



# NIRVANA<sup>®</sup>

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## Setup Guide

# TABLE OF CONTENTS

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## FOCUS OF THIS GUIDE

WHAT YOU CAN EXPECT FROM THIS GUIDE

**1 FOCUS OF THIS GUIDE**

## UNDERSTANDING THE GTD<sup>®</sup> BEST PRACTICES

AN OVERVIEW OF THE KEY BEST PRACTICES OF THE GTD METHODOLOGY

- 2 WHAT IS GTD?**
- 2 GTD'S FIVE STEPS OF MASTERING WORKFLOW**
- 2 THREE STAGES TO INTEGRATING GTD**
- 3 THE GTD WORKFLOW MAP**

## APPLYING GTD TO NIRVANA<sup>®</sup>

SETTING UP NIRVANA FOR GTD

### **PROJECTS, NEXT ACTIONS, WAITING FOR, AND SOMEDAY LISTS**

- 4 THE BASIC STRUCTURE**
- 4 LINKING PROJECTS TO NEXT ACTIONS**
- 5 EXPLANATION OF THE COMMON GTD LISTS**
- 16 PARKING FUTURE ACTIONS RELATED TO PROJECTS**
- 18 USING SEARCH**
- 18 SORTING BY AREAS**
- 20 CUSTOMIZING YOUR CONTEXTS**
- 20 MOVING ITEMS BETWEEN LISTS**
- 21 USING FOCUS**
- 22 MARKING ITEMS COMPLETE**

(CONTINUED)

# TABLE OF CONTENTS (CONTINUED)

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## APPLYING GTD TO NIRVANA (CONTINUED)

- 22 USING DUE DATES
- 22 USING THE NIRVANA INBOX
- 24 THE SCHEDULED VIEW
- 25 REVIEWING YOUR LISTS
- 25 SHARING FROM NIRVANA

### EMAIL

- 27 INTEGRATING ACTIONABLE EMAIL WITH NIRVANA
- 27 GETTING YOUR INBOX TO ZERO
- 28 TWO OPTIONS FOR MANAGING ACTIONABLE EMAIL

### CALENDAR

- 30 WHAT BELONGS ON YOUR CALENDAR
- 31 REVIEWING YOUR CALENDAR

### REFERENCE

- 31 USING NIRVANA TO STORE REFERENCE INFORMATION

### SHORTCUT KEYS

- 35 LIST OF NIRVANA SHORTCUT KEYS

## CONCLUSION

### FINAL THOUGHTS AND NEXT STEPS

- 36 ADDITIONAL RESOURCES

## FOCUS OF THIS GUIDE

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Our focus with this Guide is to show you how to use Nirvana® for your GTD® workflow. The Guide is packed with our best practices for configuring and populating Nirvana for your Projects, Next Actions, Waiting For, Someday/Maybe, and Reference lists. We'll also cover strategies for managing your calendar and email.

If you are new to Nirvana, this Guide should be an excellent starting point for you to build a solid GTD foundation for optimizing your productivity. If you already have an established system in Nirvana, use this Guide as an opportunity to fine-tune or simplify, if you have found you've underused or overbuilt your setup.

This is not a technical Guide, nor will it cover all the instructions for how to use Nirvana. We'll leave that to the folks at Nirvana to share with you through their excellent support material.

There are many ways you could configure Nirvana for GTD. This Guide focuses on the methods we have found work well for GTD for a wide range of people. It's also important to note that no one tool will handle all of your needs for GTD, including Nirvana. Even with your lists managed in Nirvana, you'll still have your calendar and email in other programs.

Whatever configuration you choose in tools like Nirvana, be careful not to overcomplicate it to the point where you can only maintain it when you are at your peak of mental clarity. It's too easy to have a complicated system fall apart when you're not at your best. Your GTD tools should be complex enough to manage your workflow, but simple enough that if you were sick in bed with the flu, you could still easily maintain them.

Don't worry about using every available feature in Nirvana (or any of your tools for that matter). There may be more offered than you will ever need. Focus on what makes a difference for you. However, we do recommend the paid Pro version of Nirvana, to take advantage of unlimited projects and lists. Without it, you may find yourself hampered in being able to truly capture a full inventory of your commitments.

OK...let's get started!

***Be careful not to overcomplicate your systems to the point where you can only maintain them when you are at your peak of mental clarity.***

# UNDERSTANDING THE GTD BEST PRACTICES

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To get the most out of Nirvana as a tool for your GTD practice, let's review the fundamentals of the Getting Things Done® approach, so you understand how the methodology and tools will intersect.

## WHAT IS GTD?

GTD is the shorthand brand for “Getting Things Done,” the groundbreaking work-life management system and bestselling book<sup>1</sup> by David Allen, which provides concrete solutions for transforming overwhelm and uncertainty into an integrated system of stress-free productivity.

## GTD'S FIVE STEPS OF MASTERING WORKFLOW

- CAPTURE** Collect anything and everything that's grabbing your attention.
- CLARIFY** Define actionable things into concrete next steps and successful outcomes.
- ORGANIZE** Sort information in the most streamlined way, in appropriate categories, based on how and when you need to access it.
- REFLECT** Step back to review and update your system regularly.
- ENGAGE** Make trusted choices about what to do in any given moment.

## THREE STAGES TO INTEGRATING GTD

- 1. UNDERSTANDING** You understand the distinct differences in the five steps of Mastering Workflow. You understand a project versus a next action. You know how to transform what you've collected by asking the key processing questions, clarifying what something is, and what you want to do about it.
- 2. IMPLEMENTATION** You have installed at least the basic gear to support your GTD practice, including ubiquitous collection tools, functioning reference systems for your non-actionable information, and seamless buckets with “clean edges” for tracking your projects and next actions.
- 3. BEHAVIOR CHANGE** The five steps of Mastering Workflow are second nature to you. You have changed the way you think and work and are achieving stress-free productivity on a regular basis. When you “fall off” you know what to do to get “back on.”

This Guide will leap forward to the Implementation stage, by configuring Nirvana as an organizing tool for your projects, actions, and reference. Success at the implementation stage depends on your understanding of GTD.

If you are committed to GTD and experiencing stress-free productivity, don't shortchange yourself by skipping the “Understanding” stage.

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<sup>1</sup> *Getting Things Done: The Art of Stress-Free Productivity*; Viking, New York; 2001, 2015 hardback or paperback. Available from booksellers everywhere.

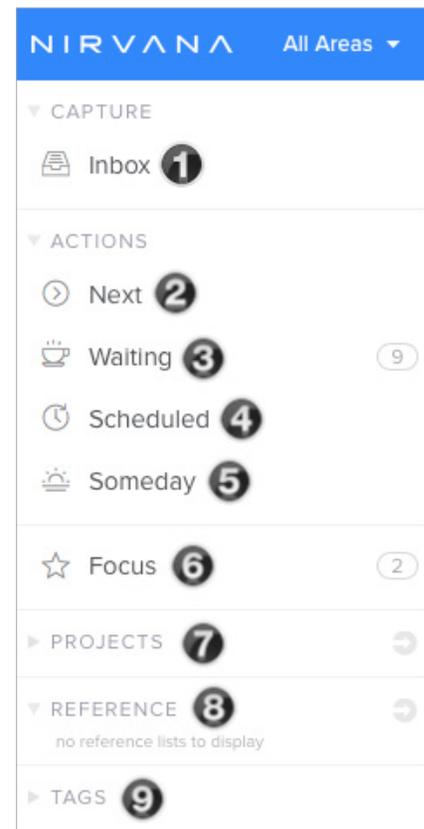
# APPLYING GTD TO NIRVANA<sup>®</sup>

## SETTING UP NIRVANA FOR GTD

### THE BASIC STRUCTURE

We think Nirvana is a great choice for a tool to implement the lists you'll need for your workflow because it was designed with GTD in mind. You will find the key areas recommended in the *Getting Things Done* book already built in for you to populate, including:

1. **Inbox** – Use to capture Mind Sweep<sup>2</sup> items still to be clarified and organized.
2. **Next** – Use for storing Next Actions, which capture the next physical, visible activity that progresses something toward completion.
3. **Waiting** – Use for storing items you are waiting for a response from someone or something else.
4. **Scheduled** – A view for items scheduled to start at a later date. In GTD, these are considered incubated items, which can be stored in Nirvana in the Scheduled view or on your calendar as a day-specific action.
5. **Someday** – A place to organize projects and actions you are committed to review consistently, for potential action at a later date.
6. **Focus** – Used sparingly and kept current, the Focus view can be an effective way to see items due today (or overdue), as well as specific items you choose to focus on.
7. **Projects** – Any multi-step outcomes that can be completed within one year.
8. **Reference** – Information to file/save, for potential use in the future.
9. **Tags** – A way to view your information by areas (such as personal, professional, areas of responsibility), contacts (people), and labels (next actions by context).



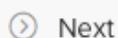
### LINKING PROJECTS TO NEXT ACTIONS

One of the awesome features of Nirvana for your GTD implementation is the ability to link projects to their related next actions. Not many software apps do this as easily or elegantly as Nirvana.

<sup>2</sup> For more on the Mind Sweep process, read the *Getting Things Done* book or listen to the GTD Public podcast at [gettingthingsdone.com](http://gettingthingsdone.com).

## NEXT ACTIONS

In Nirvana, use the Actions > Next section to track your Next Actions lists.


 A rectangular button with a light gray background and a thin blue border on the left side. It contains a right-pointing arrow icon followed by the text "Next".

Use Tags > Labels to organize lists by context (Agendas, Anywhere, Calls, Computer, Errands, Home, Office).

Organizing your next actions by context is recommended in GTD because when you are choosing what to do, context will always be your first limitation. For example, if you are at work, you don't want to be seeing (and having to take the time to skip over) actions that require you to be at home to do. Contexts should map to the people, places, and tools you need to get work done. You can always go back to customize these later, after you've experimented, to discover what works best for you. We encourage you to give these lists some time, especially if the concept of sorting by contexts is new to you.

Use the keyboard shortcut X to create a new Next Action entry, or go to New Item > Action. You can also create new entries by enabling Rapid Entry under Nirvana Preferences, or it can be turned on using Shift + E.

**AGENDAS** This list tracks the topics and agenda items for people you interact with regularly. For example, if you have a standing meeting with a particular team, and want to capture agenda items to bring up at the next meeting, this is the place to capture them. The Agenda list is not for tracking next actions that you need to take related to that person or team (for example, a call you need to make to that person, which would instead go on your "Calls" list). Once you're on the call, you may refer to the Agenda list for that person, but it's the Calls list that is triggering the action to make the phone call, not Agendas.

You could easily have half a dozen people and meetings that you are tracking through Agenda lists—your direct reports, your boss, your assistant, your spouse, the weekly staff meeting, the monthly board meeting, etc.

⋮	<input type="checkbox"/>	★ Anne	agendas ▾
⋮	<input type="checkbox"/>	★ Marketing Team	agendas ▾
⋮	<input type="checkbox"/>	★ David Allen	agendas ▾
⋮	<input type="checkbox"/>	★ Mom's Doctor	agendas ▾

### THREE OPTIONS FOR CREATING AGENDAS

We will be using labels (a view within Tags menu) to create all of your Next Actions lists in Nirvana, starting with Agenda items.

There are three different ways we recommend for creating Agenda lists in Nirvana. Please read through all three options described below, before setting up your Agenda lists, so you can gauge which option(s) will work best for you.

You can also cycle through viewing your lists by Areas with the shortcut keys Shift + → or Shift + ←.

***Be careful that whatever additional criteria you add for creating new entries, like creating and adding tags, do not become a burden or requirement. It's easy to let a feature like tags become unwieldy, so watch it carefully to ensure it's helping your productivity and not hindering it.***

## CUSTOMIZING YOUR CONTEXTS

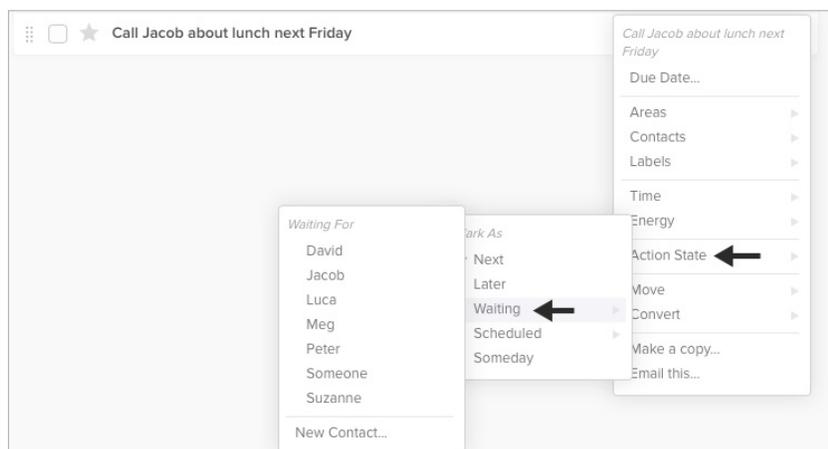
The lists and context tags we have suggested should serve as a starting point. You may need more of these or fewer. For example, some people find they want to break out Computer into more specific lists, such as Computer-Work and Computer-Personal, or a list just for email-related next actions called Computer-Email. Executive support staff can often use a context called Meetings to Schedule. Or, you may find you don't want to use as many contexts for actions and find fewer context tags works better for you.

Be willing to experiment to find the set of lists that you can maintain and gives you the information you need quickly and easily.

## MOVING ITEMS BETWEEN LISTS

When you are working your system, you'll be moving items between lists frequently. For example, you may have a next action in your Calls list to make a call. If you reach their voicemail but need to track that the person calls you back, that item would get reassigned to the Waiting For list.

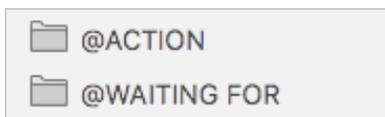
To change the list assigned to an entry, such as moving a next action to a waiting for, change the Action State from Next to Waiting and assign a contact.



## TWO OPTIONS FOR MANAGING ACTIONABLE EMAIL

### OPTION ONE: USE THE EMAIL AS THE REMINDER

Create @Action and @Waiting For email folders in your email program and use them as an action list. You would not also put those reminders on your calendar, or Next Actions or Waiting for lists in Nirvana—the email itself would be the only reminder. That means you need to scan these folders with as much discipline as you would your lists and calendar, for reminders of your commitments. The @ symbol is a trick to push these folders to the top of your email structure for easy access. If the @ symbol does not work in your email program, try a hyphen.



People often like this option for the quick win it gives in getting your inbox processed to zero. The downside with this option in email is that you have no place to capture the next action or due date that's associated with that actionable email. So, you'll inevitably be doing some "re-deciding" about emails you've already processed if the next action is not apparent in the subject line.

### OPTION TWO: USE YOUR LISTS IN NIRVANA OR YOUR CALENDAR AS THE REMINDER

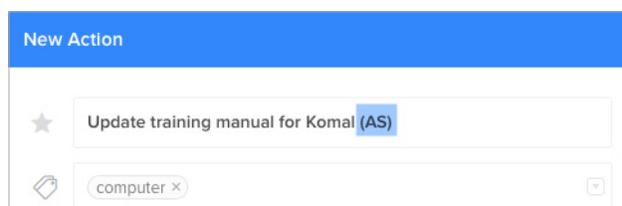
Create @Action Support and @Waiting For Support folders in your email program to hold emails that support actions that are tracked on your calendar, Next Actions, or Waiting For lists. In this case, the folders only serve as storage buckets to hold the information you need to take the action on. You would be reminded of the action when you review your calendar, Next Actions, or Waiting For lists. It's one less place to look for actions or waiting for items, whereas the first option adds an additional location to look for a complete view of your reminders.



People often like this second option because all of your reminders will be tracked in as few places as possible.

To capture the related action or waiting for item in Nirvana, you have two choices before filing the email in the Action Support or Waiting For Support email folder:

- Toggle over to Nirvana and create a new Action or Waiting For entry. Some people like to make a note somewhere within the task entry letting them know where the email is stored (such as "see action support" or just "AS").



# CONCLUSION

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## ADDITIONAL RESOURCES

We hope this instruction guide has been useful. It is intended as a supplement to our core education of workflow mastery developed over many years—not a substitute. The most successful implementation of this guide builds on the understanding of the GTD best practices presented in our many learning tools, including the *Getting Things Done* book, the courses and individual coaching offered by our global partners, and our online learning center GTD Connect®.

Please visit our website to take advantage of the many support tools and training available to assist you in getting your GTD system up and running.

### FOR TECHNICAL SUPPORT WITH NIRVANA, PLEASE VISIT:

[help.nirvanahq.com](http://help.nirvanahq.com)

### FOR MORE INFORMATION ABOUT GTD, PLEASE VISIT:

[gettingthingsdone.com](http://gettingthingsdone.com)

[gtdconnect.com](http://gtdconnect.com)