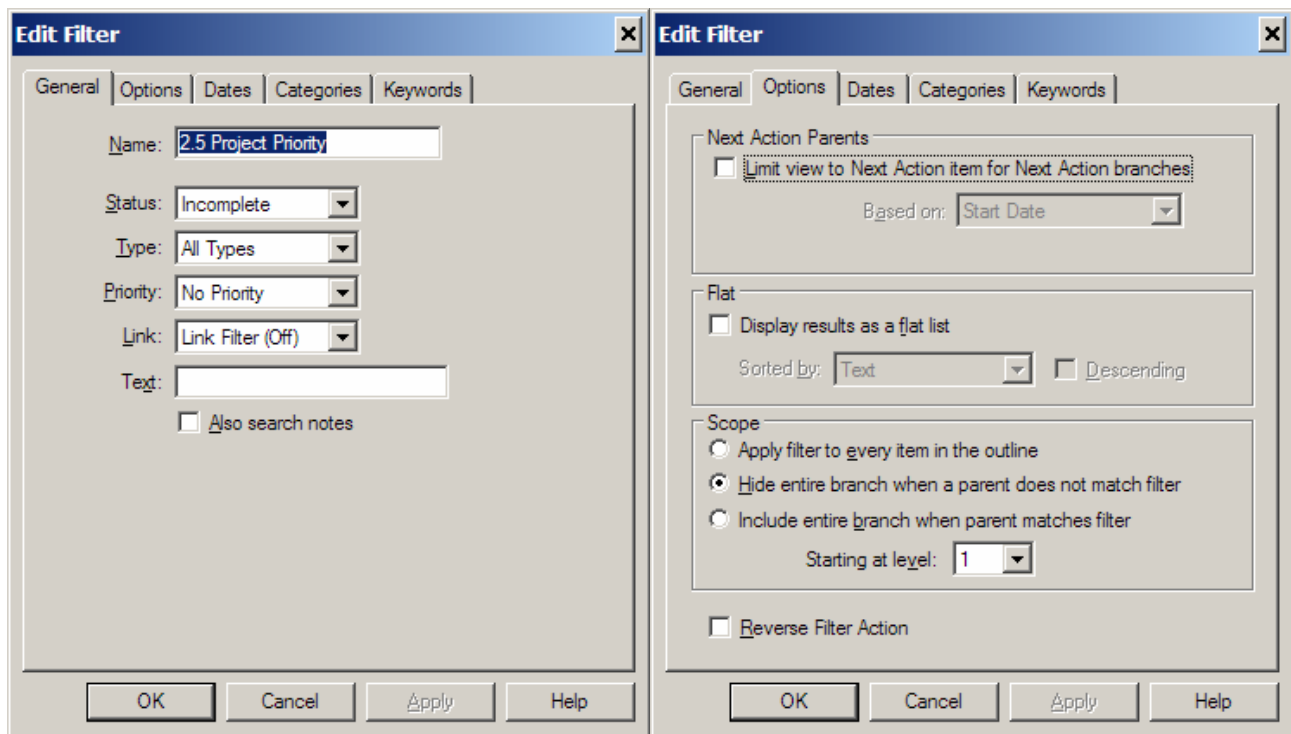


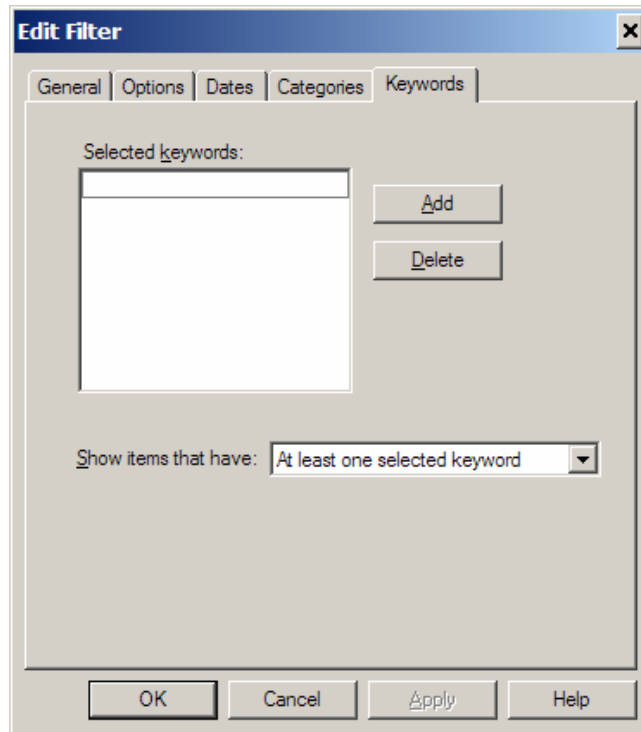
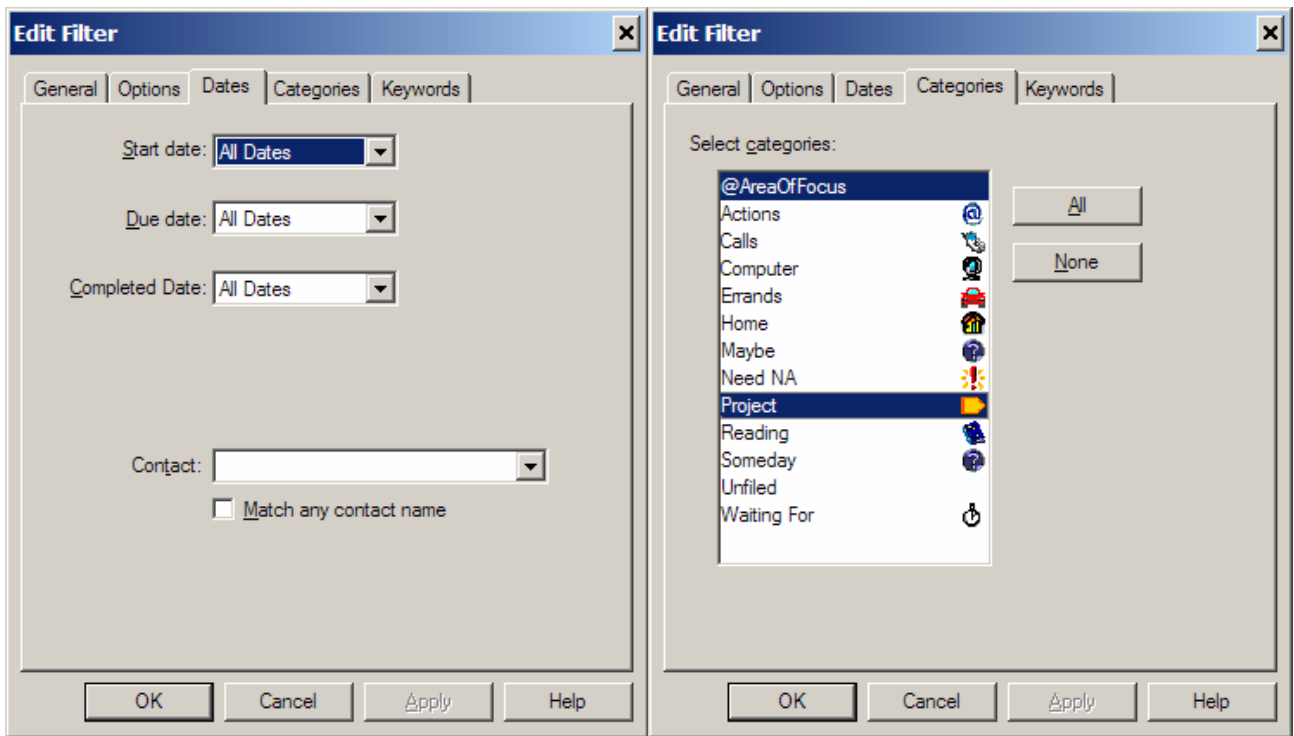


## 2.5 Project Priority

I use priority as a weighting factor. Priority 1 projects are ones whose impact will be felt more than a year out. Priority 2 projects are ones that are 6 months to a year. Priority 3 are everything else.

- Status: incomplete
- Priority: no priority
- Scope: filtered parent hides branch starting at level 1
- Categories: @AreaOfFocus, project

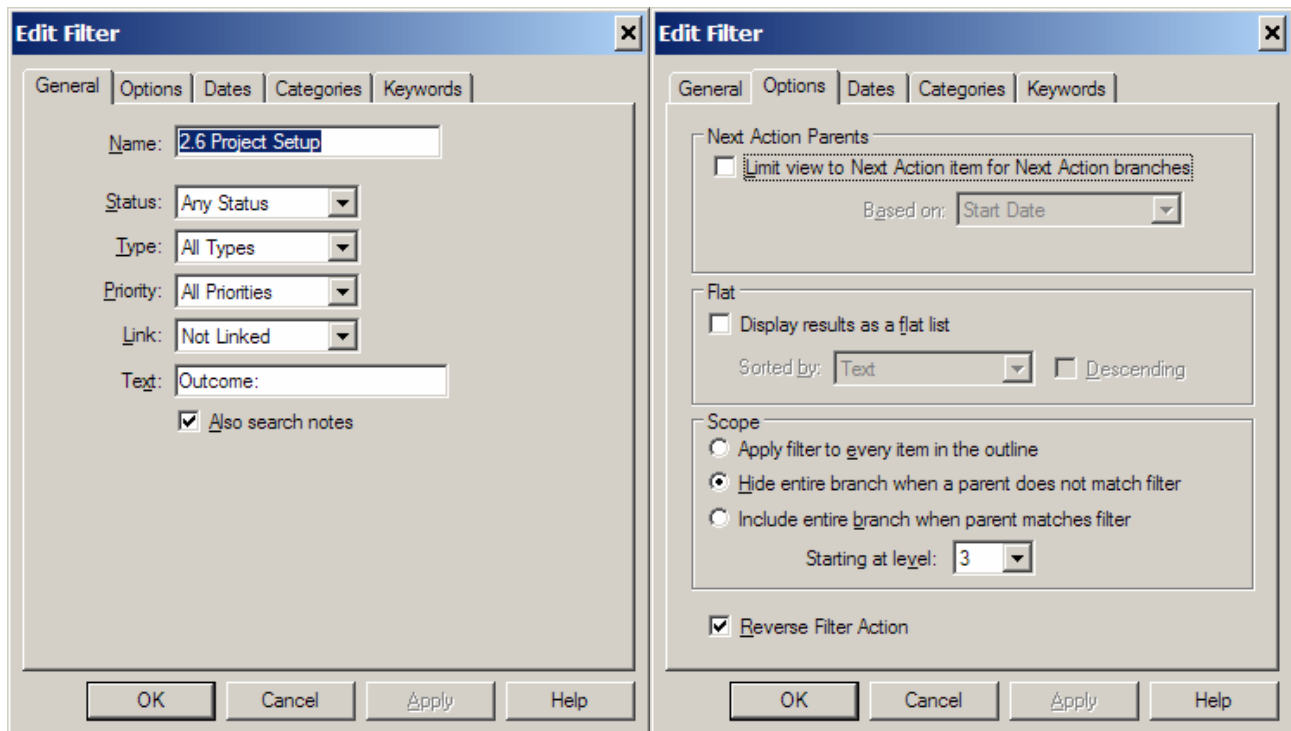


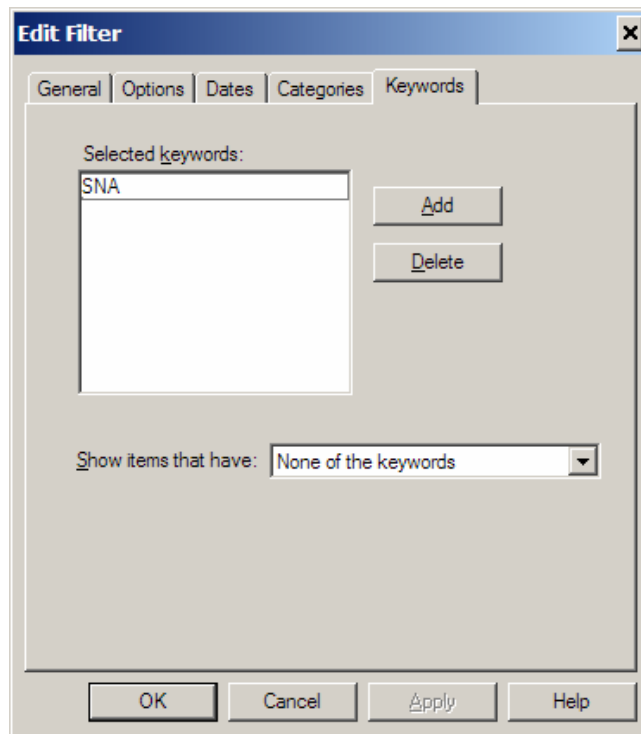
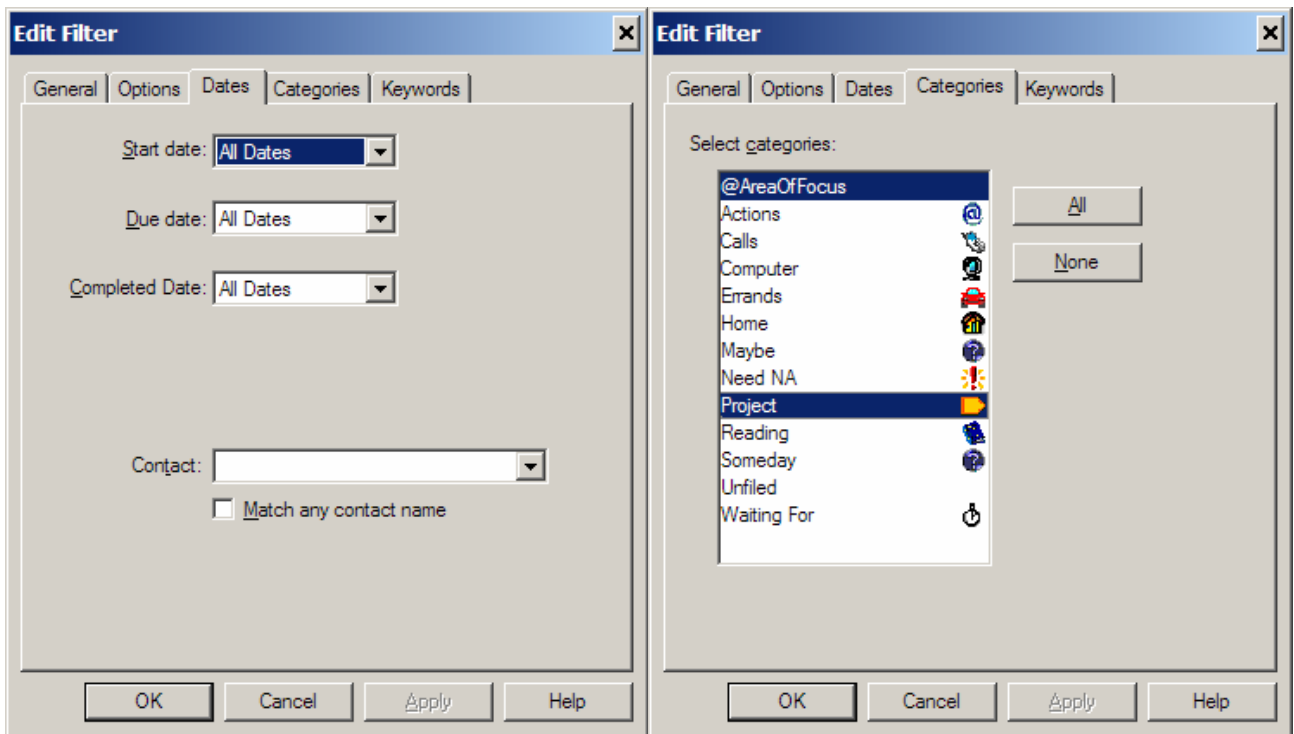


## 2.6 Project Setup

I try to capture three things about any project: the purpose, the outcome and brainstorming. Writing the purpose down helps me find anything that is not in line with my goals. Determining the outcome lets me know when this project is done. Brainstorming allows me to mind dump things that might have to be done to bring the project to completion. This filter finds projects that don't have the above thinking done.

- Link Filter: not linked
- Text: Outcome:
- Also search notes: yes
- Scope: filtered parent hides branch, starting at level 3
- Reverse Filter Action: yes
- Categories: @AreaOfFocus, Project
- Keywords: SNA
- Show items that have: none of the keywords





# Review Filters

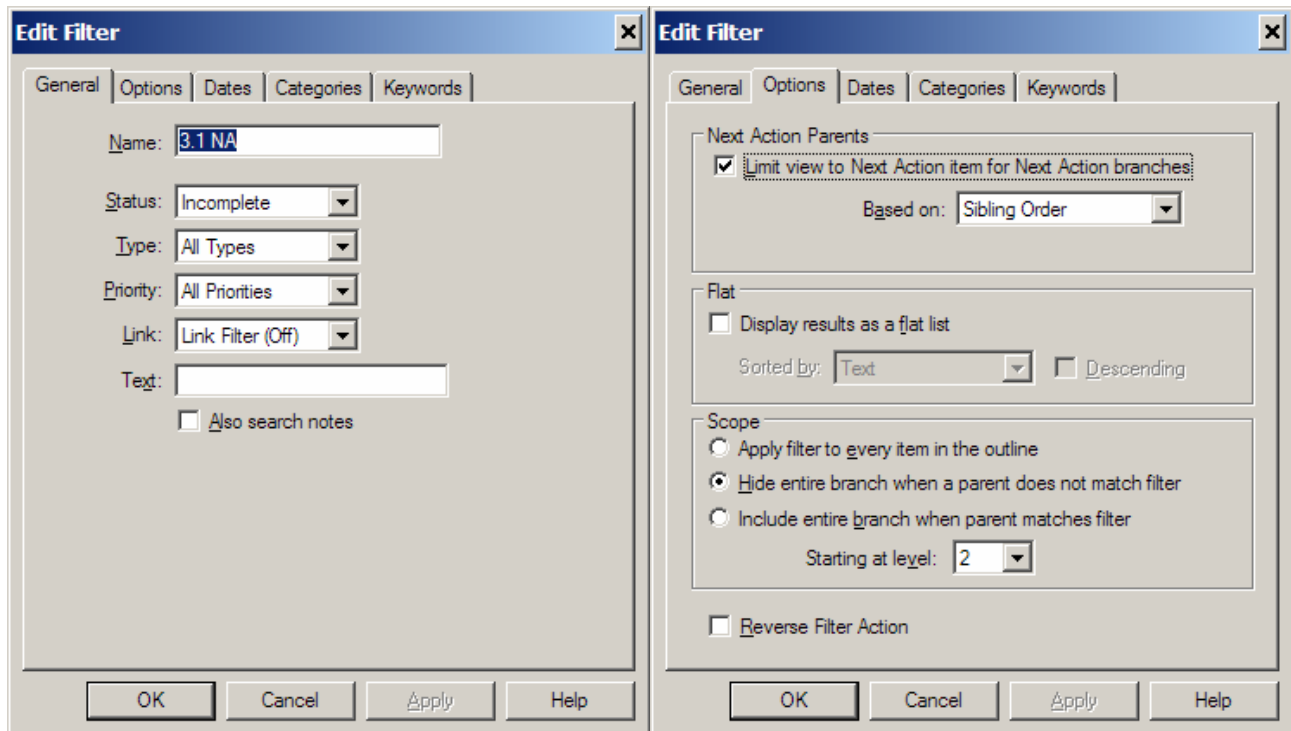
## Review Filters

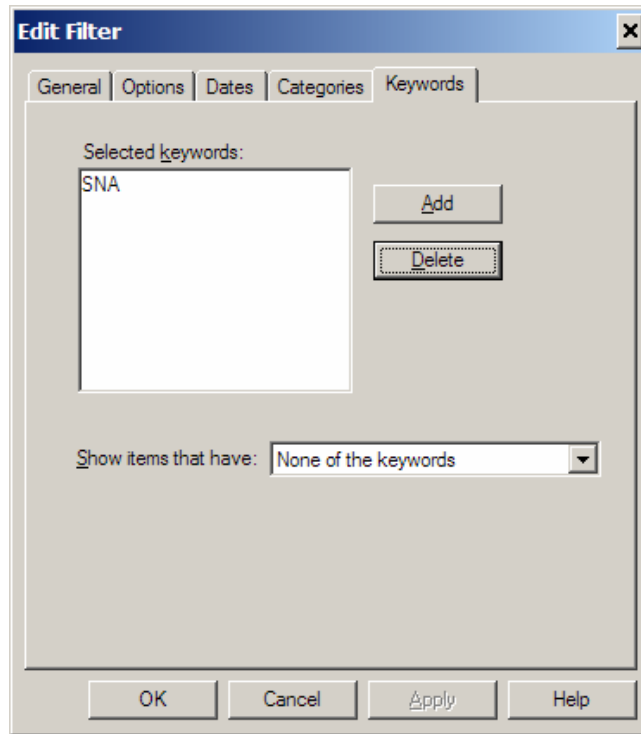
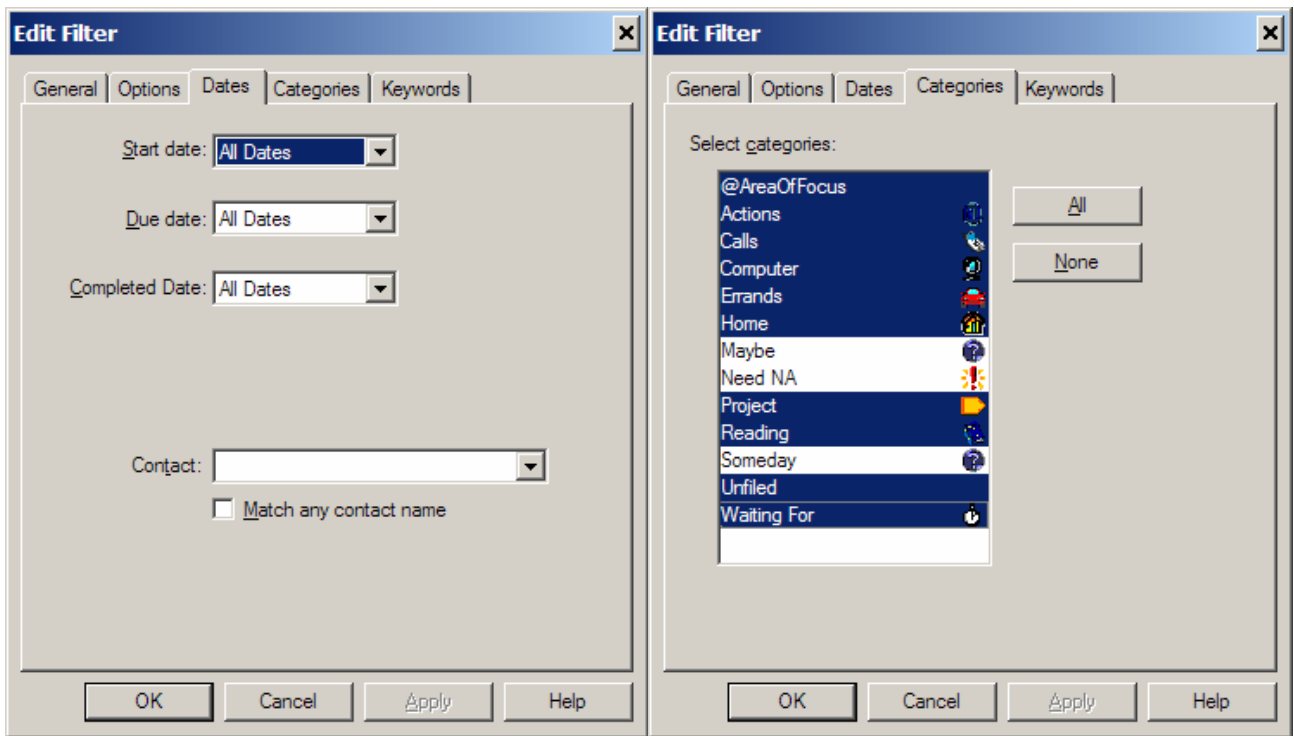
Review filters are ones I use during my weekly review.

### 3.1 NA

This filter shows me a list of all projects and their next actions.

- Status: incomplete
- Limit view to Next Action item: yes, based on sibling order
- Scope: filtered parent hides branch, starting at level 2
- Categories: all except Someday, Need NA, Maybe
- Keywords: SNA
- Show items that have: none of the keywords

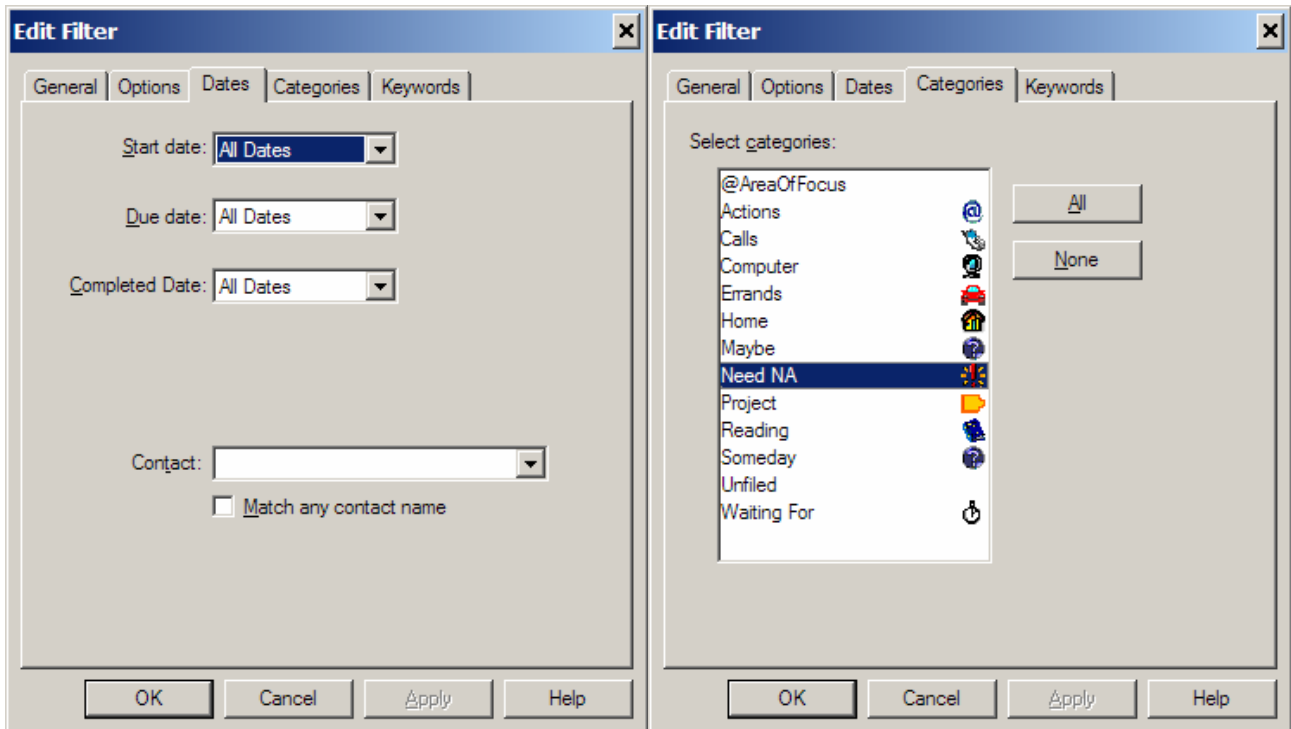
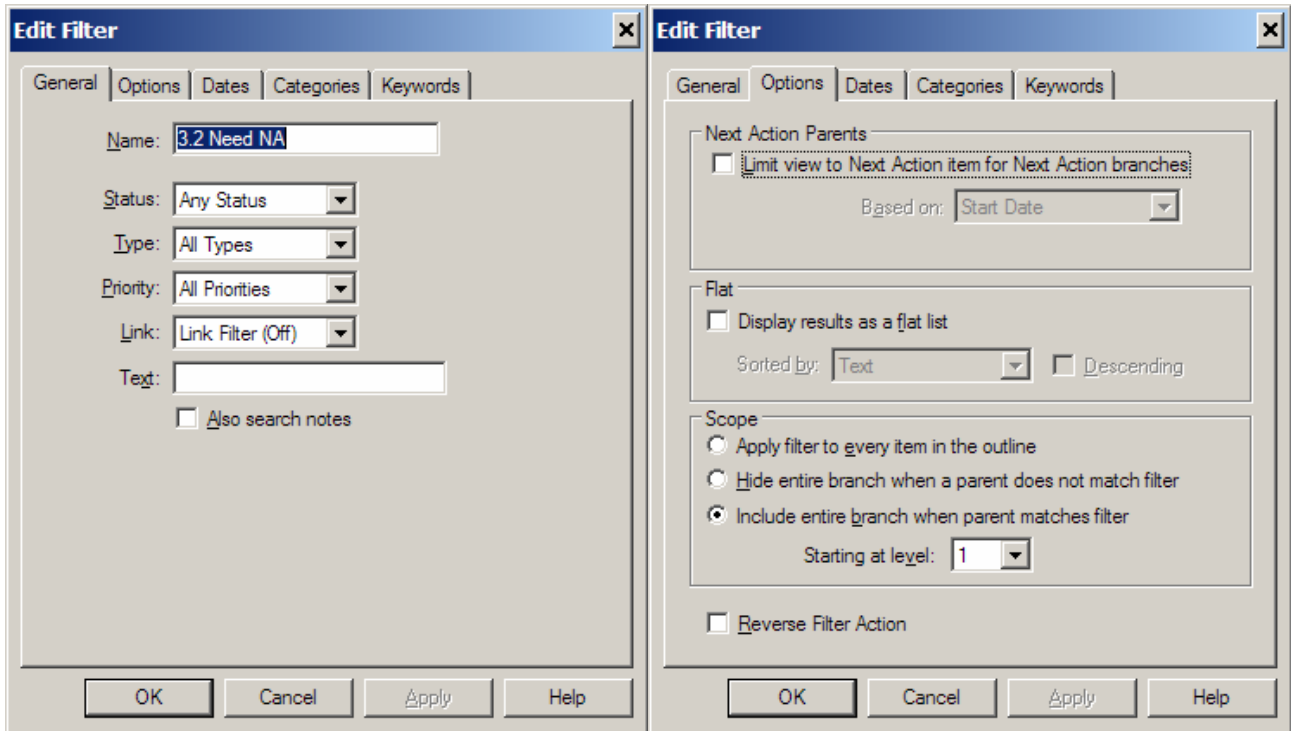


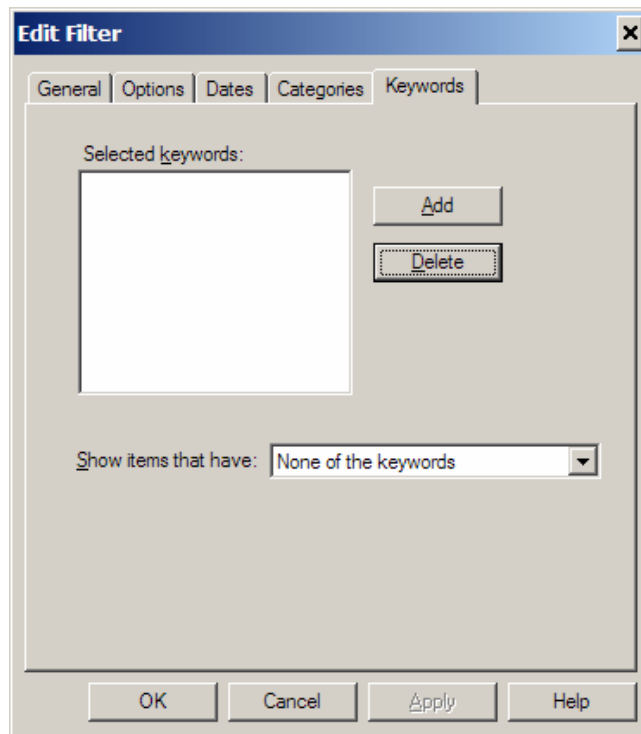


### 3.2 Need NA

This filter tells me which projects need to have a next action defined.

- Scope: Include entire branch when a parent matches a filter, starting at level 1
- Categories: Need NA

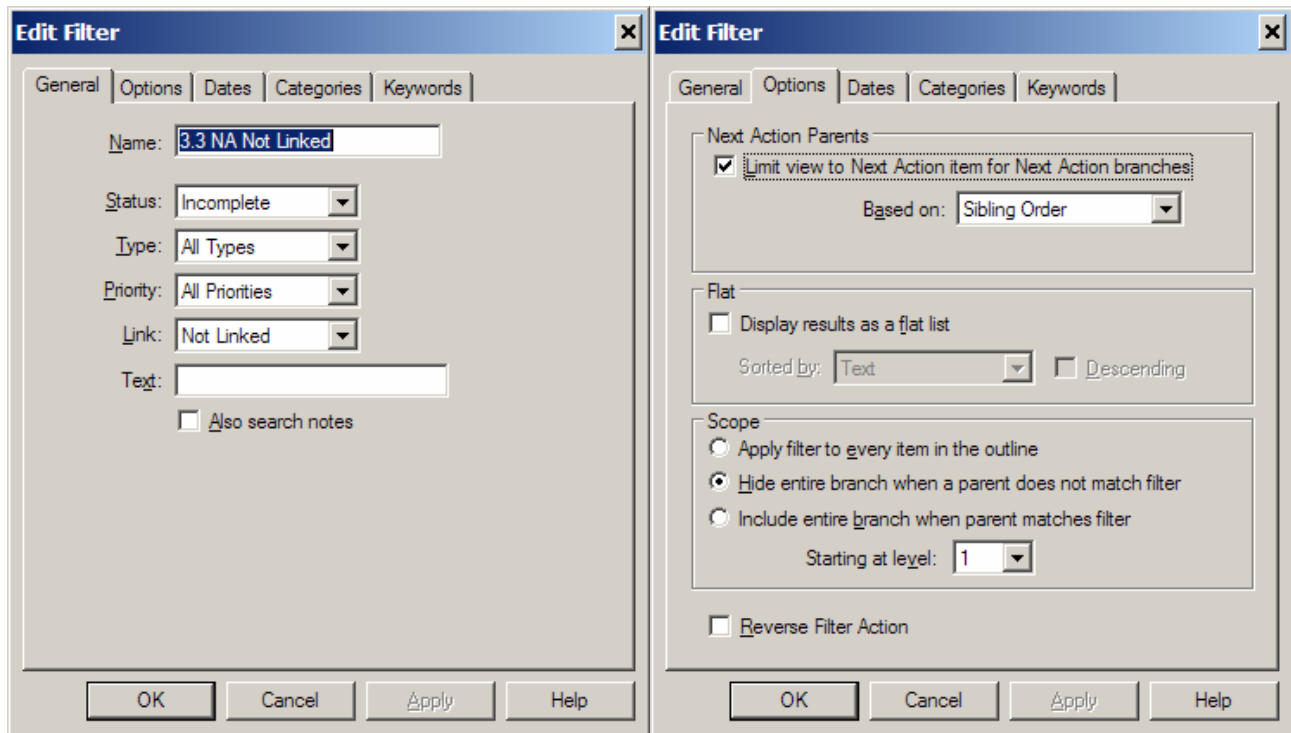


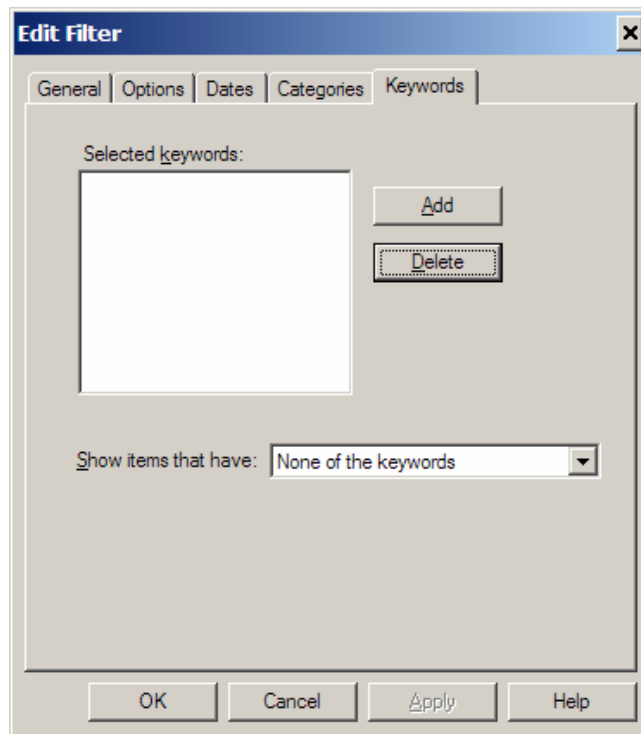
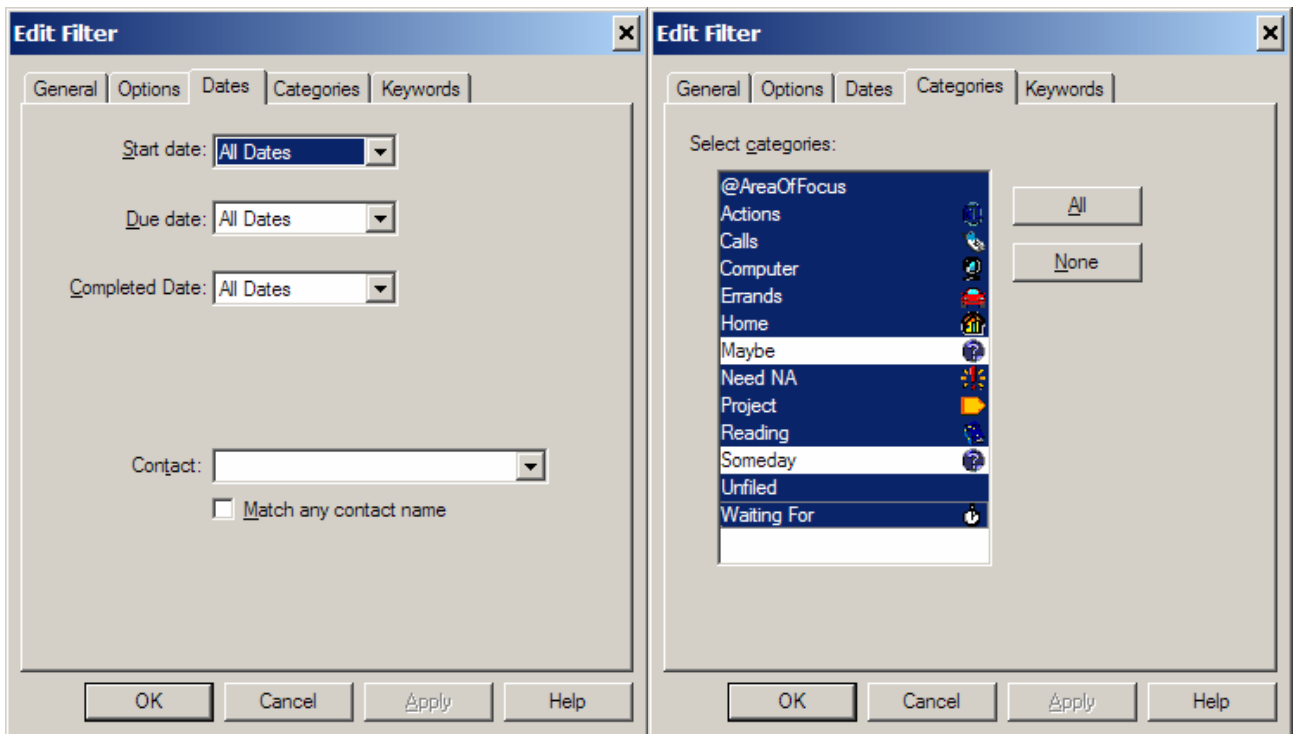


### 3.3 NA Not Linked

This filter allows me to see which items are not linked to the task list, and quickly link them.

- Status: Incomplete
- Link Filter: Not Linked
- Limit view to Next Action item: yes, based on Sibling Order
- Scope: filtered parent hides branch, starting at level 1
- Categories: all except Maybe and Someday

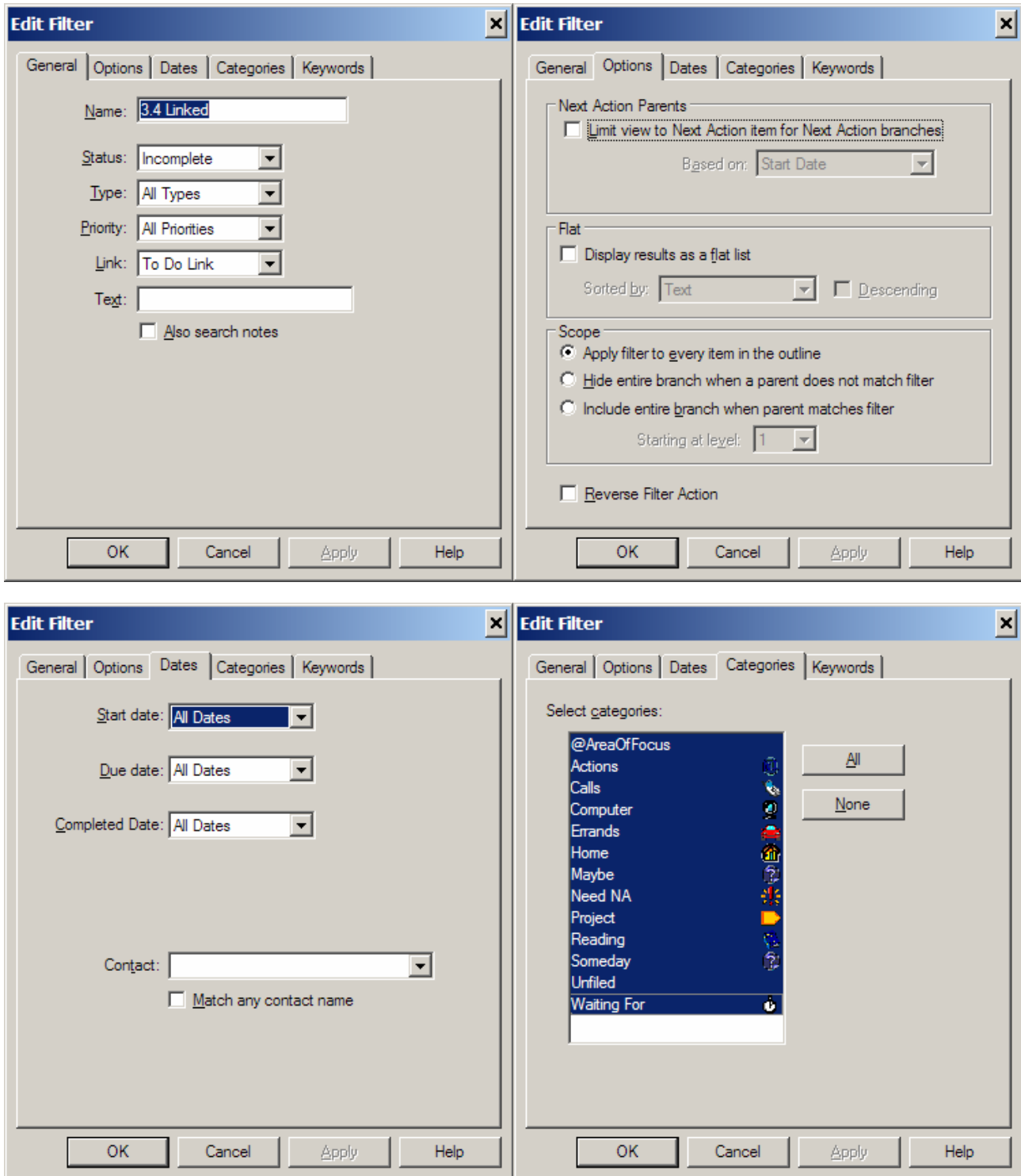


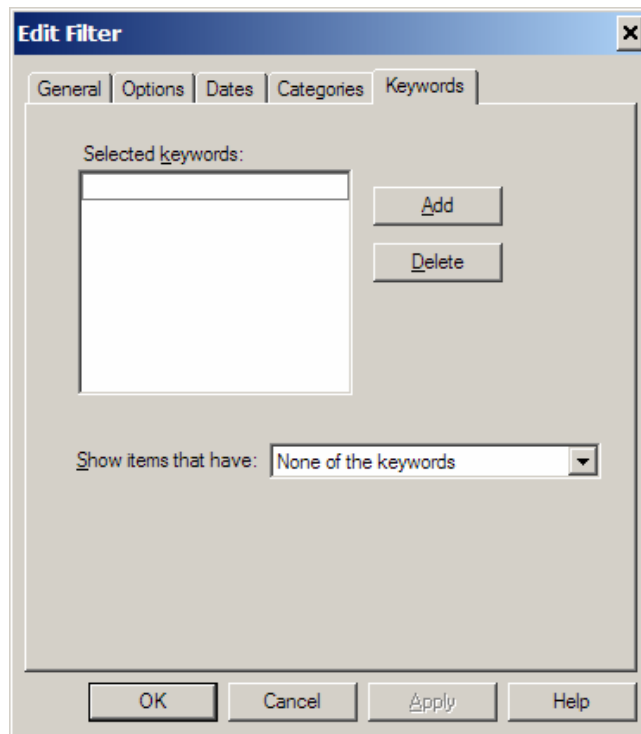


### 3.4 Linked

This last filter gives me an idea of what my workload is for the week.

- Status: incomplete
- Link Filter: to do link





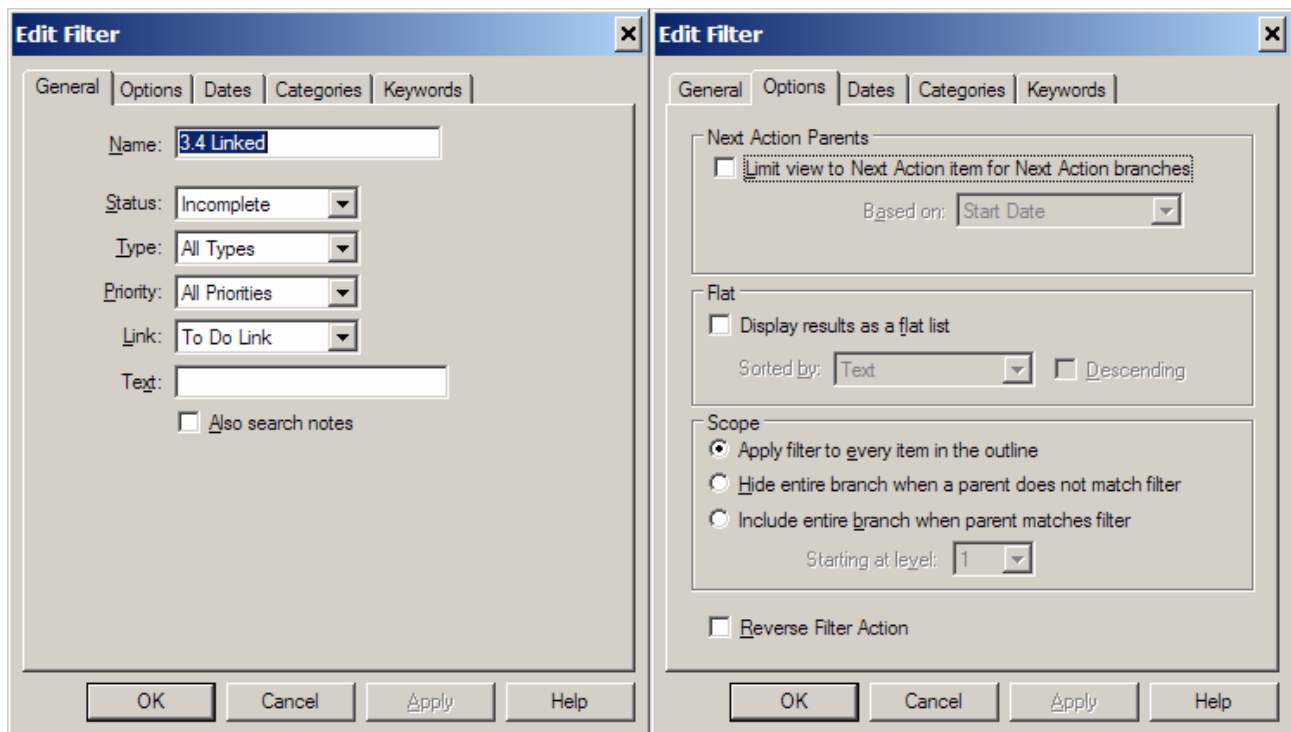
# Working List Filters

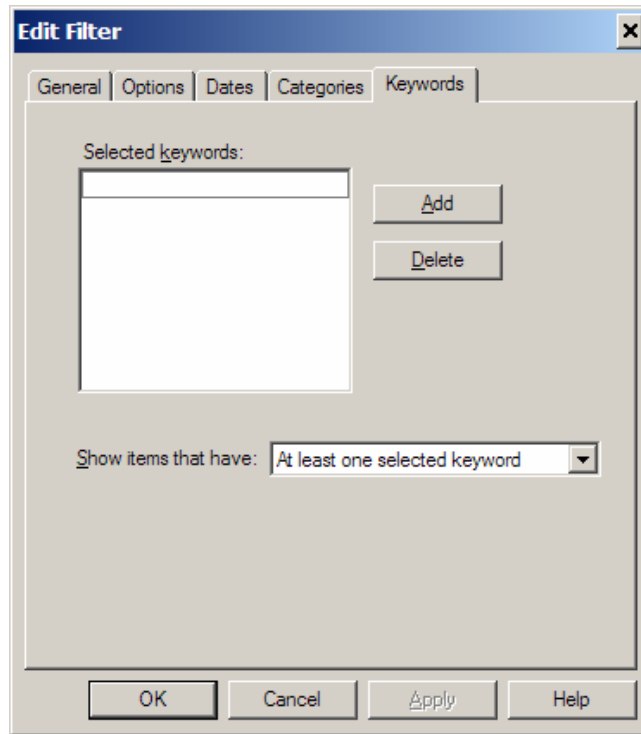
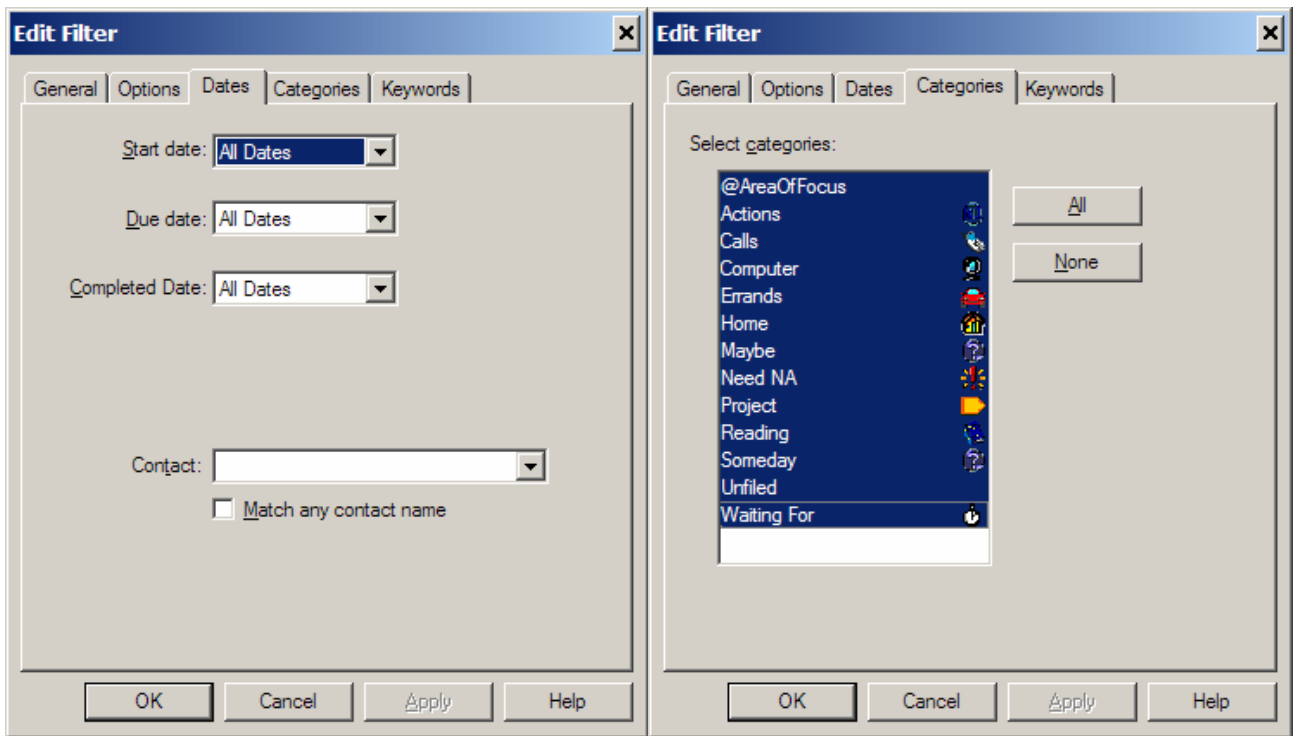
## *Working List Filters*

Working lists are ones I work from on a daily basis when I am in focused mode. The items might be linked to my task list, but I can easily distinguish items from Bonsai here from the flotsam that accumulates on my to do list.

### Flat NA Linked

- Status: Incomplete
- Link Filter: To do link
- Display result as a flat list: yes, Sorted by Priority
- Categories: all except Project, Someday, Maybe and Waiting For

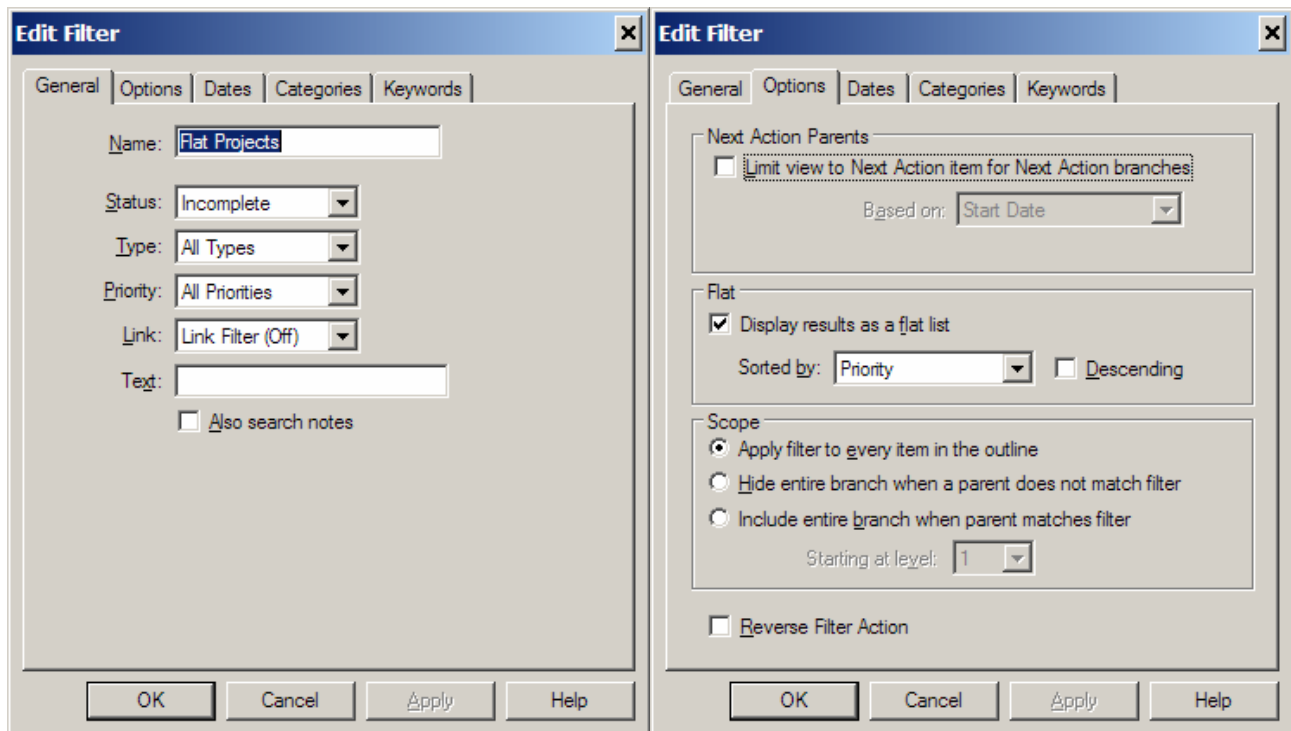


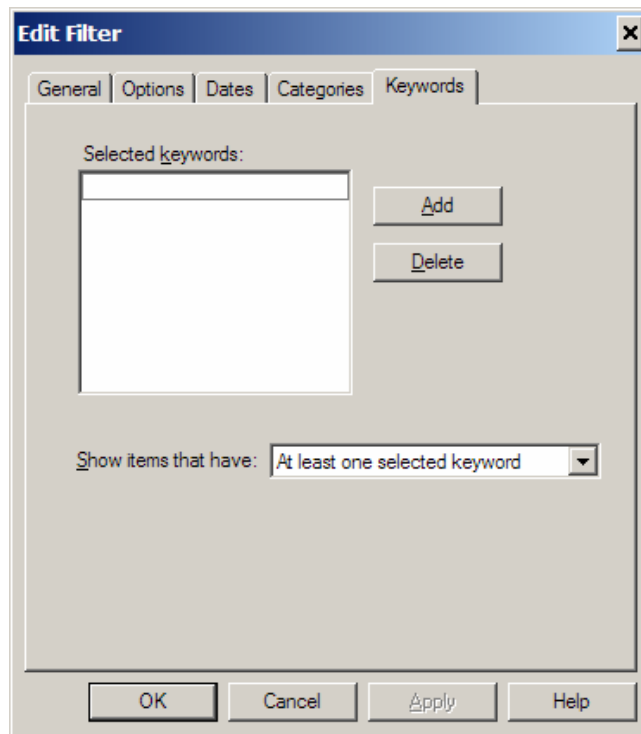
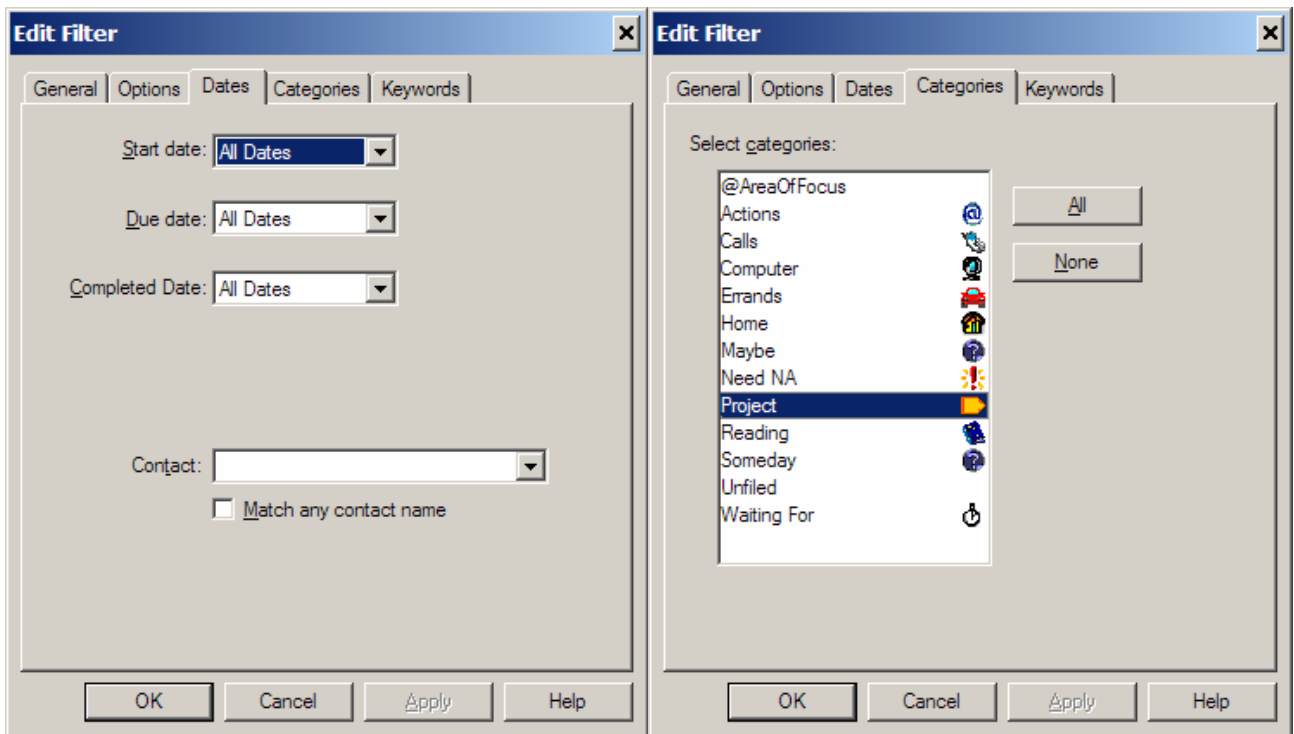


## Flat Projects

A flat list of my current projects

- Status: Incomplete
- Display result as a flat list: yes, sorted by priority
- Categories: Project

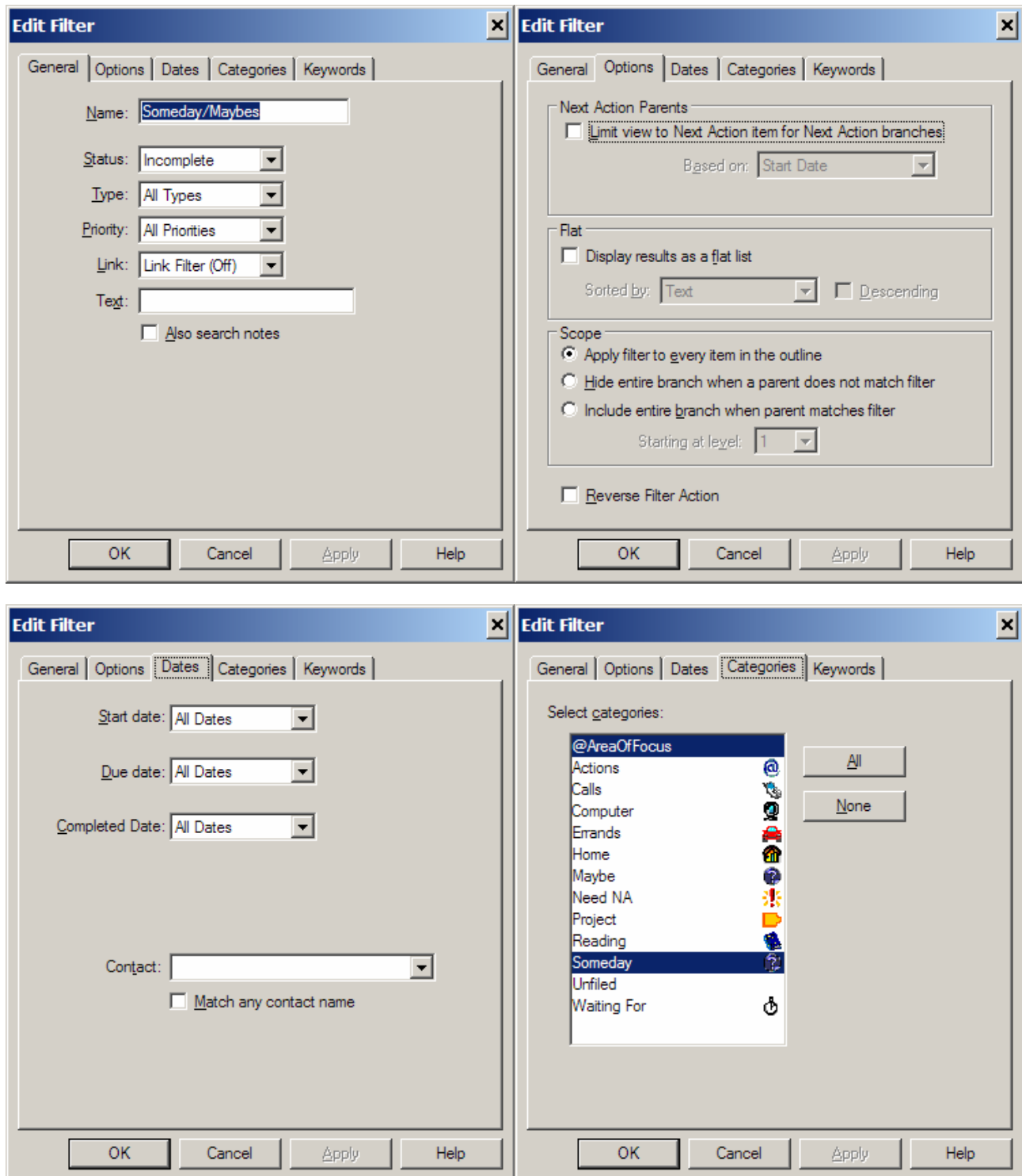


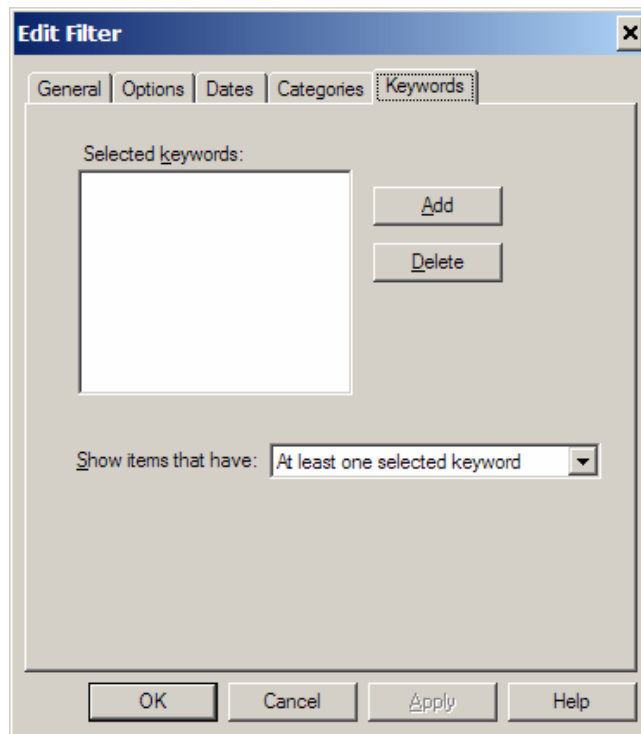


## Someday/Maybes

This filter is used for reviewing and purging my someday/maybe lists

- Status: incomplete
- Categories: @AreaOfFocus, Someday, Maybe





# Capturing and Processing

## *Using the Outline: Capturing and Processing*

When anything comes into my system, I set the filter to 1.1 Processing and enter it directly under the top Processing item. This allows me to make sure I can assign a category and keywords before I move it into the working outlines. Items are either entered into Slap on my handheld, or captured from either my web browser or my on-line notebook. I copy and paste everything in rather than re-entering the text.

### **Capturing**

Here is an example of a recent capture:

1. Give birthday dinner for Rosa
2. Schedule blog writing for SimpleProductivityBlog
3. Review 'The 4 Hour Work Week'
4. Have filling looked at
5. Buy tickets for trip home
6. Make a bee nesting block--  
<http://www.sunset.com/sunset/garden/article/0,20633,1038908,00.html>
7. Mail children's artwork to grandma

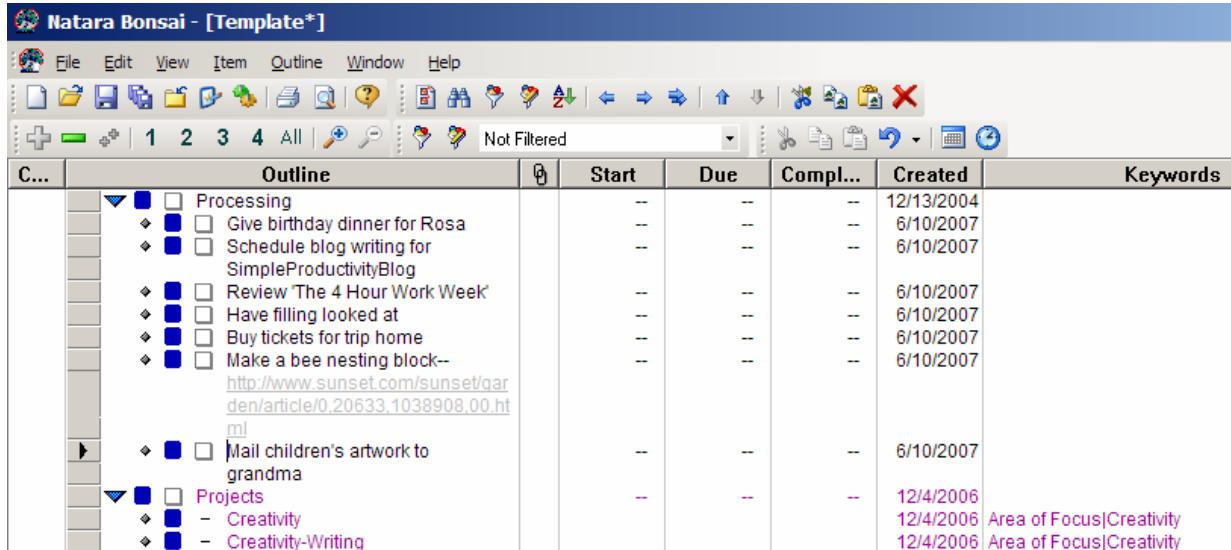
Notice that each of these items is phrased in a way that the end result is part of the task itself.

The last item is directly from del.icio.us. When I come across things I want to take action on, I bookmark it to del.icio.us under the tag @Action and put the action plus the URL in the notes. That way I can quickly copy/paste one line from the browser into Bonsai. After I make the initial paste, I remove the URL and put it in the notes.

## Processing

Using the first set of filters (1.x), I go through my items.

### 1.2 Unfiled



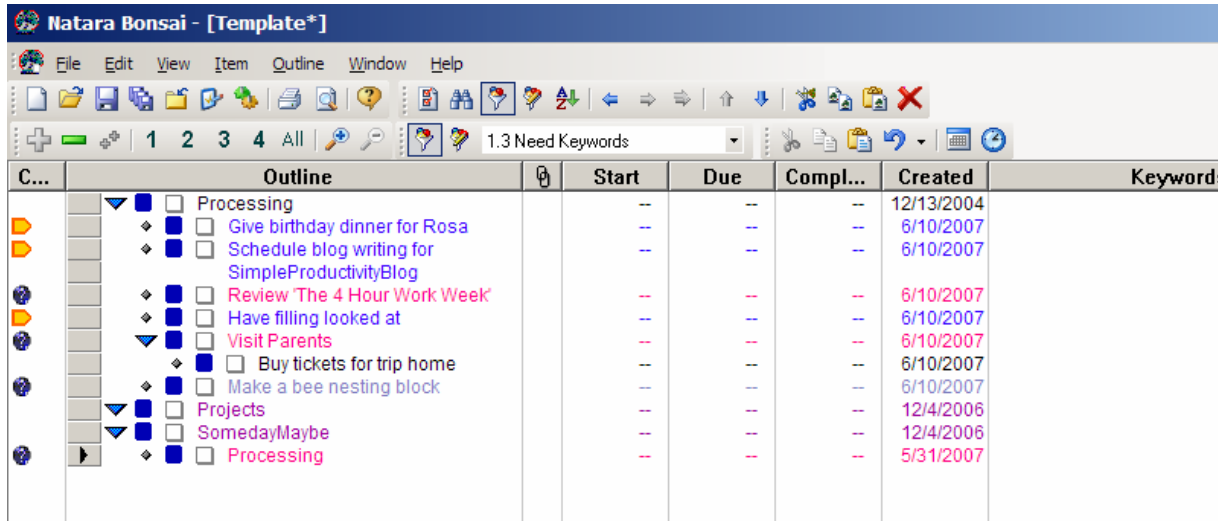
C...	Outline	Start	Due	Compl...	Created	Keywords
	Processing	--	--	--	12/13/2004	
	Give birthday dinner for Rosa	--	--	--	6/10/2007	
	Schedule blog writing for SimpleProductivityBlog	--	--	--	6/10/2007	
	Review 'The 4 Hour Work Week'	--	--	--	6/10/2007	
	Have filling looked at	--	--	--	6/10/2007	
	Buy tickets for trip home	--	--	--	6/10/2007	
	Make a bee nesting block-- <a href="http://www.sunset.com/sunset/garden/article/0,20633,1038908,00.html">http://www.sunset.com/sunset/garden/article/0,20633,1038908,00.html</a>	--	--	--	6/10/2007	
	Mail children's artwork to grandma	--	--	--	6/10/2007	
	Projects	--	--	--	12/4/2006	
	- Creativity				12/4/2006	Area of Focus Creativity
	- Creativity-Writing				12/4/2006	Area of Focus Creativity

Using this filter, I set a category for each item in the processing. I ask, "Is this a single next action (SNA)? Does it have more than one action, and would be classified as a project? Is this something I want to do now, someday, or perhaps never?" Referencing the above list, these are the categories selected:

1. Give birthday dinner for Rosa --> Project; this must be done in the next few weeks and consists of more than one action to bring it to completion.
2. Schedule blog writing for SimpleProductivityBlog --> Project; this has no end date but will give me significant benefits
3. Review 'The 4 Hour Work Week' --> Someday; I want to review this for the blog, but I don't want to do it right now
4. Have filling looked at --> Project; this one should be done ASAP.
5. Buy tickets for trip home --> This is actually a NA for a larger project, which is "Visit Parents". I will change the item and list Buy Tickets as a sub-item.
6. Make a bee nesting block--> This is a maybe. It's a nice idea, but I don't know that I want to do it for sure.
7. Mail children's artwork to grandma --> This is a single next action that is an Errand

### 1.3 Need Keywords

Next I switch over to the keywords view, and decide to which Area of Focus each of these items belongs. Even if an item is a someday or maybe, I still put in the keyword, since my Someday/Maybe first level item has everything underneath it filed under my Areas Of Focus. I also tag SNAs here.



C...	Outline	Start	Due	Compl...	Created	Keyword
	Processing	--	--	--	12/13/2004	
	Give birthday dinner for Rosa	--	--	--	6/10/2007	
	Schedule blog writing for SimpleProductivityBlog	--	--	--	6/10/2007	
	Review 'The 4 Hour Work Week'	--	--	--	6/10/2007	
	Have filling looked at	--	--	--	6/10/2007	
	Visit Parents	--	--	--	6/10/2007	
	Buy tickets for trip home	--	--	--	6/10/2007	
	Make a bee nesting block	--	--	--	6/10/2007	
	Projects	--	--	--	12/4/2006	
	SomedayMaybe	--	--	--	12/4/2006	
	Processing	--	--	--	5/31/2007	

Remember that if you put in your keywords by right-clicking in a keywords column, as soon as you select the first keyword, the item will disappear from the filter. A better way to approach items where you need to add multiple keywords is to go do the Details screen and enter from there.

1. Give birthday dinner for Rosa --> Family
2. Schedule blog writing for SimpleProductivityBlog -->Work
3. Review 'The 4 Hour Work Week' -->Work
4. Have filling looked at -->Physical
5. Visit Parents -->Family
6. Make a bee nesting block -->Home
7. Mail children's artwork to grandma --> Family, SNA

## 1.4 AOF Filing

This first level of filing takes care of the projects. I fire up this filter, then sort those items under the Processing level by Keyword. I then set the outline to display level 2 items, and start cutting branches (Ctrl+B) and pasting (Ctrl+Y).

C...	Outline	Start	Due	Compl...	Created	Keywords
	Processing	--	--	--	12/13/2004	
	Give birthday dinner for Rosa	--	--	--	6/10/2007	Family
	Visit Parents	--	--	--	6/10/2007	Family
	Buy tickets for trip home	--	--	--	6/10/2007	Family
	Make a bee nesting block	--	--	--	6/10/2007	Home
	Have filling looked at	--	--	--	6/10/2007	Physical
	Review 'The 4 Hour Work Week'	--	--	--	6/10/2007	Work
	Schedule blog writing for SimpleProductivityBlog	--	--	--	6/10/2007	Work
	Projects	--	--	--	12/4/2006	
	Creativity				12/4/2006	Area of Focus Creativity
	Creativity-Writing				12/4/2006	Area of Focus Creativity
	Family				2/16/2007	Area of Focus Family
	Family-Parent				2/10/2004	Area of Focus Family
	Family-Partner				3/12/2004	Area of Focus Partner

C...	Outline	Start	Due	Compl...	Created	Keywords
	Processing	--	--	--	12/13/2004	
	Visit Parents	--	--	--	6/10/2007	Family
	Buy tickets for trip home	--	--	--	6/10/2007	Family
	Make a bee nesting block	--	--	--	6/10/2007	Home
	Have filling looked at	--	--	--	6/10/2007	Physical
	Review 'The 4 Hour Work Week'	--	--	--	6/10/2007	Work
	Schedule blog writing for SimpleProductivityBlog	--	--	--	6/10/2007	Work
	Projects	--	--	--	12/4/2006	
	Creativity				12/4/2006	Area of Focus Creativity
	Creativity-Writing				12/4/2006	Area of Focus Creativity
	Family				2/16/2007	Area of Focus Family
	Give birthday dinner for Rosa	--	--	--	6/10/2007	Family
	Family-Parent				2/10/2004	Area of Focus Family
	Family-Partner				3/12/2004	Area of Focus Partner

C...	Outline	Start	Due	Compl...	Created	Keywords
	Projects	--	--	--	12/4/2006	
	- Creativity				12/4/2006	Area of Focus Creativity
	- Creativity-Writing				12/4/2006	Area of Focus Creativity
	- Family				2/16/2007	Area of Focus Family
	- Give birthday dinner for Rosa	--	--	--	6/10/2007	Family
	- Family-Parent				2/10/2004	Area of Focus Family
	- Family-Partner				3/12/2004	Area of Focus Partner
	- Financial				6/3/2005	Area of Focus Financial
	- Home-inside				5/24/2004	Area of Focus Home
	- Home-outside				5/24/2004	Area of Focus Home
	- Physical-Health				5/31/2005	Area of Focus Physical
	- Have filling looked at	--	--	--	6/10/2007	Physical
	- Self Improvement-General				12/3/2006	Area of Focus Self Improvement
	- SI-Reading				2/3/2006	Area of Focus Self Improvement
	- Social				12/12/2004	Area of Focus Social
	- Spiritual				3/12/2004	Area of Focus Spiritual
	- Work-Employee				6/10/2007	
	- Work				3/12/2004	Area of Focus Work
	- Schedule blog writing for SimpleProductivityBlog	--	--	--	6/10/2007	Work
	SomedayMaybe	--	--	--	12/4/2006	
	Processing	--	--	--	5/31/2007	

### 1.5 AOF Filing (SNA)

This level catches the SNAs that need to be moved. I generally don't have SNAs in the Someday/Maybe area.

C...	Outline	Start	Due	Compl...	Created	Keywords
	Processing	--	--	--	12/13/2004	
	- Mail children's artwork to grandma	--	--	--	6/10/2007	Family SNA
	Projects	--	--	--	12/4/2006	
	- Creativity				12/4/2006	Area of Focus Creativity
	- Creativity-Writing				12/4/2006	Area of Focus Creativity
	- Family				2/16/2007	Area of Focus Family
	- Give birthday dinner for Rosa	--	--	--	6/10/2007	Family
	- Family-Parent				2/10/2004	Area of Focus Family
	- Family-Partner				3/12/2004	Area of Focus Partner
	- Financial				6/3/2005	Area of Focus Financial
	- Home-inside				5/24/2004	Area of Focus Home
	- Home-outside				5/24/2004	Area of Focus Home
	- Physical-Health				5/31/2005	Area of Focus Physical
	- Have filling looked at	--	--	--	6/10/2007	Physical
	- Self Improvement-General				12/3/2006	Area of Focus Self Improvement
	- SI-Reading				2/3/2006	Area of Focus Self Improvement
	- Social				12/12/2004	Area of Focus Social
	- Spiritual				3/12/2004	Area of Focus Spiritual

## 1.6 Completed SNA

This filter shows me the completed items flagged as SNA. I then copy and paste them into the Completed Outline (which is stored only on my computer) if I am at my PC, or into the CompletedTransfer outline on the PDA.

I use this filter to thin out the list. I like to know when I have done things, but I don't want that clouding my outline or bulking up my file size.

C...	Outline	Start	Due	Compl...	Created	Keywords
	Projects	--	--	--	12/4/2006	
	- Social				12/12/2004	Area of Focus Social
	- Return Jaime's phone call	--	--	6/10/2007	6/10/2007	SNA Social

## 1.7 Completed Projects

This works just like the completed SNA.

C...	Outline	Start	Due	Compl...	Created	Keywords
	Projects	--	--	--	12/4/2006	
	- Creativity				12/4/2006	Area of Focus Creativity
	- Creativity-Writing				12/4/2006	Area of Focus Creativity
	- Family				2/16/2007	Area of Focus Family
	- Family-Parent				2/10/2004	Area of Focus Family
	- Family-Partner				3/12/2004	Area of Focus Partner
	- Financial				6/3/2005	Area of Focus Financial
	- Home-inside				5/24/2004	Area of Focus Home
	- Wash windows	--	--	6/10/2007	6/10/2007	Home
	- Home-outside				5/24/2004	Area of Focus Home
	- Physical-Health				5/31/2005	Area of Focus Physical
	- Self Improvement-General				12/3/2006	Area of Focus Self Improvement
	- SI-Reading				2/3/2006	Area of Focus Self Improvement
	- Social				12/12/2004	Area of Focus Social



# Thinking

## *Using the Outline: Thinking*

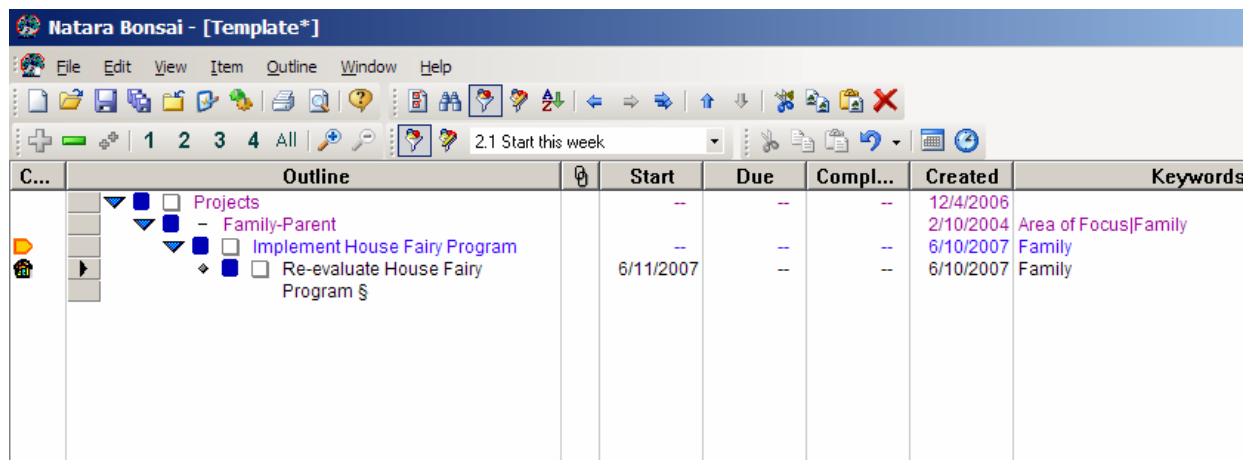
Once a week I sit down and think about what is going on in my system. This is where I look at what I have going on, what I am trying to accomplish and how I will know when something is done. I find that if I skip this step, I end up with lists of things that are un-doable, and consequently I will start ignoring my system.

### 2.1 Start this week

I use the Start field on Bonsai items to set items that need to be started at a given point. These start dates usually represent promises I have made, or things with recurring deadlines. For example, I have an item in Bonsai that is part of a project (Implement House Fairy program for three months) where I have to schedule a House Fairy visit for each week. (No, I'm not insane, just a very satisfied practitioner. Check out <http://www.housefairy.org> to see how you can get your children to clean their rooms without yelling.)

I also examine each item to see if another project needs to be completed before starting any other one on this list.

I don't do anything with this list other than familiarize myself with things that need to be done in the next week.



The screenshot shows the Nataru Bonsai software interface. The title bar reads "Nataru Bonsai - [Template\*]". The menu bar includes File, Edit, View, Item, Outline, Window, and Help. The toolbar contains various icons for file operations and navigation. The main window displays a table with the following columns: C..., Outline, Start, Due, Compl..., Created, and Keywords. The table contains the following data:

C...	Outline	Start	Due	Compl...	Created	Keywords
	Projects	--	--	--	12/4/2006	
	- Family-Parent				2/10/2004	Area of Focus Family
	Implement House Fairy Program	--	--	--	6/10/2007	Family
	Re-evaluate House Fairy Program §	6/11/2007	--	--	6/10/2007	Family

## 2.2 Due this month

This filter represents items with hard and fast due dates. I can see what is coming up within the next month. I chose a month because only rarely do I have projects that require more than 30 days preparation time.

Again, I don't do anything with this list other than familiarize myself with the contents.

C...	Outline	Start	Due	Compl...	Created	Keywords
	Projects	--	--	--	12/4/2006	
	- Family				2/16/2007	Area of Focus Family
	Give birthday dinner for Rosa	--	6/30/2007	--	6/10/2007	Family

## 2.3 Current P&S (Projects and Somedays)

I use this outline to see what my workload is here. Underneath the Projects level 1 item, I examine each of the items under each Area of Focus. I ask 3 questions:

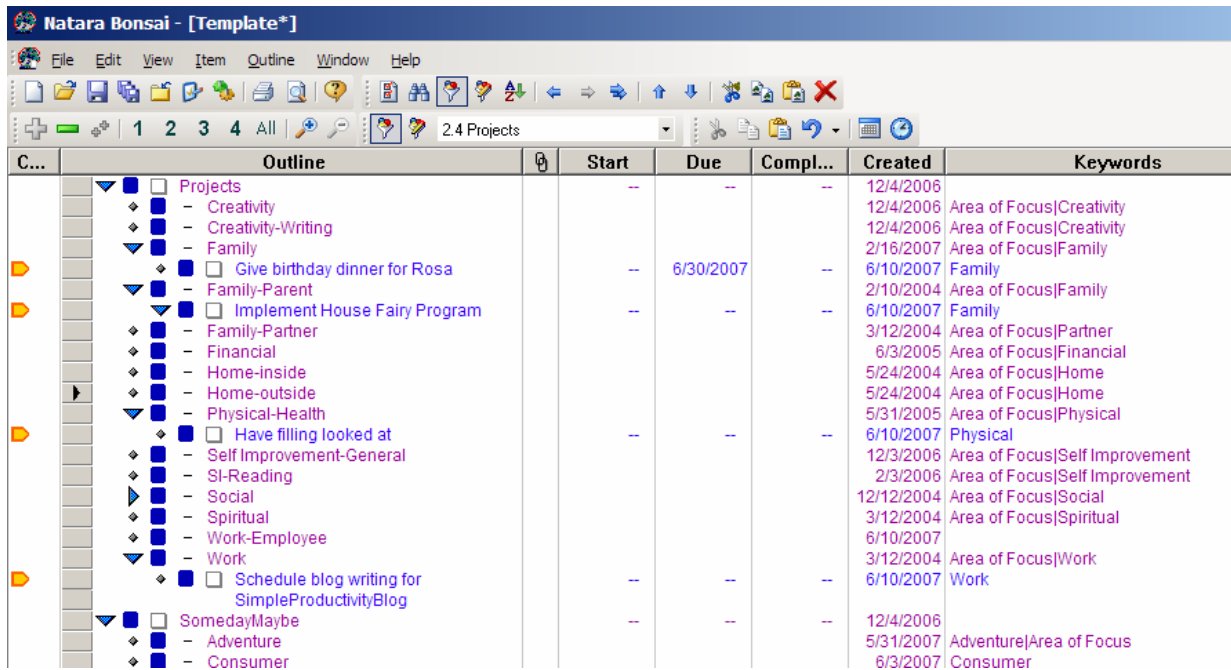
1. "Do I have too many things going on in this area to the neglect of other areas?"
2. "Can I drop something in this area to leave more time for other areas?"
3. "Am I really going to commit to moving forward on these projects in the next week?"

This filter allows me to balance the workload. One of the troubles I have with Getting Things Done is my tendency to keep on working and not take time to renew myself. Another trouble is that I always feel like I can get more done than I actually can -- and I inevitably fall short, get discouraged, and accomplish almost nothing. Balancing allows me to prevent these situations from happening.

C...	Outline	Start	Due	Compl...	Created	Keywords
	Projects	--	--	--	12/4/2006	
	- Creativity				12/4/2006	Area of Focus Creativity
	- Creativity-Writing				12/4/2006	Area of Focus Creativity
	- Family				2/16/2007	Area of Focus Family
	Give birthday dinner for Rosa	--	6/30/2007	--	6/10/2007	Family
	- Family-Parent				2/10/2004	Area of Focus Family
	- Implement House Fairy Program	--	--	--	6/10/2007	Family
	- Family-Partner				3/12/2004	Area of Focus Partner
	- Financial				6/3/2005	Area of Focus Financial
	- Home-inside				5/24/2004	Area of Focus Home
	- Home-outside				5/24/2004	Area of Focus Home
	- Physical-Health				5/31/2005	Area of Focus Physical
	Have filling looked at	--	--	--	6/10/2007	Physical
	- Self Improvement-General				12/3/2006	Area of Focus Self Improvement
	- SI-Reading				2/3/2006	Area of Focus Self Improvement
	- Social				12/12/2004	Area of Focus Social
	- Spiritual				3/12/2004	Area of Focus Spiritual
	- Work-Employee				6/10/2007	
	- Work				3/12/2004	Area of Focus Work
	Schedule blog writing for SimpleProductivityBlog	--	--	--	6/10/2007	Work
	- SomedayMaybe				12/4/2006	
	- Processing				5/31/2007	
	- Adventure				5/31/2007	Adventure Area of Focus

## 2.4 Projects

This list shows the current workload. It's a double-check on the balance. I often will move projects into someday when I see only those items I'm going to commit to working on in the next week.

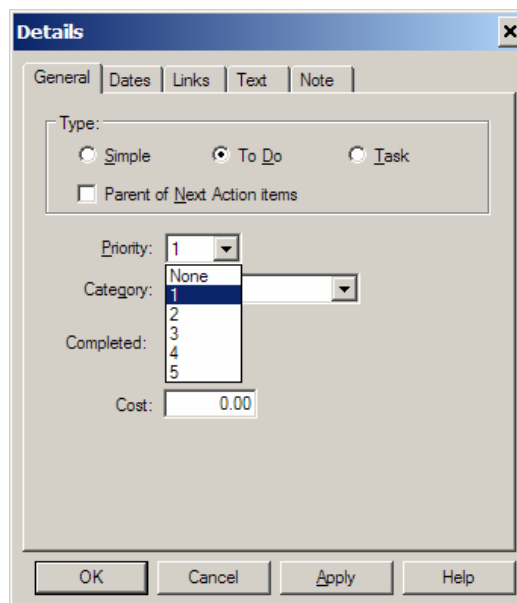


The screenshot shows the 'Nataru Bonsai' software interface with a project outline table. The table has columns for 'C...', 'Outline', 'Start', 'Due', 'Compl...', 'Created', and 'Keywords'. The 'Outline' column contains a hierarchical list of projects and tasks, some with checkboxes and expand/collapse icons. The 'Start', 'Due', and 'Compl...' columns contain dates or dashes. The 'Created' column contains dates. The 'Keywords' column contains descriptive text for each item.

C...	Outline	Start	Due	Compl...	Created	Keywords
	Projects	--	--	--	12/4/2006	
	- Creativity				12/4/2006	Area of Focus Creativity
	- Creativity-Writing				12/4/2006	Area of Focus Creativity
	- Family				2/16/2007	Area of Focus Family
	Give birthday dinner for Rosa	--	6/30/2007	--	6/10/2007	Family
	- Family-Parent				2/10/2004	Area of Focus Family
	Implement House Fairy Program	--	--	--	6/10/2007	Family
	- Family-Partner				3/12/2004	Area of Focus Partner
	- Financial				6/3/2005	Area of Focus Financial
	- Home-inside				5/24/2004	Area of Focus Home
	- Home-outside				5/24/2004	Area of Focus Home
	- Physical-Health				5/31/2005	Area of Focus Physical
	Have filling looked at	--	--	--	6/10/2007	Physical
	- Self Improvement-General				12/3/2006	Area of Focus Self Improvement
	- SI-Reading				2/3/2006	Area of Focus Self Improvement
	- Social				12/12/2004	Area of Focus Social
	- Spiritual				3/12/2004	Area of Focus Spiritual
	- Work-Employee				6/10/2007	
	- Work				3/12/2004	Area of Focus Work
	Schedule blog writing for SimpleProductivityBlog	--	--	--	6/10/2007	Work
	SomedayMaybe	--	--	--	12/4/2006	
	- Adventure				5/31/2007	Adventure Area of Focus
	- Consumer				6/3/2007	Consumer

## 2.5 Project Priority

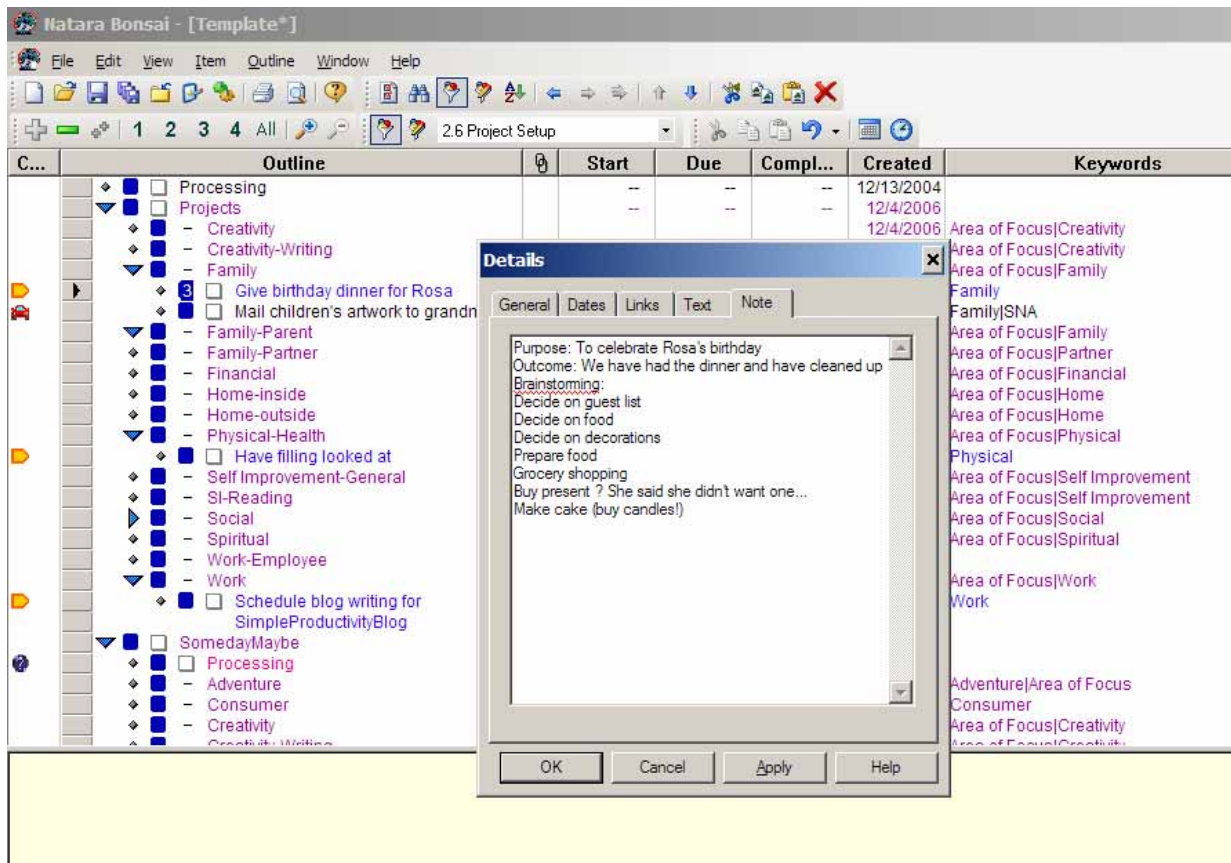
I assign projects priority based loosely on how important they are going to be 6 - 12 months from now, and how well they fit in with my goals. The original idea was that I should spend 50% of my time on those items marked #1, 30% on #2, and 20% on #3. In practice, it doesn't work quite that way, but I find that I work more on the higher priority goals when given a chance.



## 2.6 Project Setup

This filter's primary goal is to show me where I haven't defined a purpose and outcome. For each project, I make a point of thinking about why I am doing something (the purpose) and also how I will know when this project is done (the outcome). I place this information in the notes of the project item, and tack on a third area, brainstorming, where I list all the things I can think of that I will need to do or consider to bring this project to its outcome.

To use this filter, I select it, and then I scan through the list concentrating on the icon for projects, which I have set as my left-most column. If I see any of my project icons there, I stop and enter in the appropriate fields in the notes. The filter looks for the word "Outcome:" in the notes, so I make sure that I have that in the notes.



# Review

## Using the Outline: Review

This series of filters is to make sure that I have things queued up for working on my projects. The filters pertain only to next actions. While there are very few filters in this action, this is what keeps me on track.

### 3.1 NA

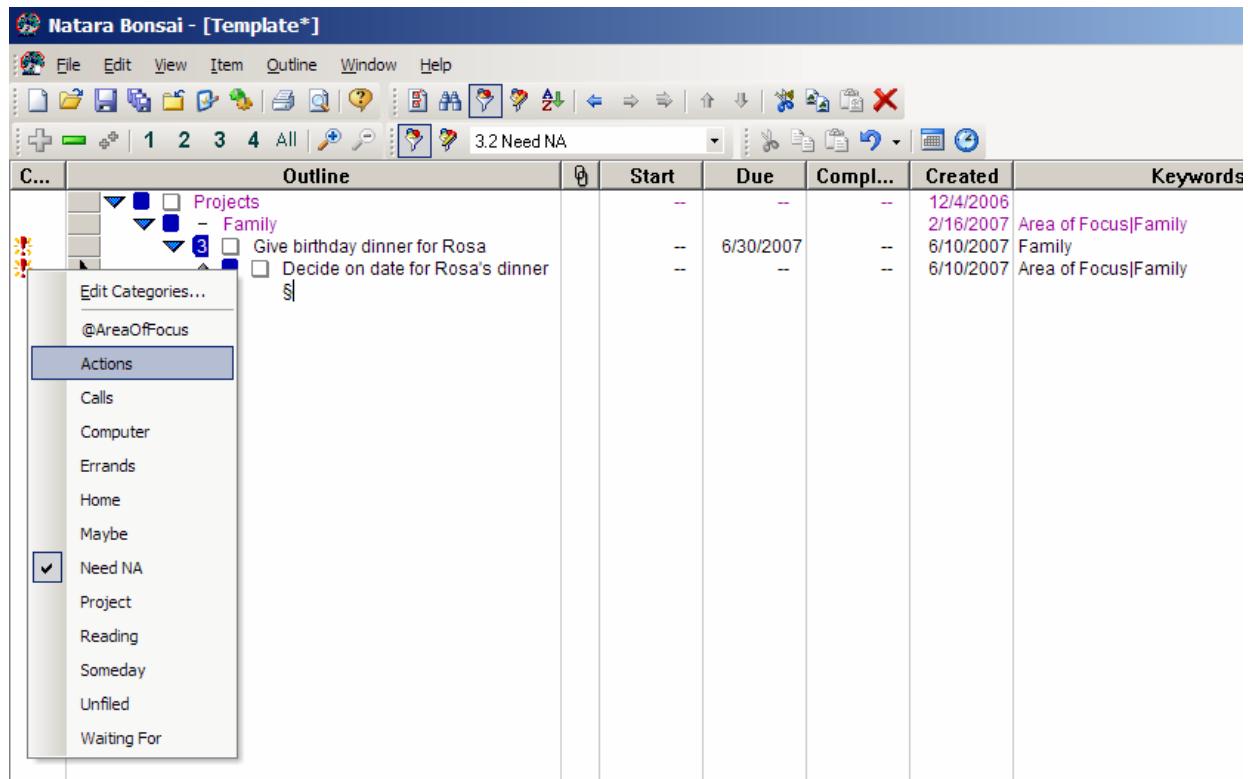
This filter shows the next actions for my current projects. If there is a project listed without a next action defined, I change the project to category "Need NA"

C...	Outline	Start	Due	Compl...	Created	Keywords
	Processing	--	--	--	12/13/2004	
	Projects	--	--	--	12/4/2006	
	- Creativity				12/4/2006	Area of Focus Creativity
	- Creativity-Writing				12/4/2006	Area of Focus Creativity
	- Family				2/16/2007	Area of Focus Family
	Give birthday dinner for Rosa		6/30/2007	--	6/10/2007	Family
	family-Parent				2/10/2004	Area of Focus Family
	Implement House Fairy Program		--	--	6/10/2007	Family
	Re-evaluate House Fairy Program §	6/11/2007	--	--	6/10/2007	Family
	family-Partner				3/12/2004	Area of Focus Partner
	financial				6/3/2005	Area of Focus Financial
	home-inside				5/24/2004	Area of Focus Home
	home-outside				5/24/2004	Area of Focus Home
	physical-Health				5/31/2005	Area of Focus Physical
	Have filling looked at	--	--	--	6/10/2007	Physical
	Self Improvement-General				12/3/2006	Area of Focus Self Improvement
	Self-Reading				2/3/2006	Area of Focus Self Improvement
	social				12/12/2004	Area of Focus Social
	spiritual				3/12/2004	Area of Focus Spiritual
	Work-Employee				6/10/2007	
	Work				3/12/2004	Area of Focus Work
	Schedule blog writing for SimpleProductivityBlog	--	--	--	6/10/2007	Work
	edayMaybe				12/4/2006	
	adventure				5/31/2007	Adventure Area of Focus
	consumer				6/3/2007	Consumer
	creativity				5/24/2007	Area of Focus Creativity

Purpose: To celebrate Rosa's birthday  
Outcome: We have had the dinner and have cleaned up  
Brainstorming:  
Decide on guest list  
Decide on food

### 3.2 Need NA

I now deal with any projects that need a next action. Selecting this filter, I go through each one, adding next action(s) as necessary.



### 3.3 NA Not linked

Here is the list of next actions that are not linked into my task list. I can quickly go through and link what I need to.

Note: I use a § at the end of every Bonsai next action so that I can quickly distinguish things in my task list as coming from Bonsai.

C...	Outline	Start	Due	Compl...	Created	Keywords
	Processing	--	--	--	12/13/2004	
	Projects	--	--	--	12/4/2006	
	- Creativity				12/4/2006	Area of Focus Creativity
	- Creativity-Writing				12/4/2006	Area of Focus Creativity
	- Family				2/16/2007	Area of Focus Family
	3 Give birthday dinner for Rosa	--	6/30/2007	--	6/10/2007	Family
	Decide on date for Rosa's dinner §	--	--	--	6/10/2007	Area of Focus Family
	Mail children's artwork to grandma §	--	--	--	6/10/2007	Family SNA
	- Family-Parent				2/10/2004	Area of Focus Family
	Implement House Fairy Program	--	--	--	6/10/2007	Family
	Re-evaluate House Fairy Program §	6/11/2007	--	--	6/10/2007	Family
	- Family-Partner				3/12/2004	Area of Focus Partner
	- Financial				6/3/2005	Area of Focus Financial
	- Home-inside				5/24/2004	Area of Focus Home
	- Home-outside				5/24/2004	Area of Focus Home
	- Physical-Health				5/31/2005	Area of Focus Physical
	1 Have filling looked at	--	--	--	6/10/2007	Physical
	1 Call dentist §	--	--	--	6/10/2007	Area of Focus Physical
	- Self Improvement-General				12/3/2006	Area of Focus Self Improvement
	- SI-Reading				2/3/2006	Area of Focus Self Improvement
	- Social				12/12/2004	Area of Focus Social
	- Spiritual				3/12/2004	Area of Focus Spiritual
	- Work-Employee				6/10/2007	
	- Work				3/12/2004	Area of Focus Work
	1 Schedule blog writing for SimpleProductivityBlog	--	--	--	6/10/2007	Work
	1 Decide how often to post to blog §	--	--	--	6/10/2007	Area of Focus Work

### 3.4 Linked

This filter shows me things that are linked. I can use this to process items, or as a double-check on my workload.

C...	Outline	Start	Due	Compl...	Created	Keywords
	Projects	--	--	--	12/4/2006	
	- Family				2/16/2007	Area of Focus Family
	<input type="checkbox"/> Give birthday dinner for Rosa	--	6/30/2007	--	6/10/2007	Family
	<input type="checkbox"/> Decide on date for Rosa's dinner §	--	--	--	6/10/2007	Area of Focus Family
	<input type="checkbox"/> Mail children's artwork to grandma §	--	--	--	6/10/2007	Family SNA
	- Family-Parent				2/10/2004	Area of Focus Family
	<input type="checkbox"/> Implement House Fairy Program	--	--	--	6/10/2007	Family
	<input type="checkbox"/> Re-evaluate House Fairy Program §	6/11/2007	--	--	6/10/2007	Family
	- Physical-Health				5/31/2005	Area of Focus Physical
	<input type="checkbox"/> Have filling looked at	--	--	--	6/10/2007	Physical
	<input type="checkbox"/> Call dentist §	--	--	--	6/10/2007	Area of Focus Physical
	- Work				3/12/2004	Area of Focus Work
	<input type="checkbox"/> Schedule blog writing for SimpleProductivityBlog	--	--	--	6/10/2007	Work
	<input type="checkbox"/> Decide how often to post to blog §	--	--	--	6/10/2007	Area of Focus Work



# Working Lists

## Using the Outline: Working Lists

This last set of filters is for when my PDA either discharges itself or dies, and I am without a PDA for a given amount of time. I use these lists to see what my current projects are, and my current actions.

### Flat NA linked

This is a display of those Next Actions that are linked into my task list. The difference here is that they are not sorted by project or area of focus, but by the priority I have assigned them. In theory, I should be spending the most time on the 1s, next the 2s, and finally the 3s.

C...	Outline	Start	Due	Compl...	Created	Keywords
1	<input type="checkbox"/> Call dentist §	--	--	--	6/10/2007	Area of Focus Physical
1	<input type="checkbox"/> Decide how often to post to blog §	--	--	--	6/10/2007	Area of Focus Work
3	<input type="checkbox"/> Decide on date for Rosa's dinner §	--	--	--	6/10/2007	Area of Focus Family
3	<input type="checkbox"/> Mail children's artwork to grandma §	--	--	--	6/10/2007	Family SNA
3	<input type="checkbox"/> Re-evaluate House Fairy Program §	6/11/2007	--	--	6/10/2007	Family

### Flat Projects

I use this project list to see what I have going on at a given time.

C...	Outline	Start	Due	Compl...	Created	Ke
1	<input type="checkbox"/> Have filling looked at	--	--	--	6/10/2007	Physical
1	<input type="checkbox"/> Schedule blog writing for SimpleProductivityBlog	--	--	--	6/10/2007	Work
3	<input type="checkbox"/> Give birthday dinner for Rosa	--	6/30/2007	--	6/10/2007	Family
3	<input type="checkbox"/> Implement House Fairy Program	--	--	--	6/10/2007	Family

## Someday/Maybes

This list is all the items I have stashed under someday/maybes. About every two months I go through this list, deleting those maybes that no longer appeal, and moving items from somedays to maybes and vice versa. This keeps me in touch with the things I might want to do, and to find things that will further my goals.

C...	Outline	Start	Due	Compl...	Created	Keywords
	Home-outside				5/24/2004	Area of Focus Home
	Physical-Health				5/31/2005	Area of Focus Physical
	Self Improvement-General				12/3/2006	Area of Focus Self Improvement
	SI-Reading				2/3/2006	Area of Focus Self Improvement
	Social				12/12/2004	Area of Focus Social
	Spiritual				3/12/2004	Area of Focus Spiritual
	Work-Employee				6/10/2007	
	Work				3/12/2004	Area of Focus Work
	SomedayMaybe	--	--	--	12/4/2006	
	Processing	--	--	--	5/31/2007	
	Adventure				5/31/2007	Adventure Area of Focus
	Consumer				6/3/2007	Consumer
	Creativity				5/31/2007	Area of Focus Creativity
	Creativity-Writing				5/31/2007	Area of Focus Creativity
	Family				5/31/2007	Area of Focus Family
	Visit Parents	--	12/22/2007	--	6/10/2007	Family
	Family-Parent				5/31/2007	Area of Focus Family
	Family-Partner				5/31/2007	Area of Focus Partner
	Financial				5/31/2007	Area of Focus Financial
	Home-inside				5/31/2007	Area of Focus Home
	Home-outside				5/31/2007	Area of Focus Home
	Physical-Health				5/31/2007	Area of Focus Physical
	Self Improvement-General				5/31/2007	Area of Focus Self Improvement
	SI-Reading				5/31/2007	Area of Focus Self Improvement
	Social				5/31/2007	Area of Focus Social
	Spiritual				5/31/2007	Area of Focus Spiritual
	Work				5/31/2007	Area of Focus Work
	Review 'The 4 Hour Work Week'	--	--	--	6/10/2007	Work



## **Summary**

### ***Summary***

I hope you have found this description of my Bonsai system to be useful. It has been a stable part of my productivity routine for about 9 months.

I find that keeping everything in Bonsai eliminates the loss of information should my PDA die. I can do printouts from Bonsai if necessary and use those, or work on the PC.