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WELCOME TO OMNIFOCUS

What OmniFocus Is

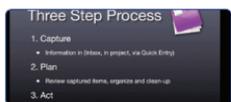
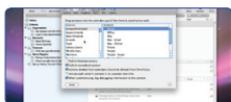
OmniFocus is a place for you to keep all of the stuff you're meaning to do, whether it's the stack of paperwork sitting on your desk that's due *now now now*, or the marble monolith in your garage you've been meaning to sculpt one of these years.

Of course, you could just make a big list on paper or in an ordinary text editing application. But OmniFocus is carefully crafted to understand task lists: it can show you just what you need to know right now in order to make progress on your many projects. It can remember which projects you are putting off for later, which projects you claim are important but which you haven't touched in weeks, and which projects may blow up if you don't do something about them right away.

The really, really cool thing about OmniFocus is that once you get the hang of it, you can really trust your system and know that nothing is slipping through the cracks. The reward is certainty that you're doing exactly what you need to be doing right now, or even that you don't need to be doing anything at all.

Quick start video

We've put together an introductory video about OmniFocus; watching it is probably the best way to get acquainted with the software. And then if you want to learn more, this manual will still be here when you're done!



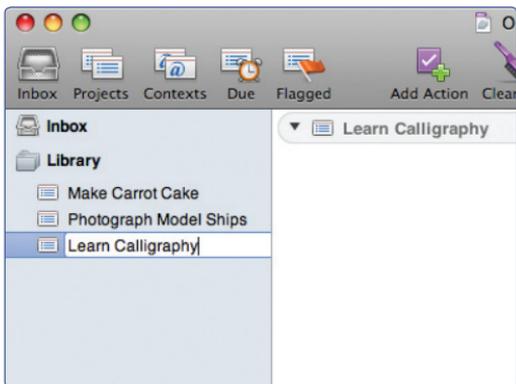
To watch, visit the OmniFocus product page:
<http://www.omnigroup.com/applications/omnifocus>

Tutorial 1: Create projects

OmniFocus starts out with a couple of projects already in the library. In this tutorial, we'll assume that you've looked them over and deleted them, but you can leave them around if you want.

Think of something you're working on, or that you'd like to start working on, that will require several steps to complete. In OmniFocus, that's called a *project*. To create a project, click the plus button at the bottom of the blue sidebar and type a name.

Each project you create in the sidebar also appears in the main outline. Make a few different projects to begin with.



Tutorial 2: Add actions

Select a project in the main outline and then press Return to add an action to it. Try to be as specific as you can with your action titles; you should be able to know immediately upon looking at an action exactly what needs to be done. Keep pressing Return and typing names to add as many actions as you want. You don't need to include every action between now and the completion of the project; you can always add new actions later.

▼  Make Carrot Cake	
<input type="checkbox"/> buy carrots, eggs, & vanilla extract	No C
<input type="checkbox"/> ask Ned about the exact measurements of his recipe	No C
<input type="checkbox"/> bake cake	No C
▼  Photograph Model Ships	
<input type="checkbox"/> call Catelyn to ask about rigging	No C
<input type="checkbox"/> set up backdrop & lights	No C
<input type="checkbox"/> take photos	No C
<input type="checkbox"/> return ships to Catelyn	No C
▼  Learn Calligraphy	
<input type="checkbox"/> look up teachers we met at the culture festival	No C

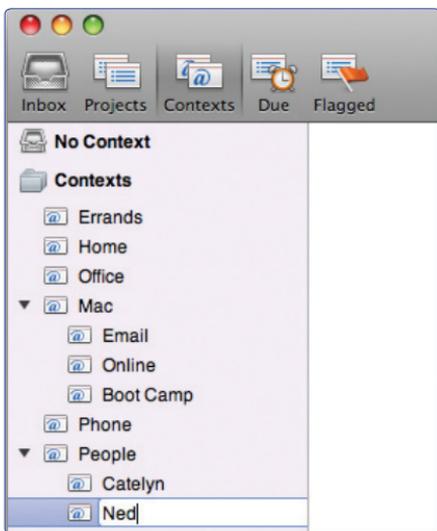
Tutorial 3: Create and assign contexts

Contexts are central to the way OmniFocus helps you find out what to do next: they represent the place, the tools, or the person you need in order to get something done. The contexts included in OmniFocus should give you an idea of what this means: any project you create may contain some things to do while you're out running **Errands**, some **Phone** calls, some things to do at your **Office**, some things to talk to your **Boss** about, and so on.

Switch to context mode by clicking the contexts button in the toolbar: 

While the planning mode's blue sidebar holds your projects, the context mode's purple sidebar holds your contexts.

OmniFocus comes with a few contexts already created for you. Add some new contexts by clicking the plus button below the sidebar, or double-click an existing context's name to change it. Make as many contexts as you need for the various places and modes you have for doing work: Home, Office, Mac, Errands, Phone, and so on. You can always add more contexts later on when you find that you need them.



Now, go back to planning mode by clicking the Projects icon in the toolbar: 

Open the pop-up menu on each action (where it says No Context), and choose from the contexts you just saw in context mode to assign a context to each action.

Make Carrot Cake	
<input type="checkbox"/> buy carrots, eggs, & vanilla extract	Errands
<input type="checkbox"/> ask Ned about the exact measurements of his recipe	Ned
<input type="checkbox"/> bake cake	Home
Photograph Model Ships	
<input type="checkbox"/> call Catelyn to ask about rigging	Office
<input type="checkbox"/> set up backdrop & lights	Mac
<input type="checkbox"/> take photos	Mac : Email
<input type="checkbox"/> return ships to Catelyn	Mac : Online
Learn Calligraphy	
<input type="checkbox"/> look up teachers we met at the culture festival	Phone
	People
	People : Catelyn

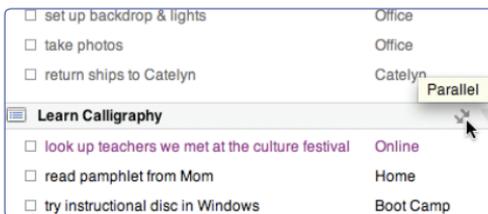
Tutorial 4: Action status

You might have noticed that some of your actions are colored differently from others. Actions are styled based on their status, to give you an idea of their availability.

The *next* action in each project is colored purple. This represents what you can do to make progress on the project.

In your *sequential* projects, that is, projects whose actions need to be completed in order, only the next action is considered available. The rest are colored gray to show that they are *unavailable* until you complete the next action.

If you change one of your projects to be *parallel* by clicking the twin arrows to the right of the project's name, you'll see the actions after the next action turn black. These actions are all *available*, because you don't need to do them in any particular order.

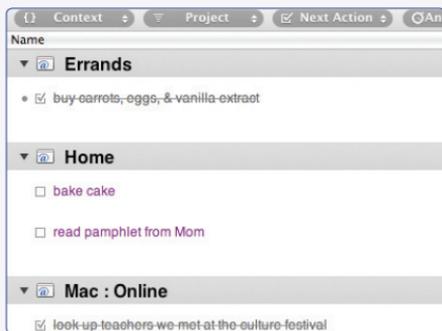


Tutorial 5: Use the view bar

Once you have a significant amount of information in your OmniFocus database, it can start to get overwhelming. The view bar can help you whittle down all that data into something meaningful and manageable.

For instance, say you're ready to get some work done. Staying in planning mode with all of your projects and actions all over the place won't do. Try this:

- Switch to context mode, where actions roam free of their project headings.
- Click an empty area in the sidebar to deselect all contexts; all of your actions become visible in the main outline.
- Show the view bar by clicking the glasses button in the toolbar; a row of pop-up menus appears.
- From the action status menu (with the checkbox icon), choose **Next Action**. Everything but your next actions disappears from the view.
- As you mark things complete, the view updates to keep giving you stuff to work on.



This is just one way the view bar can show you exactly what you're looking for. For more about how to use it, see the view bar section on page 36.

If you ever get the view bar into a wacky state that doesn't show what you want, you can always choose **Revert to Default View** from the **Perspectives** menu.

Tutorial 6: Drop things in the inbox

When some new chunk of work comes along, you don't necessarily want to go find the right project, add the action, and assign a context. For the time being, you can put newly-arrived stuff in the inbox.

- Switch to planning mode.
- Click the Inbox in the sidebar.
- Press Return to create a new inbox item.
- Type as descriptive a title as you want to give the item for now.
- Keep pressing Return and adding whatever bits of work come to mind.



That's it. You can add as much information to the inbox as you need, using it as a kind of holding area for stuff you haven't yet gotten around to fully adding to your library of projects. For extra-speedy brain-dumping action, try the quick entry window (see page 29).

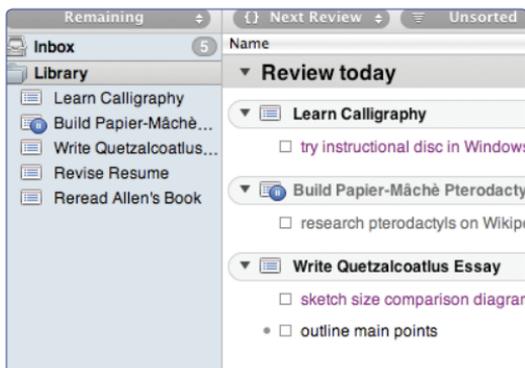
Whenever you're ready, you can reword the items into proper actions, assign a project and a context to each item, then click the **Clean Up** button in the toolbar. The items shuffle off to where they belong. If you want to turn an inbox item into a project instead of an action, drag it to the sidebar.

Tutorial 7: Review projects

Periodically, you should review your projects to make sure they're in good shape. For this example, imagine you've been using OmniFocus for a while now, long enough to reach the one-week review period for some of your projects.

From the Perspectives menu, choose **Review** (there's also a corresponding button you can add to your toolbar, if you like). In this view, your remaining projects are grouped in order of when they're due to be reviewed.

Look at each project and decide whether it's in the state it needs to be in. Are there new actions you need to add to it? Is it something you still plan on doing for sure, or should you change its status to On Hold? Is it something you should give up on, and change its status to Dropped? If it's already on hold, should you set it back to Active status? Once you're satisfied with the state of the project you're reviewing, choose **Mark Reviewed** from the Edit menu (or use the corresponding toolbar button) and move on to the next one.



This regular evaluation of each project can be a huge help; when you're planning well, you work well.

How projects, actions, contexts, work together

Actions

• read pamphlet from Mom

In OmniFocus, the things you need to do are represented by *actions*. Ideally, an action is a distinct chunk of work, described by a name that starts with an unambiguous verb. This makes things less intimidating to start, and easier to finish: a list of ten actions such as “Carry boxes out to recycling bin” and “Assemble bookshelf” is much more approachable than the nebulous “Finish moving in”. Of course, you should find the level of specificity that works best for you. As you create actions and move them around, OmniFocus keeps track of which ones are available, waiting on something else, or complete.

Projects

▼  Learn Calligraphy

Related actions are grouped into *projects*, which represent a set of actions working toward a common goal. Anything you want to do that requires more than one action, like “Finish moving in” or “Get novella published”, are good candidates for projects. Projects can then in turn be organized into folders, for keeping track of your broader areas of work.

Single-Action Lists

▼  Miscellaneous

Some actions, like “Get a haircut”, don’t really fit into any particular project; they’re just individual little things you need to do. You can keep this kind of action in a single-action list. These lists are similar to projects, but they don’t assume that the actions they contain have anything to do with one another.

Contexts

▼  Office

It’s handy (or, for some people, crucial) to assign a *context* to each action. A simple way to think of contexts is as *the place or mode you need to be in to do a given task*: you can only make **phone** calls when you’re near a phone, you can only buy groceries when you’re out running **errands**, and you can only do research on the web when you’re at your **Mac**. If you think about it, almost any task requires you to be in a certain context to do it. You can use planning mode and context mode to look at your actions in terms of what project they belong to or what context they require.

Creating a project

Make a project any time you realize you have something you need to do which requires more than one step.

To create a project:

- Make sure you are in planning mode; an easy way to get there is by clicking the Projects button in the toolbar: 
- Click the plus button at the bottom of the sidebar.
- Type a title for your new project.

Regardless of which view mode you are in, you can also create a new project by clicking the Add Project button in the toolbar, choosing Add Project from the File menu, or typing Command-Shift-N. OmniFocus switches to planning mode automatically.

Adding actions to a project

Add actions to a project whenever you think of something that you need to do in order to move the project forward.

Most of the time you'll probably want to add actions using the inbox or the quick entry window (see pages 28-29), but of course you can also add to the project directly. To add an action to a project:

- Make sure you are in planning mode; an easy way to get there is by clicking the Projects button in the toolbar: 
- Select the project, either in the sidebar or in the main outline, by clicking the index-card icon next to its name. Or, select an already-existing action in the project.
- Press Return or click the **Add Action** button in the toolbar; the new action appears immediately after the item you selected.
- Type a name for your new action.

You can move an action between projects by clicking its bullet and dragging it to its new location. You can even turn an action into a project by dragging it to the top level of the outline or the sidebar.

Attaching files and notes to actions and projects

You can use the notes area of an action or a project to store extra information or materials about the item.

When you have an action or a project selected, click the notes icon  on the far right side of the row (or press Command-apostrophe). You can type, paste, or drop plain text, rich text, links, images, or other files in this area. Click the notes icon again to hide the notes and attachments.

Another way to attach a file to an item is to select the item and then choose **Attach File** from the **Edit** menu.

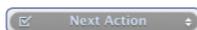
By default, OmniFocus creates links to the files you attach, rather than adding the files to your OmniFocus database. This keeps your database from growing needlessly (which is especially important if you are syncing your data), but the link will break if you delete the file or put it somewhere OmniFocus can't find it. To make OmniFocus copy a file into its database for safekeeping, hold the Option key as you drop the file, or select **Embed the file in the document** in the **Attach File** dialog.

An item with notes or attachments shows its notes icon all the time; others only show it when you select them or put the mouse pointer over them.

Keeping track of the next action in each project

Any active project keeps track of the *next action* that you have yet to complete, and styles it differently from the other actions—by default, the next action is purple. This is useful for figuring out what you ought to do to keep your projects moving forward.

When you are only interested in next actions, you can hide everything else. Show the view bar by clicking its icon in the toolbar, then choose **Next Action** from the action filtering pop-up menu:



For sequential projects, where you need to do one thing before another, the next action is the only thing you can do right now to make progress on the project. For parallel projects, where you can do the actions in any order, the next action is just the first action in the list, and acts as more of a suggestion of what you might want to do next.

Making a project sequential or parallel

Some projects consist of actions that can be done in any order, like picking up items at a few different shops; these are *parallel* projects. Other projects require one action to be done before the next one starts, like building a papier-mâché pterodactyl; these are *sequential* projects. In a parallel project, all incomplete actions are available, and the “next action” is just the first one in the list. In a sequential project, only the next action is available.

Whether a project is sequential  or parallel  is shown by the pair of arrows by the right side of its row in the outline. To switch to the other type, just click the icon. You can also choose a type from the inspector. If you find yourself using one type much more often than the other, you can change the default setting in the Data preferences.

Using action groups

The actions in a project can be organized hierarchically. This is useful for keeping track of complicated projects, or breaking actions into smaller actions without creating a whole separate project. Action groups, just like projects, can be parallel or sequential. This means you can put parallel groups inside of sequential projects and vice versa, to represent complicated dependencies.

To give an action some child actions, thus turning it into a group:

- Select the action you want to be the parent of the new group.
- Choose **Add Child** from the **Edit ▶ Outlining** menu, or press Command-}.

To create a group from some existing actions:

- Select all of the actions you want to group.
- Choose **Group** from the **Edit ▶ Outlining** menu, or press Command-Option-L.

Also, you can indent some actions to make them children of the action immediately before them in the outline:

- Select the actions you want to indent, making sure that there's an action before them in the outline.
- Choose **Indent** from the **Edit ▶ Outlining** menu, or press Command-], or click one of the items' handles and drag to the right.

If you mark an action group complete, all of its child actions are also marked as complete.

You can even nest groups within other groups, but that can get pretty ridiculous pretty quickly. If you have more than two levels of hierarchy in one project, you might want to consider splitting things up into separate projects.

Organizing projects into folders

Folders are a convenient way of organizing your projects, the same way you use folders to organize files on your Mac. For example, you could keep folders for each area of your life: perhaps Home, Work, Health, Education, Recreation, and Papier-Mâché Pterodactyls. That way, when you're concentrating on one area, you can keep just that folder expanded in the sidebar, or use the Focus feature to hide the others completely.

To create a folder:

- Make sure you are in planning mode; an easy way to get there is by clicking the Projects button in the toolbar: 
- In the sidebar, select the item just above where you want the new folder to appear.
- Click the Add Folder button below the sidebar.
- Name your new folder.

To put something (a project or another folder) inside your folder, just drag its icon onto the folder in the sidebar. You may have as many layers of folders as you can stand.

Setting start dates and due dates

Actions and projects can have start dates and due dates. A *start date* determines when an action or project becomes available, while a *due date* determines when something is considered overdue. You can also use the Dates & Times section of the Data preferences to set how long before its due date an item should be considered “due soon”.

Also in the Dates & Times section of the Data preferences, you can choose which time of day to use for when you enter a due date with no time. By default it is **12:00 AM**, the very beginning of the day; you could for instance enter **11:59 PM** to make new items due at the very end of the day, or **5:00 PM** to make new items due at the end of the workday.

Start and due dates can be entered either in the main outline (if you have the date columns turned on in the **View** menu) or in the inspector.

To group and sort by start or due dates, use the grouping and sorting menus in the view bar.

You can be pretty creative with the way you enter dates; OmniFocus is rather smart about guessing what you mean. For example:

- **2d, -3w, 1h, 1y1m**, and so on — Relative dates and times put the date at a certain amount of time from right now. Negative numbers represent times in the past.
- **2 days, -3 weeks, 1 hour, 1 year 1 month**, and so on — You can use the full names of units too.
- **yesterday, tomorrow, next thursday, last month, this friday**, and so on — You can refer to relative dates using common words. “This”, “next”, and “last” have specific meanings: **this friday** always means the Friday in this week, **next friday** always means the Friday in the next week, and **last friday** always means the Friday in last week, regardless of what day today is. Other units work in the same way.
- **september, thurs, 2019**, and so on — If you enter the name of a specific time period, the date will be at its beginning. So **september** means September first.
- **5/23/08 10a, 9.30.09 2:00 PM**, and so on — You can use the short date format as defined in your International system preferences.

- **2w sat, 4d @ 5p, tues 6a, aug 6 tues 5p**, and so on — Mix the available formats however you like.
- **now, 9, 14:00, tom**, and so on — OmniFocus makes its best guess at things like bare numbers, times, and word fragments. If you think something might work, give it a try.

Setting up repeating actions and projects

When you have something that needs to be done more than once, you can set it up as a repeating item.

- Select the item you want to repeat.
- Open the inspector from the **Inspectors** menu or by clicking the **Inspectors** button in the toolbar.
- Click the **Repeat** checkbox in the inspector.
- Enter a repeat interval.
- Choose how to count the repeat interval. You can count from the original assigned date (for something that has to happen regularly, like paying the rent) or from the completion date (for something that needs to happen a certain duration after the last time you did it, like getting a haircut).

For example:

- Start Tuesday 5:00 PM; due Tuesday 10:00 PM; repeat every 1 week from assigned date: take out the trash. This repeats from the assigned date because it is necessary to do it at the same time every week, regardless of when you last did it.
- Start today 12:00 AM; due today 6:00 PM; repeat every 5 days from completion date: clean the kitchen. This repeats from the completion date because the next time you need to do it depends on the last time you did it.

When you mark a repeating item as complete, the next instance of it is created with its start and due dates pushed forward as indicated by the repeat interval. If you want an item to stop repeating, just turn off the Repeat setting in the inspector.

Estimating action duration

If you like, you can note how long you expect actions to take. Then, when you're looking for something to do, you can choose based on how much time you have on hand.

To display the time estimate column in the main outline, choose **View ▶ Columns ▶ Estimate**.

To assign a time estimate, click in the estimate column for an action, then type a duration. By default, the numbers you type are interpreted as minutes (**5m** and so on). You can also type larger units, like hours (**h**) and days (**d**).

To group and sort by time estimates, use the grouping and sorting menus in the view bar.

Marking actions complete

When you've finished an action, just click its checkbox; its status changes to "completed". If it was the project's next action, and the action that follows it is available, that action becomes the next action.

Another way to mark something complete is to select the whole row and press Space. You can also right-click any number of selected items and choose "Complete" from the contextual menu, or click the Complete toolbar button.

If you mark an action group complete, all of its child actions become complete too.

If you're marking an action that you actually completed a while ago, you can adjust the completion date so that your records are accurate. Just select the item, open the inspector, and edit the **Completed** field.

Remember that regardless of the actions they contain, *projects* stay active until you decide that there are no more actions to be added and you mark the project complete.

Flagging projects and actions

On the right end of any project or action row, there's a little flag that you can turn on or off. The flag has no inherent meaning of priority or anything special like that, so you can use it however you like. You could, for example, mark all of the things you'd like to get done before lunch, topics for a meeting you're about to present at, or projects to reconsider the next time you have a chance to think about them. It's entirely up to you.

To flag a project or action, click the little flag on the right side of the project or action row in the main outline. You can also select any number of actions and projects and then choose **Set Flag** from the **Edit** menu, or click the Flag toolbar button.

If you flag a project or an action group, all of its actions get an implicit “ghost” flag, and are treated as if they were flagged themselves. You can still flag them individually, if you want them to stay flagged when you remove the flag from the containing item.

To see only items that are flagged, use the Flag State menu in the view bar.

Keeping track of single actions

Sometimes you need to do something that doesn't really fit into a project. “Make rosemary lemonade” or “Buy a new cowboy hat”, for example, probably don't contribute to the completion of any particular project. To keep track of such actions, you can use single-action lists.

To create a single-action list:

- Make sure you are in planning mode; an easy way to get there is by clicking the Projects button in the toolbar: 
- Choose **Add Single-Action List** from the **File** menu or from the action menu  below the sidebar.
- Enter a name for your new list, and drag it to wherever you'd like to keep it.

Continued on the next page >>

You can keep any number of single-action lists; some people like to make one for each top-level folder in their library. Others make a “Reading” list, a “Shopping” list, and so on. Single-action lists are similar to projects; you can drag them into folders, add actions to them from the Inbox, and so on. They are different in a couple of ways, though:

- Single-action lists are always parallel; the actions in them don’t block each other from becoming available.
- All single actions count as “next actions”, since each one is kind of a little tiny project in itself.
- Single actions appear in a unique style — blue text by default.

Assigning contexts to actions

In addition to the hierarchical ways of organizing your actions, you can also assign each action a *context*. This indicates where you need to be or what you need to have available in order to complete the action.

Once your actions have contexts assigned, you can selectively view your actions by context, to see just the ones that are actually available to you wherever you are now.

To create a new context:

- Make sure you are in context mode; an easy way to get there is by clicking the Contexts button in the toolbar: 
- Click the plus button at the bottom of the sidebar.
- Type a title for your new context.

To assign a context to an action in planning mode:

- Click in the Context column for the action.
- Type part of the name of the context you want to assign; OmniFocus tries to match what you typed with the names of your existing contexts.
- If you see the context you want, select it. Otherwise, you can finish typing the context name and then press Command-Return to create it as a new context.

To assign a context in context mode, just drag an action into the context’s entry in the sidebar.

Organizing contexts hierarchically

You can nest a context inside another context, creating a hierarchy as deep as you like. Just drag any context in the sidebar inside of any other context.

When you select a parent context, you can see all of the actions inside that context or inside any of its descendants. This way you can look at your actions assigned to a more general context (like **Office**) or a more specific one (like **Office : Mac**). You can also keep identically-named contexts inside of different parent contexts (like **Office : Mac** and **Home : Mac**).

Viewing actions by context

When you're at the office and ready to get some work done, you probably don't care to see actions that require you to be at the store, at home, or at your cottage in Wisconsin. So it's useful to selectively view just the actions that fit your context right now.

To view the actions assigned to a particular context:

- Make sure you are in context mode; an easy way to get there is by clicking the Contexts button in the toolbar: 
- In the sidebar, click the context you are interested in. As you select it, only actions assigned to that context appear in the main outline.
- If you like, Command- or Shift-click other contexts to select them at the same time.

When you find yourself using a certain set of contexts, focus, and view bar filters pretty often, you might want to save them as a perspective (see page 38).

To see everything in the main outline again, deselect all contexts by clicking in an empty area of the sidebar or by Command-clicking all of the selected contexts.

Using on-hold or “waiting” contexts

You can set a context’s status to “On Hold” with the inspector; actions assigned to an on-hold context are considered unavailable, and they block the progress of sequential projects. There are two main situations in which you might want to use on-hold contexts:

First, you might create one or more “waiting” contexts for keeping track of actions that you’ve delegated to other people. You can’t actually do anything until you hear back from that person; all you can do is wait for them to finish it, and maybe nudge them about it every now and then. So an action like “get annotated pterodactyl brochure draft back from Dennis” might go in your “Waiting : Dennis” context.

Second, you might have some contexts that you don’t expect to be available to you any time soon. You could put your “Frankfurt” context on hold when you’re in London, or put your “Boss” context on hold until she comes back from vacation, and any actions assigned to them would become unavailable. This helps you see which actions and projects aren’t likely to make progress until your situation changes.

Dropping contexts

If there’s a context you don’t intend to use anymore, such as the office for a job you left, or a person who transferred to a different department, you can drop it. All of your old actions that were assigned to it stay assigned to it, but the context doesn’t appear in your Remaining contexts sidebar. Any remaining actions still assigned to a dropped context become unavailable and move to the No Context group of the context mode sidebar.

Adding stuff to the inbox

The inbox is a kind of intermediary area between your brain and your OmniFocus library. Whenever you have something important that you don’t want cluttering up your mind, but you’re not quite ready to meticulously file it away in the right place in your OmniFocus structure, just put it in the inbox. Later on, when you process the inbox, you can decide whether each item is a new project or an action in an existing project, what its context is, and so on.

To create a new inbox item, just select the inbox (in the sidebar or in the main outline) and press Return. Type whatever’s on your mind, forget about it for now, and get back to whatever you were doing! For extra bonus productivity-streamlining finesse, don’t even switch to OmniFocus to do this; use the quick entry window (page 29) or the clipping service (page 31) instead.

You can create hierarchy in the inbox by using the **Edit ▶ Outlining** menu commands, if you already know that something is going to have sub-items. Later, you can add these groups to an existing project or make them into full-fledged projects themselves.

When you are ready, you can process your inbox items by assigning them projects and contexts (See page 24).

Using the Quick Entry window

So the inbox is a quick way to get things off of your mind. But there's an even quicker way, if you're in the middle of something else and you don't want to switch your brain to a different mode: the quick entry window.

In the OmniFocus preferences, there's a setting for the quick entry keyboard shortcut. This is a key combination which, as long as OmniFocus is open, no matter what else you're doing on your Mac at the time, summons up a little window where you can send things to OmniFocus.

To collect stuff in the quick entry window:

- Press the quick entry keyboard shortcut as you have set it in the preferences. By default, it's Control-Option-Space. The quick entry window appears.
- Type in the quick entry window as if you were typing in the OmniFocus inbox. Create as many items as you want, with as much hierarchy as you want (you'll need to press Control-Return to create more than one item, as Return dismisses the window — you can change this in the General preferences). You can assign projects, contexts, dates, notes, and so on for each item; click the button with the gear icon to choose which columns are visible.
- When you're done, click the **Save** button or press Command-S. The items are whisked off to your database and you can keep on doing whatever you were doing. If you don't want to put the items in your database yet, press the quick entry shortcut again; the items will still be there the next time you open the quick entry window. If you want to get rid of the items entirely, click the **Cancel** button or press Command-Period.

Processing inbox items

Items you put in the inbox stay there until you assign them a project or context (by using the inspector or by typing in the Project and Context columns). If you assign both a project and a context, then the item is filed away where it belongs. Depending on your settings in the Inbox Processing section of the Data preferences, an inbox item with a project but not a context assigned, or vice versa, may stay in the inbox or may be automatically filed where it belongs.

Inbox items have both a Project column and a Context column. To assign a project or a context, you can click the pop-up button next to the appropriate cell to see a menu of all available projects or contexts. Alternatively, you can type directly into the cell. With each letter you type, OmniFocus guesses which of your projects or contexts you might mean. Most of the time you can get the right one with just a couple of key presses. For example, if you type **aak** or **ado** into a project cell, OmniFocus would find your “Adopt a Kitten” project. Once the correct project or context is highlighted, you can just leave the cell.

If you need to create a new project or context, just type its name into the cell and press Command-Return instead of Return. OmniFocus creates the new project or context for you, and assigns the action to it.

To move inbox items to your library:

- For an individual action, just assign a project and a context to it, then use the **Clean Up** command in the Edit menu or the **Clean Up** button on the toolbar to move it to its proper place.
- For any inbox item, including groups, you can click its handle and drag it to the sidebar or the main outline wherever you would like it to go. Drop it inside a project to add it to that project, or drop it anywhere else to turn it into a project.

Clipping material from other applications

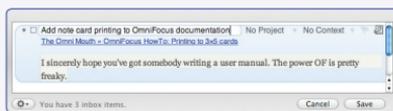
You may come across an email message, a web page, a newsreader article, or some other scrap of info that you'd like to turn into an OmniFocus action. In the olden days you might heft your mouse, highlight the text, copy it, summon up the OmniFocus quick entry window, and paste. But no, you're living in the *future*. You use the **OmniFocus Clippings service**.

To clip content from another application:

- Highlight some text in any application (that is, any application that supports Mac OS X Services, which should be *all* applications these days, *ahem*)



- Press the Clipping keyboard shortcut (if you have set one in OmniFocus Clippings preferences), or open the application menu and then the **Services** submenu, then choose **OmniFocus: Send to Inbox**.
- A new item, with the highlighted content (rich text and embedded images) as its note, lands in the quick entry window for you to revise and save.



You can change some details of how clippings work with the OmniFocus Clippings preferences. From the **OmniFocus** menu, choose **Preferences**, then click the **Clippings** tab.

To change the **Clippings Shortcut**, click in the field and type a key combination. To clear the shortcut, click the **✕** button.

With the **Copy Clippings** setting, you can choose whether to clip material into the quick entry window for review and revision, or to drop it straight into the Inbox.

Continued on the next page **»**

OmniFocus processes material differently depending on which application it was clipped from, using application-specific plug-ins. For example, when you clip content from Mail in Mac OS X 10.5, the new action has the message's subject line as a title, and its note has a link to the original message. You can select an application in the plug-in list to see details about how it will process clipped content. You can also turn off plug-ins you don't intend to use, or for which you'd rather use the "Any Application" plug-in.

The OmniFocus Mail Clip-O-Tron 3000 is a little tool that adds the ability to clip the entirety of the selected message in the Mail message list. To install it, open the Clippings preferences and then click the button in the lower-right corner. If you don't install it, you can still clip content highlighted in Mail's message content area.

Processing Mail messages into actions

When it's not convenient for you to put data directly into OmniFocus (like when you're sitting at a someone else's computer), you can send a specially-formatted email to yourself and OmniFocus will process it later. To set it up, use the OmniFocus Mail preference pane.

To turn on Mail processing, select the **Add Mail Rule to create OmniFocus actions** checkbox.

Once the Mail Rule has been added, you can tell OmniFocus what kind of messages to look for. One way is to look for messages that have **+omnifocus** before the @ sign in the destination address, as in **cornelius+omnifocus@omnigroup.com**. If your mail service is properly set up for this type of addressing, the message arrives in the correct mailbox as if the plus sign and the extra word were not there, but they act as a label for special handling. The other way is to look for messages whose subject line begins with certain characters, -- by default.

If you want to keep the messages that OmniFocus processes in a certain mailbox, select **Archive processed messages** and choose a mailbox. Otherwise, they are deleted.

The **Allowed From addresses** list is automatically filled with any email addresses on the "Me" card in Address Book. You can add more addresses, if you expect to be sending yourself OmniFocus actions from any other accounts.

The way that messages are processed is pretty detailed, and you have a lot of power in how you can format your items (some examples are on the next page):

- The subject and body of the message are joined into a single block of text.
- The first line and any other lines starting with -- (double-hyphens) become new actions. Other lines become notes for the preceding action.
- To specify a project, use > (greater-than sign) or :: (double-colons), followed by a project name or abbreviation. The colons are nicer for the iPhone because they are on the first shifted keyboard rather than the less-accessible math keyboard. The project string is matched exactly as if it was entered in a project cell in OmniFocus.
- To specify a context, use @ (at sign), followed by a context name or abbreviation. Like project names, the context name is matched exactly as it would be in OmniFocus.
- To enter start or due dates, use # (number sign), followed by some date expression. The same expressions you use in OmniFocus (**tomorrow**, **9-30-2008**, **2w**, and so on) can be used in mail messages. If there is only one date, it becomes the due date. If there are two (each with its own number sign), the first becomes the start date and the second becomes the due date.
- To enter a time estimate, use \$ (dollar sign—time is money) followed by some duration expression (like **5m**, **1h**, and so on); you can use the same duration expressions that you use in OmniFocus.
- You can also add a note on the same line as an action title by separating them with // (double-slashes). Anything after the double-slashes becomes a note, but double-slashes in a URL like **http://omnigroup.com/** don't count.

Continued on the next page >>

Here are some examples of actions you could send to yourself:

```
-- Action
Note note note note note la la la
note la la
-- Another Action > Project 2 @ Context 3
Note wheeeeeeee

I have empty lines in my note

It's great

-- Action 3 > Project 1 @ Context 1 // Same-line notes
too, if you are into that kind of thing
-- Action 4 #friday // Due Friday, because I only
entered one date
-- Action 5 #monday #friday // Starts Monday; due
Friday.
-- Action 6 #monday # // Starts Monday; no due date.
-- Action 7 :: Project 3 // Written on my iPhone; colons
work in place of greater-than sign.

--Action8>p2@c2#2d$5m//no spaces needed, nor full names
```

Cleaning Up

The grouping, sorting, and filtering settings in the view bar control what parts of your database are visible and how they're arranged. For instance, most of the time you don't care to see actions you've already completed, so you use the action filter to show only remaining actions. Sure, that's handy, but you also don't want OmniFocus pulling stuff out from under you as you're working on it. For instance, if you mark an action complete, you probably don't want it to disappear that very moment; you may still change your mind and want to uncheck it, or copy its notes into an e-mail, or just double-check that you clicked the right thing. Likewise, you probably don't want an inbox item to be spirited away the instant you assign a context to it.

So, OmniFocus has a command called Clean Up. You can clean up by clicking the **Clean Up** toolbar button, or choosing **Clean Up** from the **Edit** menu.

Cleaning up puts everything where it belongs: items that don't match the filter settings disappear, visible items move into the appropriate groups, inbox items move to their assigned projects, and so on. After you change some items, you can Clean Up to make sure that your view is up to date.

Focusing on certain projects or folders

If you know that you want to concentrate for a while on a particular project, folder, or combination of items, the Focus feature can get everything else out of your way.

To focus:

- Select a project or folder (or any combination of projects and folders) in the sidebar.
- Click the **Focus** toolbar button, or choose **Focus on *selected items*** from the **View** menu. Everything outside your selection disappears from the sidebar, and the title at the top of the window changes to **Focusing on *selected items***.
- As you work in planning mode, or switch to context mode, OmniFocus ignores everything outside of your focus, as if the items you're focusing on are the only items in your library.
- When you're done focusing, choose **Show All Projects** from the **View** menu, or click the **Show All** toolbar button. Your library comes back as if nothing ever happened!

When you find yourself using a certain set of contexts, focus, and view bar filters pretty often, you might want to save them as a perspective (see page 38).

Using the view bar to filter and arrange items

The view bar is a powerful way to filter and rearrange the items in your window. It has one pop-up menu to control what appears in the sidebar, and five pop-up menus to control what appears in the main outline. The various filters work together, so that you can come up with quite expressive combinations of settings, like *Flagged next actions in active projects, that I can do in less than 15 minutes, sorted by due date*.

When you find yourself using a certain set of contexts, focus, and view bar filters pretty often, you might want to save them as a perspective (see page 38).

Project Filter



This appears above the sidebar in planning mode; click it to choose what kind of projects to show in the sidebar. You'll probably want this to be **Active** most of the time, so you can see only the projects you're working on now. You can also choose **Remaining** (projects that haven't been completed or dropped), **Stalled** (projects without any available actions), **Pending** (projects with start dates in the future), **On Hold**, **Dropped**, **Completed** (projects you have marked with these statuses), or **All**.

Context Filter



This appears above the sidebar in context mode; click it to choose what kind of contexts to show in the sidebar. You can choose **Remaining** (contexts which haven't been dropped), **Active** (contexts that have actions assigned to them), **Stalled** (contexts without any actions), **On Hold** (contexts you've indicated should not allow their actions to become available), or **All**.

Grouping



Click this to choose how to group the projects in the Planning view outline, or the actions in the Context view outline. You can **Ungroup** everything, or group by **Folder** (for the same structure as you see in the sidebar), **Due** date, **Start** date, **Completed** date, **Next Review** date, **Added** date, or **Changed** date. Each group shows up as a collapsible bar in the main outline. Remember that in Planning view, the grouping applies to whole projects, not to the individual actions inside them.

Sorting



Click this to choose how to order the projects in the Planning view outline, or the actions in the Context view outline. If you have a grouping selected, the sorting happens inside the groups but the groups themselves stay in the same order.

In planning mode, you can leave projects **Unsorted**, or sort them by **Name**, whether they are **Flagged**, their **Due** dates, **Start** dates, **Completed** dates, **Next Review** dates, **Added** dates, or **Changed** dates.

In context mode, you can sort individual actions by the order of the **Project** they belong to, whether they are **Flagged**, their **Due** dates, **Start** dates, **Completed** dates, **Added** dates, **Changed** dates, or their **Time** estimates.

Action Filter



Click this to choose what kind of actions show in the main outline. You can choose to see actions with **Any Status**, **Next** actions (just the next thing to do in each eligible project), **Available** actions (things you can actually do, because they aren't blocked by earlier actions in a sequential project), **Remaining** actions (anything that's not completed), or **Completed** actions (things you've already done).

Estimated Time Filter



Click this to show actions whose time estimates fall within a certain range. You can choose to find **All** actions (regardless of their time estimates), or actions that are estimated to take less than **5 minutes**, less than **15 minutes**, less than **30 minutes**, less than **1 hour**, more than **1 hour**, or an **Unknown** amount of time (for actions you haven't estimated).

Flag Filter



Click this to show projects or actions based on whether they have flags set on them. You can choose to see items with **Any Flag State**, **Flagged** items, or **Unflagged** items. Note that flagging an action puts a kind of ghost flag on its parent project, making the project count as flagged too, and flagging a project ghost-flags all of its contained actions.

Searching for actions or projects

The OmniFocus toolbar includes a Search field for filtering the main outline down to items that contain a certain string of text. As you type in it, items that don't match disappear dynamically. You can search based on action names, notes, context names, or project names. When you're done, click the clear button on the right side of the field and everything reappears.

OmniFocus also has a Find and Replace panel like many other applications; from the **Edit** menu, choose **Find** ▶ **Find and Replace** to summon it.

You can find and replace text in the visible columns of any items that are visible in the main outline. Even dates and assigned contexts can be replaced, though the context you're replacing with has to match the name of an existing context.

Using perspectives to store your OmniFocus window settings

You may find certain ways of setting up your OmniFocus window that are useful enough to make you want to come back to them again and again: your morning glance at what's due today, your weekly review, or your retrospective of what you've gotten done lately. With perspectives, you can save view settings and get back to them whenever you like.

OmniFocus comes with a few built-in perspectives that you can't edit, as a way to get back to a few basic states. In the Perspectives menu, they are:

- **Remaining Items** — Everything you have left to do.
- **Due Items** — Your remaining items grouped by due date.
- **Completed Items** — All of the items you've already finished.
- **All Items** — Everything ever. This may take a while to load.

To create a perspective:

- Set up an OmniFocus window with the view mode, columns, focused items, sidebar selection, and view bar settings just the way you like them.
- From the **Perspectives** menu, choose **Show Perspectives Window**.
- Click the plus button at the bottom of the Perspectives window.
- Type a name for your new perspective.

There are several ways to open a perspective:

- Double-click the perspective's icon in the Perspectives window.
- Choose the perspective from the Perspectives menu.
- Choose **Customize Toolbar** from the **View** menu, and add the perspective to your toolbar as a button; then click it.

If you want to change an existing perspective, you can take a new snapshot:

- Get a window looking the way you want (possibly by opening the existing perspective and then changing a couple of things here and there).
- Select the perspective to overwrite in the Perspectives window.
- Click the camera icon at the bottom of the Perspectives window: 

To edit a perspective's options, click the kinda arrowy-looking button at the bottom of the perspectives window:  You can choose whether the perspective should open in planning mode or context mode and whether the settings for both modes should be restored. The settings for whether to always open in a new window, for giving your perspective a keyboard shortcut, and for giving your perspective a custom icon are also here.

To quickly print a perspective without even having to open it, click the printer button at the bottom of the Perspectives window:  If you trust that the settings are right and you don't even want to see the Print panel, Command-click the button to print right away. You may find this handy for dashing off a copy of your errands perspective onto some note cards before you run out the door, for instance.

To delete a perspective, select it and then click the minus button at the bottom of the Perspectives window.

Reviewing projects

Reviewing is a good way to make sure all of the projects in your library are in good shape and are ready for you to take action. If you have projects that need more actions added to them, or projects that aren't relevant anymore, or projects you don't mean to do any time soon, following a regular review process can help you keep them from falling through the cracks.

Each project has an interval for how often you intend to review it and a date when the next review is planned. You can change the default review interval in the Data preferences, and you can change the review interval and next review date of individual projects with the inspector.

To review your remaining projects:

- From the **Perspectives** menu, choose **Review** (there's also a corresponding button you can add to your toolbar, if you like). In this view, your remaining projects are grouped in order of when they're due to be reviewed.
- For each project in the **Review Today** group (or earlier groups), check whether the project is in the state it needs to be in: Should you revise its actions, or add new ones? Should you put it on hold, drop it, or complete it? Or is it just fine?
- Once you're satisfied with the state of the project, select it and click the **Mark Reviewed** toolbar button or choose **Mark Reviewed** from the **Edit** menu. The project's next review date moves forward and you can go on to review another project.

Marking a project complete

Eventually, oh frabjous day, you're going to reach the successful end of a project. When you're sure that you've really accomplished "Move in to new house", "Carve Halloween pumpkins", or "Write pterodactyl novel", you can mark the project complete. Select the project and then either click the **Complete** toolbar item, choose **Edit** ▶ **Status** ▶ **Completed**, or just press the Space bar. The project's status changes to **Completed**, and it is filed away in your library for safekeeping.

Putting a project on hold

If you're not quite sure whether you want to start (or continue) a project, you can put it on ice for a while. It disappears from your **Active** list in the sidebar, and its actions likewise stay hidden. Every now and then, you can set the project filter in the view bar to show **On Hold** projects (or **All Projects**), and review which ones you'd like to make active, which ones you'd like to drop, and which ones you'd like to keep on hold.

There are several ways to put a project on hold:

- Select the project in the main outline, then use the Status control in the inspector to choose **On Hold**.
- Select the project in the sidebar, then choose **On Hold** from the gear menu at the bottom of the sidebar.
- Right-click or Control-click the project in the main outline or in the sidebar, then choose **On Hold** from the contextual menu.

To make an on-hold project active again:

- Choose **On Hold** from the view bar's project filter pop-up menu.
- Find the project, then use one of the same techniques as above to set the project's status back to Active.

Dropping a project

If you've decided not to work on a project any further, you can drop it completely. It disappears from your **Active** list in the sidebar, and its actions likewise stay hidden. Of course, you could just *delete* the project, but then you wouldn't have any record of it or its actions ever having existed.

Keeping them around in a dropped state means you can go back and check on how often you give up on projects, check which actions you've completed regardless of whether they're from still-relevant projects, and so on.

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There are several ways to drop a project:

- Select the project in the main outline, then use the Status control in the inspector to choose **Dropped**.
- Select the project in the sidebar, then choose **Dropped** from the gear menu at the bottom of the sidebar.
- Right-click or Control-click the project in the main outline or in the sidebar, then choose **Dropped** from the contextual menu.

To make a dropped project active again:

- Choose **Dropped** from the view bar's project filter pop-up menu.
- Find the project, then use one of the same techniques as above to set the project's status back to Active.

Page setup and Printing

Printing your OmniFocus data is pretty straightforward: set up a window that contains exactly the data you want by focusing, selecting items in the sidebar, or expanding and collapsing rows in the main outline. Then choose **Print** from the **File** menu. OmniFocus resizes the content to fit horizontally on the paper you've chosen.

For more control over how your data is printed, choose **Page Setup** from the **File** menu, then choose **OmniFocus** from the **Settings** pop-up menu for OmniFocus-specific settings.

- **Completion checkboxes** — you can choose to print the checkbox for each action (to differentiate between completed and incomplete actions, or if you like to have the box to mark off with a pen).
- **Completion style** — you can choose to print completed actions with their completed action style applied (a strikethrough by default).

- **Window title** — Add the title of the window to the top of your printed document.
- **Date and Time** — Add the date and time of printing to the top of your printed document.
- **Convert to black & white** — Ignore OmniFocus’s color styling and draw all text in black on a white background.
- **Rows** — You can **collapse all** to show just the top level of the hierarchy, **leave as displayed** to use the expansion as it is in the window on your screen, or **expand all** to expose the collapsed rows.
- **Notes** — You can **hide all** to put away the notes regardless of their visibility on the screen, **leave as displayed** to use the note visibility as it is on the screen, or **show all** to expose the notes for everything regardless of their visibility on the screen.

To print on unusually-sized paper:

- Choose **Page Setup** from the **File** menu.
- Make sure the **Settings** pop-up menu says **Page Attributes**.
- Choose your printer from the **Format for** pop-up menu.
- See if the paper you want to use is listed in the **Paper Size** pop up menu. If it is, choose it and print normally. If it isn’t, choose **Manage Custom Sizes** to create it.

If you change the Page Setup for a window with a perspective open (you can tell because the perspective’s name appears in the window’s title bar), those settings are saved with the perspective. This means you can print your errands perspective on index cards in black and white at 120% scale and with no extra columns, print your weekly review perspective in full color on landscape-orientation letter paper, and so on.

The Perspectives window has a special Quick Print button  at the bottom. Just select a perspective and click it to bring up the Print panel for that perspective; then you’re just a click away from your printed perspective. If you trust that the settings are right and you don’t even want to see the Print panel, Command-click the button to print right away.

Synchronizing between Macs and mobile devices

OmniFocus version 1.5 introduces the ability to synchronize your database with a server or a disk, so that all of your Macs, and your iPhone or iPod touch, will stay up to date.

To get to the Sync preferences, just choose **Preferences** from the **OmniFocus** menu, then click the **Sync** button.

By default, OmniFocus is set to sync with **Nothing** — in this case, the database in your Library folder is the only one that matters.

Step 1: Archive old data

If you have been using OmniFocus for more than a couple of months, you may want to archive your old, unused items before setting up synchronization. Choose **Move Old Data to Archive** from the **File** menu; your database will be slimmer and faster to sync, especially on iPhone or iPod touch.

Step 2: Choose a sync method



In order to synchronize, you need to keep a “server” or “sync” copy of your database somewhere, and let OmniFocus check up on it periodically. There are several types of places you can keep the sync copy, each represented by a button on the Sync pane:

MobileMe — This service from Apple includes iDisk online file storage; if you have a subscription, this is the easiest way to put your OmniFocus database where all of your Macs and devices can synchronize with it over the Internet.

Bonjour — This is a very simple way to let Macs and devices on your local network discover and sync with a copy of your OmniFocus database. As it doesn’t require special setup or a subscription to a service, this is the simplest way to synchronize Macs or devices locally.

Disk — Anything that you can mount and edit as a disk in Finder, such as a portable USB drive, a Time Capsule on your local network, or a file server that you access over the internet, can be used to synchronize your OmniFocus database. Note that iPhone and iPod touch can’t mount disks over the network like a Mac can, so this sync method won’t work with it.

Advanced (WebDAV) — This is a type of server for sharing files on the web, offered by some hosting providers. Check with your hosting provider to find out whether you can set up your own WebDAV space. Be aware that providers which don't fully comply with the WebDAV standard may not work properly.

Step 3: Choose a sync location



MobileMe — If your MobileMe account information is already set up in System Preferences, then your Location field is already filled in. You can add a folder name to the end of the URL if you want to keep your database somewhere other than the top level of your iDisk.

Bonjour — Click **Keep the sync database on this Mac**, then enter a password to protect your database. OmniFocus then makes a sync copy of your database available to other Macs and devices on your network.

Disk — When you choose to synchronize to a disk, a sheet appears for you to choose a location. Make sure the disk is mounted, browse to the location on the disk you want to use, and then click the **Set Sync Location** button.

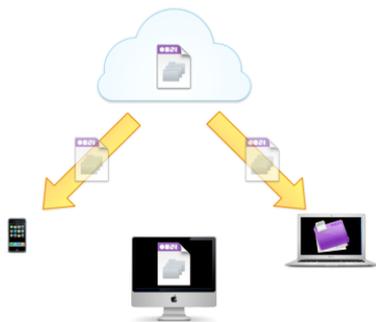
Advanced (WebDAV) — Enter your WebDAV address (such as **https://www.example.com/webdav/**) in the Location field. If your provider supports it, you can use **https** for a semblance of security while transmitting your data; otherwise, ordinary **http** also works.

Step 4: Sync



Click the **Sync Now** button to start your first sync. Since you don't have a sync database yet, this first sync will consist of creating one and copying all of your OmniFocus data into it.

Step 5: Set up other Macs and devices

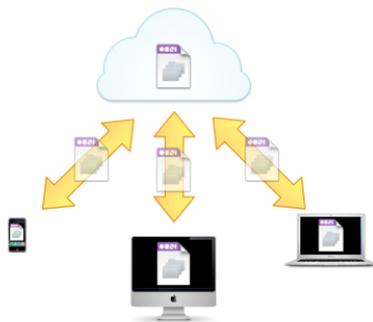


Once you've fully synchronized your database to the server for the first time, you're ready to tell your other Macs and portable devices about it.

Setting up another Mac — Follow steps 1, 2, and 3 again on that Mac, using the same settings. (If you are using Bonjour, click **Connect to an existing sync database** and select the Mac that you set up before.) When you synchronize that Mac, it will find the existing database on the server.

Setting up an iPhone or iPod touch — OmniFocus is available for the iPhone and iPod touch, from the App Store. If your device is on the same wireless network as your Mac, you can open OmniFocus on that device and choose to get the sync settings from your Mac by name. Otherwise, click the Send Settings button on your Mac's OmniFocus Sync preferences pane to email a special link to yourself. Open the email on your mobile device and tap the link; OmniFocus does the rest.

Step 6: Stay in sync



One minute after you make any change, OmniFocus automatically synchronizes with the server. With Bonjour sync, whenever you make a change on one client, any other clients that are awake and connected to the network are notified right away. Even if you don't change anything, OmniFocus syncs once an hour. You can also manually sync by choosing **Synchronize with Server** from the **File** menu, or by clicking the **Sync** toolbar button. As long as OmniFocus synchronization is enabled on all of your computers and handheld devices, and they can all reach the database on the server, they will all be up to date with one another.

Synchronizing with iCal

An excellent way to liberate your data from OmniFocus and communicate with lots of other applications and devices is to synchronize with iCal. Once your data is in iCal, you can share it in the iCalendar format understood by scads of calendar and to-do applications.

To synchronize OmniFocus with iCal:

- Choose **OmniFocus** ▶ **Preferences**, then click the iCal icon.
- Select the **Unsynchronized** group in the **Calendar** list; all of the contexts you're not synchronizing appear in the **Contexts** list.
- Drag context names into the calendar name you'd like to synchronize them with. For instance, if you drag your "errands" context to your "Home" calendar, any actions assigned to your errands context will get corresponding to-do items in your Home calendar in iCal.
- From the **File** menu choose **Synchronize with iCal**. For each context that you dragged into a calendar, its actions are synchronized to iCal.
- Whenever you like, choose **Synchronize with iCal** to bring iCal and OmniFocus back in sync. New OmniFocus actions in synchronized contexts are copied to the associated calendars in iCal. New iCal to-dos in synchronized calendars are copied to the OmniFocus inbox. Changes to actions on either side are applied to the corresponding items on the other side.

In the Sync preferences, you can change how the synchronization process works:

- **Add blocked actions to calendars** — if this is selected, even actions that aren't available (because another action needs to be completed first, for instance) are copied to iCal.
- **Add completed actions to calendars** — if this is selected, even actions that you have already marked complete are copied to iCal.
- **If actions are deleted from calendars, delete them from OmniFocus** — If you want to delete actions in iCal and have them be deleted from OmniFocus too, select this checkbox. Otherwise, you can be sure that synchronizing will never delete any of your actions in OmniFocus.
- **Include each action's context in its calendar item title** — This prepends your action titles with the assigned context name, like **@Office: alphabetize paperweights**.

Importing data from other applications

If you have some data in an OmniOutliner document, especially a Kinkless GTD document, you can import it into your OmniFocus database.

To import an OmniOutliner document:

- If the file you want to import is not a kGTD document, make sure it has the hierarchy you want and has a column for each kind of value you want to import (title, start date, due date, and so on).
- From the **File** menu, choose **Import**.
- Choose the OmniOutliner file you'd like to import. If it is a kGTD document, OmniFocus automatically figures out how to import it properly and you're done. If it's an ordinary OmniOutliner document, you'll have to help it along a bit; carry on to the next steps.
- A column mapping dialog appears. For each column in the original file, choose an OmniFocus column to receive the data.
- All of the data is imported as a single new project. If you want the top-level items of the outline to become their own projects, just select all the contents of the new project and choose **Edit ▶ Outlining ▶ Outdent**.

Backing up your database

We've made OmniFocus err on the side of obsessive, paranoid data preservation, just in case something bad happens to your database. After all, we're asking you to put your whole life into this app.

OmniFocus automatically backs up your database once a day, in the folder `~/Documents/OmniFocus Backups/`. To change when the automatic backups happen, or where they are saved, choose **Preferences** from the **OmniFocus** menu and use the **General** pane. You can choose to back up once or twice a day, and also to back up whenever you quit OmniFocus.

To manually back up your database, choose **Back Up Database** from the **File** menu. You can choose where to put the backup.

To restore a backed-up version of your database, choose **Revert to Database Backup** from the **File** menu, then choose a backup file to use. Your entire database is replaced by the version in the file; if you're not sure that the backup is what you want, you can double-click the backup file in Finder to open it in its own window first and make sure it's right.

Exporting your database to different formats

Your data belongs to you; if you want to send it to other applications, run scripts on it, publish it on the web, or do other exciting stuff with it that we haven't even thought of, you're more than welcome to write it out to the format of your liking and do so!

To export your database, first adjust your view settings (view bar, focus, sidebar selection, and so on) to show the data you want to export. When the window contains the data you want, choose **Export** from the **File** menu, then choose a format and a location. The available formats are:

- **OmniFocus Document** — This is an ordinary OmniFocus document, just like the one that you use as your database. If you open such a file in OmniFocus, it appears in its own window and you can work with it normally, but application-wide settings such as preferences and perspectives don't come along with it.
- **Plain Text (TaskPaper)** — This is a plain-text representation of your data, and it happens to be compatible with the light to-do application TaskPaper from Hog Bay Software. Of course, you don't need TaskPaper to use your plain text export; you can just give it a **.txt** extension and open it in the text editor of your choice.
- **Simple HTML** — This is a single-file HTML representation of your data; the stylesheet and even the icons are embedded in the HTML. If you are proficient with CSS, you should be able to restyle the result however you like.
- **Comma Separated Values (CSV and CSV UTF-16)** — CSV is a kind of *lingua franca* for applications old and new on all platforms, as it's just all of your data in a plain text file with its columns separated by commas. Once you have your data in CSV format, it's easy to run scripts on it, convert it to some other format, or open it in applications that understand it (like OmniPlan!). If you're having trouble persuading other applications to read the non-ASCII characters in your CSV file, such as accented letters or non-Roman characters, try exporting with the UTF-16 CSV option, and importing that into the other application. This makes it easier for some applications to detect the correct encoding and interpret your characters properly.

Using the inspectors

The inspector window is a central place for setting the attributes of actions, groups, projects, and contexts. You can use it to examine or change one or many selected items. When you select something in the sidebar or the outline, the inspector window automatically switches to the applicable inspector.

Each inspector has controls that are relevant to the type of item you have selected, and some of these controls overlap between different types of items.

- **Project** — This sets which project an action or group belongs to. You can use this as an alternative to finding the destination project in the sidebar and dropping the item there.
- **Type** — You can choose whether the selected group or project's contained actions should become available sequentially or in parallel; that is, one at a time or all at once. You can also turn a project into a single-action list, for containing unrelated one-time actions.
- **Status** — For projects, the status can be Active (a project you're still working on), On Hold (a project you've set aside for some day in the future), Completed (a project you've successfully finished), or Dropped (a project you've decided not to pursue anymore). For contexts, the status can be Available (a context you still intend to use), On Hold (a context whose actions aren't available for you to work on), or Dropped (a context you don't expect to use anymore).
- **Context** — This sets the selected action's assigned context, just like choosing one in the Context column of the main outline.
- **Default Context** — This assigns a context to be automatically assigned to any new actions added to the selected group or project. This is handy if you have a project that you know is going to take place mainly in one context.
- **Estimated Time** — This is the amount of time you expect the selected action or group will take to complete. See estimating action duration on page 24 for more information.

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- **Start and Due** — An action, group, or project's start date determines when it becomes available; if you can't start working on something until later, give it a start date so that it will stay out of your way (in Pending status) until then. If your action, group, or project has a deadline, enter a due date. As the due date approaches, the item appears in the due soon style, and if it becomes overdue, it appears in the overdue style.
- **Completed** — The date that an action, group, or project was completed is recorded here. You can edit the completion date, in case you actually completed something a while back but didn't get around to telling OmniFocus about it until just now.
- **Added and Changed** — OmniFocus keeps track of when each item was added to your database and when you last changed it. Sometimes it's useful to check these values to see just how long you've been meaning to do something.
- **Repeat** — If you have an action, a group, or a project that needs to be done regularly, you can set up a repeat interval. The **Next Start** and **Next Due** dates show how the next repetition of the item would be scheduled if you completed this one right now.
- **Next Review** — This indicates when the selected project is due to be reviewed. You can let OmniFocus determine this based on the review interval (see **Review Every** below) and the last time you marked it as reviewed, or you can enter your own date.
- **Review Every** — The default interval between reviews is set in the Data Preferences, but you can change the interval on a per-project basis if there are projects you want to keep a closer eye on or leave alone longer.
- **Last Reviewed** — This is the last time you marked the project as reviewed (or the date it was created, if you have never reviewed it).

Style preferences

In order to avoid too much fiddling around, OmniFocus doesn't support styling individual items. Instead, you can style all items of a particular type.

To get to the Style preferences, just choose **Preferences** from the **OmniFocus** menu, then click the **Style** icon. As you adjust the styles, keep in mind that you can always click the Reset button at the bottom of the pane to return to the default settings.

At the top of the pane is a pair of buttons for changing all of your font sizes at once; this is a shortcut if you just want bigger or smaller text in general. Each press increases or decreases all font sizes by 1 point. You can also select particular styles and specify a font size for each one.

On the left side is an outline of all item types that you can style, organized by how they inherit from one another. For example, **Next Actions** are a type of **Actions**, and **Actions** appear in the **Main Outline**. Each item type uses its parent's style attributes unless you specifically change them.

You can change the appearance of the following types of items:

- **Sidebars** — Everything that appears in the planning mode or context mode sidebars, on the left side of a window.
- **Top-Level Items** — The Inbox, Library, No Context, and Contexts items in the sidebar.
- **Contexts** — The individual contexts listed in the sidebar. The background color for this style fills the entire contexts mode sidebar.
- **Projects** — The individual projects listed in the sidebar. The background color for this style fills the entire planning mode sidebar.
- **Folders** — Folders listed in the sidebar.
- **Main Outline** — Everything that appears in the planning mode or contexts mode outline, on the right side of a window.
- **Groupings** — The headers that group together items when you set a grouping in the view bar; larger and bold by default.
- **Projects** — The items that represent projects and single-action lists in planning mode; bold by default.

Continued on the next page >>

- **Actions** — Ordinary available actions.
- **Next Actions** — Purple by default.
- **Single Actions** — Blue by default.
- **Action Groups** — Bold by default.
- **Notes** — Smaller and gray by default, but in individual notes you can do as much rich-text styling as you want.

In addition, you can customize the following **Status-Based Styles**. These styles override any other styles that may be on an item.

- **Completed** — Items that have been marked as complete; gray and with strikethrough by default.
- **Due Soon** — Items whose due date is within the “soon” duration as set in the Data preferences; orange by default.
- **Overdue** — Items whose due date has passed; red by default.
- **Blocked** — Stalled projects and unavailable actions; gray by default.

Below the style list is an Action pop-up menu for resetting the selected styles to their default attributes, copying the selected styles, or pasting onto the selected styles.

The controls on the right affect the selected style:

- **Font Preview** — This identifies the selected font and acts as a preview of what the font looks like. Note that this only represents the settings that you change with the **Choose Font** button, not the other attributes below. Click the preview to open the standard Font panel, where you can specify a font family, style, and size.
- **Text Color** — The color for the font itself. For example, next actions appear in purple.
- **Background Color** — A color to draw behind the item. In the case of the **Main Outline** style or the sidebars’ **Projects** and **Contexts** styles, this color fills the entire view.

- **Shadow** — A sharp shadow one pixel below the text; this is most effective in white, for the etched look that many elements in Mac OS X have these days.
- **Strikethrough** — A line drawn through the text, like the default style for completed actions. We're not sure why you'd want to cross out anything else, but hey, you're the boss.
- **Underline** — A line drawn under the text, in the color and pattern of your choice.
- **Row Spacing** — This number specifies, in points, how much vertical space the item should have before it. So, essentially, adjacent items get farther apart when you increase this number.
- **Child Spacing** — This number specifies, in points, how much vertical space should appear between the item and its child items. For instance, you could make actions in a project appear closer to or farther from the project row itself.
- **Child Indent** — This number specifies, in points, how far to the right to indent children of items of this style. So if you increase this number for projects in the main outline, then the actions inside each project will move further to the right.

Customizing columns

There are a few columns you may or may not want to see in the main outline:

Context, Estimate, Start Date, Due Date, and Completion Date

You can use the **View** ▶ **Columns** submenu to choose which of these columns are visible.

To customize column widths, first show the view bar by clicking its icon in the toolbar or choosing it from the **View** menu. Then drag the edges of the column headers that appear.

Your column visibility and width settings are saved with your perspective, so you can keep different settings for different situations.

General preferences

To get to the General preferences, just choose Preferences from the OmniFocus menu, then click the General icon if it is not already selected.

The General preferences pane contains settings for the Quick Entry window (see page 28) and how often the database should be backed up.

There's also a setting for how hierarchical project and context names should be displayed in the main outline. Say you have contexts called "Home" and "Office", each with another context called "Mac" inside it. When you see those contexts in planning mode's context column, you might want to see their hierarchy in order to tell them apart. You might also want to see the folder hierarchy for projects in context mode. When you turn on the **Show full hierarchy** setting, the contexts appear as **Home : Mac** and **Office : Mac**. If you're not a fan of the colon, you can choose or enter a different separator in the field to the right; this is used in the grouping headers and smart match cells whether you turn on the full hierarchy setting or not.

Data preferences

To get to the Data preferences, just choose **Preferences** from the **OmniFocus** menu, then click the **Data** icon.

The **Inbox Processing** section of the Data preferences controls exactly how items should be handled when you perform a Clean Up.

- You may want to require that an inbox item has **A Project, A Context, Both,** or **Either** before it is automatically moved out of the inbox.
- If you process items with a project but no context, they move into the appropriate project but also appear in the No Context group of context mode so that you can assign them a context at some point.
- If you process items with a context but no project, they move into the **Default List for Single Actions** as indicated below; you can choose a single-action list for holding your projectless actions, or let OmniFocus create a "Miscellaneous" list when it's needed.
- You can also choose whether **Clean Up completed Inbox items**. If you want OmniFocus to file away inbox items you've marked complete, regardless of whether they have a project or context, turn this setting on. If you still want to go back and assign projects or contexts to your completed inbox items, so that they get filed away in the right place, turn this off.

In the **Dates & Times** section, you can control how OmniFocus handles time-related stuff.

- The **Mark actions due “soon”** setting controls how long before an item’s due date it should start appearing in the special style for almost-due items. By default, items start turning orange 2 days before they are due.
- The **Show Due Soon and Overdue actions** setting determines whether you should see colored counters next to items in the sidebar, a colored counter in the menu bar, or a colored badge on the OmniFocus Dock icon. If you choose to show an indicator in the menu bar, you can click it to see how many due soon or overdue items you have in your inbox and your individual contexts; choose an item from this menu to open an OmniFocus window on it.
- You can set the review interval for new projects; by default each project is to be reviewed every week.
- Below that, you can choose which day is considered the start of the week, for the purposes of entering dates like “next week”. If you choose **Default**, the week starts on whichever day is normal for the region chosen in the International System Preferences pane.
- The **Default Time for Due Dates** setting controls the time of day assigned to due dates that you enter without specifying a time, as described in the Setting start dates and due dates section of the help.

The setting in the **Projects & Action Groups** section determines whether newly created projects and groups should be parallel or sequential.

AppleScript support

OmniFocus has quite comprehensive AppleScript support. So if there’s something you wish it did, you may be able to make it. Open OmniFocus’s AppleScript dictionary in the Script Editor application for the relevant documentation.

Licensing

Select the **Licenses** menu item from the **OmniFocus** menu to see the Licenses dialog. From here you can review and edit your OmniFocus licenses, which verify that you've actually paid for the software. (Thanks!)

To buy a license:

- Click the **Buy Licenses** button and you will find yourself magically transported to the Omni Group's store on the web. Naturally, this only works if you have a live Internet connection.
- If you're considering buying a Family Pack license, note that a Family Pack licenses up to five members of a private household. If you're buying for a company or some other organization that's not a private household, you can't use a Family Pack. Also, if you're just planning on using OmniFocus on a couple of different machines by yourself, and you don't intend to have more than one copy running at a time, you can just buy a single license.

To add a new license:

- Click the **Add License** button.
- If you have a license key in an e-mail message, copy and paste both the **Owner** name and the **License Key** into the appropriate fields. If you can't copy and paste the information, you'll have to type it in; make sure you copy everything exactly as it appears in your license message. Also, double-check that the license you're entering really is a license for OmniFocus; licenses for other Omni Group products won't work.
- Use the drop-down menu to select the type of license you would like to use. (Keep reading to learn about license types.)
- Click the **Save** button.

OmniFocus has three different types of licenses:

- **Personal:** This license is for your personal use, and will only be available on this computer when you are logged on as the user who installed the license. You can install this license on more than one computer, but only for your personal use. If a personal license is available, the application will use it instead of other types of license.
- **Computer:** You can use this license on this computer, and so can any other user of this computer. However, you should not install this license on more than one computer. If both a network license and a computer license are available, the application will prefer the computer license.
- **Network:** This license sits on your network and is available to any user on the network. However, only a certain number of users (indicated by the number of “seats”) can use the license at one time. OmniFocus will only use a network license if neither a personal nor a computer license is available.

To remove a license:

- Select the license you want to remove.
- Click the **Delete License** button.

Software Update preferences

OmniFocus can automatically use your internet connection to check for new and updated versions of itself; you can get to the automatic update options by choosing **Preferences** from the OmniFocus menu, then clicking the **Update** button.

If the **Check for Updates** checkbox is selected, you will be notified when there is a new version of OmniFocus ready for you to enjoy. Click the **Check for Updates Now** button to look for the newest version once right away.

You can select the **Include system information** checkbox to volunteer some information about your computer’s configuration when you check for updates. For details about what kind of information we collect and how we use it, click the **Learn More** button on the preference pane. To see the statistics we have collected from users, visit update.omnigroup.com.

Getting help

The **OmniFocus web site** is a good place to find the latest information about OmniFocus.

<http://www.omnigroup.com/applications/omnifocus/>

The **Release notes**, available from the **Help** menu, list all of the changes to OmniFocus for each version. Check them out if you'd like to keep up with what's new.

The Omni Group maintains online **forums** for all of our products, and you're invited! Come share your questions and ideas with other users and Omni staff:

<http://forums.omnigroup.com/>

If you're stuck, or if you just want to let us know how we're doing, go ahead and send us an e-mail. Choose **Send Feedback** from the **Help** menu to conjure up a message addressed to us. A real human reads and replies to every message we get. We'll do our best to help you out.

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