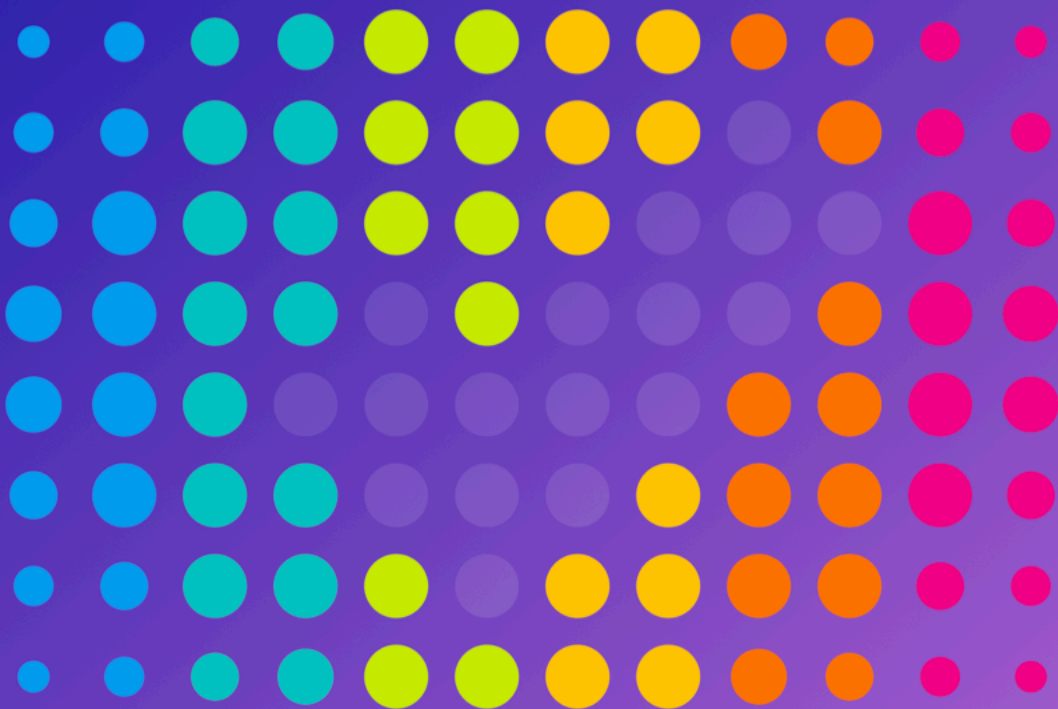


Ryan Dotson &
Rosemary Orchard



Build
Your
OmniFocus
Workflow

Build Your OmniFocus Workflow

by
Ryan Dotson
and
Rosemary Orchard

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by Ryan Dotson & Rosemary Orchard

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First Steps



ABOUT THIS BOOK

THIS IS BUILD YOUR OMNIFOCUS WORKFLOW. It's a book we've written for all users of OmniFocus, from those taking their first steps with the app to those who are experienced and familiar with it. Irrespective of where you fall on this spectrum, you will be facing one truth: *you must build your workflow*. OmniFocus is a tool, like a screwdriver, that you will use in disparate situations to accomplish a variety of goals. Our work and lives are all quite different to our neighbours' and thus our workflows will be just as diverse. Fortunately OmniFocus is a *really good screwdriver* that adapts to work in lots of different ways.

The point remains, though, that we all need to mould and shape OmniFocus into being the app we want and that makes sense to us. The initial point of customising the app begins with simply putting in our own data, the things we need to get done. You'll expand upon this to add ways to organise those things both structurally within projects and with categorisation using tags. With this rich data, you can use OmniFocus to build highly curated lists of what needs your

attention next, whether it's something you *want* to get done or something you *must* get done.

To help you build this system, we've written this book. It begins with *First Steps* which introduces the very basics of OmniFocus using examples to help you understand the philosophies behind how the app works. There you'll also be introduced to *Building Blocks* which are small tasks we set you which will help guide your thinking as you progress through the book and in creating your system.

Following on from First Steps, the *Fundamentals* chapter lays out all the basic pieces of the app in both interface and concept – tags, projects, perspectives – in, if we dare say, almost too much detail. This brings up one of our philosophies in writing this book, though: we want it to provide you all this information in a concentrated and easy to reference way. To further assist you when reading, we [provide links back](#) (marked with this dark purple colour) to sections which first explain the topics mentioned. Additionally, we also provide links explaining terms in the [glossary→](#) (marked with an arrow), when it may be necessary.

From this point we move into the more advanced plateaus of using OmniFocus. Fittingly titled *Advancing*, this chapter notably covers custom perspectives ([PRO](#)), the most powerful feature of OmniFocus, available as part of the OmniFocus Pro package. On the theme of expanding your horizons with the app, the following chapter, *Final Horizons* discusses topics around keeping your system healthy and introduces you to automating the system.

Frequently throughout the book we, both Rose and Ryan, drop in with our personal interpretations of features, showing you how we use them or how we handle situations. We've both been using OmniFocus for many years and it has been our companion through many a stressful (and joyful!) situation. Not that we would ever claim to be the most proficient practitioners of productivity. We're just two normal, and quite different, people who *get what we want done* because we have built systems which support us. It is our hope that some of this experience can assist you with the same. After parceling out dribs and drabs of our workflows all through the book, we conclude the main text with more comprehensive views of our

systems, again in the hope that it may be of use to you as you build yours.

BUILDING BLOCK: INTRODUCTION

- № 0 This is a Building Block as described above. Each of these will assist in building your workflow. As you work through each, don't be afraid to adjust and change things. Our systems are never static.

SETTING UP OMNIFOCUS

Before getting started, it's advisable to get OmniFocus up and running on your computer. You needn't do anything much yet, though. It will be nice to have the app ready for you to pop over to whenever you want to get a good look at or to try something out. We've used the macOS version of OmniFocus to illustrate this, but the process is quite similar on iOS.

The first time you launch OmniFocus you'll be welcomed with an introduction video and a note informing you that your trial has begun. If you've already bought OmniFocus 3 click **Unlock** to activate the full version. Otherwise, you can watch the video and once you're ready click **Get Started**.

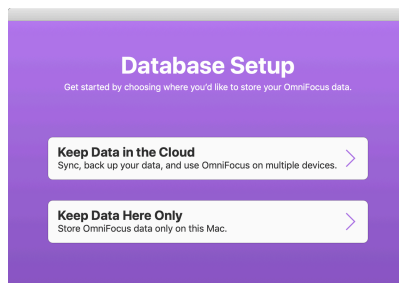


FIG 1: Choosing where to keep your OmniFocus database on macOS.

In the next step (**FIG 1**) you choose where to keep your OmniFocus data. Generally speaking, we recommend syncing your data (Keep Data in the Cloud) as it enables you to use OmniFocus on other platforms. If you do choose to sync, OmniFocus will then ask where to sync to (**FIG 2**). The Omni Group offer syncing through their own Omni Sync Server for free. This service is separate from Apple's iCloud services and keeps your data up to date on every version of OmniFocus you use. It also enables you to use OmniFocus for the Web if you need to access your data on non-Apple platforms. If you've not got an account, you can use the [Sign Up...](#) button to create one. Once it's set up, enter your user name and your password when prompted. If you cannot, or prefer not to use the Omni Sync Server, [you can also sync using any WebDAV server](#).

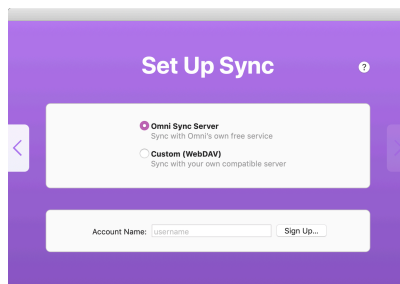


FIG 2: Choosing how to sync your database on macOS.

The set up process finishes by providing some tutorial information. These include links to the *Inside OmniFocus* blog where amongst other users, Rose has written about some aspects of her OmniFocus workflow. In addition, OmniFocus can add tutorial data to your database. This includes some example tags, projects and actions that can guide you through some of the basics of using OmniFocus. You can choose to keep the tutorial project for now and delete any extraneous information later, but if you'd prefer to start clean, skip it; you can add the tutorial again later from the [Help](#) menu.

Setting up OmniFocus on iOS is almost entirely identical to the Mac but includes an additional step: granting permissions. You'll

need to allow these if you intend to use features like location-aware tags, calendar entries in Forecast and notifications. You'll automatically get the tutorial added to your database in addition to some pop-up tips to help you along as you move through the app.

BUILDING BLOCK: SET UP OMNIFOCUS

- № 1** Set up OmniFocus on at least one of your Mac or iOS devices.

OMNIFOCUS INTERFACE

Understandably the OmniFocus interface differs depending upon the platform and device you're using it on. However there are three key pieces that appear in all major versions of the app: the Sidebar, the Outline and the Inspector (**FIG 3**).

Again using macOS, from the left, the first interface element is the Sidebar. From here you select the perspective you wish to view (**FIG 3-A**). That content is then shown in the Outline (**FIG 3-2**) alongside selected metadata about the items displayed there. You can further refine what will be shown in the Outline by using the selection sidebar (**FIG 3-B**). Upon clicking on an item in the Outline or sidebar, the Inspector (**FIG 3-3**) will show all the details related to the item selected. At first the Inspector won't be visible, but you can show it by clicking the ⓘ information button on the toolbar. Similarly, the sidebar will be visible at first but can be hidden by clicking the ⏏ Hide Sidebar button.

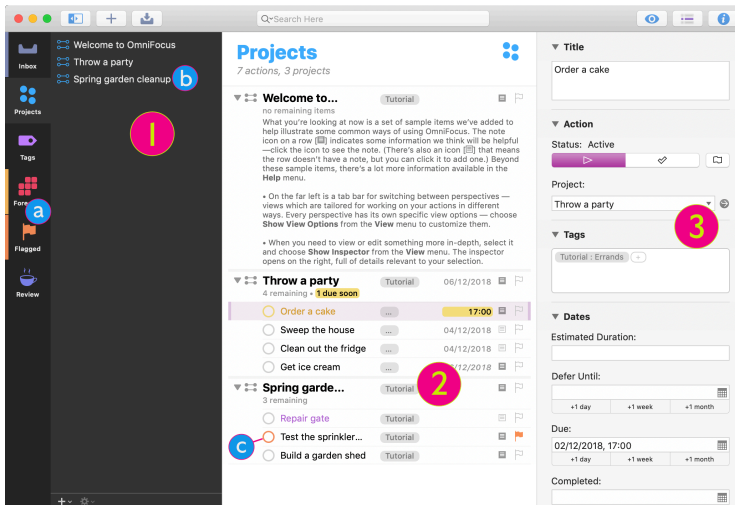


FIG 3: Projects perspective on macOS showing three main elements of OmniFocus: (1) the Sidebar, (2) the Outline and (3) the Inspector.

Within the Outline, you will always see titles of projects and actions. Other information like notes, defer dates, due dates, assigned tags and projects may appear depending on the platform and other factors. The second most prominent feature of items in the outline is the *status circle* (FIG 3-C). This is the button you click or tap on to complete an action, but it also conveys meaning by changing colour. Orange, yellow and red denote flagged, due and overdue status whilst a solid grey in the circle, with a tick mark, shows an item is completed. In addition to colour, when the circle contains an ellipsis (...), it indicates that the item has a repeating rule and will recur once completed.

OMNIFOCUS FOUNDATIONS

There are two keys to getting started using OmniFocus: understanding the software and developing a workflow. Both of these concepts can have a great deal of complexity. In this initial chapter, however, we intend to introduce only the bare bones of both – fundamental

terminology and a basic workflow. It should be just enough to get you started. The workflow we are describing can be summarised in four points. Each item in OmniFocus will pass through these stages:

1. Capture
2. Process and categorisation
3. Review
4. Doing

OmniFocus will assist you with all of these steps. It uses a hierarchical system of *projects* and *actions* (tasks or to-dos) to store your items with tags to categorise. Specialised *perspectives*, views of your data, give you functionality to locate and focus in on what you're doing.

CAPTURE

It all begins with taking in and saving all the things you need to do. You *capture* them. There's a lot that can be said for what you might want to capture, but for now we'll focus just on getting you up and running.

To start we suggest doing a *mind dump*. This is just a brainstorming session where you note down anything that's on your mind. You may have fully-formed actions like **make copies of landing permission forms by Wednesday** or just vague ideas like **do I need new shoes?** which can be sorted out later. You can do this anywhere, but it's most convenient to dump items directly into OmniFocus. In the app, the Inbox is the place for anything that's captured but unprocessed. Just keep creating new items as you think of things.

This is the first step in putting trust into your system and tools. Begin by getting things out of your head, knowing they're safely kept. Doing so will allow your brain to let go of them, trusting that you'll come back to deal with them later.

PROCESS & CATEGORISE

Everything in OmniFocus needs to be processed and categorised in some fashion. The processing and categorisation steps involve determining what an item is, where it belongs (either inside OmniFocus or somewhere external) and how it's going to get done.

Let's begin with an example from before: **make copies of landing permission forms by Wednesday**. This is an *action*. This action may be something that accomplishes a goal on its own or it may be a single step leading to a finished product.

In our case it's the latter; it's a discrete action that's in preparation of a flight on the spaceship Bistromath, taking off Thursday afternoon. We can imagine that in the days and weeks leading up to the captured action, we've already filed and received permission for the flight. We're now left with these related items in the Inbox:

- make copies of landing permission forms by Wednesday
- confirm final flight path
- fly flight KKT49 Thurs 14:20

We're almost done but we mustn't forget these last steps before the flight. Consider that point, however. All these actions are working toward the common goal of flying flight KKT49. As such, we should put them into a *project* together.

This may cause you to wonder why we use a project. The colloquial meaning of that word is often “a big thing to make or do”. We agree with that definition in part but, inspired by the GTD method, would remove the word “big”. To be more precise, we consider a project to be any desirable outcome that takes two or more steps to achieve. Even nearing the end of this project, which we shall call **Prepare for Flight KKT49**, it still qualifies as a project by that definition. As such, we need to create a project. You can do this in various ways, but for the sake of simplicity, you can add it in the Projects area of OmniFocus.

With the project created, let's turn back to processing the Inbox items. First, **make copies of landing permission forms by Wednesday**.

It's part of the project we just made, so we'll assign it there. Next we should consider categorising the action with tags.

Tag systems can become unwieldy and unnecessarily complex quickly. Unlike tags you may use in macOS or your notes app, those in OmniFocus don't need to describe or categorise in the same way. **Make copies of landing permission forms by Wednesday** could have ☞ **paperwork**, ☞ **copy**, ☞ **central office**, ☞ **flights**, ☞ **KKT49** or more. This is excessive.

OmniFocus tags are better suited for describing how or where you plan to complete the action. Whilst your tagging system in OmniFocus will grow with your experience with the app, we recommend starting simply. Using ☞ **home** and ☞ **work** gives you a good starting point. If you don't work, you may elect to not use tags. Otherwise consider the two or three major facets of your life where you'd appreciate some division when looking at your OmniFocus data. In the next chapter we'll go into detail about tags, including some tagging systems which you may eventually want to implement.

Let's tag **make copies of landing permission forms by Wednesday** with ☞ **work**. We're almost finished. Now, though, the *by Wednesday* bit. This is redundant because we can assign due dates in OmniFocus. Is this really *due* on Wednesday? Or is it really due a few hours before take-off? Probably the latter. Setting a false due date is a bad habit to get into; we believe they should mean something when encountered. To that point we'll set the due date of this item to Thursday, 12:00 and because it's important to get done soon, we'll also flag it so it stands out. With that, **make copies of landing permission forms** is processed. It's still visible in the Inbox, but once we switch away from it, it'll be filed away into its correct location as specified.

On to the next item, **confirm final flight path**. We'll assign it to the same project, add the ☞ **work** tag and considering this must be confirmed 24 hours in advance, we'll assign a due date of Wednesday, 14:00. Done and dusted.

The last item to be processed is **fly flight KKT49 Thurs 14:20**. Does it really fit into **Prepare for Flight KKT49**? No. Should it go onto a general Work action list? Maybe, but it's not an action that can be

done at any time. Rather, it's a fixed item in your schedule and as such the best place for it is on the calendar. Add it there and you can delete it from OmniFocus. Fortunately, your calendar items can also be viewed from within OmniFocus using Forecast so you'll still see that information when planning.

Now our Inbox is processed and empty. *Well done, us!* You may not entirely agree with the decisions we made or may wonder why we chose to do things as we did. We'll explain much more in detail later but for now we hope this helps guide your initial processing decisions in OmniFocus.

BUILDING BLOCK: MIND MAP AREAS OF FOCUS

- № 2** Which are the big areas of focus in your life? Try making a mind map or list of areas of focus to help you group them together. These areas can become folders in OmniFocus.





REVIEW

Until now you may have kept all your things to do “in your head”. There they cycled around, occasionally bobbing up out of the murky depths. When they did you may have thought, “*I must remember to do that this week*”, “*Perhaps I need to go back and finish that*” or “*Oh Zark, I forgot that yesterday!*”. This was your brain's review cycle. It was highly unstructured and did little to support you, but when it worked it helped you keep *some* of your things to do in mind.

OmniFocus functions by gathering up all those things bobbing around in your mind and keeping them safe for you. They're still your responsibility to manage, though. The system is an extension of *you*. OmniFocus doesn't, and can't, understand the difference between turn the mattress, consider opening a shoe store and arrange transport off of Earth. Only *you* do.

As we discussed previously, it's reasonable to use due dates when something has a deadline, but for other items, what do you do? How do you decide what's next? This is part of reviewing. We could go on, but for now let it suffice to say that daily reviews are your time to establish what your priorities are for today and the next few days.

This begins with Forecast. Without doubt, your due or overdue (let's hope not!) items will be amongst your first priorities. Forecast is not just for today, though. You should have a look over the items for the next few days to make sure you know what's on the horizon.

If what's due today isn't enough to keep you busy, you can review your available actions. From Tags, select the tags relevant to where you are now or will be during the day. For anything you want to accomplish today or soon, you may want to add a flag or a tag like  doing,  today. You could even opt for a symbol like  ★ or  O, or an emoji.

This is your daily review and it's quite informal and focused on making sure you're keeping the balls in the air. The more formal OmniFocus review process happens in the Review perspective. There you take time to look over projects and their actions to make sure they're still on track.

BUILDING BLOCK: PLAN YOUR REVIEW

- № 3** Pick a time where you should be able to perform a review every week. *You may wish to set a time for home review and work review to help you focus.*

DO

The final step is the doing. *We've talked it over and decided to leave this bit up to you.* Though we can offer a little guidance.

One thing to remember is that OmniFocus is *not* the tool for *doing*. Experienced users of any task manager will tell you that the biggest part of their day is spent away from the tool. OmniFocus can remain hidden or in a minimal position, like displaying a simple list, throughout much of the day. We know it's a fun app to play with – and you should play some times, but not at the expense of getting things done.

Sometimes to help facilitate getting the *doing* done, blocking out time on your calendar can be a help. Treat it as a promise to yourself to sit down and spend time finishing what needs doing.

Ryan: Most of my day is spent away from a computer so for my task management to remain completely effective, I keep a list of my analogue, and some digital, actions for the day on a scrap of paper to keep on top of them. ☹☹

Rose: I spend most of my day at my computer but have my OmniFocus window as small as I can make it with just the tasks I want or need to accomplish today visible. I regularly check in to make sure I'm getting the right things done, but try to avoid working in OmniFocus and instead work on my tasks. ☹☹

ONWARDS AND UPWARDS

We hope you've got a basic idea of how to begin using OmniFocus. There's much more that you can do with it, though. The following sections take you through the details of each of the standard perspectives whilst explaining all of the structures in OmniFocus. Because OmniFocus can morph and adapt to fit you, understanding these details becomes important not only in building your system but in establishing a stable relationship with OmniFocus.

There's one important point we'd like to make before moving on. This applies to everyone, though particularly those who are new to OmniFocus and task management. As you go through the process of building your workflow, we would suggest keeping it *simple*. Once you've begun to get your bearings with your system and as your experience with OmniFocus deepens, you can improve upon your workflow iteratively. We have both been through numerous versions of our workflows, sometimes making changes to established systems and other times rebuilding it anew. As you go along, you'll learn more about how you think of and accomplish the things to be done in your life.

ABOUT THE AUTHORS

Rosemary Orchard

Rose is a chocoholic who loves OmniFocus almost as much as she does chocolate. She's been using OmniFocus for years to help manage her studies and work, as well as a decent amount of travel.

Ryan Dotson

Ryan is a lapsed linguist who takes great comfort from a cup of tea and a determiner phrase. Whatever success he enjoys today is due to his many years of relying on OmniFocus to keep him on track. His favourite vowel is /y/.

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