gtd®

OMNIFOCUS® 3
FOR DESKTOP

Setup Guide

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FOCUS OF THIS GUIDE

Our focus with this Guide is to show you how to use OmniFocus® for your GTD® workflow. The Guide is packed with our best practices for configuring and populating OmniFocus for your Projects, Next Actions, Waiting For, Someday/Maybe, and Reference lists. We'll also cover strategies for managing your calendar and email. The Guide focuses primarily on the Desktop version and touches upon the Web version. We offer a separate guide for the iOS version, given the significant differences in the look and feel of that app.

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

This is not a technical Guide, nor will it cover all the instructions for how to use OmniFocus. We'll leave that to the folks at The Omni Group to share with you through their excellent support material.

There are many ways you could configure OmniFocus for GTD. This Guide focuses on the methods we have found work well for GTD for a wide range of people. It's also important to note that no one tool will handle all of your needs for GTD, including OmniFocus. Even with your lists managed in OmniFocus, you'll still have your calendar and email in other programs.

Whatever configuration you choose in tools like OmniFocus, be careful not to overcomplicate it to the point where you can only maintain it when you are at your peak of mental clarity. It's too easy to have a complicated system fall apart when you're not at your best. Your GTD tools 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 them.

Don't worry about using every available feature in OmniFocus (or any of your tools for that matter). There may be more offered than you will ever need. Focus on what makes a difference for you.

OK…let's get started!

> *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.*

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 bestselling book[1] by David Allen, which provides concrete solutions for transforming overwhelm and uncertainty into an integrated system of stress-free productivity.

GTD'S FIVE STEPS OF MASTERING WORKFLOW

CAPTURE   Collect anything and everything that's grabbing your attention.

CLARIFY   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.

REFLECT   Step back to review and update your system regularly.

ENGAGE   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 steps 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, 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. BEHAVIOR CHANGE The five steps 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.

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[1] *Getting Things Done: The Art of Stress-Free Productivity*; Viking, New York; 2001, 2015 hardback or paperback. Available from booksellers everywhere.

- It's common to have multiple actions you can do in parallel on any given project.
- Next actions should start with a verb, clearly describing what you will do. (E.g., Call, Read, Write, Email, Edit, Talk to, Outline, etc.)
- Projects that do not have at least one current next action, calendar item, or waiting for should be marked complete, deleted, or incubated to Someday/Maybe.
- Not every next action, calendar item, or waiting for is related to a project. (E.g., "Buy shampoo" doesn't mean you have to create a project called "Wash my hair.")
- OmniFocus will force you into linking every next action to a project, but we will show you an easy workaround for that by creating a "---" project, as a placeholder.
- Next Action lists are to be reviewed as often as you can.
- Effective next action descriptions attract you more than repel you toward completing the action.

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:
  – Agendas
  – Anywhere
  – Calls
  – Computer
  – Errands
  – Home
  – Office
- Waiting For
- Someday/Maybe
- Projects

NOTE: Some of these won't match the settings that come pre-populated in OmniFocus. We'll walk you through setting these up in the next section.

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 project type can be changed in the Type field in your project details:
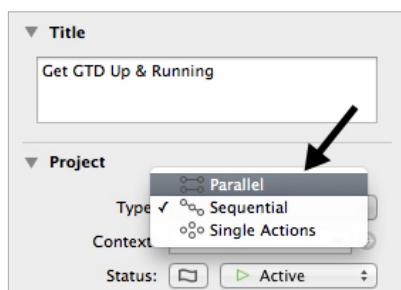
Before leaving the Organization preferences, change Clean up inbox items...to Either a Project or a Tag and change Clean up changed items to Immediately:
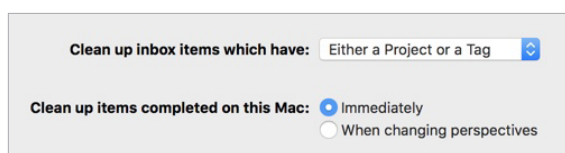

CHANGE MISCELLANEOUS PROJECT NAMES

OmniFocus assumes every next action is related to a project (which will not always be true). Therefore, next actions you create in OmniFocus that you do not manually assign to one of your projects will be automatically assigned to a preset project called "Miscellaneous" by default, if you have changed the setting above to Clean up items which have a Tag (Miscellaneous is not created if you left that setting as Project). We suggest changing the name from "Miscellaneous" to "---" to make this project name more accurate ("---" implying "none") and to make your lists more visually appealing to work with.

1. Go to the **Projects section** of OmniFocus.

2. Double click on the project named "Miscellaneous" to be able to edit the project name (if you do not have a project named "Miscellaneous," see next page).
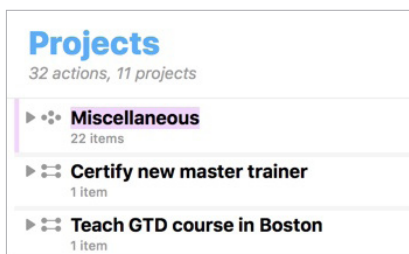
Change "Miscellaneous" to "---" instead.
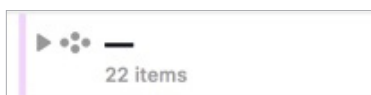
POPULATING OMNIFOCUS

**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).
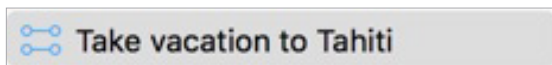
4. Highlight the new project in the Projects list and click **the + sign in the toolbar or use the keyboard shortcut ⌘ N.**
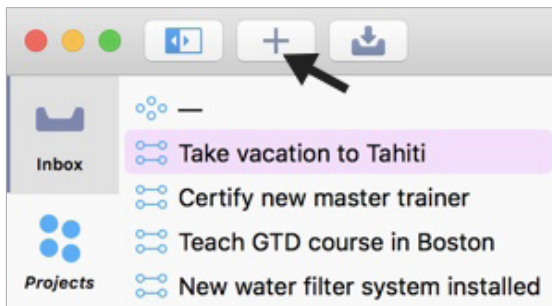
5. Now enter the four actions listed below for this sample project. Pressing **Enter/Return** twice after each one will bring you to a new field.

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DUE DATES OR NO DUE DATES?

Our recommendation is to use due dates so that you trust them. In other words, use them carefully, so that when you see them they are actually a motivator and an accurate reflection of your choices. Many people get into the habit of due-dating everything to death, which leads to not really trusting any of them. Even though OmniFocus allows you to enter a start date, we do not recommend using this feature, so that your Next Action lists truly represent a clear view of your current action choices only.

MARK COMPLETE VERSUS DELETE

Whether you mark an item **complete** or **delete** it is entirely up to you. Many people find that keeping a list of completed projects is very useful, especially for year-end reviews. You may not need that same level of tracking with your next actions.

On the other hand, if it serves no harm and you have the space on your computer, there's no reason to delete what might be useful to recall someday or remind you of the excellent work you've completed.

THE GTD WEEKLY REVIEW TIES IT ALL TOGETHER

Any tool you use will take effort to keep clean and current, so that you can trust your action choices. OmniFocus is no exception. Rest assured, the GTD Weekly Review is what ties this whole thing together, ensuring that you have actions on all the active parts of your projects on a consistent basis, so you can trust that what you are choosing from your next action lists is current. The Weekly Review steps include:

GET CLEAR

Collect Loose Papers and Materials
Get "IN" to Zero
Empty Your Head

GET CURRENT

Review Action Lists
Review Previous Calendar Data
Review Upcoming Calendar
Review Waiting For List
Review Project (and Larger Outcome) Lists
Review Any Relevant Checklists

GET CREATIVE

Review Someday/Maybe List
Be Creative and Courageous

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ADDITIONAL RESOURCES

We hope this instruction guide has been useful. It is intended as a supplement to our core education of workflow mastery developed over many years—not a substitute. The most successful implementation of this guide builds on the understanding of the GTD best practices presented in our many learning tools, including the *Getting Things Done* book, the courses and individual coaching offered by our global partners, and our online learning center GTD Connect®.

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

FOR TECHNICAL SUPPORT WITH OMNIFOCUS, PLEASE VISIT:

support.omnigroup.com

FOR MORE INFORMATION ABOUT GTD, PLEASE VISIT:

gettingthingsdone.com
gtdconnect.com

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