



OmniFocus[®] 2

Setup Guide

TABLE OF CONTENTS

UNDERSTANDING THE GTD® BEST PRACTICES

AN OVERVIEW OF THE KEY BEST PRACTICES TO UNDERSTAND THE GTD METHODOLOGY

- 1 What is GTD?
- 1 GTD's Five Phases of Mastering Workflow
- 1 Three Stages to Integrating GTD
- 2 GTD Workflow Map
- 3 Three Key Areas of OmniFocus®
- 3 Inbox Fundamentals
- 3 Project Fundamentals
- 4 Contexts Fundamentals
- 5 The Most Common GTD Lists
- 10 Customizing Your Contexts

CONFIGURING OMNIFOCUS

ONE-TIME CONFIGURATION OF OMNIFOCUS TO OPTIMIZE IT FOR GTD

- 11 Configure Default Project Types
- 12 Change Miscellaneous Project Names
- 13 Customizing Your Contexts for GTD Next Action Lists
- 14 Setting Context Views
- 15 Customizing Your Toolbar
- 15 Setting Up Clippings
- 16 Setting Up Mail Drop
- 16 Creating Email Support Folders
- 17 Integrating with Your Calendar
- 18 Synching to iPad® and/or iPhone®

TABLE OF CONTENTS

POPULATING OMNIFOCUS

INPUTTING YOUR WORK INTO OMNIFOCUS

- 19 Adding New Projects and Related Actions
- 20 Adding New Next Actions and Linking to the Related Project
- 21 Adding New Next Actions Not Related to Projects
- 21 Creating Project Folders
- 22 Capturing Notes
- 22 Storing Reference
- 23 Processing Items in the OmniFocus Inbox
- 24 Due Dates or No Due Dates?
- 24 Mark Complete Versus Delete
- 24 The GTD Weekly Review[®] Ties It All Together
- 25 Saving Time with Keyboard Shortcuts

CONCLUSION

- 26 Additional Resources

UNDERSTANDING THE GTD[®] BEST PRACTICES

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

WHAT IS GTD?

GTD is the shorthand brand for “Getting Things Done,” the groundbreaking work-life management system and best-selling book¹ by David Allen, which provides concrete solutions for transforming overwhelm and uncertainty into an integrated system of stress-free productivity.

GTD'S FIVE PHASES OF MASTERING WORKFLOW

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

THREE STAGES TO INTEGRATING GTD

1. **Understanding** – You understand the distinct differences in the five phases of mastering workflow. You understand a project versus a next action. You know how to transform what you've collected by asking the key processing questions, and clarifying what something is and what you want to do about it.
2. **Implementation** – You have installed at least the basic gear to support a GTD system, including ubiquitous collection tools, functioning reference systems for your non-actionable information, and seamless buckets with “clean edges” for tracking your projects and next actions.
3. **Behavioral Change** – The five phases of mastering workflow are second nature to you. You have changed the way you think and work and are achieving stress-free productivity on a regular basis. When you “fall off” you know what to do to get “back on”. This Guide will leap forward to the “Implementation” stage, by configuring OmniFocus as an organizing tool for your projects, actions, and reference. Success at the implementation stage depends on your understanding of GTD. If you are committed to GTD and experiencing stress-free productivity, don't shortchange yourself by skipping the “Understanding” stage.

¹ The *Getting Things Done* book is available from any major bookseller or our Online Store.

THE MOST COMMON GTD LISTS

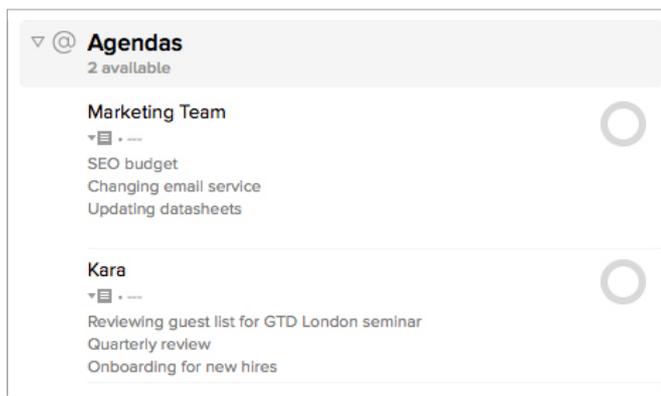
There are 10 lists recommended in the *Getting Things Done* book that are a good starter set for most people.

- Next Actions lists sorted by context:
 - Agendas
 - Anywhere
 - Calls
 - Computer
 - Errands
 - Home
 - Office
 - Waiting For
- Someday/Maybe
- Projects

Agendas – This list tracks the topics and agenda items for people you interact with regularly. For example, if you have a standing meeting with a particular team, and want to capture agenda items to bring up at the next meeting, this is the place to capture them.

You can organize agendas two ways:

1. Add the person or team name in the subject line and use the note field to capture your agenda items. With this method, you only have one agenda entry per person or team.



The advantage with option one is that all of your agenda items are parked in one place, which can be easier to retrieve and/or print as one page before you go into a meeting.

CONFIGURING OMNIFOCUS

These one-time configuration changes, broken down into some simple steps, should take you about 20 minutes to complete. We recommend these changes to adapt OmniFocus to the optimal configuration that best supports a GTD system.

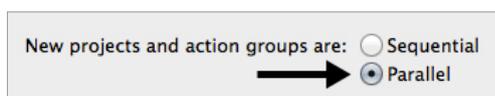
CONFIGURE DEFAULT PROJECT TYPES

OmniFocus allows two different types of projects to be created: Parallel or Sequential. Parallel means you can create multiple next actions for any given project and all of those next actions, if assigned a context, will appear on your Next Action (Contexts) lists.

Sequential assumes you only have one next action for any given project, and even if you have a context assigned to other next actions for that project, only the first one listed will appear in Next Actions. With Sequential, additional next actions will only appear on Next Actions when you complete actions one by one. For this reason, **we recommend only using the Parallel type for all of your projects.**

With the Parallel type, you will have the most flexibility in working with your projects and completing actions. We have found the Sequential type to be far too limiting for most people's needs, by forcing you into only one next action. It also makes a false assumption that the next listed next action under your project is the actual next one. That may not be the case at all. Have you ever known, when starting a project, exactly what the steps are in the project, in the exact order that those actions should happen, with no new variables along the way? It's unlikely. Therefore, we always recommend you choose Parallel as the type, when creating projects in OmniFocus, to give you the most options in choosing what to do.

1. Go to the **Projects section** of OmniFocus. 
2. Under **OmniFocus > Preferences > Organization**, be sure Parallel is the default project type when creating new projects:



Parallel projects will show this symbol in your Projects list:



Sequential projects will show this symbol in your Projects list:



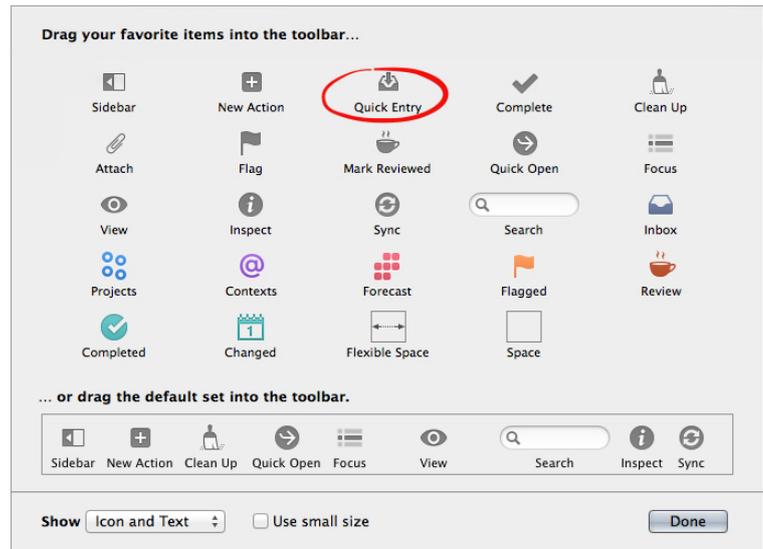
Single-Actions lists (ideal for general Reference) will show this symbol in your Projects list:



CUSTOMIZING YOUR TOOLBAR

For easy access to the OmniFocus features you will use most often, be sure your toolbar is set how you need it.

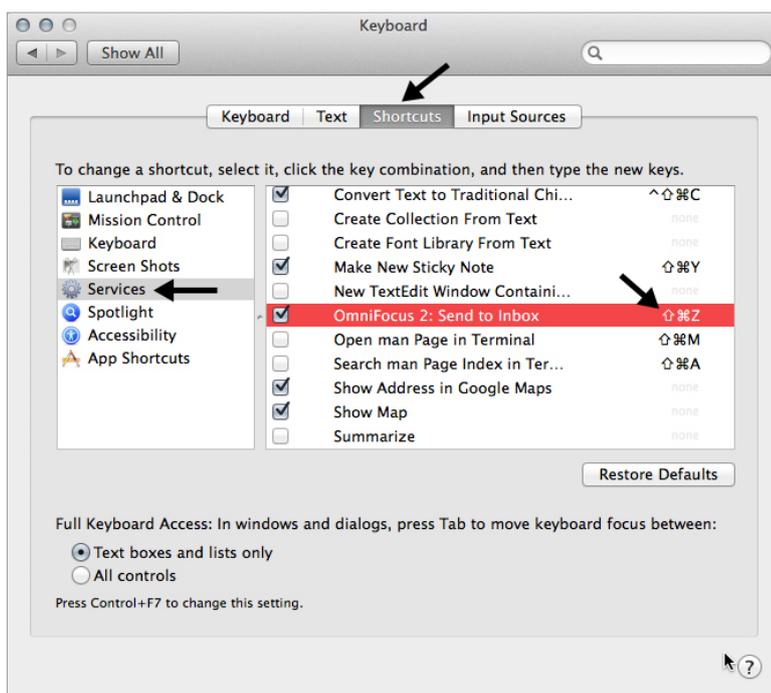
Go to **View > Customize Toolbar**. The icon we recommend adding in particular is Quick Entry.



SETTING UP CLIPPINGS

The OmniFocus Clippings feature can be a useful addition to your workflow. It allows you to copy text from other applications and quickly create a new entry in OmniFocus. This can be particularly useful in email, to grab next actions out of an email that should go on to your Next Actions lists. You'll also likely find it useful when browsing the web when you come across useful reference information you want to save with your Reference lists in OmniFocus. To use this feature, you'll need to create a keyboard shortcut for Clippings, if you haven't already done so.

In the OmniFocus menu, go to **OmniFocus > Preferences > General tab**. Click on Set Shortcut, which will launch two new windows: OmniFocus Help instructions about Clippings and a Macintosh system window to set your shortcut. Go to the window for setting the shortcut, which will look like this:



POPULATING OMNIFOCUS

You are now ready to start populating OmniFocus with your work.

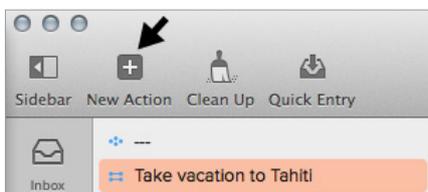
ADDING NEW PROJECTS AND RELATED ACTIONS

Let's start with an easy sample project so you get the idea.

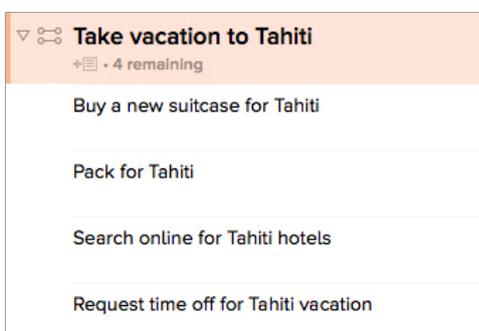
1. Click on the **Projects button** in the toolbar.
2. Click on the **+ icon** in the lower left hand corner of your OmniFocus window and select New Parallel Project.
3. Describe the desired project outcome in the Project Name (use "Take vacation to Tahiti" for this example).



4. Highlight the new project in the Projects list and click **New Action**.



5. Now enter the four actions listed below for this sample project. Pressing **Enter/Return** twice after each one will bring you to a new field.



CONCLUSION

ADDITIONAL RESOURCES

Our intention with this guide was to show you the essential set of features in OmniFocus that are available to build a seamless system of lists for yourself. It's tempting for some people to create their initial system with a complex set of lists and sub-lists. If you have a solid understanding of the GTD and OmniFocus basics down, by all means experiment with a more customized setup.

Be careful not to overcomplicate your systems to the point where you can only maintain them when you are at your peak of mental clarity. It's too easy to be out of that mindset and have the whole system fall apart. Your list manager should be complex enough to manage your workflow, but simple enough that if you were sick in bed with the flu you could still easily maintain it. Don't worry about using every feature in OmniFocus or any tool. There is likely far more built-in than you will ever need. Focus on what makes a difference for you.

If you are new to OmniFocus, this Guide should be an excellent starting point for you to build a solid foundation for managing your Projects and Actions. If you are already established in OmniFocus, use it as an opportunity to fine-tune or simplify if you have found you've underused or overbuilt your setup.

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

We wish you all the best!

FOR TECHNICAL SUPPORT WITH OMNIFOCUS, PLEASE VISIT:

omnifocus@omnigroup.com
+1 206-523-4152
+1 800 315-6664
<http://forums.omnigroup.com>

FOR MORE INFORMATION ABOUT GTD, PLEASE VISIT:

gettingthingsdone.com
gtdconnect.com

OR CONTACT US:

David Allen Company
407-F Bryant Circle
Ojai, CA 93023
805-646-8432
customerservice@davidco.com