

Working
with

OmniFocus



JOE BUHLIG

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by Joe Buhlig

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First Edition

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Acknowledgements

A huge thank you to my amazing wife, Becky. Without her help and unending support, this book would not exist. Thank you, love.

Chapter 1

Introduction

Stop searching for the right way to use OmniFocus.
There isn't one.

It's fun to get lost reading about how other people use a tool. I am fascinated by the ways other people work. It makes me rethink how I operate and re-evaluate my own ways of thinking about tasks. But it's easy to spend too much time researching how others use a tool and developing my system without accomplishing the work itself. How many of us have spent hours moving tasks around and reorganizing them in OmniFocus? How many new OmniFocus users have pored through books, articles, and screencasts trying to find the correct way to use it? We do this because incomplete projects stall and continue cluttering our system. We believe there must be something wrong with the system if we're not accomplishing everything. But what if that's not the problem? What if we're just human and have over-committed ourselves? And if that's the case, is there a wrong way to use OmniFocus? Yes, there is. But the right way to use OmniFocus depends on you and how you operate. The more we understand how we work, the more we understand what we need from a support system to help us accomplish our tasks. Working with OmniFocus is about learning concepts behind the tool and combining them with how you work.

This book will not take you through the mechanics of OmniFocus. I'm assuming you know how to create a task and project. My purpose is to help you understand how OmniFocus can be coupled with your personality in order to set you up with the best chance of completing your projects. We will explore nuances in the features of OmniFocus and find ways to use them that will be best for you. We will walk through stories and explanations of my own system and the systems of others that I've had a chance to review or read about. And because the way we each use OmniFocus is dependent upon our ways of working, it makes sense to start with my background so that you can understand why I do things the way I do. That will help you understand the

“why” behind my OmniFocus workflows, which I hope will allow you to find your own nuanced ways of working with OmniFocus.

I am also making the assumption that you understand the steps of *Getting Things Done* (GTD), by David Allen. OmniFocus is built to be a tool for GTD. You can't use it appropriately and effectively without employing the mechanics and habits behind the GTD framework. I will refer to GTD and its steps throughout this book. If you haven't read GTD, you'll still get a lot out of this, but I would recommend re-reading this book after you've read *Getting Things Done*. Yes, I'm assuming you'll go read it. It will change your life if you let it.

Like most, my story of finding *Getting Things Done* starts with a desperate search for help - and also turns out to be the way I started with OmniFocus. I'm telling it to help you understand where I come from; it's the basis behind the daily workflows and systems that I use with OmniFocus today.

My Story

It was my second year working in a corporate office and I had just started my third meeting for the day. It was 8 am. I think I was on my third cup of coffee and I was trying to put together a plan in my head for the rest of the day as the presenter was talking. I thought I had everything figured out. But then the presenter asked for my opinion about something and followed up by inquiring about a report I had committed to doing for that meeting. I had completely forgotten about the report.

The plan I had put together for the rest of the day was out the window. I told them I would finish the report that day (even though I hadn't started it), and started looking for ways to make it happen while I was in meetings. I had four more that day and I wasn't prepared for any of them. I was hoping that I would be able to fake my way through those meetings and make it look like I actually knew what was going on. And while others were talking (they were conference calls), I would be on my second monitor working on the report.

Luckily my meeting immediately following my 8 am was canceled last minute and I had an hour to myself to catch up on everything that had just

happened. But instead of building the report I was behind on, I sat and stared at a computer screen. I was completely overwhelmed with no idea how I was going to accomplish everything. So I did nothing.

My next meeting came and of course I wasn't ready for it. I spent the rest of the day faking my way through meetings and attempting to multi-task. Somehow I finished the report and sent it out while keeping up with the meetings. I was exhausted. I knew tomorrow would be the same all over again. It always was.

On my way home from work that day, I sat in silence. I left the radio off and contemplated how to catch up. I had found a lot of clever ways to get more time on projects, but that wasn't helping me check things off. I had developed a pattern of running to the loudest task. I was stressed and quickly approaching burn out.

Being a hopeless nerd, the only thing I could think to do was Google it. What were other people doing in this situation? Surely I wasn't the only one overwhelmed by how much I had to do and the environment I was in. I was looking for anything that would help me with tracking commitments, taking meeting notes, and overcoming procrastination. I needed help and I knew it.

Getting Things Done

In the midst of my research I ran across the book *Getting Things Done* by David Allen. All the reviews showed that people loved it and it worked. I was skeptical, so I spent some time looking for implementations of GTD. I didn't actually read the book; I thought I could look up how people were implementing it and be done.

Many people recommended using tools that I was already familiar with. That made sense to me. I didn't want to learn a system and a new tool at the same time. I also found a number of people using Evernote for their system. I had already been using Evernote to collect meeting notes and ideas, but it was a mess. I figured it was a tool that I knew and because there were people already using GTD with Evernote, I thought it would be a good place to start.

So I started picking off pieces of other people's systems and putting them together into my own. It was okay. But it failed. I didn't understand the workflow. I had a lot of the pieces and habits, but not the broader mindset. It felt like more stuff for me to do and I certainly didn't have time for that. I went back to researching.

But the more I studied it, the more I realized I didn't understand GTD. And for some reason I thought I should do more and more research instead of actually reading the book. I probably spent more time reading articles than I would have spent if I had bought the book and read it. Hindsight is always 20/20. I wish I had bought the book to begin with and saved myself the trouble of a bunch of half-baked systems.

Reading the Book

After putting it off for a few months, I bit the bullet and bought *Getting Things Done*. I think I read it in two days. Everything I had been trying to do was suddenly beginning to click. It made sense. Capture the ideas, make a decision about them, organize them somehow, review them regularly, and get to work. Done. The process of capturing ideas and tasks when they come to you was the missing puzzle piece for me.

At the end of my two days of reading I was on a quest to make my system perfectly in sync with the book. Yes, I actually thought it was possible to follow the book to the letter. All I had to do was follow what David Allen recommended step-by-step and I would be off to the races.

Of course, that didn't pan out either. It took me about two weeks of attempting to come up with contexts to realize that I didn't know how to put contexts together. I didn't know how to make the decisions necessary to pick the lists I personally needed. And it was frustrating. But it showed me that the book has a lot of flexibility built into it. It's a framework, not a rule book.

That's when I ran across Sven Fechner's article, [A Fresh Take on Contexts](#). In the article, Sven talks about using energy levels as contexts since the tools we use every day are always with us. I thought it was the holy grail of contexts. I had been starting to do more in the technology space and most of

my work could be done from anywhere at any time. The typical contexts of hardware, devices, and locations didn't apply to me, and the approach from Sven made perfect sense.

I quickly put together energy levels as contexts based on Sven's ideas. I used them for about two weeks before realizing that I was not making clean breaks when my energy levels changed. I understand the time element of short and long tasks, but a high-energy task that takes a lot of time can sit on my list for weeks. I never think I'm in that context, so I don't work on it. That's partly because long, intense tasks aren't always fun. I don't like working on unfun tasks. So as much as I liked the concept of energy levels as contexts, they weren't for me.

When I studied other folks' systems and how they implemented GTD, I was always attempting to use someone else's processes instead of creating my own. I was trying to work the way they worked. It was time to stop trying to operate like them and start thinking about how I function best. I needed to create my own system based on my preferred workflows.

That's when my journey to understand myself and how I operate truly began. I started learning what makes me tick and figuring out how I like to see my tasks. I was trying to find a way to view my projects and goals that would keep me in line with where I want to go.

I realized that I enjoy tools that have been designed for a specific task. I like using programs that have a single purpose and are excellent at filling that need. Evernote is a great tool, but it quickly becomes a catchall drawer for me. Using it as a task manager created chaos and I found myself spending more time keeping the system up to date than I did accomplishing tasks that were in the system. I began searching for an alternative to Evernote.

Potential Tools

The first search I did was for a GTD app, and I got a very long list. Apparently GTD is a framework that a lot of developers are drawn to and want to streamline using technology. That had me excited from day one. I've been a

paperless guy for a long time and knew that going with paper for my GTD system would not work.

When I realized that there were so many potential solutions, I started looking at the communities that develop and support these tools. I wanted to know what people thought of them, what potential drawbacks there were, and what functionality people get the most excited about. In other words, which tools had the biggest following and the strongest supporters. That narrowed my search down to four potential programs.

I started to look for articles by supporters for each of these tools. I wanted people who were passionate about each of them. I was interested to see how they used them compared to how they work and how the tool has helped them be successful. It's one thing to talk about an app and how great you think it is, but it's an entirely different ballgame when you look at the productivity that comes from the use of that app. That's what I was looking for: proof.

The tool that stood out above the rest was OmniFocus. The community behind OmniFocus was strong and they seemed to have more success than the others. It also looked like a tool that was extremely flexible and had the potential to fit almost any personality style. If you wanted a really simple structure you could get it, but if you wanted to create a complex and in-depth workflow, it had the ability to do that.

I saved articles from the key supporters of OmniFocus and started thinking about how to build my own system before I ever purchased it. It's an expensive tool compared to other GTD apps, and I wanted to make sure I could find a way to use it before I pulled the trigger.

In my research, I found a huge variance between systems. There were users who had zero folders and only two contexts and there were others who had up to 40 folders of projects and 35 contexts. And then you would find people in the middle who had a mash up of the two. That told me it was possible to do just about anything I wanted with OmniFocus. It meant I didn't have to decide how to set it up before I got started. I could buy the tool, start setting it up, and see how it worked for me with the assurance that I could make changes along the way.

Choosing and Setting up OmniFocus

I picked up OmniFocus and immediately started dumping things into it. I entered all of the corporate projects I had going on, any random ideas I had, books I wanted to read, things I needed to do around the house, and potential ideas for future projects. I put everything I could think of into OmniFocus.

It was a mess. I wish I had spent more time planning. It would've saved me a lot of heartache and kept me from dropping the ball in a few instances. When I realized I had an organizational nightmare, I went back to the research I had saved in my original search for a GTD app. Part of that research consisted of David Sparks' screencasts, Kourosch Dini's articles, and a few Asian Efficiency articles. This time I started taking notes and combined their ideas with what I had learned about my personal preferences and patterns. Between those two I was able to draft a layout that I began building into OmniFocus.

And it worked! I was able to get my head around my commitments, started catching up, and learned to say no to new projects because I knew how much bandwidth I had.

Since then I've had many iterations of my setup and learned a few nuances of GTD and its implementation. I've been through a few different cultures (corporate, small virtual company, self-employment), all of which involved knowledge work. I've learned more about myself and how to keep motivated than I thought possible. And it's those experiences that have helped me create and morph my GTD and OmniFocus system into what it is today.

You can find a lot of articles on OmniFocus, but there are only a few places where you can get an entire picture of someone's system. My goal is to pull back the curtain on my setup and show you a full example. Yours will likely be completely different than mine, and that's okay. There may be some pieces that you incorporate, but only do so if you think like me in an area. I want to help you find a successful structure by explaining some of the subtleties of OmniFocus and how they've impacted my own system.

Chapter 2

Tasks

Tasks are commitments. If it makes it onto your lists, it's a commitment that you're making with yourself. You're saying that you want to come back to it in the future and do something about it. It could be in an hour or it could be four years from now. It doesn't matter. You've made a decision to keep the thing around. These commitments should be treated with care because they are representations of actions that you'll be taking in the future. They represent time spent doing something. And we all know that we only have so much time.

When you enter these commitments into OmniFocus you have a bit of metadata to enter. Starting with how you name it.

Naming Tasks

It sounds straightforward, but I've seen it done incorrectly so many times. The stereotypical view of a to-do list contains items like "grandma," "light bulbs," or "Report." What does that even mean? How do you know what to do with them? Are you calling grandma or are you emailing her? What kind of light bulbs do you need? Which report and when do we need it? Are you printing it or creating it?

Multiply this out over 300 tasks and you can see how this escalates fast. Having accurate names for your tasks is important. Otherwise you'll end up eating light bulbs or emailing reports to grandma.

When naming your tasks start them with a verb. Email, call, write, file, print, etc. In any of these cases you know exactly what action to take. It clarifies what you are to do with the noun that follows the verb, so you know at a glance what to do with that report.

Be sure to provide as much detail as possible while being concise. The intent is to get the task off of your mind and allow you to get back to work. If you leave the task ambiguous, your brain won't be free to let it go. There's still information about the task that you need in order to complete it. That

About the Author

Byoolig. My last name. That's how you say it. I know that's the main reason you came to this page.

My career in a nut: I work in agriculture. Having grown up on a farm in Missouri, it's in my blood. I've worked in soybean seed research; I've worked in data analysis in corporate; I transitioned to web application development in corporate and now work from home dreaming up and creating new technologies.

Talk about a variance in work environments. Bean field → office → cubicle nation → family room.

I'm a fan of woodworking, anything Apple, coffee (I'm an addict), DIY projects around the house, and anything that involves my family, which is where the bulk of my elusive free time is spent.

Resources

Joe Buhlig: <http://joebuhlig.com>

Learn OmniFocus: <https://learnomnifocus.com>

Using OmniFocus: <http://www.usingomnifocus.com>

Technically Simple: <http://technicallysimple.com>

MacSparky: <http://macsparky.com>

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