

OmniFocus for iPad

Version 1.6



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What is OmniFocus?

OmniFocus is the personal task management tool that helps you keep track of all the goals, plans, errands, and aspirations that come up in your life. Whether the task at hand is something small, such as setting a reminder to swing by the bike shop after work, or the tasks are part of a bigger goal, such as making plans for that long overdue vacation, OmniFocus helps to keep you on track of everything you need to do throughout your day.

Available on your iPad, iPhone, and Mac, OmniFocus is packed full of tools to help you prioritize steps within complex projects or simply jot a quick to-do list for a weekly meeting. OmniFocus works great as a standalone productivity aid or in conjunction with whatever time and task-management scheme suits your personal style.

Note: OmniFocus for iPad and iPhone are sold separately on the [App Store](#). OmniFocus for Mac is available on the Mac App Store and directly from [The Omni Group](#).

OmniFocus for iPad uses all of the strengths of the iPad's Multi-Touch interface to help enhance your productivity intuitively and accessibly. With only a few taps you can quickly access the things you need to do now, sort others for later, and organize your tasks into projects and relevant contexts. Dive right in and experience the productivity tool that starts simple, and effortlessly grows to meet your most complex task management needs.

For a video tour of the features of OmniFocus, check out:

<http://www.omnigroup.com/products/omnifocus-ipad/videos/>

The Basics

It all starts with a basic idea. You have something that needs to get done, and you know you'd better make a note about that somewhere, but how reliable is that sticky note that's stuck to your desk when you're on your way home from work? That thing—that very important thing—that you so diligently wrote on a sticky note is now useless. If only you had an app on your iPad or iPhone or your trusted Mac that you could use to keep you on track.

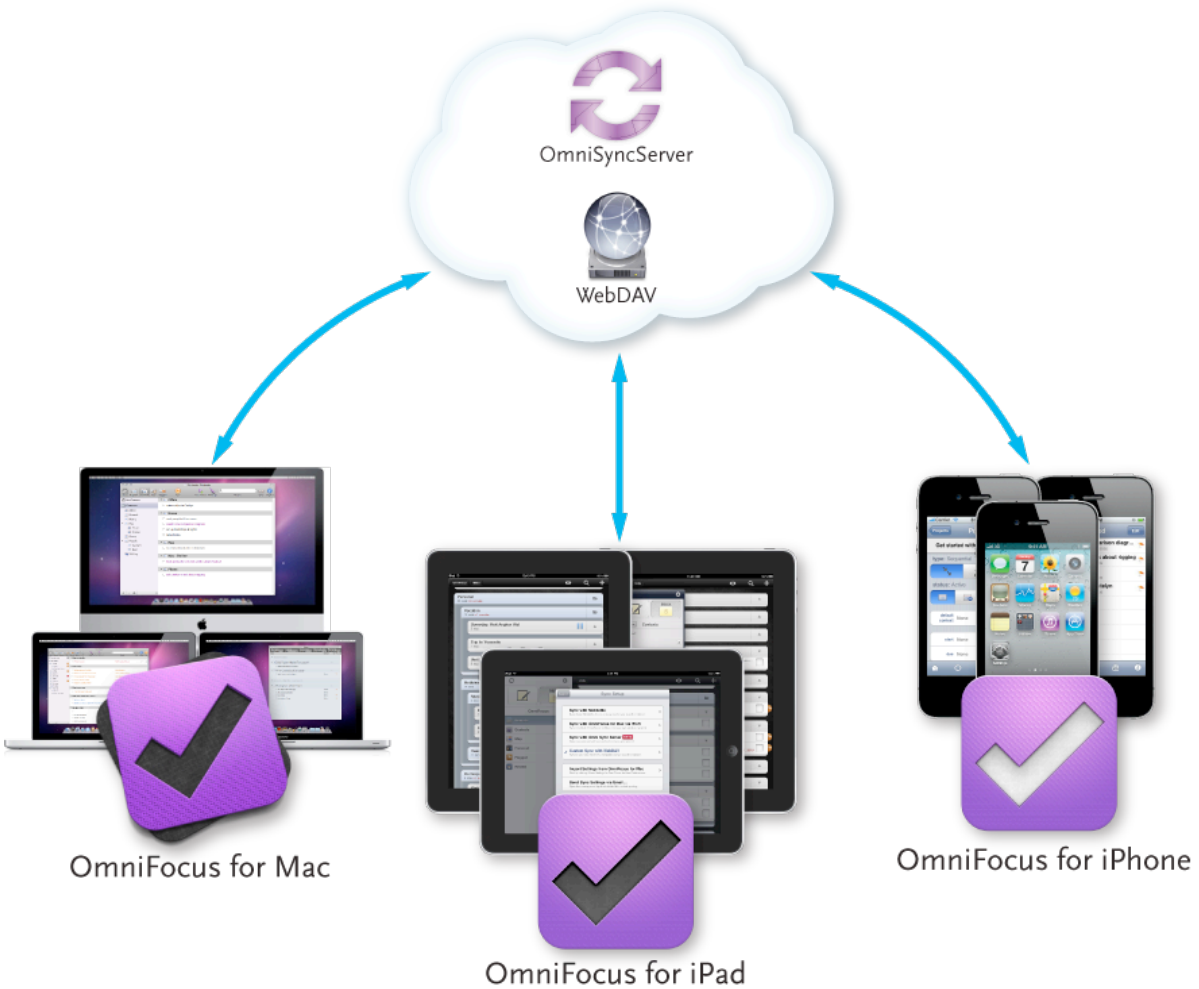
OmniFocus does all that and more. And best of all, OmniFocus lets you take your tasks with you so they're right there when you need them.

So let's get started with a quick overview of OmniFocus!

Getting Synced

When you first launch OmniFocus for iPad you'll be asked to set up your **sync settings**. OmniFocus synchronizes your actions with a server so that all your iPad, iPhone, and Mac tasks and projects are always up to date.

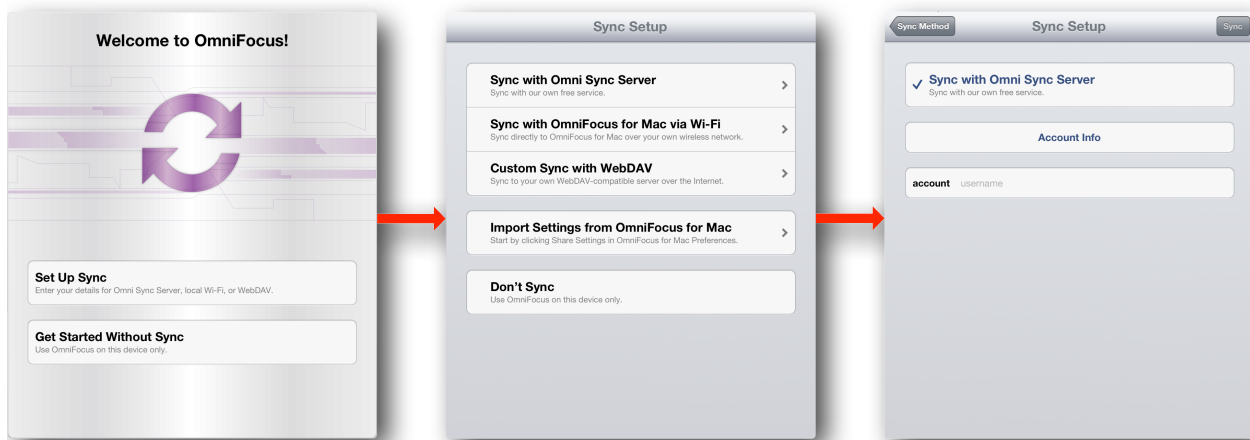
Even if you're only using OmniFocus on your iPad, syncing is recommended for the automated data backup it provides. Best of all, our Omni Sync Server is free, and we take care of managing the servers so your data is backed up and always available when you need it most.



Note: Different OmniFocus databases can't be merged, so if you use the app on multiple devices (for example, on your iPhone and iPad) and want them to communicate, you should set up sync the first time you use OmniFocus on the device to avoid any conflicts.

Connecting with Omni Sync Server

Because we feel that synchronization is such a crucial part of being productive, we've made it part of the launch experience when you first open OmniFocus for iPad.




After choosing **Set Up Sync**, you will see that you have three methods to choose from:

- Sync with Omni Sync Server
- Sync with OmniFocus for Mac via Wi-Fi
- Custom Sync with WebDAV

Our own Omni Sync Server is recommended for ease of use and reliability of support. So what are you waiting for? Get started by creating a new Omni Sync account here:

<https://manage.sync.omnigroup.com>

If you choose to run your own WebDAV server, step-by-step instructions for setting up WebDAV on OS X Server are available [on Omni's Forums](#).

If you don't set up sync now, but later decide that you want to, you can always choose **Sync Setup** from the **Settings**  menu.

How Synchronization Works

With sync turned on in OmniFocus, a server you designate keeps a copy of your database so that it's always available wherever you are. With each subsequent sync, OmniFocus

compares your local database with what's on the server and applies any differences to the dataset on the server.

We've also built in an automatic sync mechanism. With sync turned on, OmniFocus sends new changes to the sync server after one minute, or whenever you switch to another app. At a bare minimum, OmniFocus checks in with sync server every hour if nothing has changed on the device. This helps ensure that your data from OmniFocus is always safe, secure, and most importantly—up to date.

The point worth stressing here is that you'll *always* want to perform a manual sync (by tapping or clicking the **Sync** button in OmniFocus) before switching to OmniFocus on another iOS device or your Mac. This pushes your latest changes up to the sync server, so that when you launch OmniFocus on the other system, all you have to do is tap or click **Sync** to ensure that all of your changes are there.

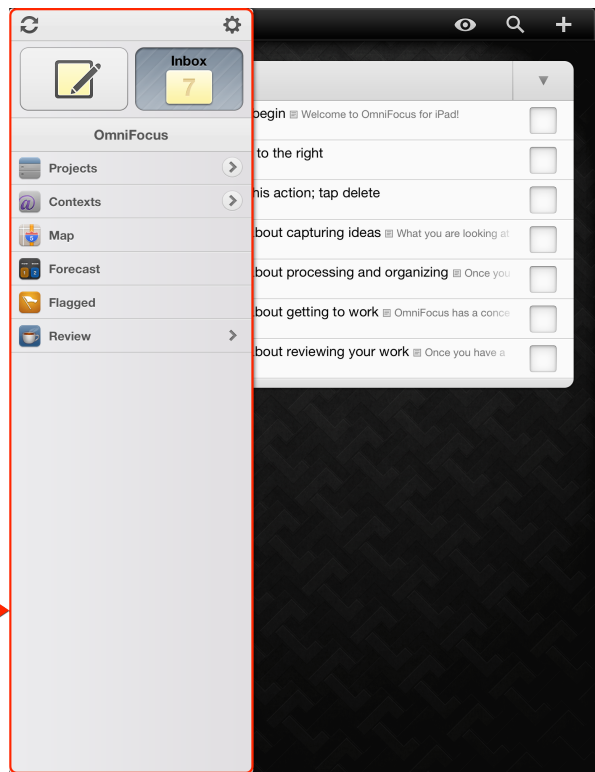
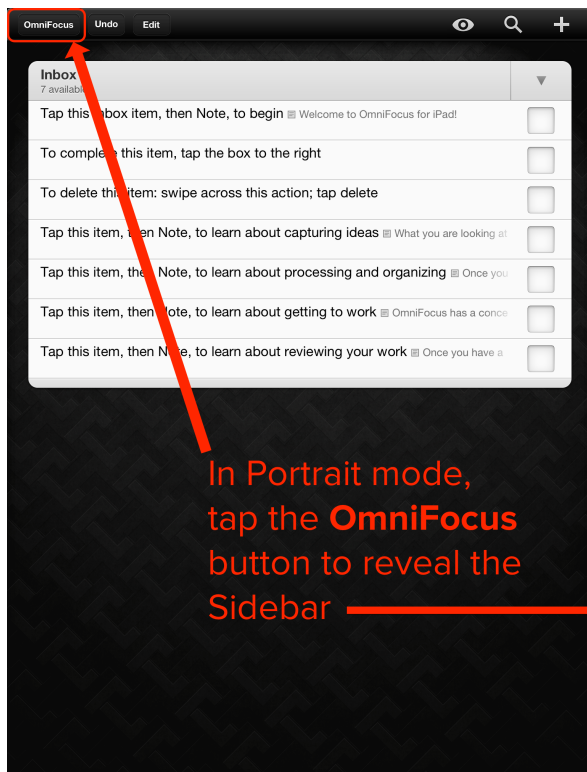
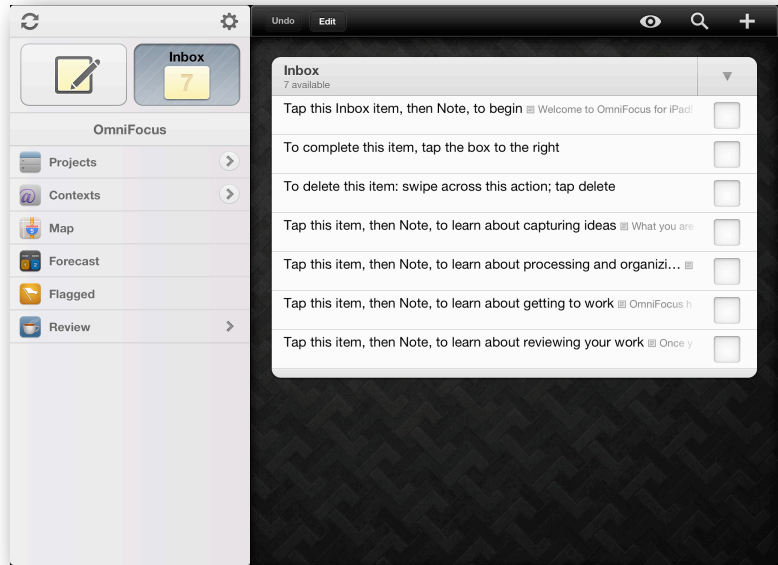
Warning: Services such as Dropbox are great for file sharing, but they can't handle OmniFocus data properly. Using Dropbox as a place to sync your data can corrupt your OmniFocus data. As a result, do not use Dropbox as a means of synchronizing your OmniFocus data.

Getting to Know OmniFocus

After you've set up sync, you'll find yourself at the OmniFocus **Home Screen**, where all your great plans begin! If you're using OmniFocus for the first time, you'll find that we've added a

helpful list of items in your **Inbox** so you can explore and learn more about OmniFocus.

As you can see, OmniFocus has two sides: the light side, otherwise known as the **Sidebar**, and the dark side is the **Content Area**. When your iPad is in landscape mode, the sidebar and content area appear side by side.



However, when your iPad is in portrait mode, the sidebar is hidden but is still available by tapping the **OmniFocus** button in the upper-left corner.



The sidebar gives you quick access to key features such as your Inbox, list of projects and more, while the content area is where you do most of your work in OmniFocus.

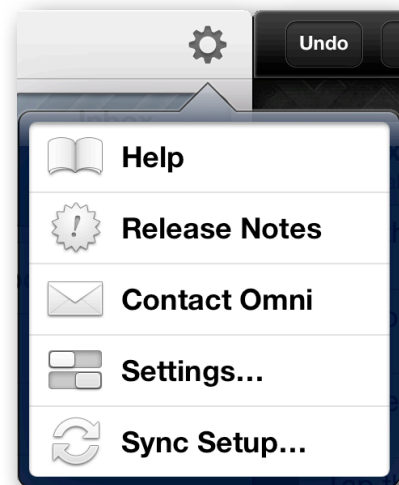
To help you find your bearings, let's quickly run through the interface so you know what to tap when you want to do something.

Using the Toolbar

The toolbar is located at the top of both the sidebar and content area. It contains several tools, some of which are specific to your iPad's orientation. (When in portrait mode, tap **OmniFocus** to show the sidebar.)







1. Tap **Sync**  to trigger a sync manually. If you are in portrait mode, the Sync button is in the sidebar.
2. Tap **Settings**  to customize your OmniFocus experience. In the popup menu that appears, tap:
 - **Help** to read a convenient in-app version of this manual.
 - **Release Notes** to find out what's new in your version of OmniFocus.
 - **Contact Omni** to send us a question, comment, or suggestion.
 - **Settings** to customize the way your data is presented and integrates with other apps.



- **Sync Setup** to set up or change your sync settings. See the [Settings Quick Reference](#) section for more information on how you can configure OmniFocus to suit your needs.

3. Tap **Undo** to, well, undo the last thing you changed. Touch and hold this button to reveal a popover from which you can undo or redo the last thing. Keep in mind that you can only undo the last 20 changes and that your undo history goes away after a sync.



4. Tap **Edit** to delete, reorder, or move items. You can shuffle the order of items in the sidebar by pressing on the reordering handles  and dragging an item up or down. Edit works differently depending on which view you're in, so give it a try as you explore OmniFocus a bit more.
5. Tap **View Options**  to reveal a popover to change which actions are visible in the content area. For example, if you only want to see the first available action for each project in project mode, select **Next Action**, and if you select **All**, you will see all of the action items in your database—even those you've completed.
6. Tap **Search**  to find an item in OmniFocus. The searches you conduct in OmniFocus are not based on a project or list of action items you might be viewing in the content area. Instead, Search sweeps across your entire OmniFocus database and shows you anything that matches your query.
7. Tap **Plus**  to add new items to the list that you're looking at. These new items include projects, contexts, actions, and Inbox items.

Using the Sidebar

The sidebar is primarily used to sync or change what you're viewing in the content area. It is always visible in landscape mode and can be accessed by tapping the **OmniFocus** button in the toolbar when in portrait mode.

Tap the arrows to the right of the items in the sidebar to see a list of that particular items' contents in the sidebar. For example, if you tap the arrow to the right of the Projects button, you'll see all of your projects in a convenient list.

By default, the sidebar contains the following:


1. Tap **Sync** to sync with the server.
2. Tap **Settings** to access the in-app manual, find out what's new in OmniFocus, ask us a question, or change various preferences.
3. Tap **Quick Entry** to create a new action item; new action items show up in your Inbox.
4. Tap **Inbox** to view your available action items.
5. Tap **Projects** to view a list of your projects and actions in the outline.
6. Tap **Contexts** to view a list of your contexts and their contents in the outline.
7. If you've assigned locations to your contexts, tap **Map** to view the available actions near your location.





8. Tap **Forecast** to quickly see which actions are due over the next seven days, as well as those that are coming up in the future or are past due.
9. Tap **Flagged** to view the actions you've flagged as critical items to keep track of. Flags are handy when you have a particular action in a project that you want to remind yourself to check in on periodically.
10. Tap **Review** to review all of your projects and action items to keep yourself on track.

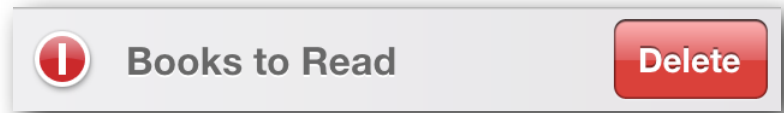
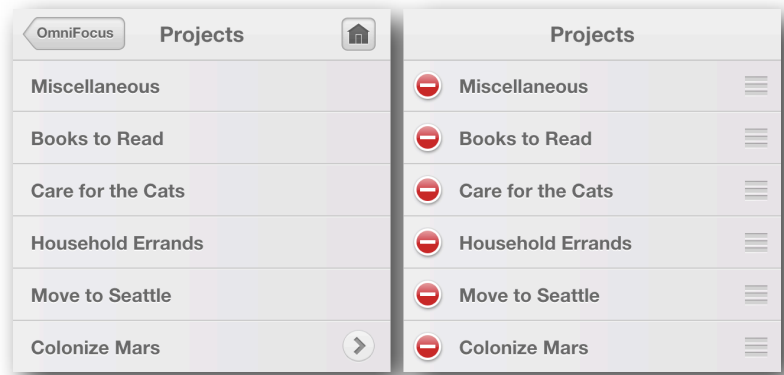
Customizing the Sidebar



After you've used OmniFocus for a little while, you might find that you perform certain actions, such as reviewing Flagged actions, more often than you use the Map view. Or, you might just want to organize your sidebar so that everything within is alphabetical.

If you tap **Edit** in the toolbar, you'll see relocation handles  to the right of the items in the sidebar. To move the items in the sidebar around, tap and press on one of the handles, and then move your finger up or down to relocate an item. As you move the rows around, you'll see the others slide out of the way to make room for you to insert the row you've dragged. Once you've found the right place, just take your finger off the relocation handle and then either continue moving items around or click **Done** in the upper-right corner of the content area.



You can also reorder sidebar items that you see when you click the circled arrow  in the sidebar. For example, if you tap  to the right of Projects, the sidebar changes to reveal a list of the projects you're working on. If you tap **Edit**, you'll notice that you don't just get the



relocation handles, but you'll also see a deletion button  on the left side of the project names. You can drag the rows around using the relocation handles, or if you tap the deletion button, you'll notice that it flips up  and a **Delete** button appears where the relocation handles were.

Understanding Actions, Projects, and Contexts

When working with OmniFocus, there are three basic concepts that we feel are important to know: Actions, Projects, and Contexts.

The individual tasks you add to OmniFocus are known as **Actions**. Think of these as the verbs of OmniFocus; these are things that you want to accomplish. A **Project** can be thought of as an organizing theme or common goal shared by the Actions it contains. And finally, similar actions can be assigned to a **Context**. Think of Context as critical resources—tools, people, or a location—you rely on when completing Actions or working on a Project. To help illustrate these three concepts, let's look at a quick example.

You've finally decided it's time to read some of the books you skipped in that Literature class from grad school. You start by creating action items for each of

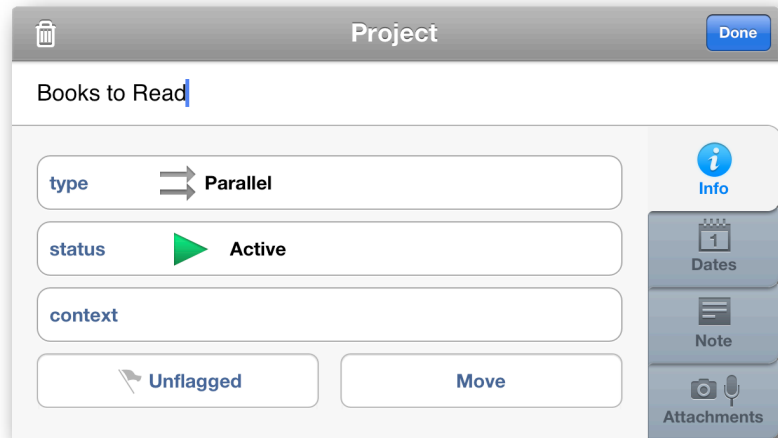
the books you want to read; *Moby-Dick*, *Black Elk Speaks*, *The Rise of Silas Lapham*, and so on. These action items show up in your Inbox.



Because these Actions all relate to a specific goal—making good on that promise to read all of the books on your to-read list—you assign them to a project.

To create a new project:

1. Tap **Projects** in the sidebar.
2. Tap **Plus** **+** in the content area's toolbar and select New Project from its popup menu.



3. In the Editor window, type in the name of the project and then tap **Done** to save the new project.

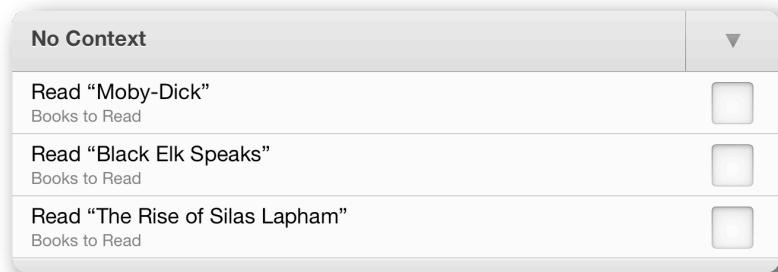
When you've created the project, you can go back to the individual action items in your Inbox and assign them to the project. And when the action items are

assigned to the project, they no longer show up in your Inbox. Now, that doesn't mean



you're off the hook for reading them, it just means that you now have a better way of keeping track of these related action items.

Finally, let's give some context to the action items. If you tap **Contexts** in the sidebar, you'll notice that all of the action items are grouped together as having **No Context**.

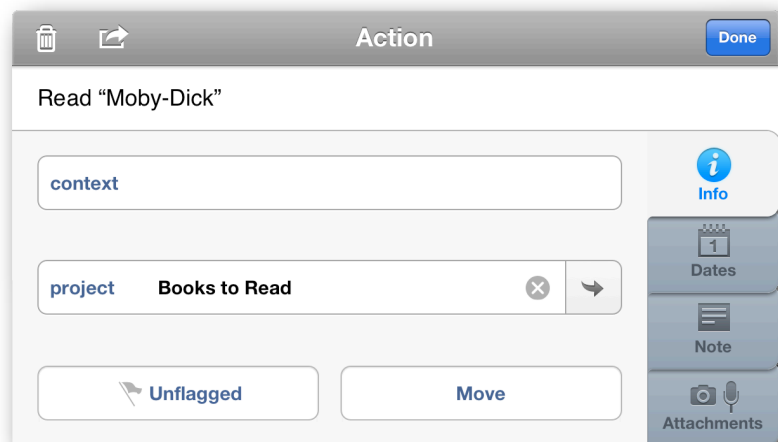


Note: This is an easy way for you to find all of the action items you've recently added to OmniFocus.

To create a new Context, tap one of the action items to reveal a popover with more information, called the Editor. You'll notice four tabs along the right side of the action item:

Info, **Dates**, **Note**, and **Attachments** (we'll explain

those in greater detail later). What you want here, though, is the **Info** tab.



Because it's highly likely that you'll want to add other books to the "Books to Read" project, you should try to come up with something that's particular to these items so you can sort them apart from other books you want to read. For example, you could create contexts for where you plan to get these books, such as "Library," "Bookstore," or "Order from Amazon".

The key here is to think in terms of accomplishing your goals, and since you probably only want to read these books once, your best option is to give them a



context of “Library” as that’s where you can pick up copy to read at your leisure. Now when you tap Contexts in the sidebar, you’ll see that the three books you want to read are grouped together under a Library context. This lets you quickly find similar action items that could be in different projects (or your Inbox).

So remember:

- **Action items** are the things you want to do.
- **Projects** are collections of related action items.
- **Contexts** apply to similar action items that could reside in different projects or your Inbox.

Now that you have a firm grasp of the basics, let’s dive into OmniFocus a little deeper.

OmniFocus Up Close

Adding items to the Inbox, processing them into actions and projects is just the beginning of how you can use OmniFocus to enhance your organization and productivity.

With OmniFocus you can **Flag** priority items and **attach** notes, images, audio clips and more to the tasks you're working on. Add start and due dates for **scheduling**, and then compare with the Calendar app all from within OmniFocus. Pair your contexts with **map locations** and receive alerts when you're nearby, and set up OmniFocus to work with **Siri** on your iPad or iPad mini to add Inbox items when your hands are busy doing something else.

The Inbox: A Launchpad For Productivity

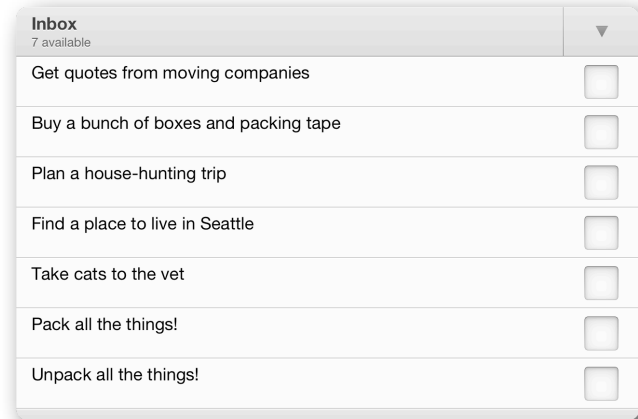
OmniFocus helps you accomplish your goals, and cataloging all the things you want to do is the first step in this process. Luckily, the **Inbox** is here to help!

When you first launch OmniFocus for iPad, you'll notice that there are a number of items already in your Inbox, waiting for review. This is our way of helping you get acquainted with OmniFocus. More importantly, they illustrate the function of the Inbox as the place where you'll start building your own unique set of tasks, goals, and madcap schemes.



Whether you need to pick up some cat snacks from the pet store on the way home from work, organize everything you need to do for your upcoming move to Seattle, or detail your plans to colonize Mars using that rocket ship you've built in your backyard, the Inbox is the first place to go in OmniFocus to help get you on task. Simply tap **+** in the toolbar to start the brainstorm ball rolling and experiment with adding new items right away.

The tasks you add to your Inbox can be large or small; the idea at this stage is to get them out of your head and into OmniFocus where you can organize them at your leisure. The Inbox is the catch-all place to deposit absolutely every goal that's been on your mind, and is subsequently the place to most easily add new tasks and to-dos on the fly.



An item living in your Inbox means that it hasn't been assigned to a specific project. You can work directly out of the Inbox, checking off items as you complete them, or take them on the next step in their progression into the OmniFocus system—assigning them as Actions, Projects, or Contexts.

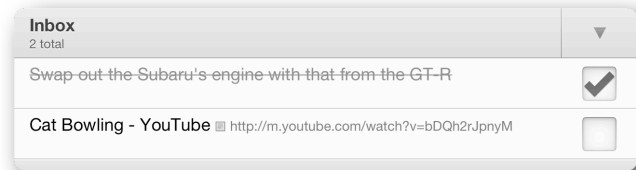
Actions: Atomic Accomplishments

Once you have a massive list of to-dos in your Inbox it may feel a bit daunting to tackle them all. A key part of working with OmniFocus is breaking down and organizing all the things you want to accomplish, leaving you feeling fully in control.

You can throw any stray thought in your Inbox. Some of these items might get completed right there in the Inbox. It might be more efficient to just change the workshop lightbulb than to move the “Change workshop lightbulb” action to the “Household Chores” project and the “Home” context and coax yourself to do this chore later. Other items are worth carefully clarifying and categorizing so that you have all the information you need at hand when you're in a particular context or focusing on completing a particular project.

Note: Only context-based perspectives can be synced from OmniFocus for Mac to OmniFocus for iPad or iPhone.

Most Inbox items you create ultimately end up as actions. This happens when you decide that an item is part of a larger goal—a Project—and you file it away with similar to-



dos (more on this in the [Projects](#) and [Contexts](#) sections). Each action has a checkbox for marking it complete; when you check an item as completed, the action item is stricken through.

Once you've assigned an Inbox item to a project, it becomes an action item that you can see in the **Projects** or **Contexts** views, or from your any context-based **Perspectives** you've synced to your iPad from your Mac. Beneath the action title is an indication of the assigned project when you're in the Contexts view, and the assigned context when you're in the Projects view.

Providing More Detail to Your Actions

To edit the details of an action, just tap its name. Details that can be set include the action's project, context, start and due dates, and whether the action is scheduled to repeat.

You can enrich the information you include with an action by adding file attachments such as images and audio recordings. You'll find more information about these in [Adding Attachments](#).

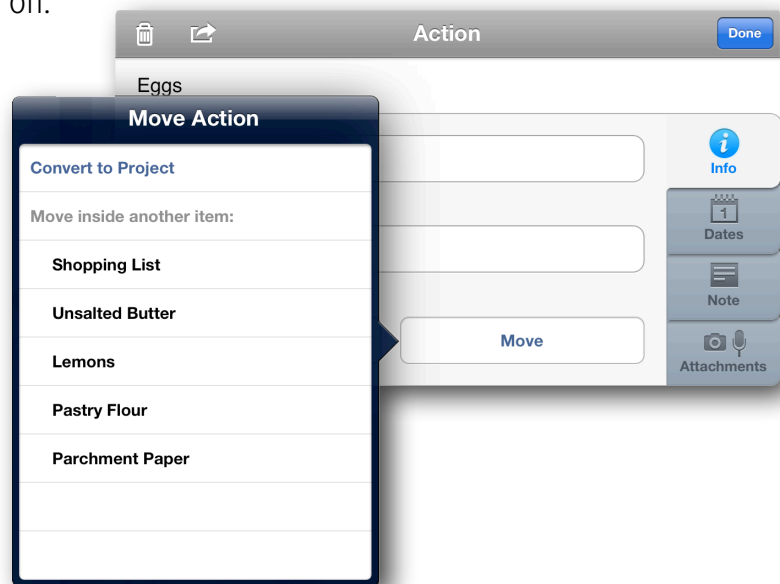
Creating Action Groups

No, we're not talking about banding together the *Super Friends* with *The Avengers* (besides, that'd never happen), we're talking about grouping actions together. Action Groups give you

the ability to add more depth to the way actions are organized, whether they're part of a project or a bunch of one-off items that somehow relate to each other.

An example would be a shopping list to make that lemon meringue cake that everyone's been asking for. You start by creating a "Shopping List" item, and then create a series of items for the ingredients you know you need to pick up: eggs, unsalted butter, lemons, pastry flour, and so on.

One by one, open each ingredient "item" and in the Info tab, tap **Move**. In the popup, you will see a section that says, "Move inside another item:"; this is the way you create Action Groups. Just select Shopping List from the popup, and then tap **Done**. When you've finished, all



of the ingredients you need are indented underneath the Shopping List item.

You could take this a step further by moving some of the ingredients into each other; for example, one nested group for the ingredients you need to make the cake, one for the filling, and another for the icing.



Recurring Action Items

Some actions occur on a regular basis. Instead of creating a new action every time you need to take out the recycling, you can set that task up so that you're reminded every Thursday night to put the recycling bins by the road for pickup Friday morning.

Repeating actions can occur regularly—every few hours, days, weeks, or months—based on when the action item was first scheduled, or rescheduled to start (or be due again) based on a set time after you've mark it completed.

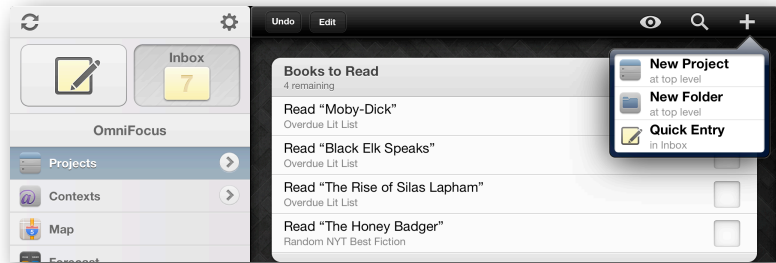
Actions that repeat only on specific days of the week can be scheduled by choosing **every x weeks** and selecting the weekdays that apply from the list that appears below. For more information on scheduling tasks, see [Scheduling Actions and Projects](#).

Projects: In Pursuit of a Goal

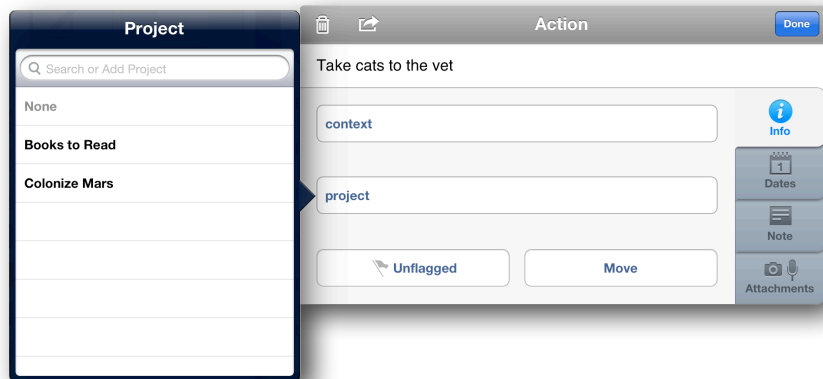
As you work through your Inbox, some of the items will stand out as larger in scope than a simple action. Planning a vacation or move, for example, are the sort of things that could benefit from being broken down into more manageable parts. Projects to the rescue!

A **Project** is a to-do item that incorporates multiple parts. Projects are typically more complex than actions, and can incorporate several related actions within them. Projects can be as elaborate as you need them to be, and you can arrange actions both sequentially and hierarchically. There are three ways to create a new project:

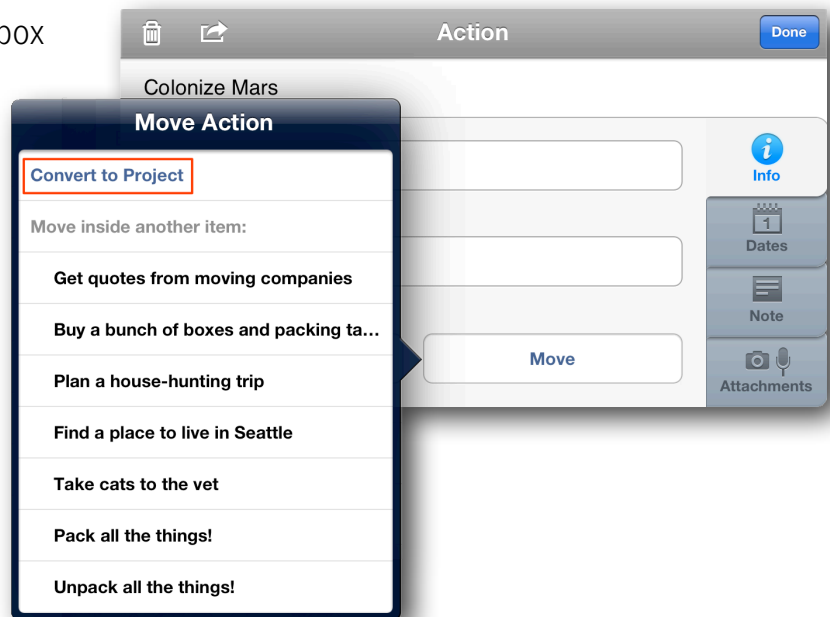
- The easiest way to add a new project in OmniFocus is to select Projects in the sidebar, and then tap **Plus**  in the upper-right corner of the content area. Tap **New Project** in the popup menu that appears, and then fill in the project details in the Project editor.



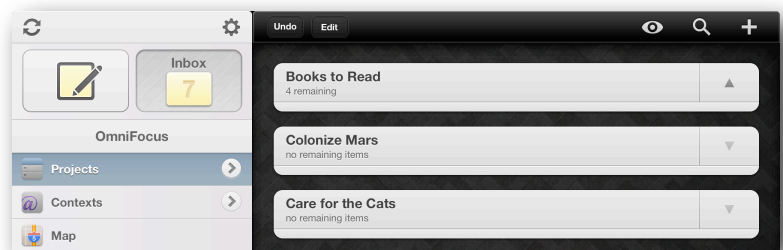
- In the process of clearing out your Inbox, items you decide are actions will usually be assigned to projects to get them filed away. You can add an Inbox item to an existing project, or create a new project to add it to.




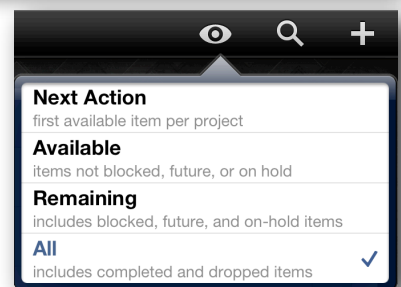
- If you decide one of your Inbox items is better classified as a project than as an action, you can designate it as a project by tapping it to bring up the edit screen. Next, tap **Move**, but instead of moving the action inside another item (which would create an *Action Group*), select **Convert to Project** from the popup menu.



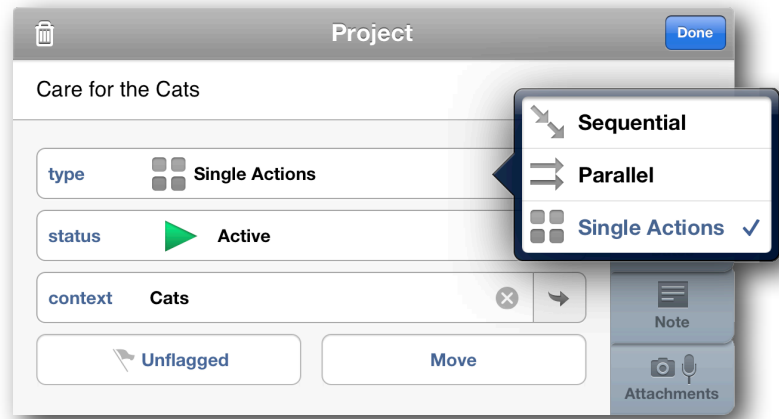
The **Projects** view shows your database hierarchically. You can create projects and folders to keep your goals organized.



Whether you see completed, on-hold, dropped, or stalled projects here depends on how you have adjusted your view options. To see the contents of a project or folder, just tap it. To view a list of your actions (filtered based on your **View Options** ) , tap **All** at the top of your project list.

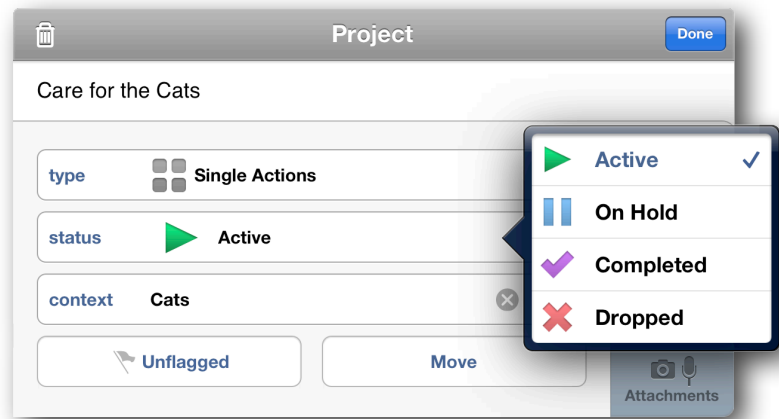


As with actions, you can provide more detail to a project by adding attachments and completion deadlines. Projects can be configured to change the availability of their actions as **Sequential**, **Parallel**, or as



Single Actions. Sequential projects have actions that may only be completed in the order listed, while parallel can be completed in any order. Single actions are similar to parallel projects, but are intended for ongoing, rotating lists of tasks rather than projects with a defined scope of completion.

Projects can also be monitored based on their status (**Active**, **On Hold**, **Completed**, or **Dropped**).



You can change a project's status here, or when you're conducting a weekly review of your projects; see [Reviewing Your Progress](#)

for more information on project review in OmniFocus.

To edit the properties of a project, select **Projects** in the sidebar, and then tap the project you'd like to customize.

Creating Subprojects with Action Groups

Action groups can also be used to create a project within a project—a *subproject*. If you find that you have an action item that requires many steps of its own, you could split that action

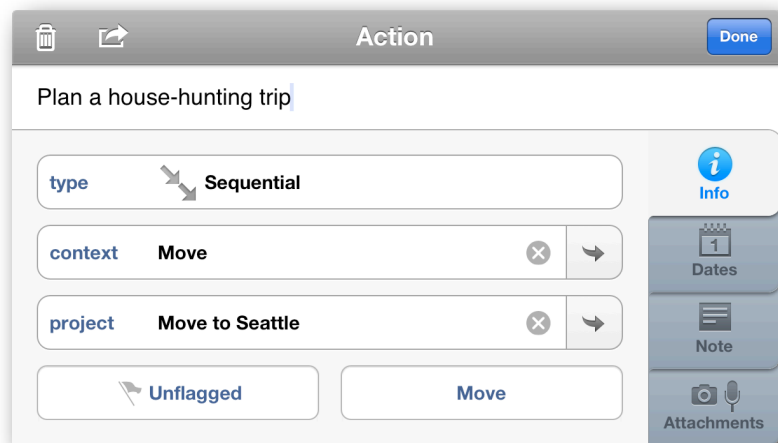
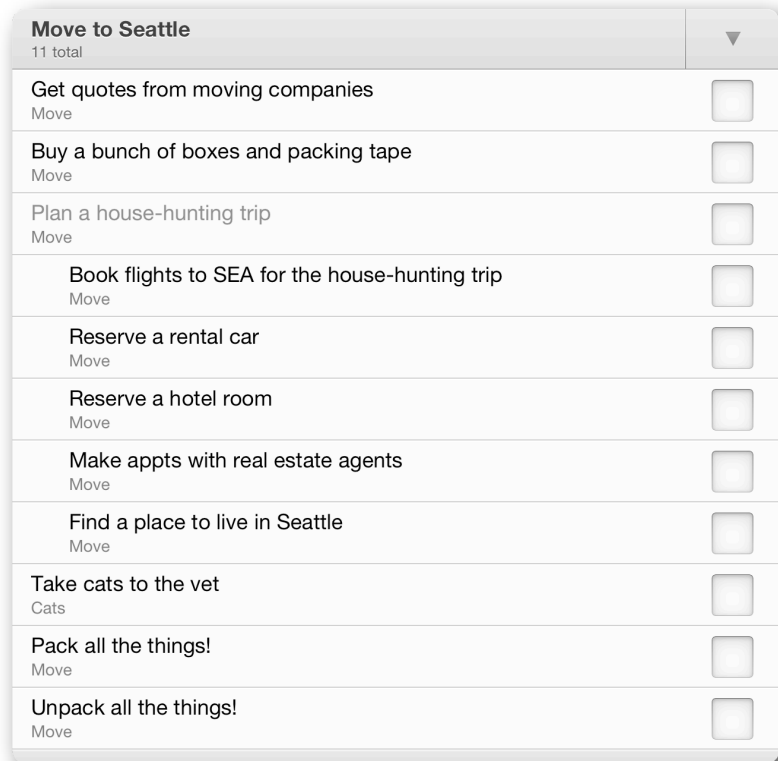
item off as a separate project.

However, a better solution would be to leave the action item in its current project, and then move the related tasks underneath.

For example, when planning your move to Seattle, you realize that you need to make a house-hunting trip to find a place to live. You need to book your flights, rent a car, reserve a hotel room, and make appointments

with real estate agents to find an apartment or that dream house in Alki Beach. You can create these tasks one by one, and while in the editor, tap **Move** and then move the action into the “Plan a house-hunting trip” action.

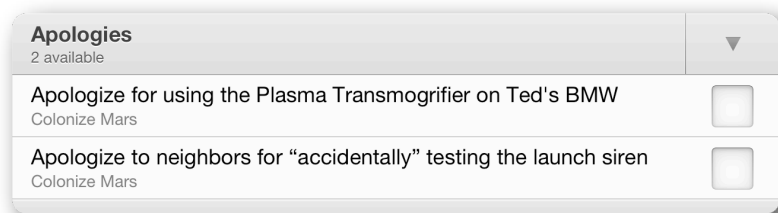
Once you’ve created that subproject, you can change the **type** from Parallel to Sequential so that the next task only becomes available when you tick off the previous task. And when you’ve completed the final action item for that subproject, the parent action item can be checked off, too.



Contexts: Situational Efficiency

You're tweaking the rocket engine you've been building in the backyard, and you're stuck because you need a specific wrench. To make matters worse, the light in your workshop went out when you went searching for that wrench. You've added the wrench as an action in your Colonize Mars project, and you just added the lightbulb to your Household Errands project. But what's to keep you from forgetting one or the other the next time you go to the hardware store? The answer is that while they're part of different projects, you can associate these items with a **Context**.

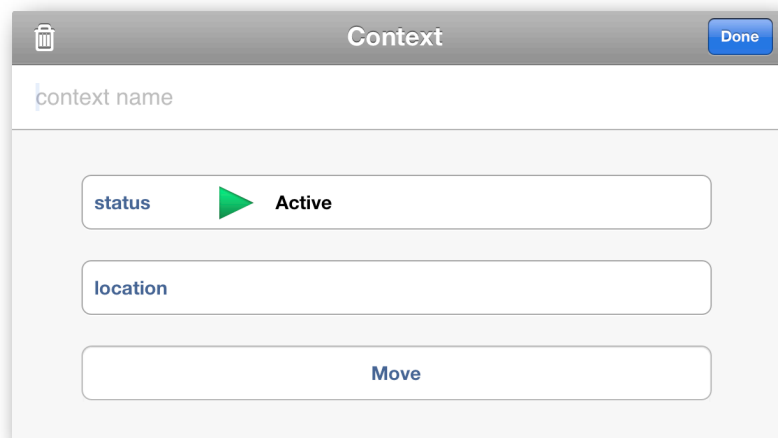
A **context** can be anything you want, such as a place (the hardware store or work), a person (you, your boss, or a coworker), or a thing (your trusty MacBook Pro or a torque wrench). When you have multiple projects in the works simultaneously, contexts



help you organize actions that have something in common, regardless of which project they're in. Contexts are supremely adaptable to your productivity style; whether you file tasks into "busy work," "creative work" and "number-crunching" or based purely on location, the way you choose contexts is a unique reflection of how you work best.

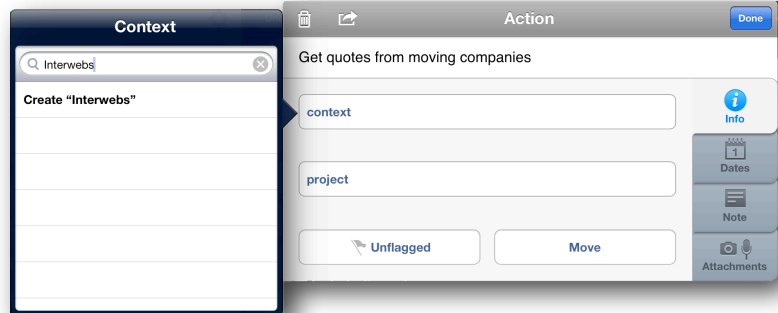
Contexts can be assigned in two ways:

- Tap **Contexts** in the sidebar, and then tap **+** in the toolbar. In the popup menu that appears, tap **New Context** and the Context editor appears. Here you can



assign a name to the context, set its status (Active, On Hold, or Dropped), and choose a location (see [Location Reminders](#) for more advanced context options) for where you need to do that ultra-important thing.

- While editing an Inbox item or action in one of your projects, you can choose a context for it or create a new context by entering a unique name in the text field. After entering the name for the new context, don't forget to tap **Create “(context name)”** just below the text field to add this context to your list.

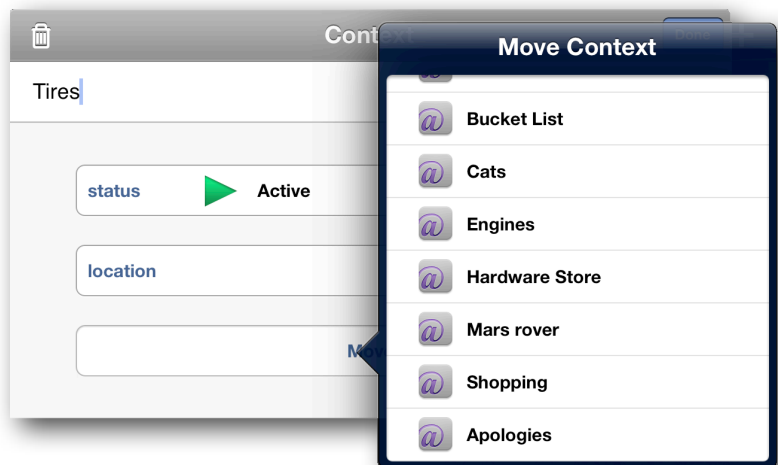


As you can see, contexts give you an amazing amount of control over the depth of information you can add to action items and projects. We have preloaded OmniFocus with a bunch of contexts that we think you'll most likely need, and the new contexts you create show up at the bottom of the list. But let's say that you don't need some of the preset contexts, or that you want to move your new contexts to the top of the list. Alrighty, let's do that next.

Nesting Contexts

By default, any new contexts you create are added at the top level of the context list. However, if you tap **Move** when creating or viewing a context, you can create nested contexts.

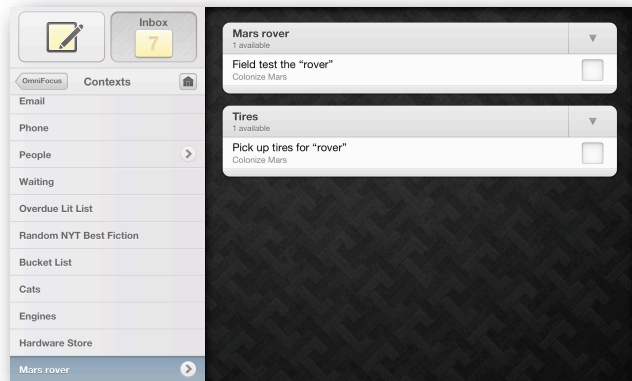
For example, if you know that you need to pick up tires for the Mars rover before you can





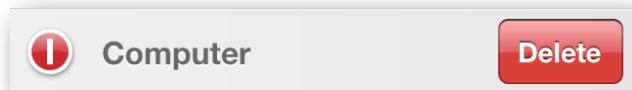
conduct that field test, you could create a Tires context, tap **Move**, and then select Mars rover from the menu that appears. There's no limit to the amount of context nesting you can do, which means you have the ability to give your action items fine-grained detail about where or how you need to do something.

Managing Your Contexts

The contexts screen separates your actions by the contexts you've assigned to them, and all of the actions without a context show up at the top in a **No Context** group. If you tap the arrow to the right of Contexts in the sidebar, the sidebar changes to reveal a list of all your contexts. When you're ready to get some work done, this is a good place to see only the things that are relevant to a particular context.




To delete or move contexts around within the sidebar, tap **Edit** in the content area's toolbar. To the left of the contexts, you'll see a deletion switch ; and on the right, you'll see a reordering handle . If you tap the deletion switch, you won't delete the item right away. Instead, a **Delete** button appears to the right where the reordering handle was. Tap **Delete** to remove the context from your list.



To change the order of the contexts in your sidebar, just press on the reordering handle and drag the context up or down in the list. As you move that context around, you'll notice that the other contexts move out of the way so you can drop the context where you would like it to be.

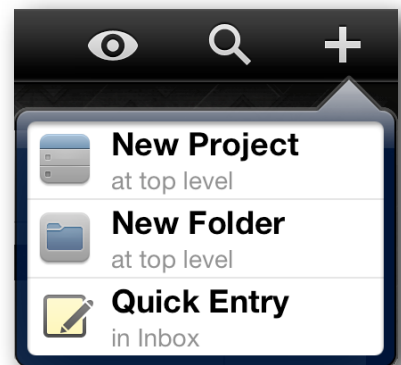
When you've finished making changes to your contexts list, tap **Done** in the upper-right corner of the content area to save your changes.


By default, actions in context lists appear in the same order they are listed in their projects. Tap **View Options**  to sort by flagged items and due dates, with flagged items shown first and then items by due date from soonest to latest.

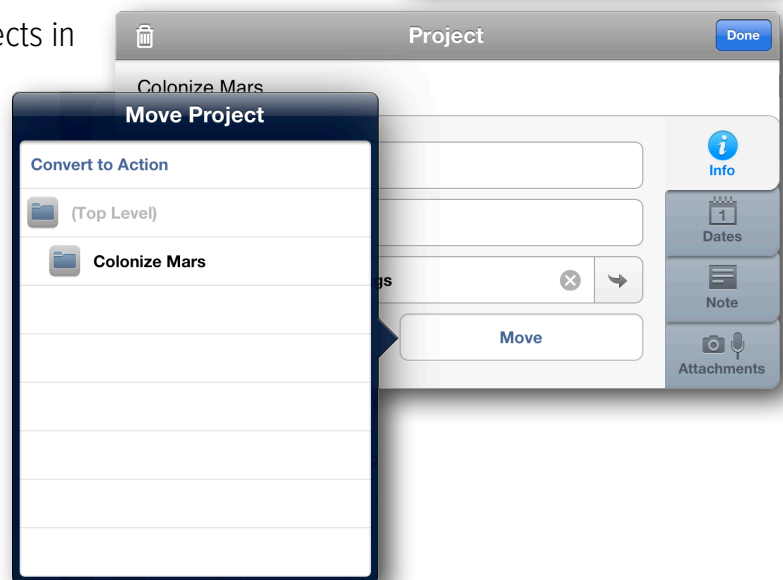
Note: If you only assign a context to an Inbox item, it appears in the *Miscellaneous* project list until you assign the action item to a specific project.

Grouping Projects with Folders


Occasionally, you'll find that some of your projects are similar enough that you want to keep them together so you can look at everything in one place. These projects might have different goals, timelines, or objectives, but they contribute to the greater whole. For projects such as this, you can use Folders in OmniFocus to group multiple projects together.

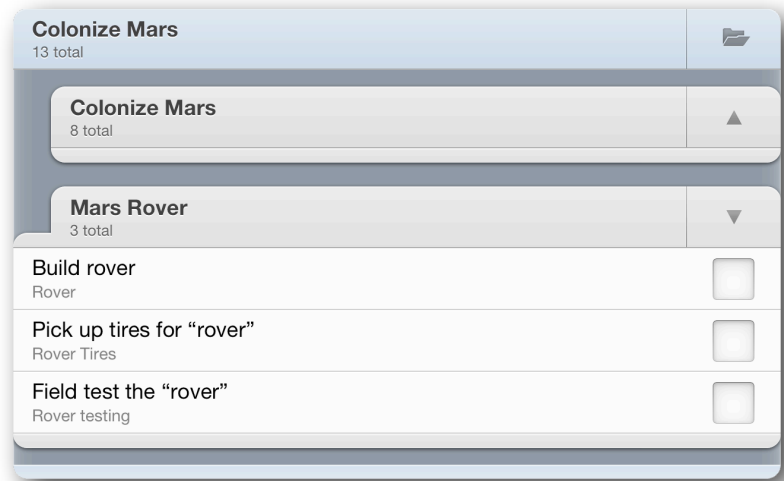


From the Projects screen (tap Projects in the sidebar), you can create a project folder by tapping  in the content area's toolbar and selecting **New Folder** from the popup. To move a project into a folder, tap on the project (not its actions) to bring up the project's details, and then tap the Move button. Then all you need to do



is select the folder that you want the project to be in, and then tap Done on the project info window to save the changes.

You'll also notice that folders look a little different than a regular project. While your projects still retain the standard collapsible gray wrapper, any folders you create take on a light blue color. To open a folder and view the projects it contains, just tap the folder icon  at right.



Power Tip

If you tap and hold down on the disclosure triangle (or the folder icon) in the upper-right corner of your nested actions, projects, or contexts, you'll get a popup that gives you the option to **Expand All** or **Collapse All**. Try it, you'll like it.



Scheduling Actions and Projects

When you have tasks to complete by a deadline, OmniFocus can help weave actions and projects into your day.

By design, the items you collect in OmniFocus aren't the same sort of thing as events or agenda items you'd list on a calendar. You'd generally use a calendar for anything that takes place at a specific time: meetings, dentist appointments, and dinner reservations would do best in your calendar because you can't act on them until that moment.

Setting Start and Due Dates

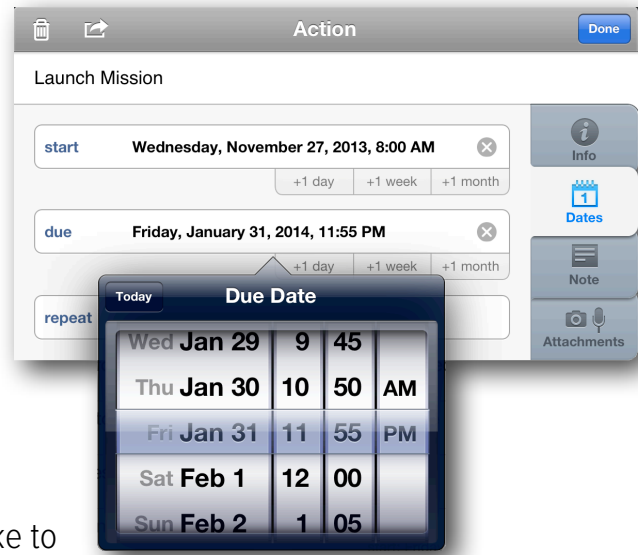
Actions and projects can have due dates and start dates with a less-specific notion of time constraint than items in your calendar. A **start date** is the date when an action or project becomes available; until that date arrives, the item remains grayed out. A **due date** is the date when an action or project needs to be completed.


To set a **start** or **due date**, tap the item to edit it, then choose **start** or **due**. From there, you can enter a specific date or use the buttons to add a day, a week, or a month. If you have an existing date set, you can use these buttons to push it out from the date assigned.

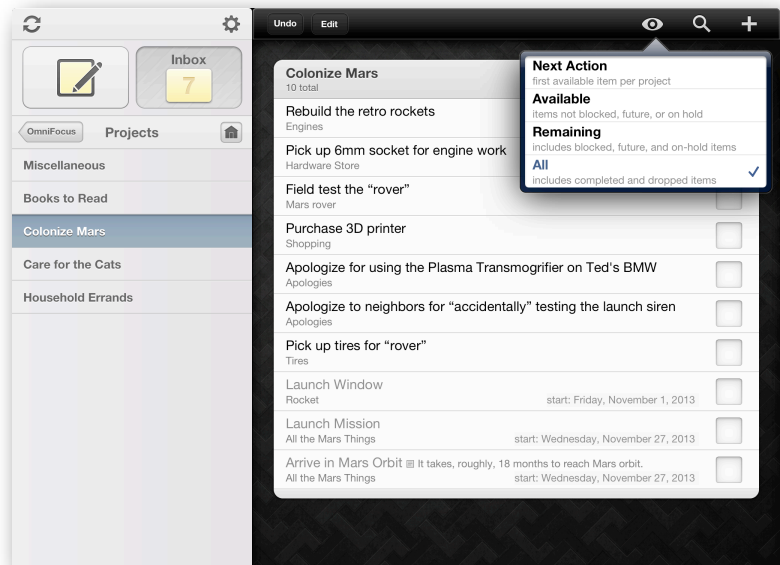
For example, to make progress on your Colonize Mars project, you need to know when Mars is in opposition so you can schedule a date during the launch window. A quick online search shows that the next window is from November 2013 to January 2014, so you decide to launch your mission on November 27 to commemorate your brother's birthday. To keep track of this, you might create a Launch Window action with a start date of November 1, 2013 and a due date of January 31, 2014.




While you're at it, you also create a Launch Mission action with a start date of November 27, 2013 and a due date of January 31, 2014. So why not a just a due date for Launch Mission? Well, because weather conditions for a launch could be bad that day, or there could be some sort of mechanical failure that delays the launch. Regardless, that is the day you know you'd like to launch the rocket, and if that date passes, OmniFocus will remind you until you're past the due date and off to explore the red planet.

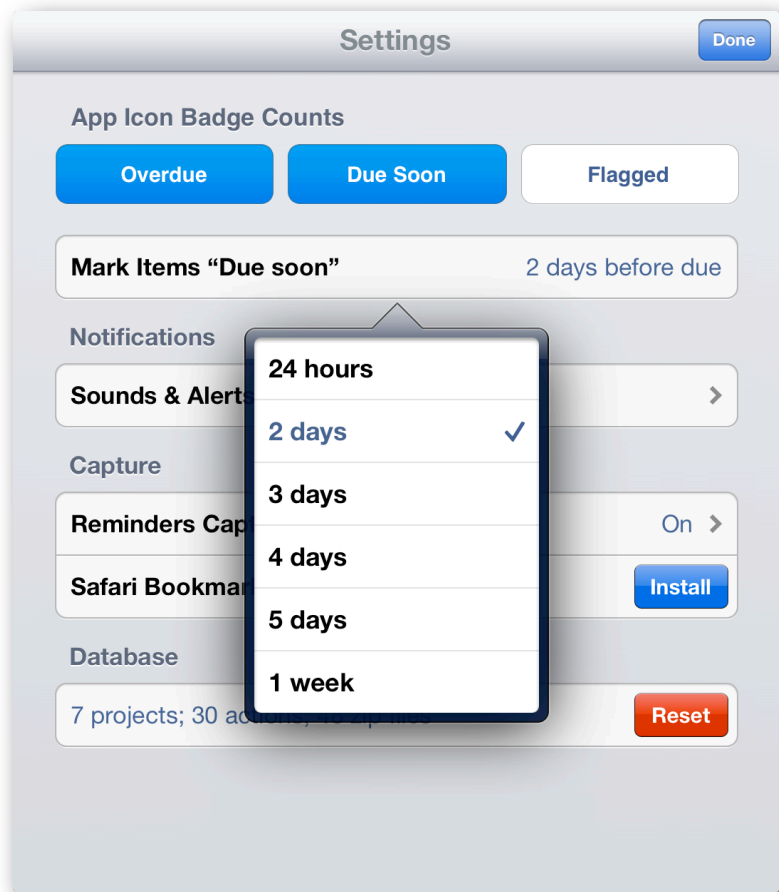


Action items that have not reached their start date are not considered available so they won't clutter your view until you can work on them. To see all of the actions in the Colonize Mars project, start by tapping Projects in the sidebar, then tap Colonize Mars. If you don't see everything there, tap  and then select



Remaining from the popup menu (tapping **All** shows completed and dropped items). Action items with a future start date are in gray. When the start date arrives, the action item's text appears in black to let you know it is available and the clock is ticking.

When due dates are approaching, OmniFocus considers actions and projects to be **Due soon** and represents them as such by changing their color from black to orange and adding them to the **Forecast** (see *Forecast View*). By default, actions become “due soon” two days before the specified due date. To change this, tap **Settings** , and then tap **Mark Items “Due soon”** and select another timeframe from the popup.



Actions that have reached their due date are styled in red. This serves as a warning to you that you should either get that task done, or reschedule its due date. In the case of the Mars mission, if you miss the launch window, you’ll have to wait another 24 months for your next opportunity.

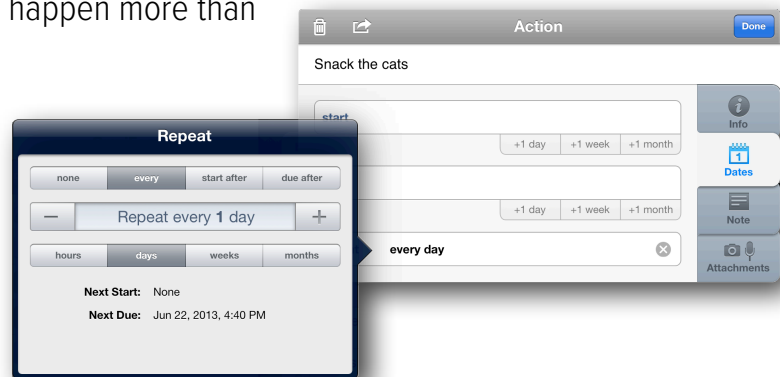
Repeating Projects and Actions

Some projects and actions need to happen more than once. Tap the item in question and choose **Repeat**. Then, pick a repeat type and interval.

Choose **every** in the top row of buttons to create an item that repeats at the same interval,

regardless of when you complete the action. For example, if you wanted to remind yourself to give your cats a snack every day, you could set the action to **Repeat every 1 day**.

However, if you forget, the cats will surely remind you if snacking becomes part of their daily routine.

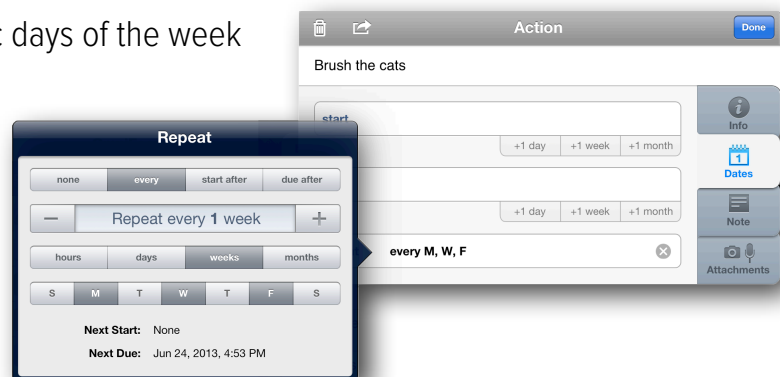


Actions that repeat only on specific days of the week can be scheduled by choosing

repeat > every > weeks, and then selecting the weekdays that apply. For example, if you brush the cats on Mondays,

Wednesdays, and Fridays you

can set a repeat of that action every week (**every M, W, F**) on just those days.



Setting Dependencies

Depending on the task, you may find the need to configure action items that recur at regular intervals. Choose the **start after** section to create a repeating action whose start date is dependent upon the completion date of the action. This is best used when you don't want the action to be available again until the selected interval has passed. For example, if you

get your hair cut every three weeks, you could set the action to repeat every three weeks. Even if you're a little late for your next trimming, the next time you need to go is still three weeks after your last visit. The action is given a start date in the future and is considered unavailable until that time.

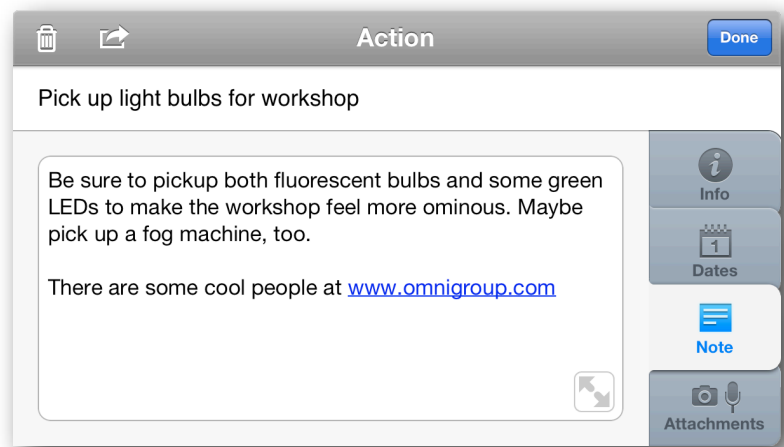
Choose the **due after** section to create a repeating action whose due date is dependent upon the completion date of the action. This is best used when it's important to have a task completed by the time a set interval has elapsed. For example, if you want to refill a prescription when the current batch runs out, you could set the action as due to repeat after a number of days corresponding to your dosage. Unlike the pet store example, this is a repeated action that must be completed within the amount of time you've allotted.

Of course, choose **none** (the default) to specify that an action does not repeat.

Providing More Detail with Notes

When you're working on a project or trying to accomplish some task, you often need a place to keep track of all the finer details; meeting notes, specifics about items you need to buy, or websites you need to visit for inspiration. Rather than writing all of these down on stickies, you can enter them in the **Note** tab that's associated with projects and actions.

There's no limit to the amount of information you can enter in the



Note field. Best of all, when you type in a URL (such as <http://www.omnigroup.com> or www.omnigroup.com), the URLs are converted to live links which you can tap and open within OmniFocus.

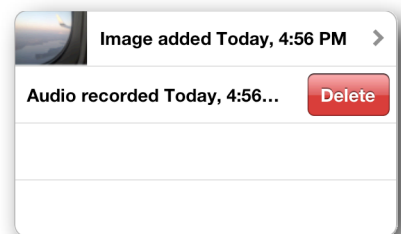
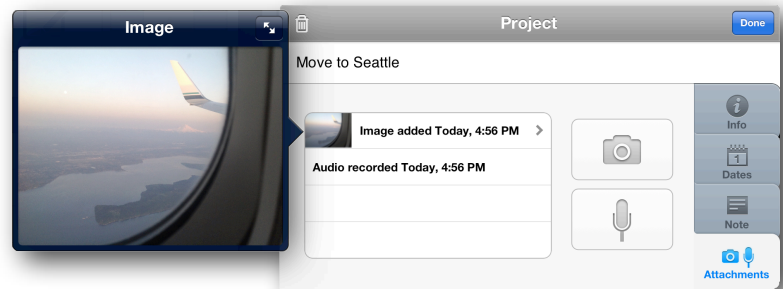
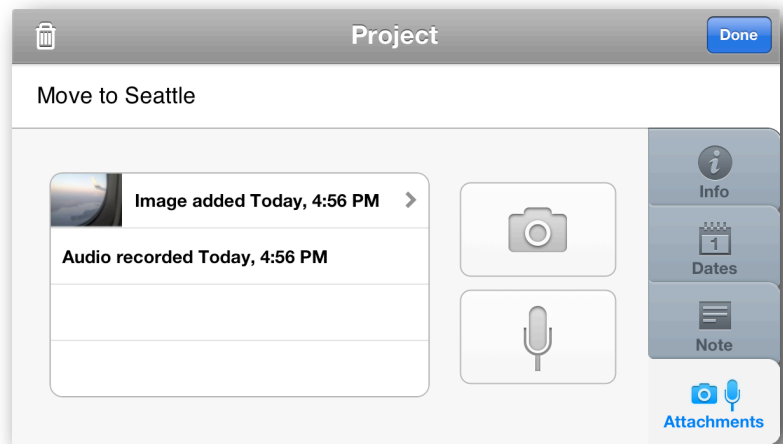
Adding Attachments

Images and audio can be added to an **action** or **project** as attachments, which are located at the bottom of the action or project screen when it is open for editing.

You can attach images to a project or action item by tapping the **camera** icon, which gives you the option to either take a picture or to choose an image from one of your photo albums.

Audio attachments are added by tapping the **microphone** button. The green bar displays the volume level of the audio being recorded.

Attachments can be viewed (or listened to) by tapping on the title of the audio clip or image. Delete attachments by swiping left or right on the attachment and then press **Delete**. And if you delete something by mistake, don't forget that you can always tap **Undo**.



Warning: Large attachments will dramatically slow down sync times, especially if you are on a slow (or cellular) network.

Syncing Attachments with OmniFocus for Mac

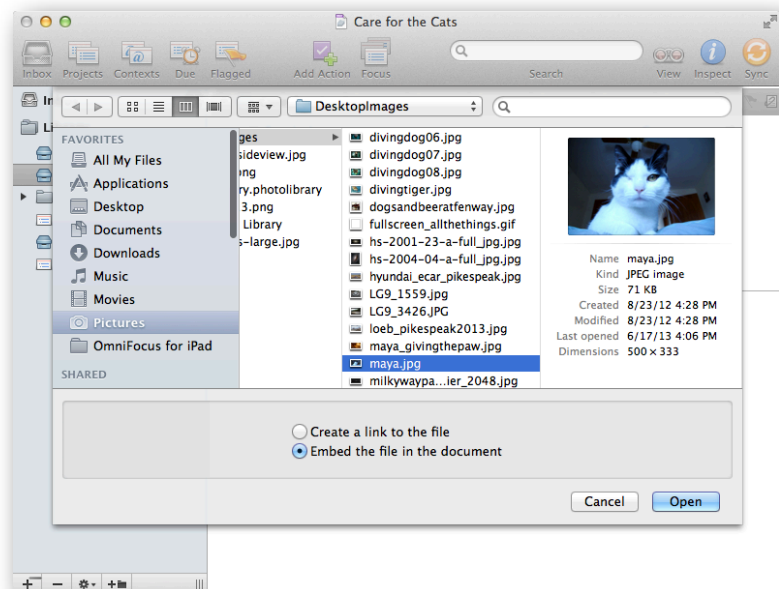
Due to the file formats supported on iOS, not all attachments added in OmniFocus for Mac are visible in OmniFocus for iPad or iPhone. If you are using OmniFocus on your Mac there are two ways to ensure attachments make it across to your iPad or iPhone. The important theme here is to **embed** the attachments, as simply *linking* to them won't work.

Note: The reason why linking to attached files won't work is because filesystem links on OS X are just that—they are *links to files on that system*. When you sync OmniFocus for Mac, those filesystem links no longer work because the iPad's filesystem is different from the one on your Mac.

However, when you embed an attachment and sync OmniFocus, that file is copied into your OmniFocus database and is stored on the sync server where it can easily be pulled down on either platform.

Option 1: Attaching Files from the Edit Menu

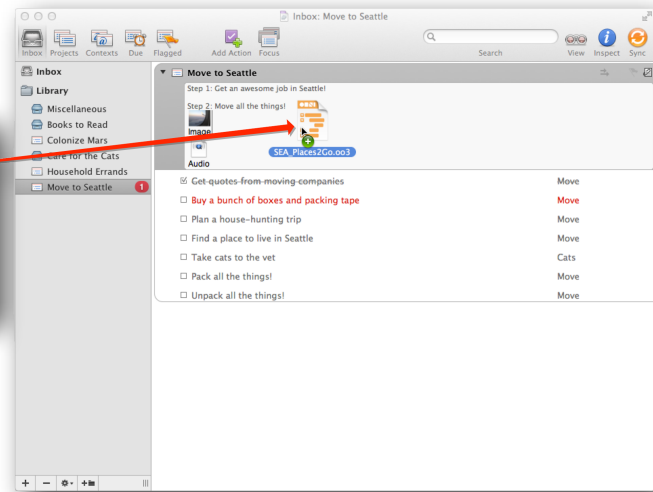
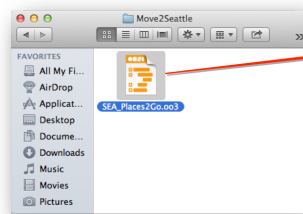
With OmniFocus open on your Mac, select the action item or project to which you'd like to attach something, and then select **Edit > Attach File** in the menu bar. In the Open sheet that slides down, select the file you would like to attach, and then make sure you select the **Embed the file in the document** radio button *before* you click Open.






Warning: The **Create a link to the file** option is selected by default. If you accidentally hit Return or click Open before selecting the embed file option, you will need to delete the attachment and then start over.

Option 2: Attaching Files from the Finder

To attach a file from the Finder (it's the blue smiley-faced icon on the far left edge of the Dock on your Mac) you will need to



Option-drag the file from the Finder to your OmniFocus project. Place the Finder window next to the OmniFocus window, select the file you want to attach by clicking on it, and then hold down the Option key while pressing the mouse button. You'll notice that when you press the Option key, the mouse pointer changes to a green circle with a plus sign inside—just like this . This is exactly what you want! Now drag that file into your OmniFocus project, let go of the mouse button, and the file is now attached.

After you have attached the file in OmniFocus on your Mac, be sure to click **Sync**  in the toolbar. Then, when you switch to OmniFocus for iPad, tap **Sync**  to bring the attachments over to your iPad.


Note: Your Mac supports all kinds of different file types, mainly because of the wide variety of apps that can run on OS X. Conversely, iOS doesn't support nearly as many file types by default. The rule of thumb to keep in mind is that *in most cases*, if you have compatible versions of an app on your Mac and iPad, you should be able to open those attachments in OmniFocus on either platform.

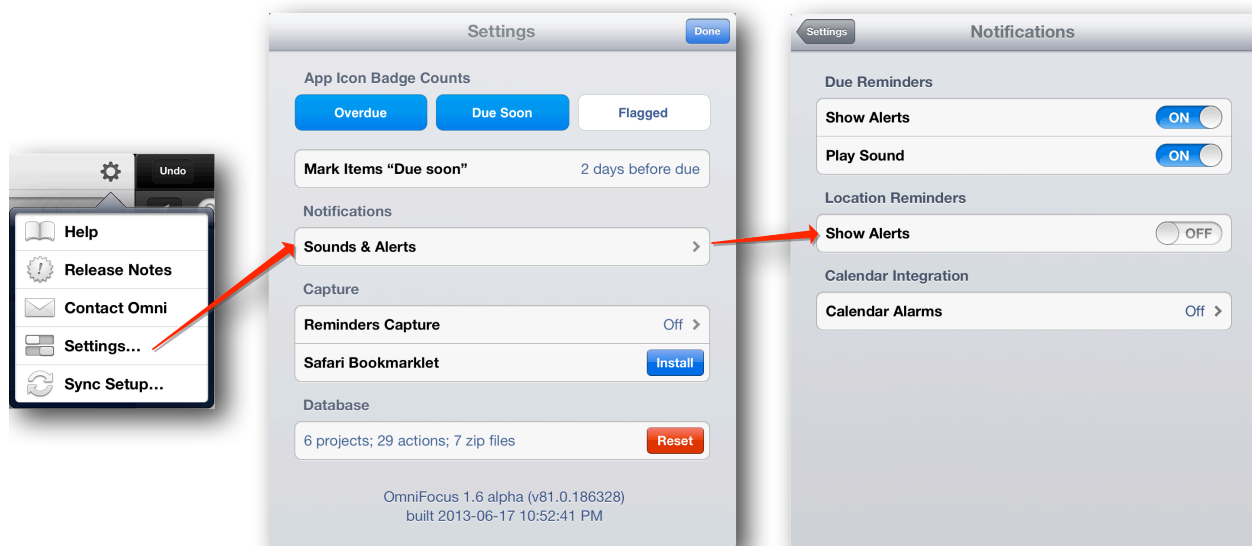
Location Reminders

Location reminders are handy for getting a little nudge when you are in the right area to complete an action. To use them, you'll need an iPad 4 or iPad mini (Wi-Fi or cellular) or later with iOS 6 or later installed. Accuracy is improved in all cases when a cellular network and GPS are available.

The underlying technology for location reminders on iOS is quirky; you can't quite count on them to occur perfectly every time you enter the specified area. (These location alerts use a less accurate and somewhat unreliable low power location monitoring, rather than the battery draining GPS services available in iOS.) The range of distances at which you might get an alert is pretty wide. If you leave an area and then enter it again within a short span of time, you might not get a second alert. And if you pass through an area quickly (such as while driving on the highway), you might not get an alert at all. So for now it is best to use this feature as an extra layer of occasional helpfulness, not a crucial part of your trusted system.

Turning on Notifications

Before you can use location reminders, the first thing you'll need to do is to turn them on in OmniFocus's settings. Tap  in the sidebar, and then choose **Settings** from the popup. Under **Notifications**, tap **Sounds & Alerts**, and then turn on **Show Alerts** by tapping the switch.



With notifications turned on, you can now set up locations for the contexts you use in OmniFocus.

Note: If you don't turn on notifications in the Settings pane, you won't be able to assign a notification to a context.

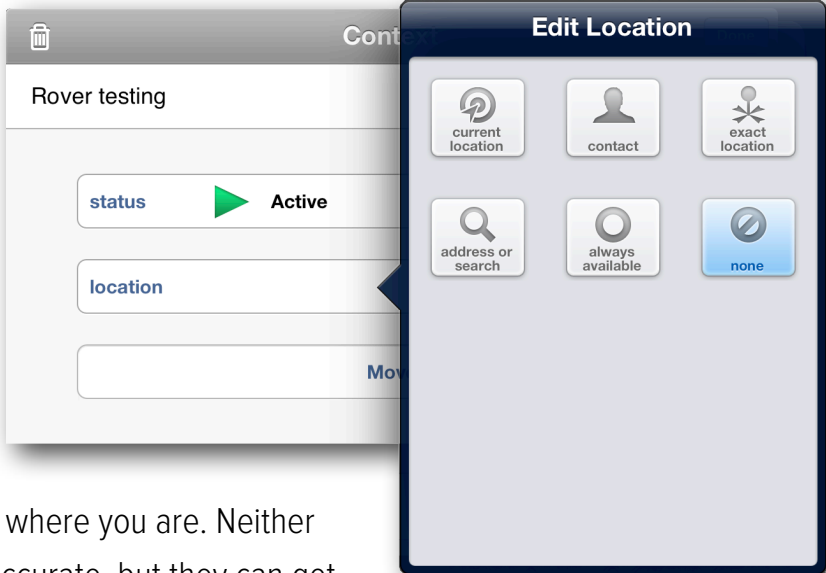
You'll also want to make sure that OmniFocus has permission to receive alerts on the iPad. On your iPad, launch the Settings app, and then select Notifications in its sidebar. In the "In Notification Center" section, look for and tap OmniFocus to turn on Notification Center alerts.

Giving a Context a Location

Your next order of business is to assign locations to your contexts. This makes it even easier for you to accomplish your goals when you're out running errands, or to remind yourself of where something needs to be done. With location alerts turned on, OmniFocus will ping you when you're near that location and bring that particular action item to the front so you can check it off your list.

- Set up location info on a context:

In the Contexts list, tap on a context, and then tap **location**. When specifying a location:

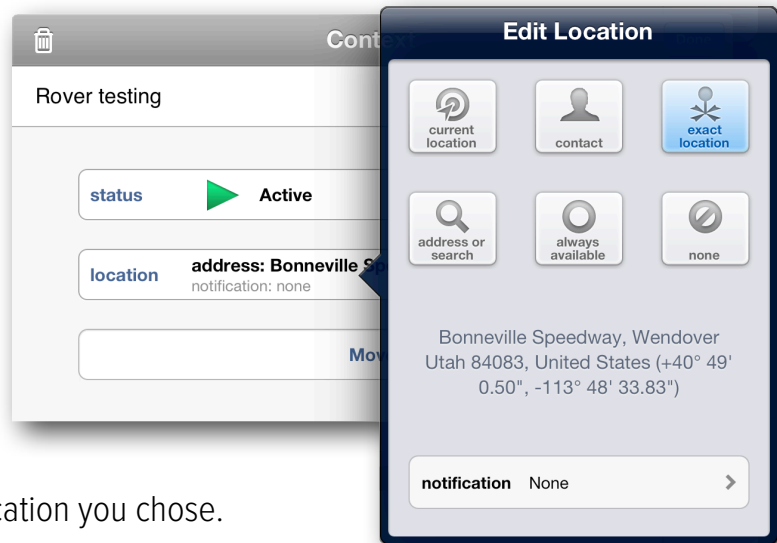


- **Current Location** uses Wi-Fi or cellular triangulation to pinpoint where you are. Neither method is 100 percent accurate, but they can get pretty darn close.
- **Contact** gives you the option to choose the address for a person or place that you’ve added to your contacts. If this is the first time you’ve opted to set a location from the Contacts app, an alert will pop up asking you to authorize OmniFocus to access your contacts.
- **Exact Location** lets you search for or select a location on the map.
- **Address or Search** gives you the option to enter an address (if known), or to do a keyword search. The keyword search option is particularly handy, for example, when you need to pick up something from a hardware store, but aren’t quite sure which one is closest to you. You can just type “Hardware” and then tap Search on the keyboard to choose a business near you. You can either assign the context an exact location that appears as a result of the search, or you can use the search itself.
- Finally, the **Always Available** location isn’t really a location—it just means that any context with this “location” are things that you can do anywhere, such as practicing your banjo (although, don’t try this on the bus during the morning commute).

Setting Notifications for a Location

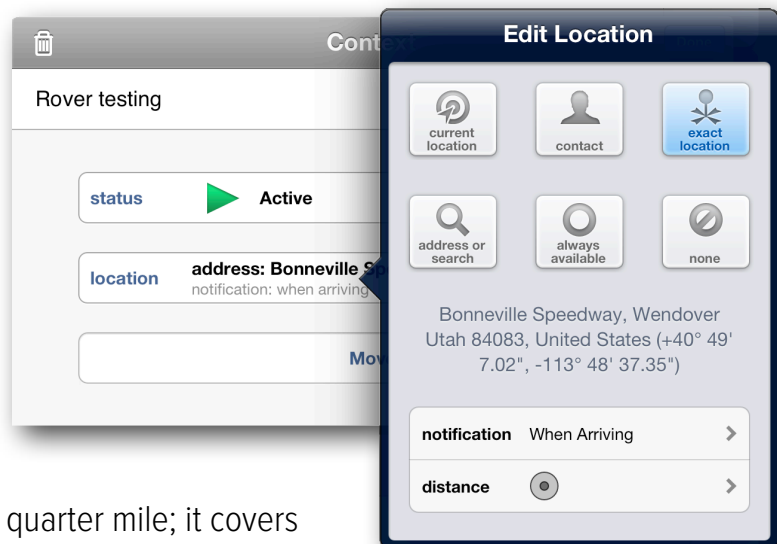
After you've set the location, you can finally set up a notification, and provide a distance alert for the context as well:

- To add a notification, tap **notification** on the location editing screen. You can choose to be notified when arriving or when leaving the location you chose.



When you go back to the location screen, you can choose a distance setting.

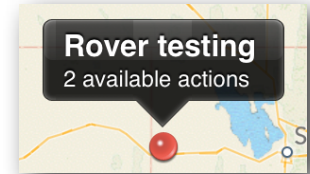
- Finally, choose a **distance**. The three distance options are very approximate. The small dot is about 200 meters or 650 feet; it covers about one city block and is useful for things such as coming home or leaving the office. The middle-sized circle is about 500 meters or about a quarter mile; it covers something such as a small neighborhood or park, and is useful for knowing when you are a few streets over from a certain store. The big circle is about 10 kilometers or 6.2 miles; it's useful for things such as a city you occasionally visit. But remember, the actual distance where you get your notification could be quite a bit different from these rough numbers.



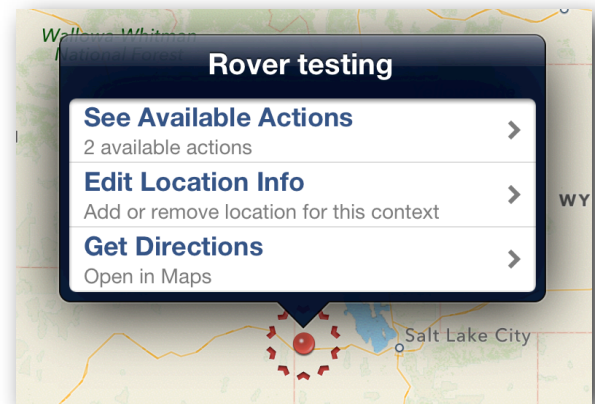
Putting Contexts, Locations, and Notifications to Work

Contexts with search-based locations do not display notifications; instead, choosing **Map** in the sidebar displays the results of searches you've defined that are close to your current location. This is useful when the most convenient way to accomplish a task could change based on your current location and timeframe.

However, if you have set a location that's far away, you can pinch on the map until you see a red location pin; tap the pin for additional options. You have the option to see the available actions for that location, to edit or remove the location from its associated context, or to get directions to the location based on your current location.

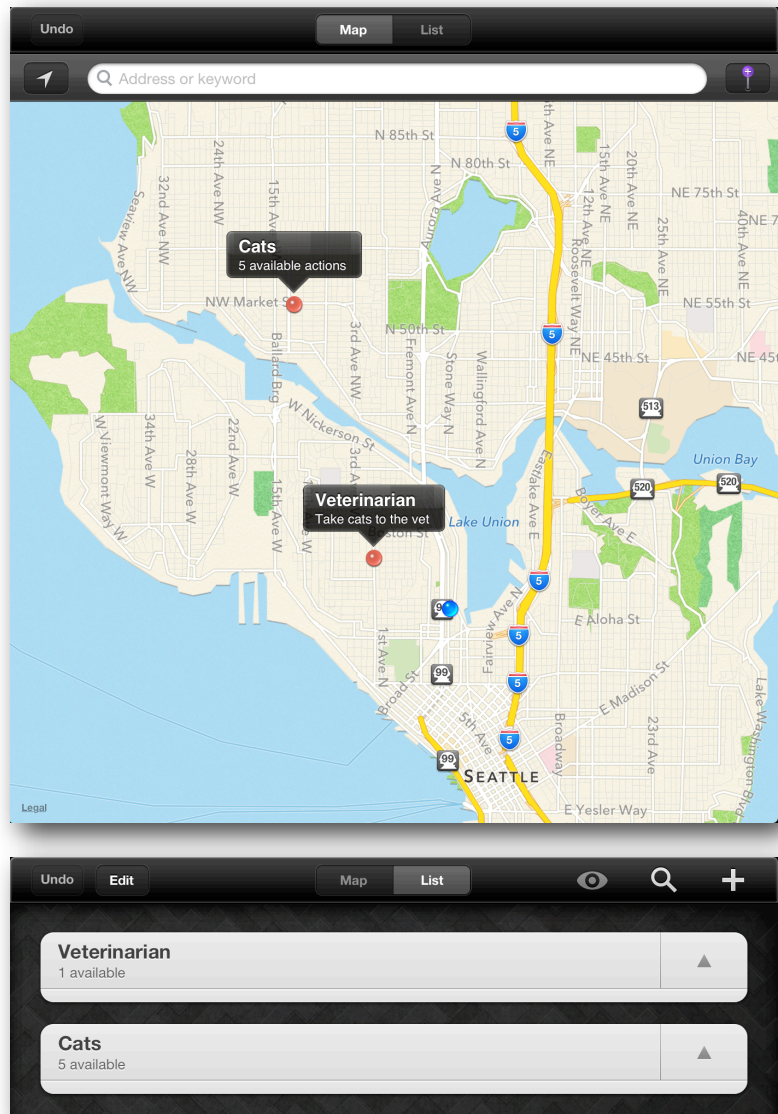


When you tap **Get Directions**, you are prompted to open the Maps app on your iPad. When you tap **Open in Maps**, the Maps app comes to the front and plots a course to the destination from your current location. To return to OmniFocus, double-tap your iPad's home button and select OmniFocus from the app switcher along the bottom of the iPad screen.



The **Map** screen is used to efficiently navigate to locations you've assigned to your contexts. Find stores nearby that match your criteria for a shopping trip, or set a reminder while in transit for the next time you're in this part of town.

The map displays information relevant to the contexts you've associated with locations. If you have set up location information for your contexts, OmniFocus looks for available actions in contexts that are nearby. You can see your actions on the map or a list (by order of proximity).

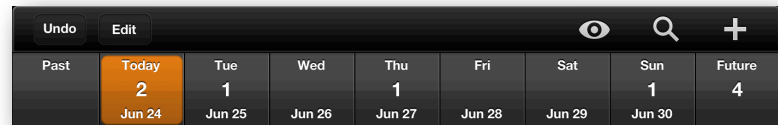
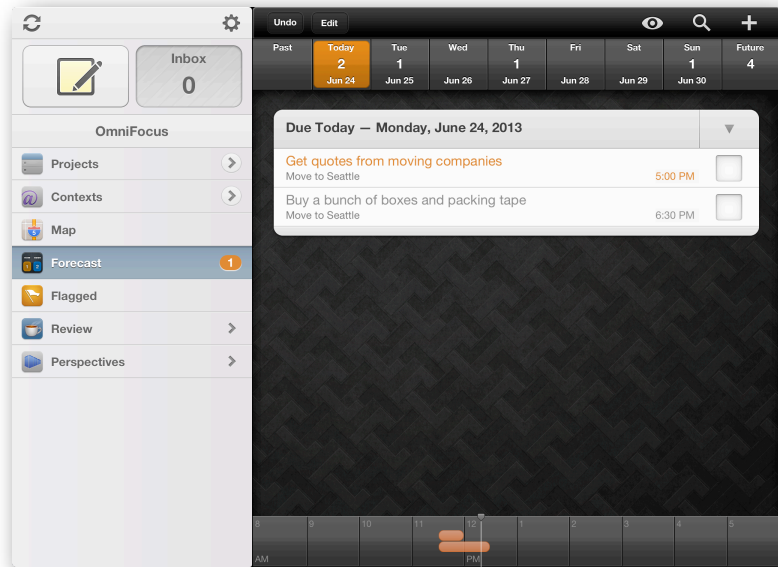


Forecast View


With **Forecast** view, you can monitor progress in your projects, check for upcoming due dates and schedule OmniFocus actions alongside important events in your Mac or iOS


Calendar. With the ability to check for past due tasks and look ahead to the future, you'll never miss a beat.

One way to think of OmniFocus's **Forecast** view is to think of the weather (which is something we do often here in Seattle)—you want to know what it's going to be like outside so you can plan ahead. The **Forecast** view gives you that same perspective by



showing you how many tasks are on your plate for the week ahead. When you tap Forecast in the sidebar, the bar along the top of the content view lets you see what's past due, what's due over the next seven days, and what is further off on the horizon.

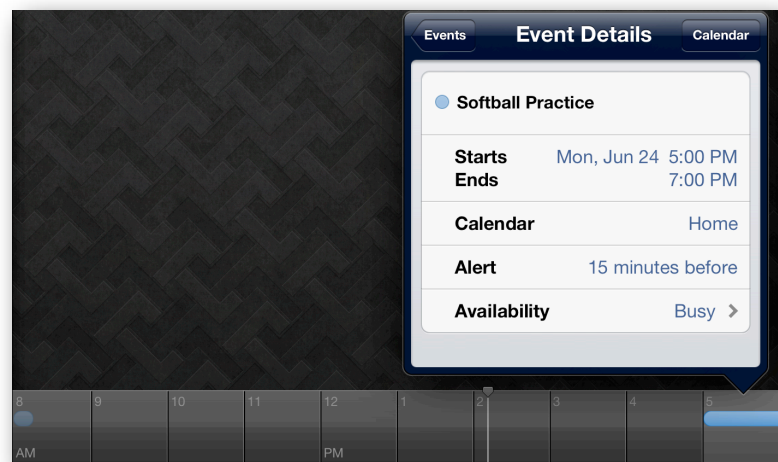
Note: Actions and Projects become available for review one week after they are created. If you are reviewing a project and you don't see everything there, tap **View Options**  and then tap **All**.

Each date button displays the number of actions associated with that date. For due items, the count is color-coded according to the most urgent item: orange indicates that an item is due soon, and red indicates an item is due or past due. To create a new action that is due on a particular day, tap the appropriate date button at the top, followed by the new item button .


Add Your Calendars to OmniFocus

OmniFocus also plays well with your calendars, including those you might sync through Apple's iCloud from Calendar on OS X or iOS, Google Calendar, as well as any CalDAV servers you have subscribed to. The calendars which you can view in OmniFocus are based upon the calendars you have enabled on your iPad. To add, remove, or change the calendars available on your iPad, go to the **Settings** app and select **Mail, Contacts, Calendars**, and then look at the **Accounts** section at the top.

Events on your calendar show up at the bottom of OmniFocus's content area in a customizable hourly grid. To view an event on your calendar, just tap the event bar, and all of its details pop into view. Tapping the **Calendar** button in the upper-right of the



popup takes you out of OmniFocus and into Calendar on your iPad. To quickly return to OmniFocus, double-tap the Home button on your iPad to bring up the app switcher, and then tap OmniFocus.

To modify what you see in the list or to adjust the time shown for the Calendar events, tap **View Options**  in the toolbar.

Flagging Important Actions and Projects

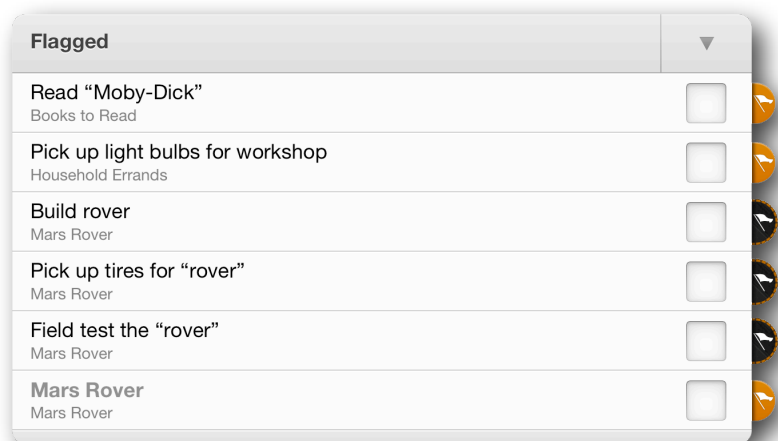
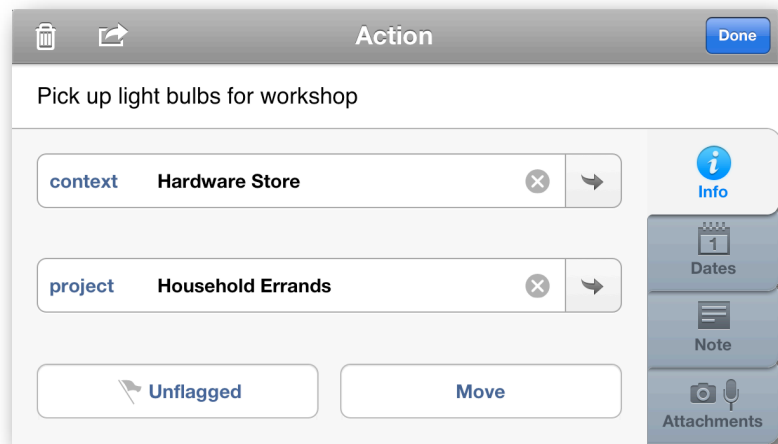
Another great way that OmniFocus helps you accomplish things is with the option to flag important actions and projects. For example, you can use flags to highlight all of the action

items you'd like to complete today, or assemble a quick set of talking points for a meeting.

To flag an item, tap the project or action and then select the Info tab. See that **Unflagged** button? Tap it to flag the item.

To view all of the items you've flagged, tap Flagged in the sidebar. OmniFocus conveniently wraps all of your flagged items together in a nice little bundle so you can tick them off as you go. Also, it's worth noting the little flags off to the right edge of the

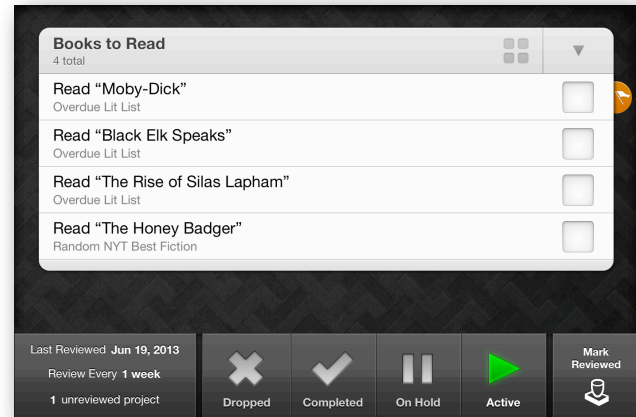
the Flagged group. An orange flag indicates that the project or item is flagged, and the black flags indicate that the item is unflagged but the project that the item belongs to *is* flagged, so its action items are considered flagged by association. The way to discern projects from action items is that project names appear as bold gray text in the flagged group.



Reviewing Your Progress

Every now and then, you'll want to check up on your progress; to see how you're coming along with that super secret project you've been working on. To enter review mode, tap **Review** in the sidebar. Your projects appear one at a time, in order of last review, from the most to least stale.

When reviewing your projects, be sure to tick off any action items that have been completed. Tapping an action item pops open the editing window so you can add review its related info, set or change dates, add notes about what you need to do for that item, or attach notes from the last project meeting. Tapping Done puts you back in review mode so you can continue your work.



This is also a good time to evaluate the status of your projects. If you know a project has to be put on hold because another project has become a higher priority, all you need to do is tap the **On Hold** button. And while you're at it, don't forget to change the dates on that project and drop in a note about when you need to resume work.

By default, projects are up for review every week. If you would like to review a project more or less frequently than the others, tap the review interval button in the bottom left to change the time between reviews.

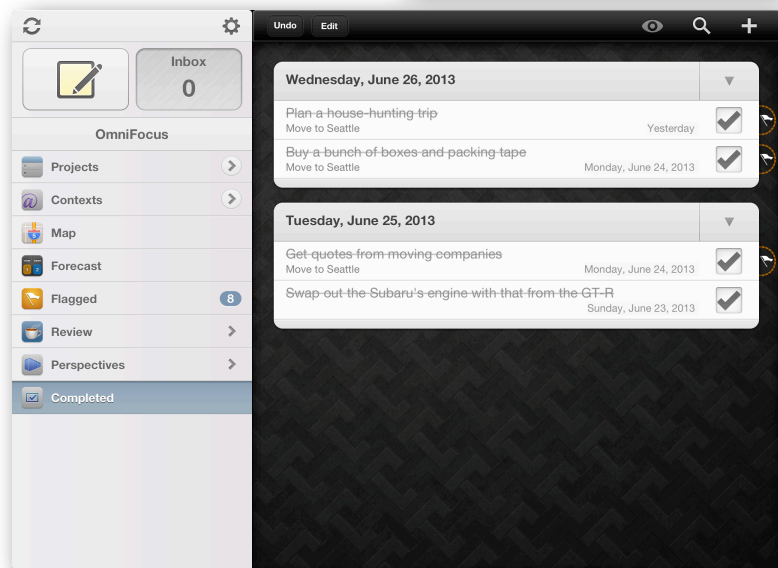
When you're satisfied with the project, tap **Mark Reviewed** and the next project in your queue.



Perspectives

If you sync with OmniFocus for Mac, you can also bring over your context-based perspectives. Perspectives are a way to revisit commonly used view states.

To add a perspective to the main sidebar, tap **Perspectives** in the sidebar, and then tap the star to the right of the perspective. For example, you might want to add the Completed perspective to your sidebar so you can see when you completed certain tasks, and then celebrate with that long-overdue vacation that you've also been planning.




OmniFocus Extended

OmniFocus for iPad is enormously useful as a standalone app and in conjunction with OmniFocus for Mac and iPhone, but its utility doesn't stop there. Used in conjunction with other apps on your iPad, OmniFocus can work for you in even more exciting ways!

Putting Siri to Work with OmniFocus

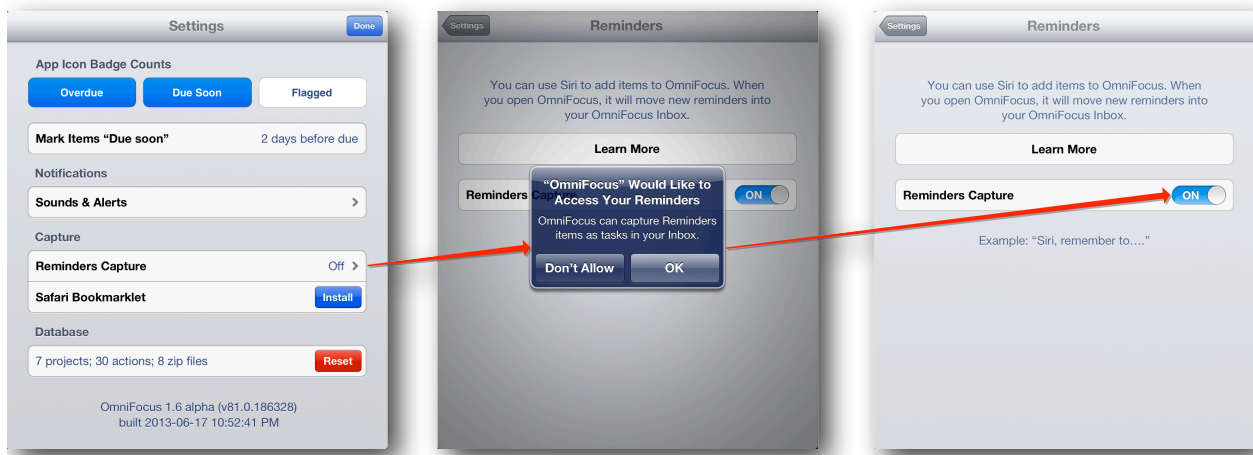
If you're using OmniFocus on an iPad 3 or later, or an iPad mini, and you would like it to keep track of the to-dos you give to Siri, all you need to do is check a few settings on your iPad and you can start adding spoken items to your Inbox in no time.

To set up Siri so it captures your reminders:

- Tap **Settings**  in the sidebar.
- In the **Capture** section, tap **Reminders Capture**.

Warning: You should only configure Reminders Capture on a single iOS device. If you rely on iCloud to sync your reminders across devices and you have OmniFocus on iPad mini and iPhone, you could end up with duplicate entries in your Inbox.

- When you tap **Reminders Capture**, an alert pops up asking you to give OmniFocus access to your Reminders; tap OK.
- Finally, you'll see the Reminders screen, where you can turn on the capture option and, if you have multiple Reminders lists set up, choose the list you want OmniFocus to capture from. (If you only have one reminders list, OmniFocus assumes that's the one you want).



To record a new Inbox item with Siri, try these phrases:

- “*Siri, remember to...*” records a task to the system default Reminders list. OmniFocus grabs it from that list if it’s the one you have chosen to capture.
- “*Siri, remind me to...*” records a task to the default list, and Siri asks for a due date.
- “*Siri, remind me when I get to (or leave)...*” records a task to the default list with a contact location attached. If you choose a specific location, make sure it matches an OmniFocus context location.


Note: Use the small dot distance (200 meters/650 feet) if you would like OmniFocus to capture Siri-transcribed actions associated with that location.

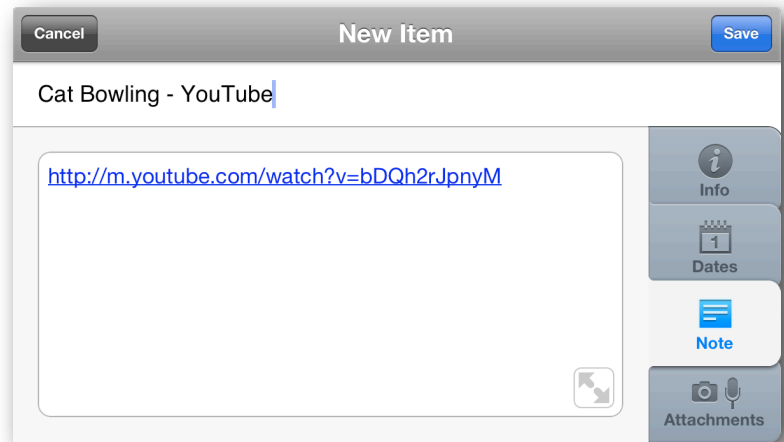
- “*Add ... to my OmniFocus list*” records a task to a list named OmniFocus if you have one set up in Reminders. OmniFocus captures the task if that’s the list you’ve chosen.
- Replace *OmniFocus* with the name of whatever list you’d prefer!

To keep your data safe, there are some Reminders items that OmniFocus will not claim. (Reminders will retain ownership of the data and it will not be lost.) These are items that have data beyond what OmniFocus can track, such as contact locations outside the set of small-size OmniFocus context radii you have established.

For this reason, the location-based aspects of capture are most effective when you tailor the locations of your OmniFocus contexts as closely as possible to your location-based Reminders contacts.

Safari Bookmarklet

You can integrate OmniFocus into your web browsing experience using the Safari Bookmarklet feature accessible via **Settings** . To install the bookmarklet, look under the Capture section and tap **Install** next to Safari Bookmarklet. You'll



be taken out of OmniFocus and to a webpage in Safari with step by step instructions for getting the bookmarklet up and running on your iPad.

Once installed, tap the custom bookmark to send the page you're viewing to OmniFocus as a new Inbox item, with the page name as the title and the URL in the **Note** tab.


Receive Calendar Alerts and Notifications

A task's due date is approaching! By combining the powers of OmniFocus with Calendar on iPad, you can set up reminders to let you know about upcoming deadlines automatically.

Hooking up OmniFocus with Calendar is a slightly complex setup process, but it's totally worth the effort. Since iOS now supports time-based notifications from OmniFocus it's also one that is only useful in a few cases—when you want an alert before an item is due, or if

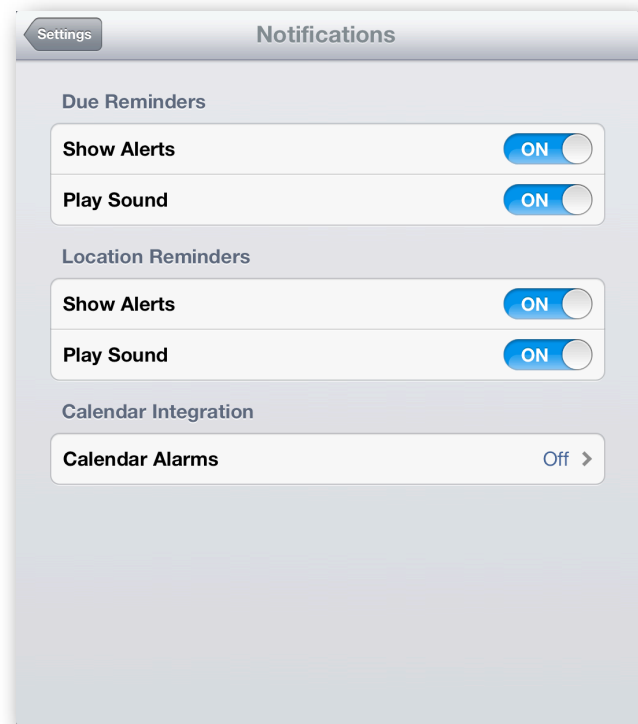
you want an alert on a device that can subscribe to your calendar but doesn't have OmniFocus.

If you decide to set up calendar export, you'll first want to enable sync either via Omni Sync Server or another WebDAV server (see [Getting Synced](#) at the beginning of this manual for instructions).

Once sync is up and running, tap **Settings**  in the toolbar, and then tap **Settings** > **Notifications** > **Sounds & Alerts** > **Calendar Alarms**. You'll see the option to view some important security information about the link to the Calendar app before proceeding. If you store potentially sensitive information in your OmniFocus database you'll want to check this out.

When you're ready, turn on **Calendar Alarms**. You'll have several options for when you'd like to be reminded of your upcoming tasks. Pick the one that works best for you, and then tap **Synchronize Now**.

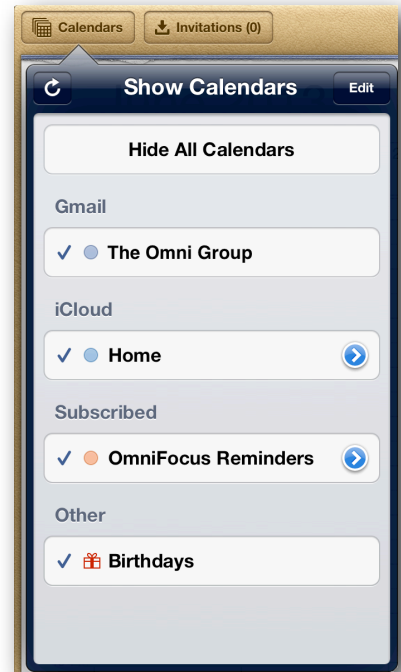
You'll need to manually switch to the Calendar app at this point. Again, the quickest way to do this is by using the app switcher in iOS—double-tap the home button on your iPad, and then flick left in the app switcher at the bottom and tap on Calendar when it shows up in the tray.



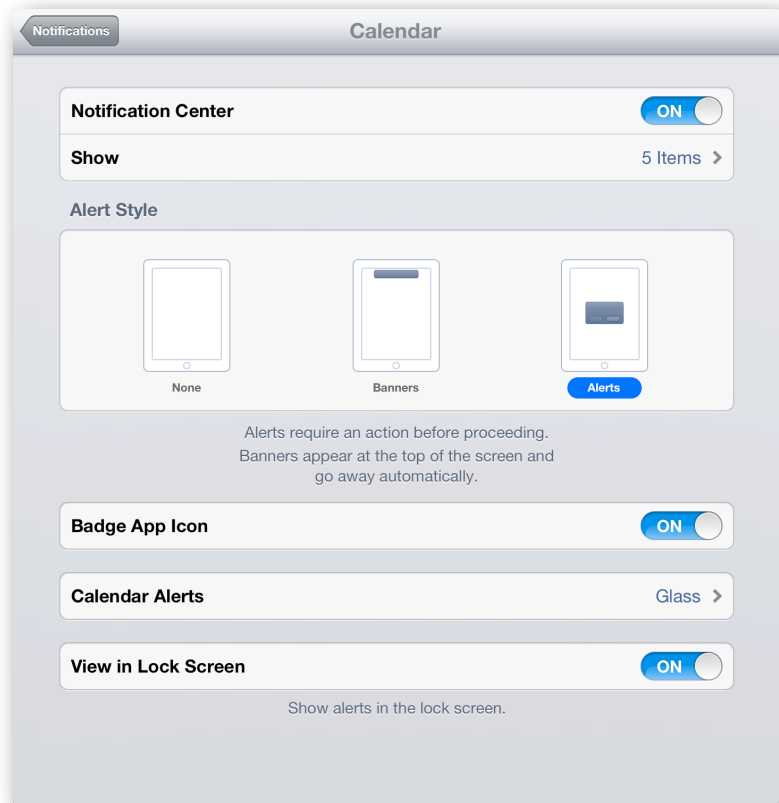
Once in Calendar, you will be asked for your login info to your Omni Sync Server account. This is because the newly created calendar with your upcoming to-do reminders now lives in the same server directory as your OmniFocus sync database.

After you've authorized the new calendar subscription, due date reminders will appear in Calendar for all the upcoming actions and and projects you've scheduled.


If you have opted to receive push notifications from Calendar on your iPad, these too will pop up on your iPad when your to-dos are due. To see what your Calendar settings are, open the Settings app on your iPad, tap Notifications in the left sidebar, and then tap Calendar in the In Notification Center



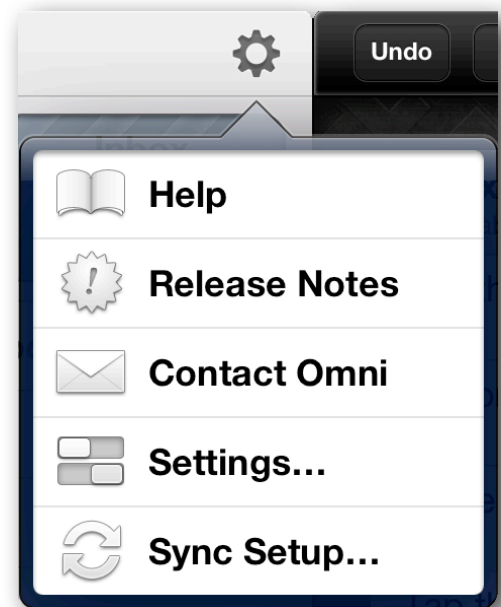
section at right. You'll want to turn on Notification Center, select an Alert Style, and then set up how you would like to receive alerts using any combination of an alert badge on Calendar's app icon, a calendar sound, or on your iPad's lock screen.



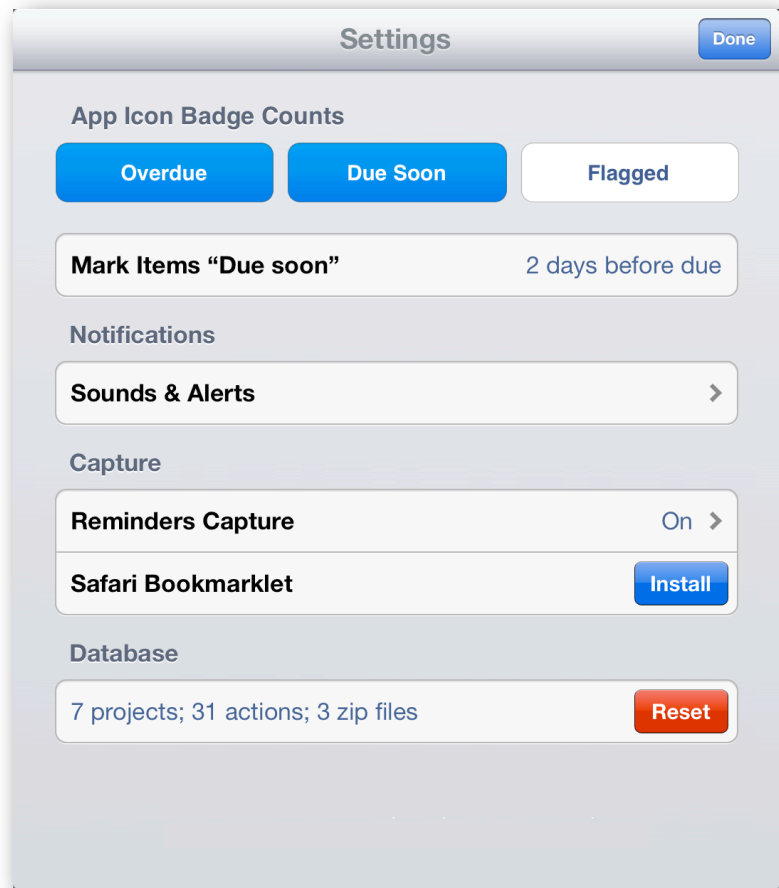
Settings Quick Reference

The settings in OmniFocus are really robust, and you can use these options to customize how OmniFocus works for you. To see what's available, tap  in the sidebar, and let's quickly run through your options:

- Tap **Help** to use the documentation that ships with the latest version of OmniFocus.
- Tap **Release Notes** to get the skinny on the latest changes—big and small—we've made to OmniFocus in the version you're running.
- Tap **Contact Omni** to send us an email and let us know what you like or want to see in OmniFocus, or to ask for help if you're stuck on something.



- Tap **Settings** to:
 - Set which items you want to appear as numbers in OmniFocus’s app **icon badge** (that little red circle with a number inside that reminds you of how many things you have to do today).
 - Set the timeframe for how you would like OmniFocus to **Mark Items** that are due soon.
 - Set **Notifications** and sounds for due and location reminders, as well as the alarms associated with events you’ve added to the Calendar app in the Receiving Calendar Alerts and Notifications section.
 - Turn on **Reminders Capture** so you can use your personal assistant, Siri, to add items to OmniFocus.
 - Install the **Safari Bookmarklet** so you can send web links to OmniFocus for articles and things you either want to read later or add as background info for a project you’re working on.
 - The **Database** section has statistics about your OmniFocus library, specifically how many items you have and the number of zip files used to contain the data. If you are syncing, you should try to sync all of your OmniFocus databases regularly to keep the number of files down. If you’re not syncing, it also helps to compact; compacting




takes all of the changes you've made and consolidates them, which reduces the data storage space occupied by OmniFocus. If you want to start over from scratch (are you sure you really want to delete everything?!), you can tap **Reset** to delete your database.

- Tap **Sync Setup** to configure the sync settings for OmniFocus. For a refresher on what to do if you haven't already set up sync, see [Getting Synced](#).

Additional Resources

The official OmniFocus for iPad website is filled with frequently asked questions (and answers!), the latest release notes, and additional support information:

<http://www.omnigroup.com/products/omnifocus-ipad/>

And don't forget, you can always contact us from within OmniFocus by tapping **Settings**  and then selecting **Contact Omni** from the popup menu. Feel free to drop us a line and let us know what you like about OmniFocus, this manual, or if you need a helpful hand to sort out how to do something in OmniFocus.