Creating Flow with OmniFocus

Mastering Productivity

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Mastering Productivity

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Versions of OmniFocus used are Desktop 1.9, iPhone 1.8, and iPad 1.2.

It is not the purpose of this book to cover the full range of information that is otherwise available on this topic, but instead to complement, amplify, and supplement other texts. You are urged to read all available material and tailor the information to your individual needs.

Every effort has been made to make this book as accurate as possible. However, there may be mistakes, and with all the rapid changes online, some details may be inaccurate by the time you read this. Therefore, this text should be used only as a general guide and not as the ultimate source of information on the topic.

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A Note to iBooks Readers

iBooks on the iPad offers the ability to enlarge images when viewed as ePub files. As *Creating Flow with OmniFocus* is image intensive, this can be useful. To enlarge images in the iBooks reader, double-tap the image.

"... create an oasis, where your mind can come out to play."

- John Cleese[1]

Acknowledgements

for Viviana, Mila, and Teresa

Foreword

John Cleese describes, [in a fascinating talk](), about giving creativity the time and space needed to com
out and play. These are really the very same conditions for any state of flow. But giving projects that
time and space requires the work of prioritizing and crafting the day's tasks and responsibilities.

The *Getting Things Done*® methodology, around which OmniFocus™ is at least partially built, helps t
get these responsibilities off the mind and bring projects into reality by optimizing a system of
planning and doing them. By addressing these projects and needs, distractions that can invade the flo
of play or work are minimized.

The aim of this text then is not just in using the productivity and task management program
OmniFocus, but also in getting to the creative space wherever that may be found. The hope is in
getting to those things you want to do and enjoy while maintaining the responsibilities that inevitably
accrue in life. Be it in work, play, or with family, we are aiming for a relaxed depth of focus and flow

There is some tendency towards being overwhelmed when first looking at a program such as
OmniFocus. While the program itself has a lot of power towards finely detailing the tasks and projec
that one has to learn, there is also the mirror that it holds up to our own understanding and
organization of our lives that can be rather daunting.

Filling it with only things that one "has" to do and avoiding those things that are enjoyable associates
the entire enterprise with misery. Rather than lists and laptops as being culprits against flow as Clees
may suggest, it may be more the filling of the day with concrete tasks of unenjoyable dreck that ruins
the process. If I can give one piece of advice towards finding use from the program it would be to
make sure to include enjoyable projects and tasks.

What I hope to do with this book, is provide a method towards using OmniFocus that helps you to loo
forward to your projects, rather than dread them.

A task management system guides attention and, by doing so, can direct several aspects of one's
workflow:

1. In optimizing the placement of simple concrete tasks

2. In deciding or planning on what to do next

3. In designing the contexts in which one can achieve a flow

4. In practicing a workflow with a goal of working it into intrinsic memory

The first workflow, is much of what Getting Things Done® is about. It helps to free "psychic RAM" i
the words of *Getting Things Done*® author, David Allen, so that you can focus on the things you woul
like to do. If you know, for instance, that the work you need to do is listed somewhere it will be
relevant, you can relax about having to remember or remind yourself of the task.

The second workflow is about prioritization. Knowing where you wish to devote your energy with the

limited resources of time and attention is an important part of devoting yourself to a project fully.

Both of the above workflows help to minimize internal distractions from interrupting flow. They are ways of creating *internal* boundaries of sorts by providing methods of dealing with thoughts as they come to mind.

The third workflow is about further creating the conditions for creativity and/or productivity. Work and play are not only about the tasks themselves. They are also about designing the contexts in which they happen. Practicing the piano happens at the context of "piano". Practicing is even better when it is in a quiet spot, with responsibilities met or placed into a trusted system, with the kids at school, etc.

The fourth workflow is about learning. Later in the text, we will create a project towards baking chocolate chip cookies. Afterwards, we will adjust the project into a template so that it can be activated for future baking sessions. Once such a project is done often enough, OmniFocus is no longer or only minimally necessary. At that point, when the process is internalized, one can now harness the more powerful nature of the mind towards doing the project. The same is true for maintenance tasks, creative endeavors, or otherwise.

While I do step you through the program with various projects and uses, I encourage you to put the guide down from time to time and fiddle around with the program's controls. The best way to learn anything is to play around with it and see what happens. OmniFocus is extremely customizable and you will more than likely find some way of using it that is not in these pages. If you feel the system does not work for you, then you will likely deviate from it. You will know when you are using it well when you are adapting it to your whims and not the other way around. The demonstrations biased towards my own workflow can be examples from which you can pick and choose.

While I will, of course, address the tools and nature of the program and some of its integration with the Getting Things Done® methodology, I will also touch on concepts outside of the program itself. Since we are dealing with all of the projects in our lives, we are dealing with not only a program. We are also dealing with desires, fears, and how our minds work in handling those.

These methodologies are about learning to guide your own attention towards flow. Ultimately, attention is our primary tool, resource, and property. Our minds are the most sought after and even, fought after, real estate in the world. Learning how to guide yourself through your day and life is quite the challenge. But, ultimately, that is the challenge worth taking.

With flow in mind, this book will ask and, hopefully, answer the following:

- Where is my attention?
- Where do I want my attention?
- How can I reliably get it there?

The learning curve to OmniFocus is not just in learning the program, but also in learning how the program adapts to how you think. To make matters more complex, how you think evolves. When a good level of understanding is attained, building a work flow unique to yourself becomes a more natural process. With progress, it becomes less about the instrument itself and more about what it can help to create.

Introduction

The Book's Layout

Creating Flow with OmniFocus is organized to bring the reader from being able to create small lists, to larger projects, all the way up to organizing and running major life goals. The beginning involves the more basic components of the program while the latter half describes organizing larger systems.

There are several main areas:

- The [Introduction](#) sections introduce the book, its layout and provide a **Quick Start**.

- The [Basic Principles](#) sections describe the **basic concepts, structure, and practice** of OmniFocus.

- The [Intermediate Principles](#) sections begin with **perspectives** and create the building blocks of an overall working system.

- The [Interlude](#) sections describe **fundamentals of plans, play, and creativity**.

- The [Advanced Principles - Part I](#) sections build a **core system** and describe **communication** workflows.

- The [Advanced Principles - Part II](#) sections discuss **prioritization** and **horizons of focus** up to 30,000 ft.

- The [Bringing It All Together](#) sections highlight the importance of **attention** and touch on the **higher altitudes** of focus.

- The [Problems and Procrastination](#) sections offer **suggested solutions** for common problems that one may encounter throughout the day.

- Finally, the [Appendices](#) list settings for suggested perspectives, a list of resources, a reproduction of the post series combining the Pomodoro Technique, Getting Things Done®, and OmniFocus, and various other odds and ends.

For those just getting started with OmniFocus, I would suggest reading from the beginning. For those with some knowledge such as being able to get around projects, contexts, planning and context mode, consider beginning with the section on perspectives. Even with an understanding of perspectives, this would still be a good place to start as the rest of the book builds upon some of the example perspectives built there. In one sense, much of the book builds towards creating a core system and establishing priorities from that point.

Throughout, tips and tricks will also be introduced. The book is neither a re-hash of the manual nor a replacement for the screencasts and tutorials that already exist. The Omni Group provides an excellent manual and introductory set of screencasts.

- A manual is provided with OmniFocus and is included in the help section of OmniFocus' menu bar.

- Screencast tutorials, including some by Don McAllister from ScreenCasts Online, are located a

- The *Getting Things Done®* book itself is also an excellent resource for the entire self-titled methodology, also known as "GTD®".

- Finally, a white-paper pdf, OmniFocus, GTD, and You, is available online to get started in putting both GTD® and OmniFocus together.

Though OmniFocus can be used in other ways, it has largely been designed with GTD® in mind. While *Creating Flow with OmniFocus* is more about getting to flow and creativity, it still does go through much of the basics of the program and methodology. At each step I try to build upon only what has been already presented in the text. There are points where ideas can be expanded by topics provided later in the text at which point a link is provided to get there. For the most part, the text provides information in a building path, with diversions along the way to fill in some gaps.

Also, note that many of the steps, especially towards the beginning of the book, will not be necessary in the actual flow of practice. They are there to illustrate how OmniFocus maintains, sorts, and presents information.

A Trusted System

In order to be able to rely on a system, we need to be able to trust it. Let us then consider what is meant by "trust."

Trust is something that is built over time. It involves a belief that something will continue behaving as it has in the past, such that it may be relied upon. Part of going through the ins and outs of how OmniFocus deals with tasks and projects is precisely to build the trust needed to function. Knowing how something works will help to keep tabs on the information put into the system. When something does not appear to work as planned, enough should be known so that adjustments may be made.

OmniFocus is a program. As such, it relies upon a computer and electricity. It can crash, and it can lose data. While the Omni Group has added an excellent system that backs up data twice daily, any program can crash. It is good practice to make sure that all data, not just that of OmniFocus, has a regular back up. Doing so will also help to establish the trust necessary to work within the program.

We must be wary of the tendency to trust a system to work simply because we want it to. I encourage a curious and inquisitive stance to look at, question, and reflect on any of the presentations I describe. Take any ideas and build a system that feels right to you.

Let us then take the first steps with OmniFocus in creating the backup system.

With the program open:

- Open the preferences panel by either going to the Menu > OmniFocus > Preferences or by typing its key command (Command-,)

- Go to the "General" tab:

The third section sets the backup functionality:
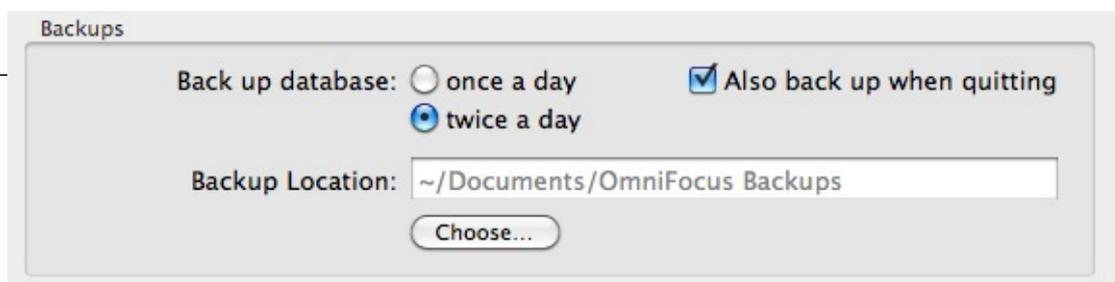
From here, select the preferences that feel comfortable. The image above lists the most exhaustive backup settings possible. The database is backed up twice daily and also when quitting. In addition, a with all programs for the computer, consider using a backup hard drive for the entire computer system. In general, a good backup practice is to have copies in at least two digital locations and in tw physical locations.

The Quick Start

Fundamentally, OmniFocus works with *tasks*, *projects*, and *contexts*. In general,

- Tasks are something simple one can actually do.

- Tasks sit inside projects.

- Tasks are done within contexts.

- Contexts are places, persons, or things needed to do the task.

Everything else about OmniFocus deals with the presentation or characteristics of these pillars.

Overview

This Quick Start section aims to show how adding contexts to tasks can help organize doing the work of two separate projects. It is an example of the first major utility of OmniFocus: optimizing the placement of simple concrete tasks.

We will create two projects, each with tasks that have "errands" contexts.

Setting The Same View

In order for us to work on the program, we will need to work from the same view.

- Begin by selecting the Projects icon to make sure OmniFocus is in Planning Mode:
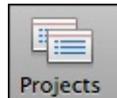
If the program is newly installed, something along the lines of the following should appear:

Inbox | **Projects** | **Contexts** | **Due** | **Flagged** | Add Action | Clean Up | Search | View | Inspect | Syn

Inbox

Library
- Get started with OmniFocus
- Learn more about Getting Things...

▼ **Inbox**

▼ **Get started with OmniFocus**

☐ Watch the OmniFocus Quick Start video   Online
http://omnigroup.com/applications/omnifocus/quickstart
Note: be sure to mark this task complete when you're done!

☐ Perform a mental sweep and record all items in your   Mac
OmniFocus Inbox
Note: a mental sweep is like a brainstorming session where you try to list every goal and task that you have been
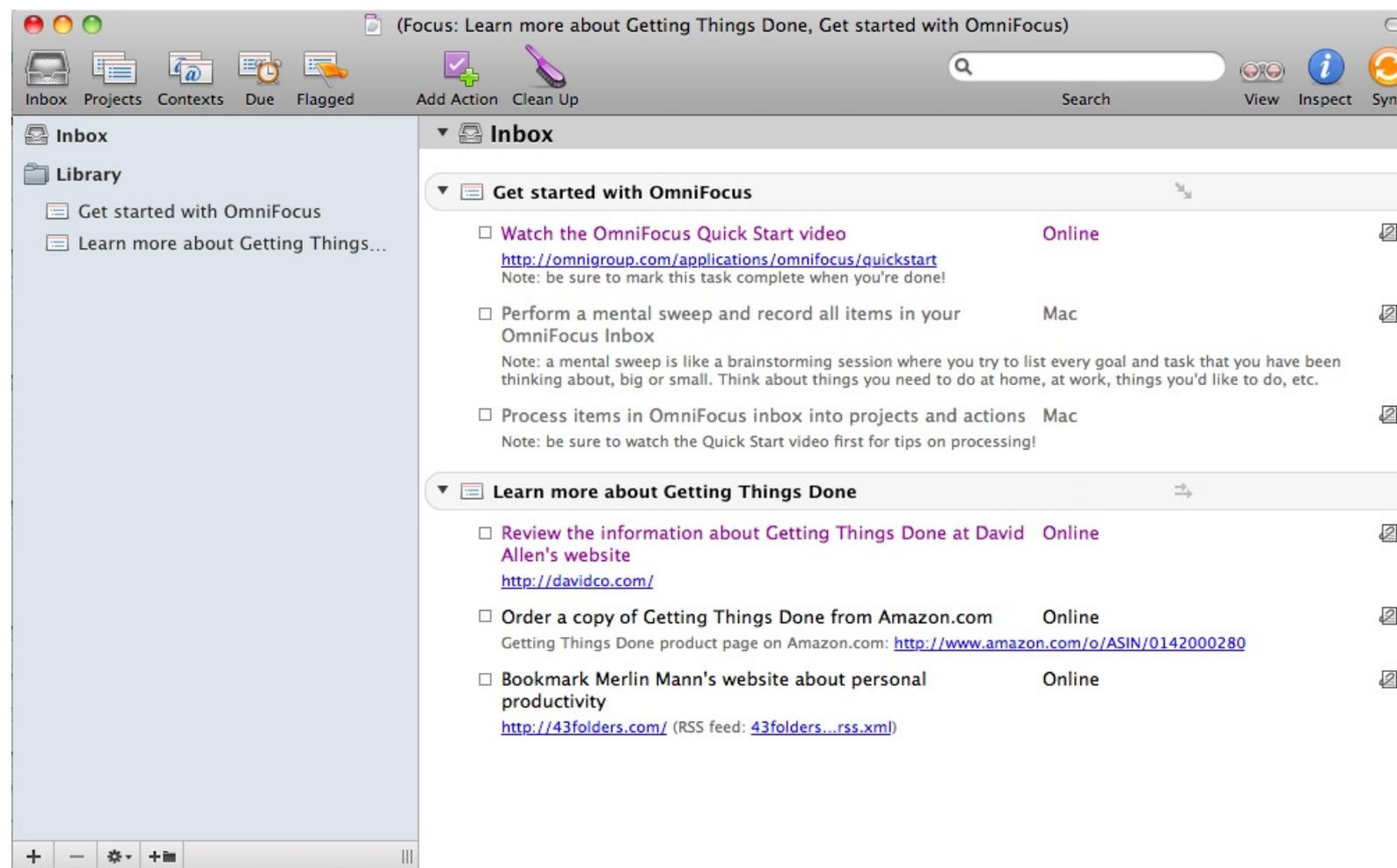thinking about, big or small. Think about things you need to do at home, at work, things you'd like to do, etc.

☐ Process items in OmniFocus inbox into projects and actions   Mac
Note: be sure to watch the Quick Start video first for tips on processing!

▼ **Learn more about Getting Things Done**

☐ Review the information about Getting Things Done at David   Online
Allen's website
http://davidco.com/

☐ Order a copy of Getting Things Done from Amazon.com   Online
Getting Things Done product page on Amazon.com: http://www.amazon.com/o/ASIN/0142000280

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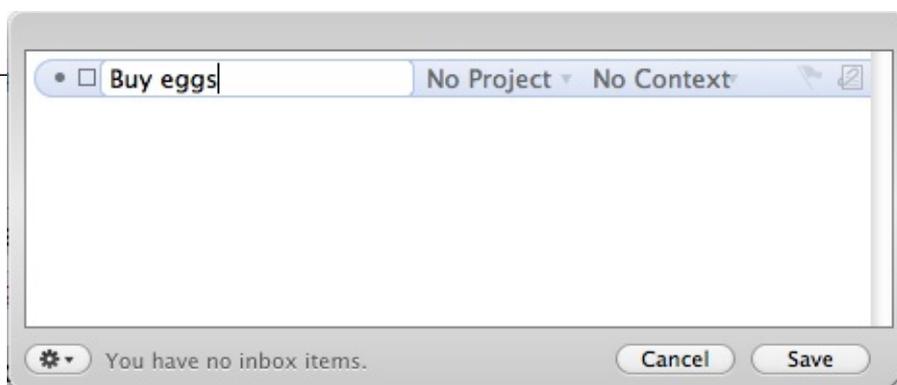http://43folders.com/ (RSS feed: 43folders...rss.xml)

Use Quick Entry To Enter A Task

First, let us create a task to buy eggs. The task will need a project in which to reside. We will use "Groceries" as the title of the project.

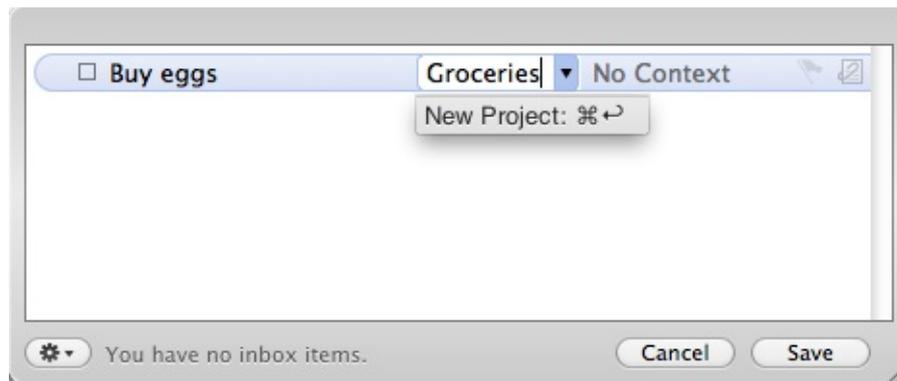- Type Control-Option-Space to bring up the Quick Entry box:
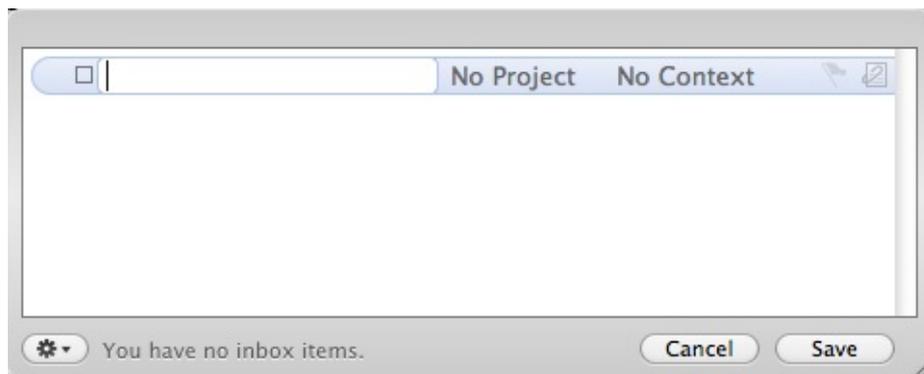
- Type the task, "Buy eggs":

- Tap the Right arrow key.

- Type the name of a project such as "Groceries" and type Command-Enter to create the project:

- Tap the Right arrow key.

- Type "Errands" followed by Command-Enter to create the context:

- Click "Save".

At this point, the screen should appear similar to the following:
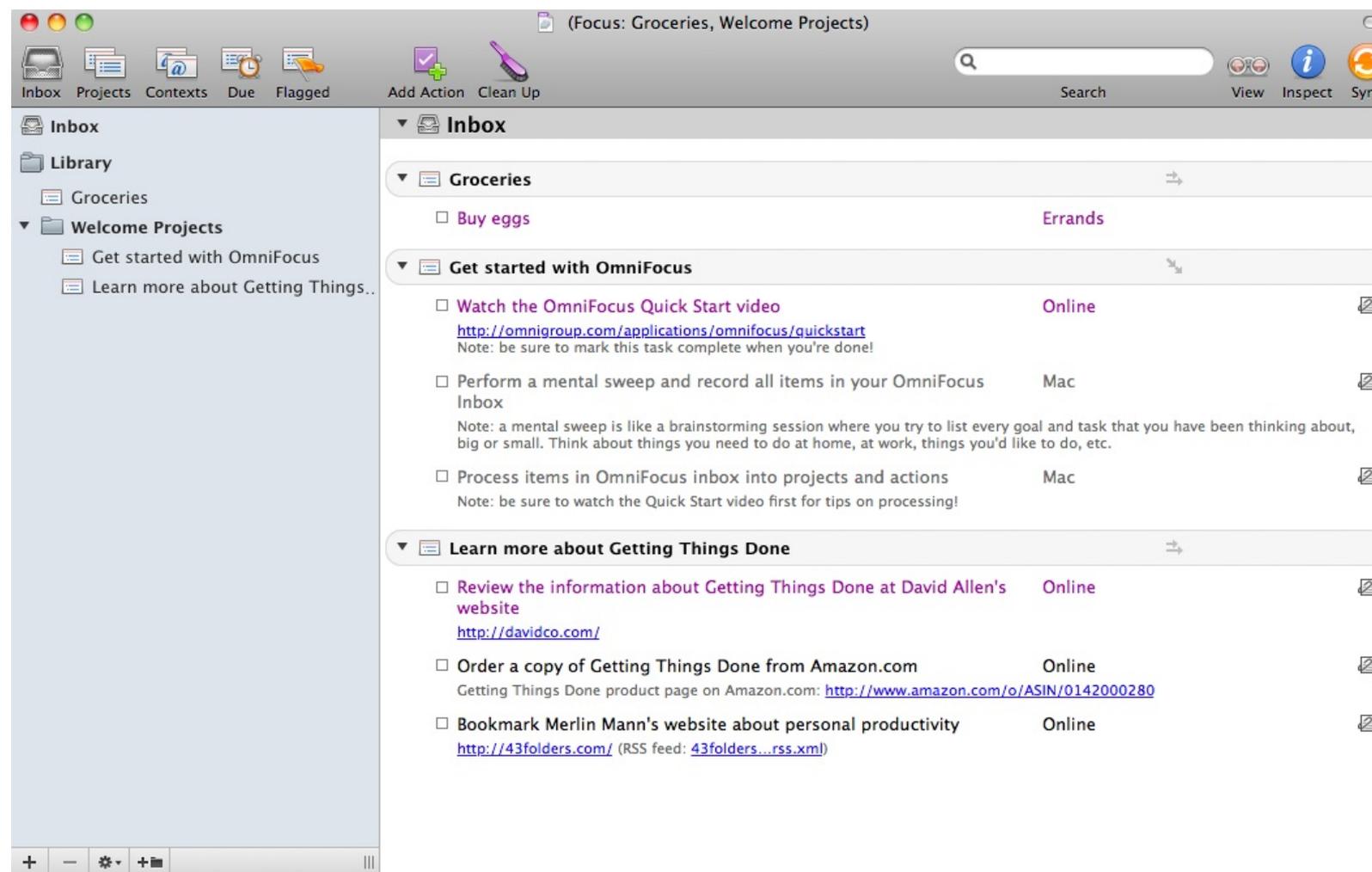
The new project, task, and errand should now be visible. At this point, we have already used all of the fundamentals of OmniFocus by creating the project "Groceries" with the task "Buy eggs" and a context of "Errands".

Create An Additional Project

Let us make an additional task in a separate project. Here we will create another errand of buying stamps.

  • Open the Quick Entry (Control-Option-Space).

  • Enter "Buy stamps":
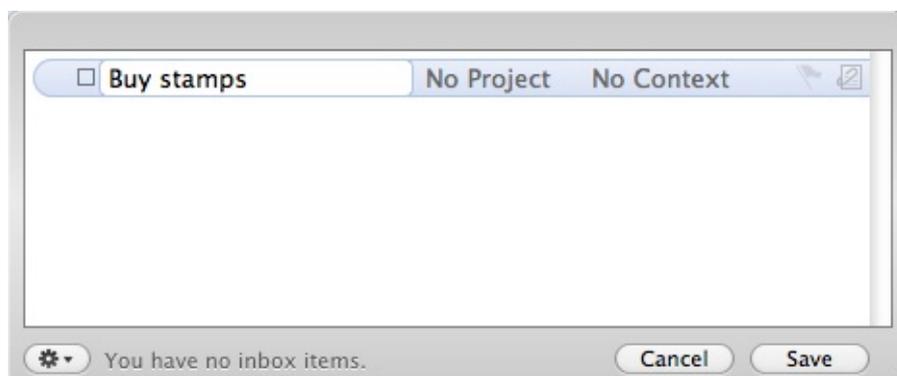
  • Tap the Right arrow key.

• Type the name of a project such as "Weekly Paperwork" and type Command-Enter to create the project:
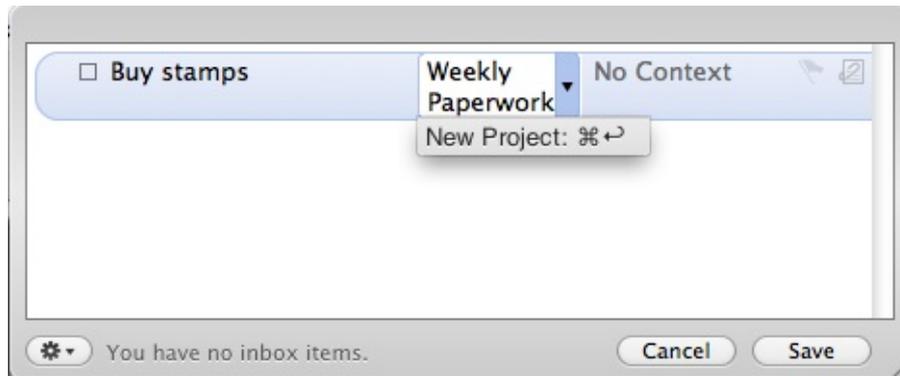
• Tap the Right arrow key.

• Type "Errands" followed by Enter:
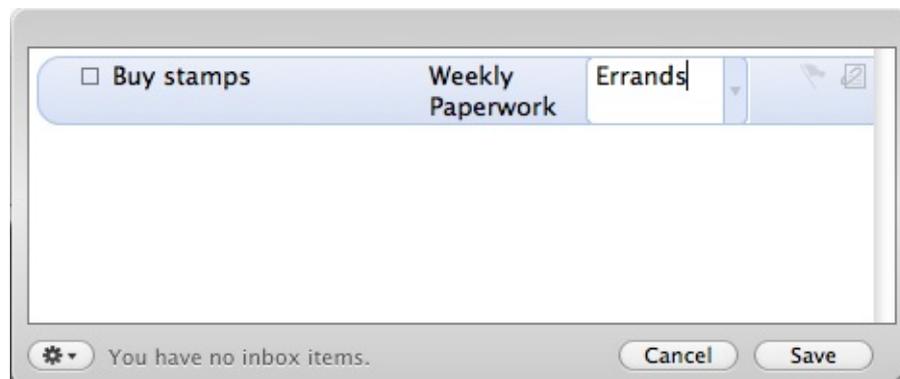
• Click "Save".

At this point, there should be the two projects just created in addition to the defaults:

| Inbox | Projects | Contexts | Due | Flagged | Add Action | Clean Up | | Search | View | Inspect | Syn |

Inbox

Library

  Groceries

  Weekly Paperwork

Welcome Projects

  Get started with OmniFocus

  Learn more about Getting Things..

Inbox

Groceries

  ☐ Buy eggs   Errands

Weekly Paperwork

  ☐ Buy stamps   Errands

Get started with OmniFocus

  ☐ Watch the OmniFocus Quick Start video   Online

    http://omnigroup.com/applications/omnifocus/quickstart

    Note: be sure to mark this task complete when you're done!

  ☐ Perform a mental sweep and record all items in your OmniFocus Inbox   Mac
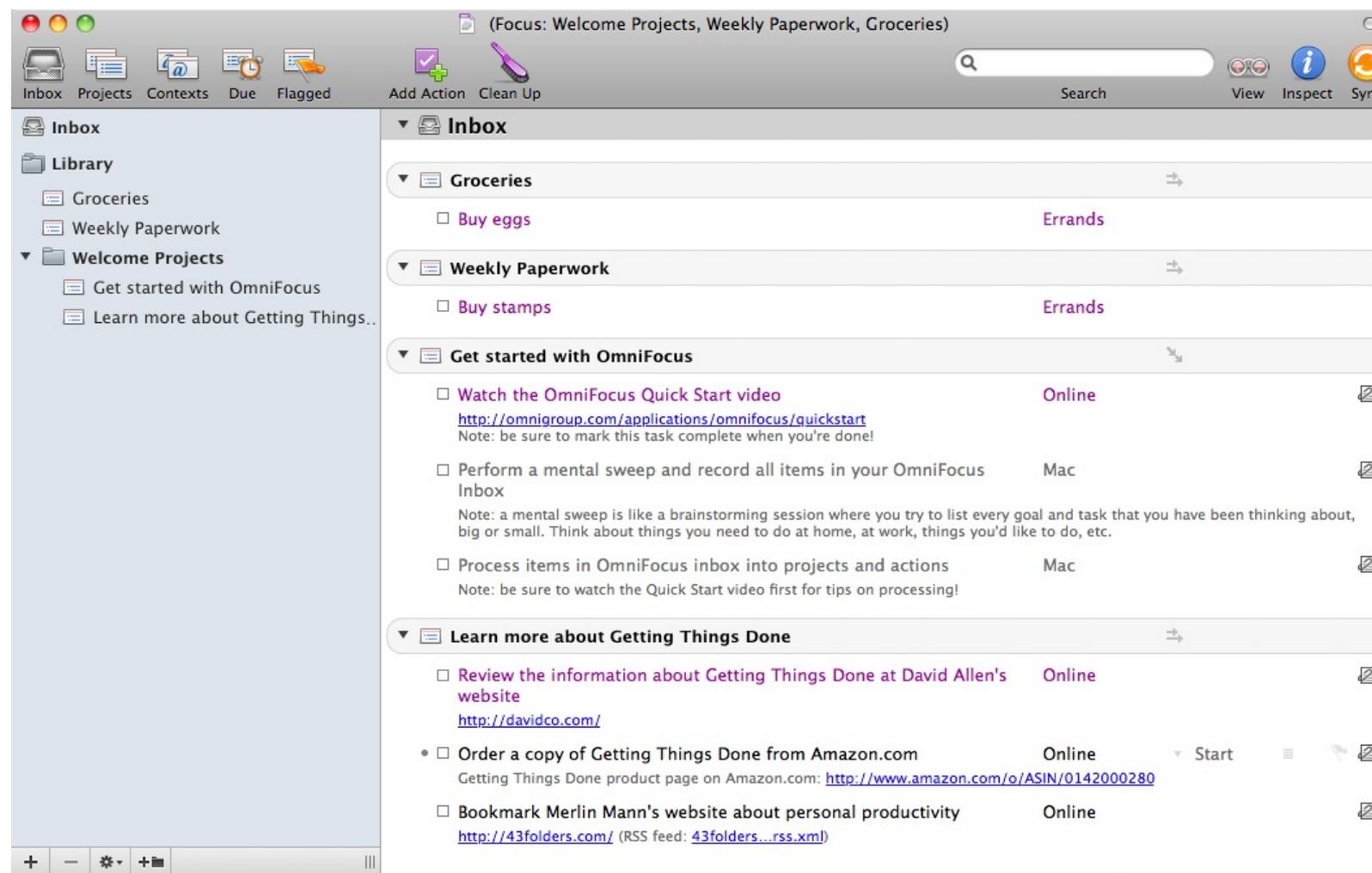
    Note: a mental sweep is like a brainstorming session where you try to list every goal and task that you have been thinking about, big or small. Think about things you need to do at home, at work, things you'd like to do, etc.

  ☐ Process items in OmniFocus inbox into projects and actions   Mac

    Note: be sure to watch the Quick Start video first for tips on processing!

Learn more about Getting Things Done

  ☐ Review the information about Getting Things Done at David Allen's website   Online

    http://davidco.com/

  • ☐ Order a copy of Getting Things Done from Amazon.com   Online   Start

    Getting Things Done product page on Amazon.com: http://www.amazon.com/o/ASIN/0142000280

  ☐ Bookmark Merlin Mann's website about personal productivity   Online

    http://43folders.com/ (RSS feed: 43folders...rss.xml)

Organization By Context

Click the Context icon to view all the tasks in context mode:

Contexts

The following should appear:

Inbox	Projects	Contexts	Due	Flagged	Add Action	Clean Up	Search	View	Inspect	Sy

No Context

Contexts

- In Silence
- Calls
- iPhone
- Agendas
- Home
- Office
- Online
- Computer
- Read/Review
- Errands
- Car
- Waiting for ...
- Someday/Maybe
- Welcome Contexts

▶ **No Context**

▼ @ **Errands**

☐ Buy eggs   Errands

☐ Buy stamps   Errands

▼ @ **Mac**

☐ Perform a mental sweep and record all items in your OmniFocus Inbox   Mac
   Note: a mental sweep is like a brainstorming session where you try to list every goal and task that you have been thinking about, big or small. Think about things you need to do at home, at work, things you'd like to do, etc.

☐ Process items in OmniFocus inbox into projects and actions   Mac
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☐ Get started with OmniFocus

☐ Learn more about Getting Things Done

▼ @ **Online**

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   Note: be sure to mark this task complete when you're done!

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   http://43folders.com/ (RSS feed: 43folders...rss.xml)

Errands List

Looking at the "Errands" list, it should now be apparent how tasks can be readily organized by context:

▼ @ **Errands**

   ☐ Buy eggs

   ☐ Buy stamps

In this case, as I was heading out the door, I could look at my errands list and accomplish both of the tasks while out of the house. Each project would be incrementally moved forward while I carried out my errands. The benefits of doing tasks by context means that I will only be concerned about my errands at the time of doing errands and not otherwise.

Basic Principles - Part I

Projects and Tasks

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