

CUSTOM PERSPECTIVES

In the Fundamentals chapter we explored all the default in-built perspectives available in OmniFocus. In doing so we established some basic parameters for how perspectives work. A perspective can be based on either a projects or tags structure and, using view options, can be customised to show available, first available, remaining or all items.

Custom perspectives make a massive leap from that point and allow huge amounts of customisation. When you create these perspectives, you can choose which structure to use and the availability, of course. There's much more that you can do, however. Rather than drawing from the entire pool of your OmniFocus items, you can create rules that pull out only the narrowest selection of projects and actions. In addition, you can then customise the appearance of how these items will be grouped and sorted within the perspective.

Custom perspectives are a powerful tool to help you make the most useful lists of things to do. We're going to explore how they work and are set up before giving some example custom perspectives you may find useful. As an appendix, we've also included explanations for all the rules for your reference.

How custom perspectives work

There are two basic pieces to a custom perspective: filter rules and presentation. The rules establish which of the items in your database should be displayed and the presentation settings determine how they'll appear in your OmniFocus screen.

The filter rules provided are based largely upon the metadata associated with your database items. This includes information like assigned tags, dates and parent items but can also include item availability as well. We have included a list and descriptions of all the filter rules in the [an appendix](#).

The second part of a custom perspective is its presentation. How the items are grouped together and how they're sorted will be up to you. If due dates are important to a perspective, group by due date; if you're more concerned with keeping flagged and unflagged items separated, group by flagged status.

Finally, only on macOS, you can customise the layout options for the perspective. You can choose to keep the same layout as specified in Preferences or choose to use either Fluid or Columns irrespective of the Preferences setting. One other exclusive setting is for iOS only. When using Individual Actions, you can choose whether or not to show an action's project path in its cell above the title.

To start building a custom perspective, select **Perspectives ▶ Add Perspective...** on macOS or tap the Add Perspective button on the OmniFocus home screen on iOS.

Filter Rules

The most important part to a custom perspective is its filter rules. These rules establish which items will be selected from the database to be displayed in the perspective. On macOS, the interface for selecting and building your rule set may be familiar. It's essentially the same as you might have used when creating sorting rules in Mail, a smart playlist in iTunes or a smart folder in the Finder.

The rules you select are placed inside a grouping rule. This group then specifies how OmniFocus should handle combining the rules together to select items: should items match *All* the rules, *Any* of the rules or *None* of the rules. Using:

- **All:** show me anything that's flagged *and* tagged with  **peas**
- **Any:** show me anything that's due soon *or* flagged **or** tagged with  **beef**
- **None:** *don't* show me anything that's flagged *nor* tagged with  **lamb** *nor* in the Inbox

Building complex filter rules

A simple rule group using either All, Any or None may cover most of your needs when creating custom perspectives. Nonetheless, you may find yourself wanting for a bit more complexity or fine-grained control over exactly what's getting selected. For those situations, you can use additional rule groups with different combination rules to produce the desired output.

- ✎ Once you've added a new custom perspective, you can change its settings from either the Perspectives window (**Perspectives** ▶ **Show Perspectives** or $\wedge \text{⌘ P}$) or when viewing it in the main OmniFocus window, you can use the view options popover. The latter is especially helpful as your changes are visible immediately as you build the perspective.

Following on from our earlier examples, imagine you want a list of flagged items but not those tagged with  **fifth meat**. This rule would be built as follows:

```
All of the following:  
  Status: Flagged  
None of the following:  
  Tagged with any of: fifth meat
```

You may later decide to also include any *due soon* items, which may not be flagged, as well. To achieve this you could expand on the rule set to be:

All of the following:

Any of the following:

Status: Flagged

Status: Due Soon

None of the following:

Tagged with any of: *fifth meat*

We now have a rule that says: show me items that are either (Any) flagged or due soon and (All) that are not (None) tagged with  *fifth meat*.

👉 On iOS it's very easy to misconfigure your perspective by placing rules into the wrong groups. Pay close attention to the indentation of your rules. Those that are inside a group will be *indented* beneath the group.

Understanding this logic is key to building your perspectives correctly. It enables you to build very complex sets of items with highly detailed focus.

Once you're satisfied with your rules, be sure to press the **Save** button when working on macOS to save your changes. To add an additional rule group on macOS, hold down the **Option** key to reveal the **...** button and on iOS, you can add them from the **Add a new rule** screen.

BUILDING BLOCK: CREATE PERSPECTIVES

№ 16 Take some time to think about what views of your database you might like or need to have. Consider combinations of tags and projects which show your actions in a view where you can focus on the *doing*. Try creating these as custom perspectives.

Presentation options

Once you're able to get a list of just the items you want to see, it's time to decide how you want the items presented to you. In the default perspectives, the presentation has already been set for you – Tags shows actions, grouped by tags and Projects shows you actions and projects, grouped by folders and projects. In a custom perspective, it's much more under your control.

You begin by choosing the base output mode, deciding what will be grouped and sorted. The choices are *Individual Actions* or *Entire Projects*. Individual Actions will generate a simple list of actions which can then be grouped and sorted according to your preferences. Entire Projects can be a bit misleading, however. It does still produce a list of actions, but each item's project will also be included in the output. The two options will also affect the contents of the Sidebar on macOS. The Sidebar for an Individual Actions perspective shows any tags assigned to the items in the list and Entire Projects shows their projects. With the output mode decided, you can select the grouping and sorting settings you prefer.

Group by options

We've prepared a list of the grouping and sorting options available when creating a custom perspective along with descriptions for each. Explore the options in OmniFocus to see what works best for you.

- ✎ The view options popover on macOS (in any perspective) is detachable. Once you drag it to detach it and move it to a more convenient place, you can freely interact with the main OmniFocus window without the popover disappearing.

The following options are available in any grouping and sorting mode:

- **Ungrouped:** no groups, only a flat list of items
- **Due:** a group for no due date and groups by due date with increasingly coarse granularity for future items (e.g. next week, in six months, next year)
- **Defer Date:** groups by defer date with increasingly coarse granularity for future items
- **Completed:** uncompleted and groups by completion date with increasingly coarse granularity for future items
- **Added:** groups by date added with increasingly coarse granularity for more distant past items
- **Changed:** groups by date of last change with increasingly coarse granularity for more distant past items

When using the *Individual Actions* mode, these grouping options are available:

- **Tag:** groups for each tag used on items in the list; if an item has multiple tags, it will appear in both groups
- **Tags (Combined):** groups for each tag and every unique combination of tags used on items in the list; if an item has multiple tags, its unique combination of tags becomes a single group, meaning the item only appears once in the list
- **Project:** groups for the projects the actions belong to
- **Flagged:** flagged and unflagged groups

Alternately, when grouping by *Entire Projects*, these options are available:

- **Folder:** groups for the folders the projects belong to
- **Next Review:** groups by date of next review with increasingly coarse granularity for more distant dates from today

Sort by options

Along with the grouping options, you can choose how the items will be sorted within the custom perspective. Bear in mind that the mode affects what is being sorted. For example, when using the Individual Actions grouping and sorting mode, sorting by name sorts the *action* name, not projects and when using Entire Projects, sorting by duration sorts the *project's* duration, not any action's duration. The following options are available in any grouping and sorting mode:

- **Projects Order:** items are listed following the order their project appears in the Projects perspective
- **Name:** sorted alphabetically by name, ascending
- **Flagged:** flagged items sort above unflagged
- **Due:** items appear by their due date in order of sooner to later; undated items appear after dated items
- **Defer Date:** items appear by their defer date in order of sooner to later; undated items appear after dated items
- **Added:** sorted most to least recent by date the items were added to OmniFocus
- **Completed:** sorted most to least recent by date the items were marked complete
- **Changed:** sorted most to least recent by date the items were edited or changed
- **Duration:** sorted from shortest duration to longest

When using the *Individual Actions* mode, one additional sorting option is available:

- **Tag:** sorted alphabetically by the name of the first tag assigned to the action

Alternately, when using the *Entire Projects* mode, one additional sorting option is available:

- **Next Review:** items appear by the date of their next review in order of sooner to later

Customising icons and colours

No doubt you'll want to make your custom perspectives easy to find and visually distinct. OmniFocus allows two types of customisation to this end: icons and colours. Both can be edited using the perspective editor on macOS or iOS.

OmniFocus ships with 74 icons for you to choose for your custom perspective. These cover a wide breadth of concepts that may fit your perspective. If you're not quite satisfied though, you can use any image for your own custom icon. In fact, because of this functionality, designers have created custom icon sets specifically for OmniFocus. The most notable is a set created by Josh Hughes, who also created this book's cover. [Josh's icons](#) are free and have been updated and expanded with the release of OmniFocus 3. You can choose an icon which will match the colour of your perspective precisely. He even offers two variant styles which fit either the macOS or iOS icon style.

- ✎ If you want one icon style that will appear on iOS and another for macOS, you'll need to create two distinct perspectives. This also means if you make any changes to the perspective's settings, you'll need to update both.

Each custom perspective can also be assigned a custom colour. The palette of 24 colours has been selected for their legibility and harmony with other interface colours. This colour will tint any of the icons that ship with OmniFocus automatically but not custom icons.

Layout

There's one additional customisation you can make to a custom perspective when on macOS. You can select the **layout** to use. The options available here are the same as those in the Layout preferences, but as specific to that perspective. If you're building a perspective where you'll want to see or be able to change dates with ease, you may prefer to use the Column layout that shows the dates, but if the project and tags are irrelevant, you could choose to not display them. In other cases, you may prefer a fuller and roomier view of the items in the perspective – Fluid may work best.

Of course you may not wish to customise the layout of the perspective at all. In that case, the default option of Use Preferences will follow whatever you've set in the Layout preferences.

BUILDING BLOCK: FLUID VS COLUMN LAYOUTS

№ 17 Experiment with the fluid and column layouts to see which best suits your needs. Don't forget you will be able to use different layouts in different perspectives, as well as change the visible columns too.

Creating new items in custom perspectives

Custom perspectives can be incredibly complex, complicated by which projects and actions appear and how they are displayed. This complexity can cause an unexpected interaction with one set of features in particular: creating new items. Most usually OmniFocus will do its level best to allow you to create new actions and projects when viewing a custom perspective, but there are exceptions.

For projects, using the **File ▶ New Project (⇧⌘N)** can only be done in a custom perspective using the Entire Projects mode (this also excludes the Tags perspective). Because the perspective is only looking at the actions and their tags, the software has no way to show you a project if you were to create it.

In the case of actions, using the **File ▶ New Action (⌘N)** command on macOS or tapping and holding to dragging the **New Inbox**

Item button on iOS will most usually work, but may not in some cases. The software needs to look at the contents of the perspective, where your current selection is (on macOS) and try to make an educated guess about what sort of new action you wish to create when invoking the command. It needs to consider things like what project it should belong to or what tags it should be assigned. Sometimes its guess won't be what you expect and at other times, it simply won't allow it. The best alternative in this case is to use the **Quick Entry** panel on macOS or tapping the **Add to Inbox** button on iOS as both are universally available. You'll need to fill in all the requisite details (at the time or later) but at least you'll be certain the action is going to the right place.

BUILDING BLOCK: PERSPECTIVE PRESENTATION

- № 18** Review the perspectives you created earlier and adjust the presentation, group by, and sort by options to reflect your needs.