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Projects and Actions: planning what needs to be done

How projects, actions, and contexts work together

Actions — In OmniFocus, the things you need to do are represented as actions. Ideally, an action is a distinct chunk of work that starts with an unambiguous verb. This makes things less intimidating to start, and easier to finish: a list of ten actions such as "Carry boxes out the recycling bin" and "Assemble bookshelf" is much more approachable than "Finish moving in". Of course, you should find the level of specificity that works best for you. As you create actions and move them around, OmniFocus keeps track of which ones are available, waiting on something else, or complete.

Projects — Related actions are grouped into projects, which represent a set of actions that are working toward a common result. Anything you want to do that requires more than one action, like "Finish moving in" or "Get novella published", are good candidates for projects. Projects can then in turn be organized into folders, for keeping track of your broader areas of work.

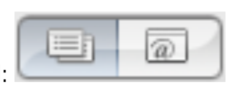
Single Action Lists — Some actions don't really fit into any particular project; they're just individual little things you need to do. You can put this kind of actions into single action lists. They are similar to projects, but they don't assume that the actions they contain have anything to do with one another.

Contexts — It's handy (or, for some people, crucial) to assign a context to each action. A simple way to think of contexts is as the place or mode you need to be in to do a given task: you can only make phone calls when you're near a **phone**, you can only buy groceries when you're out running **errands**, and you can only do research on the web when you're at your **Mac**. These are contexts; if you think about it, almost any task requires you to be in a certain context to do it. You can use Project mode and Context mode to look at your actions in terms of what project they belong to or what context they require.

Creating a project

You can make a project any time you realize you have something that you need to do which requires more than one step.

To create a project:

- Make sure you are in Project mode; the view switcher in the toolbar should have the Projects icon highlighted: 
- Click the plus button at the bottom of the sidebar.
- Type a title for your new project.

Regardless of which view mode you are in, you can also create a new project by clicking the **Add Project** button in the toolbar, choosing **Add Project** from the **Structure** menu, or typing Command-Shift-N. OmniFocus switches to Project mode automatically.

Adding actions to a project

You can add as many actions as you want to a project, at any time.

To add an action to a project:

- Make sure you are in Project mode; the view switcher in the toolbar should have the Projects icon highlighted: 
- Select the project, either in the sidebar or in the main outline, by clicking the index-card icon next to its name. Or, select an already-existing action in the project.
- Press Return, or click the **Add Action** button in the toolbar; the new action appears immediately after the item you selected.
- Type a name for your new action.

You can move an action between projects by clicking its bullet and dragging it to its new location. You can even turn an action into a project by dragging it to the top level of the outline or the sidebar.

Assigning contexts to actions

Any action requires some sort of resources, whether it's the Mac on your desk, the phone in your pocket, or even just a few moments of peace and quiet. So for each action, you can assign a context that indicates what you need in order to complete it.

To assign a context in Planning mode:

- Click or Tab into the Context column of an action.
- If the context you want has already been created, click the pop-up arrow or press the Space bar. A menu appears, listing all of your contexts; just click the one you want. Once you are used to OmniFocus, you can just type a couple of letters from the context you want, and OmniFocus guesses which context you mean; just press Return to confirm it.
- If you need to create a new context, type its name and then press Command-Return to confirm it.

To assign a context in Context mode, just drag an action into the context's entry in the sidebar.

Attaching files and notes to actions and projects

<no data yet>

Keeping track of the next action in each project

Any active project keeps track of the next action that you have yet to complete, and styles it differently from the other actions—by default, a project's next action is purple. This is useful for figuring out what you ought to do to keep your projects moving forward.

When you are interested in next actions, you can just look out for the purple actions in your outline. Or, you can hide all but the next actions by using the view bar: show the view bar by clicking its icon in the toolbar, then choose Next from the action filtering pop-up menu.

For sequential projects, where you need to do one thing before another, the next action is the only thing you can do right now to make progress on the project. For parallel projects, where you can do the actions in any order, the next action is just the first action in the list, and acts as more of a suggestion of what you might want to do next.

Making a project sequential or parallel

Some projects consist of actions that can be done in any order, like picking up items at a few different shops; these are parallel projects. Other projects require one action to be done before the next one can be started; these are sequential projects. In a parallel project, all incomplete actions are available, and the "next action" is just the first one in the list. In a sequential project, only the next action is available.

Task groups are always sequential (but they can be put inside a parallel project). Each task group only ever provides one available action at a time.

Whether a project is sequential or parallel is shown by the pair of arrows by the right side of its row in the outline. To switch to the other state, just click the icon. You can also choose a state from the Project inspector.

Using action groups

The actions in a project can be organized hierarchically. This is useful for keeping track of complicated projects, or breaking actions into smaller actions without creating a whole separate project.

Another use for groups is when you want to make a new project from the inbox. Set up an action group, then drag it from the inbox to the sidebar. The parent action becomes the project, and the child actions become the actions of that project.

If you mark an action group as complete, all of its child actions are also marked as complete.

To give an action some child actions, thus turning it into a group:

- Select the action you want to be the parent of the new group.
- Choose **Add Child** from the **Structure** menu, or press Command-}.

To create a group from some existing actions:

- Select all of the actions you want to group.
- Choose **Group** from the **Structure** menu, or press Command-Option-L.

Also, you can indent some actions to make them children of the action immediately before them in the outline:

- Select the actions you want to indent, making sure that there's an action before them in the outline.
- Choose **Indent** from the **Structure** menu, or press Command-], or click one of the items' handles and drag to the right.

Organizing projects into folders

Folders are a convenient way of separating your projects, the same way you use folders to organize files on your Mac. For example, you could keep folders for each area of your life: perhaps Home, Work, Health, Education, and Recreation. That way, when you're concentrating on one area, you can keep just that folder expanded in the sidebar, or use the Focus feature to hide the others completely.

To create a folder:

- Make sure you are in Project mode; the view switcher in the toolbar should have the Projects icon highlighted: 
- Click the Add Folder button below the sidebar.
- Name your new folder.

To put something (a project or another folder) inside your folder, just drag its icon onto the folder in the sidebar. You may have as many layers of folders as you can stand.

Setting start dates and due dates

Actions and projects can have start dates and due dates. A start date determines when an action or project becomes available, while a due date is just a label that signifies when you think the item ought to be completed.

Start and due dates can be entered either in the main outline (if you have the date columns turned on in General Preferences) or in the Dates inspector.

You can group and sort by start or due dates with the View Bar.

You can be pretty creative with the way you enter dates; OmniFocus is rather smart about guessing what you mean. For example:

- **2d, -3 weeks, 1h**, and so on — Relative dates and times put the date at a certain amount of time from right now.
- **yesterday, tomorrow, next thursday, last month**, and so on — You can refer to dates using common words.
- **september, thurs, 2019**, and so on — If you enter the name of a specific time period, the date will be at its beginning; So **september** means midnight on the morning of September first.
- **9, 14:00, tom,** and so on — OmniFocus makes its best guess at things like bare numbers, times, and word fragments. If you think something might work, give it a try. We may have thought of it.

Setting up repeating actions and projects

When you have something that needs to be done more than once, you can set it up as a repeating action or project.

- Open the Repeat inspector; if the inspectors are not already on your screen, you can get at them from the Inspectors menu or by clicking the Inspectors button in the toolbar.
- Select the item you want to repeat, then click the Repeat checkbox in the inspector.
- Enter a repeat interval.
- Choose how to count the repeat interval. You can count from the original assigned date (for something that has to happen regularly, like paying the rent) or from the completion date (for something that needs to happen a certain time after the last time you did it, like getting a haircut).

When you mark a repeating item as complete, the next instance of it is created with its start and due dates pushed forward as indicated by the Repeat interval. If you want an item to stop repeating, turn off the Repeat setting in the inspector.

Using the Action inspector

The Action inspector is a central place for changing the attributes of actions. You can use it to set the context, project, or estimated time of one or many selected actions.

Open the Action inspector; if the inspectors are not already on your screen, you can get at them from the Inspectors menu or by clicking the Inspectors button in the toolbar.

Using the Project inspector

<blank>

Using the Context inspector

<blank>

Estimating action duration

If you like, you can note how long you expect actions to take. Then, when you're looking for something to do, you can choose based on how much time you have available.

To turn on the time estimate column in the main outline:

- Choose Preferences from the OmniFocus menu.
- In the Columns section, select Show Estimated Hours Column.

To assign a time estimate, click in the Estimated Hours column for an action, then type a duration. By default, the numbers you type are interpreted as minutes (5m and so on). You can also type larger units, such as hours (h) and days (d).

To organize actions based on their estimates, use the View Bar. If the View Bar isn't on, click its icon in the toolbar FilterInactive, or choose it from the **View** menu. To see only actions that match a certain time estimate, choose the duration you want from the time estimate pop-up menu. To sort actions by their time estimates, choose Time from the sorting pop-up menu.

Marking actions complete

When you've finished an action, just click its checkbox; its status changes to "completed". If it was the project's next action, another next action gets chosen in its place.

Another way to mark something complete is to select the whole row and press Space. You can also right-click any number of selected items and choose "Complete" from the contextual menu.

If you mark a whole group complete, all of its child actions become complete too.

Remember that regardless of the actions they contain, projects stay active until you explicitly complete them, by using either the Project inspector or the right-click contextual menu.

Flagging important projects and actions

On the right end of any project or action row, there's a little flag that you can turn on or off. The flag has no inherent meaning of priority or anything special like that, so you can use it however you like. You could, for example, mark all of the things you'd like to get done before lunch, topics for a meeting you're about to present at, or projects to reconsider the next time you have a chance to think about them. It's entirely up to you.

To flag a project or action, click the little flag on the right side of the project or action row in the main outline. You can also select any number of actions and projects and then choose Set Flag from the Edit menu, or click the corresponding toolbar button.

If you flag a project, all of its actions get an implicit "ghost" flag, and are treated as if they were flagged themselves. You can still flag them individually, too.

Keeping track of single actions

Sometimes you need to do something that doesn't really fit into a project. "Make rosemary lemonade" or "Buy a new cowboy hat", for example, probably don't contribute to the completion of any particular project. To keep track of such actions, you can use single action lists.

To create a single action list:

- First, make sure you're in Planning mode. Click the mode switcher in the toolbar , or choose Planning from the View menu.
- Choose Add Single Action List from the Structure menu or from the action menu Action Menu below the sidebar.
- Enter a name for your new list, and drag it to wherever you'd like to keep it.

You can keep any number of single action lists; some people like to make one for each top-level folder in their library. Others make a "Reading" list, a "Shopping" list, and so on. Single action lists are similar to projects; you can drag them into folders, add actions to them from the Inbox, and so on. They are different in a few ways, though:

- Single action lists are always parallel; the actions in them don't block each other from becoming available.
- All single actions count as "next actions", since each one is kind of a little tiny project in itself.

Contexts: where the work happens

Creating contexts

In addition to keeping actions organized into projects, single action lists, and folders, you can also assign each action a context, to indicate where you need to be or what you need to have available in order to complete the action.

To create a new context:

- Make sure you are in Context mode; the view switcher in the toolbar should have the Context icon highlighted: Context Mode
- Click the plus button at the bottom of the sidebar.
- Type a title for your new context.

Organizing contexts hierarchically

You can nest a context inside another context, creating a hierarchy as deep as you like. Just drag any context in the sidebar inside of any other context.

[screen]

When you select a parent context, you can see all of the actions inside that context or inside any of its descendants. This way you can look at your actions assigned to a more general context (like **Office**) or a more specific one (like **Office : Mac**). You can also keep identically-named contexts inside of different parent contexts (like **Office : Mac** and **Home : Mac**).

Viewing actions by context

When you're at the office and ready to get some work done, you probably don't care to see actions that require you to be at the store, at home, or at your vacation home in Wisconsin.

To view actions assigned to a particular context:

- •Make sure you are in Context mode; the view switcher in the toolbar should have the Context icon highlighted: Context Mode
- •In the sidebar, click the context you are interested in. As you select it, only actions assigned to that context appear in the main outline.
- •If you like, Command- or Shift-click other contexts to select them at the same time.

To see everything in the main outline again, deselect all contexts by clicking in an empty area of the sidebar or by Command-clicking all of the selected contexts.

Context states

<no data>

Collecting stuff as it appears

Dropping stuff in the Inbox

The inbox is a kind of intermediary area between your brain and your OmniFocus library. Whenever you have something important that you don't want cluttering up your mind, but you're not quite ready to meticulously file it away in the right place in your OmniFocus structure, just put it in the inbox. Later on, when you process the inbox, you can decide whether each item is a new project or an action in an existing project, what its context is, and so on.

To create a new inbox item, just select the inbox (in the sidebar or in the main outline) and press Return. Type whatever's on your mind, forget about it for now, and get back to whatever you were doing!

You can create hierarchy in the inbox by using the **Structure** menu commands, if you already know that something is going to have sub-items. Later, you can add these groups to an existing project or make them into full-fledged projects themselves.

When you are ready to review the things in your inbox, you can process them by assigning them projects and contexts.

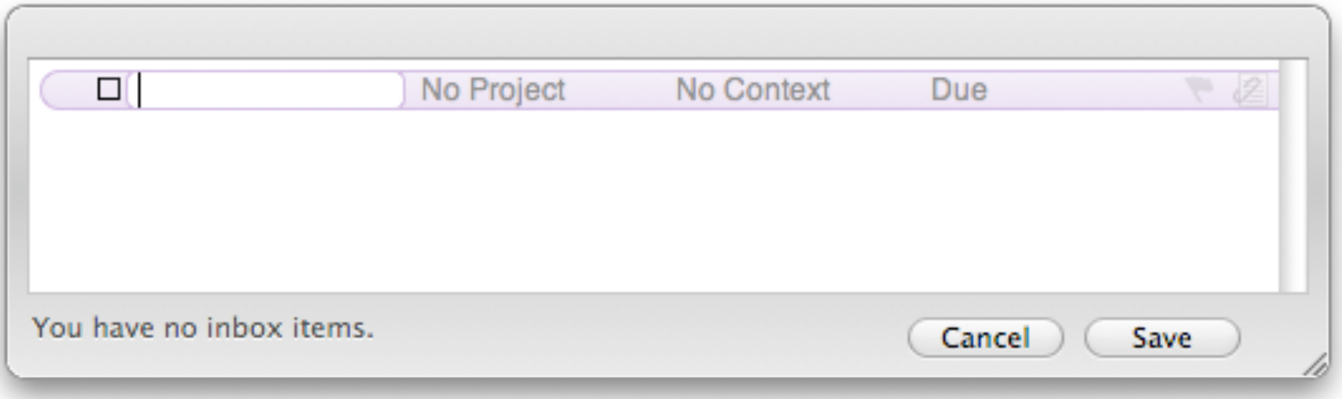
Using the Quick Entry window

So the inbox is a quick way to get things off of your mind. But! There's an even quicker way, if you're in the middle of something else and you don't want to switch your brain to a different mode: the Quick Entry window.

In the OmniFocus preferences, there's a setting for the Quick Entry keyboard shortcut. This is a key combination which, as long as OmniFocus is open, no matter what else you're doing on your Mac at the time, summons up a little window where you can send things to OmniFocus.

To collect stuff in the Quick Entry window:

- •Press the Quick Entry keyboard shortcut as you have set it in the preferences. By default, it's Control-Option-Space. The Quick Entry window appears.



•

- Type in the Quick Entry window as if you were typing in the OmniFocus inbox. Create as many items as you want, with as much hierarchy as you want. You can enter projects, contexts, dates, notes, and so on for each item.
- When you're done, click the Save button or press Command-S. The items are whisked off to your inbox and you can keep on doing whatever you were doing. If you don't want to put the items in your inbox yet, click the Cancel button or press Command-Period, the items will still be there the next time you open the Quick Entry window.

Processing inbox items

Items you put in the inbox stay there until you assign them a project or context (using the Action inspector or by typing in the Project and Context columns). If you assign both a project and a context, then the next time you clean up the item is filed away where it belongs. Depending on your preferences, an inbox item with a project but not a context assigned, or vice versa, may stay in the inbox or may be automatically filed somewhere.

Inbox items have both a Project column and a Context column. To assign a project or a context, you can click the pop-up button next to the appropriate cell to see a pop-up menu of all available projects or contexts.

Or, you can type directly into the cell. With each letter you type, OmniFocus guesses which of your projects or contexts you mean. Most of the time you can get the right one with just a couple of key presses. For example, if you type **aak** or **ado** into a project cell, OmniFocus would find your **Adopt a Kitten** project. Once the correct project or context is highlighted, you can just leave the cell.

If you need to create a new project or context, just type its name into the cell and press Command-Return instead of Return. OmniFocus creates the new project or context for you, and assigns the action to it.

To move inbox items to your library:

- For an individual action, just assign a project or context to it, then use the **Clean Up** command in the Edit menu or the **Clean Up** button on the toolbar to move it to its proper place.
- For any inbox item, including groups, you can click its handle and drag it to the sidebar or the main outline wherever you would like it to go. Drop it inside a project to add it to that project, or drop it anywhere else to turn it into a project.

Cleaning Up

The grouping, sorting, and filtering settings in the view bar control what parts of your database are visible and how they're arranged. For instance, most of the time you don't care to see actions you've already completed, so you use the action filter to show only remaining actions. Sure, that's handy, but you also don't want OmniFocus pulling stuff out from under you as you're working on it. For instance, if you mark an action complete, you probably don't want it to disappear that very moment; you may still change your mind and want to uncheck it, or copy its notes into an e-mail, or just double-check that you clicked the right thing. Likewise, you probably don't want an inbox item to be spirited away the instant you assign a context to it.

So, OmniFocus has a command called Clean Up. It happens automatically every now and then, so that things stay tidy, but you can also clean up manually by clicking the Clean Up toolbar button, or choosing **Clean Up** from the **Edit** menu.

Cleaning up puts everything where it belongs: items that don't match the filter settings disappear, visible items move into the appropriate groups, inbox items move to their assigned projects, and so on. After you change some items, you can Clean Up to make sure that your view is up to date.

Searching, focusing, and reviewing

Focusing on certain projects or folders

If you know that you want to concentrate for a while on a particular project, folder, or combination of items, the Focus feature can get everything else out of your way.

To Focus:

- Select a project or folder (or any combination of projects and folders) in the sidebar.
- Click the Focus toolbar button, or choose **Focus on** — from the **View** menu. Everything outside your selection disappears from the sidebar, and the title at the top of the window changes to **Focusing on** —.
- As you work in Planning mode, or switch to Contexts mode, OmniPlan ignores everything outside of your focus, as if the items you're focusing on are the only items in your library.
- When you're done focusing, choose **Show All Projects** from the View menu, or click the **Show All** toolbar button. Your library comes back as if nothing ever happened!

Using the view bar to filter and arrange items

The view bar is a powerful way to filter and rearrange the items in your window. It has one pop-up menu to control what appears in the sidebar, and five pop-up menus to control what appears in the main outline. The various filters work together, so that you can come up with quite expressive combinations of settings, like Flagged next actions in active projects, that I can do in less than 15 minutes, sorted by due date.

Project Filter

This appears above the sidebar in Planning mode; click it to choose what kind of projects to show in the sidebar. You'll probably want this to be **Active Projects** most of the time, so you can see only the projects you're working on now. You can also choose **Pending Projects** (which would be active but have start dates in the future), **On Hold Projects, Dropped Projects,** or **Completed Projects** (which are states you can set on a project to remove it from Active Projects).

Context Filter

This appears above the sidebar in Contexts mode; click it to choose what kind of contexts to show in the sidebar. You can choose Active Contexts (which only includes contexts that have any actions assigned to them), Available Contexts (which includes any contexts that you haven't marked as Hidden), or All Contexts (which includes all contexts whether you have marked them as Hidden or not).

Grouping

Click this to choose how to group the projects in the Planning view outline, or the actions in the Context view outline. You can **Ungroup** everything, or group by Folder (for the same structure as you see in the sidebar), **Due** date, **Start** date, **Completed** date, **Next Review** date, **Added** date, or **Changed** date. Each group shows up as a collapsible bar in the main outline. Remember that in Planning view, the grouping applies to whole projects, not to the individual actions inside them.

Sorting

Click this to choose how to order the projects in the Planning view outline, or the actions in the Context view outline. If you have a grouping selected, the sorting happens inside the groups but the groups themselves stay in the same order.

In planning mode, you can leave projects **Unsorted**, or sort them by **Name**, whether they are **Flagged**, their **Due** dates, **Start** dates, **Completed** dates, **Next Review** dates, **Added** dates, or **Changed** dates.

In context mode, you can sort individual actions by the order of the **Project** they belong to, whether they are **Flagged**, their **Due** dates, **Start** dates, **Completed** dates, **Added** dates, **Changed** dates, or their **Time** estimates.

Action Filter

Click this to choose what kind of actions of show in the main outline. You can choose to see **All** actions (regardless of their state), **Next** actions (just the next thing to do in each eligible project), **Available** actions (things you can actually do, because they aren't blocked by earlier actions in a sequential project), **Remaining** actions (anything that's not completed), or **Completed** actions (things you've already done).

Estimated Time Filter

Click this to show actions whose time estimates fall within a certain range. You can choose to find **All** actions (regardless of their time estimates), or actions that are estimated to take less than **5 minutes**, less than **15 minutes**, less than **30 minutes**, less than **1 hour**, more than **1 hour**, or an **Unknown** amount of time (for actions you haven't estimated).

Flag Filter

Click this to show projects or actions based on whether they have flags set on them. You can choose to see **All** items (regardless of their flaggedness), **Flagged** items, or **Unflagged** items. Note that flagging an action puts a kind of ghost flag on its parent project, making the project count as flagged too, and flagging a project ghost-flags all of its contained actions.

Searching for actions or projects

The OmniFocus toolbar includes a Search field for filtering the main outline down to items that contain a certain string of text. As you type in it, items that don't match disappear dynamically. You can search based on action names, notes, context names, or project names.When you're done, click the clear button on the right side of the field and everything reappears.

OmniFocus also has a Find and Replace panel like many other applications, available from the Edit menu.

Using Perspectives to remember your OmniFocus window settings

You may find certain ways of setting up your OmniFocus window that are useful enough to make you want to come back to them again and again: your morning glance at what's due today, your weekly review, or your retrospective of what kind of things you've gotten done lately. With Perspectives, you can save view settings and get back to them whenever you like.

To create a perspective:

- Set up an OmniFocus window with the view mode, focused items, sidebar selection, and view bar settings just the way you like them.
- From the **Perspectives** menu, choose **Save Perspective**. (Or click the plus button in the Perspectives window.)
- In the panel that appears, type a name for your new perspective.
- If you want to give your new perspective a keyboard shortcut for easy access, click in the shortcut field and type a key combination.
- Click the **Save** button.

There are several ways to open a perspective:

<NO DATA>

To change a perspective:

<NO DATA>

To delete a perspective:

<NO DATA>

Reviewing projects

<NO DATA>

Marking a project complete

Eventually, oh frabjous day, you're going to reach the successful end of a project. When you're sure that you've really accomplished "move in to new house",

Putting a project on hold

If you're not quite sure whether you want to start (or continue) a project, you can put it on ice for a while. It disappears from your Active Projects list in the sidebar, and its actions likewise stay hidden. Every now and then, you can set the project filter in the view bar to show On Hold Projects (or All Projects), and review which ones you'd like to make active, which ones you'd like to drop, and which ones you'd like to keep on hold.

There are several ways to put a project on hold:

- Select the project in the main outline, then use the Status control in the Project inspector to choose **On Hold**.
- Select the project in the sidebar, then choose **On Hold** from the gear menu at the bottom of the sidebar.
- Right-click or Control-click the project in the main outline or in the sidebar, then choose **On Hold** from the contextual menu.

To make an on-hold project active again:

- Choose **On Hold Projects** from the view bar's project filter pop-up menu.
- Find the project, then use one of the same techniques as above to set the project's status back to Active.

Dropping a project

If you've decided not to work on a project any further, you can drop it completely. It disappears from your Active Projects list in the sidebar, and its actions likewise stay hidden. Of course, you could just delete the project, but then you wouldn't have any record of it or its actions ever having existed. Keeping them around in a dropped state means you can go back and check on how often you give up on projects, check which actions you've completed regardless of whether they're from still-relevant projects, and so on.

There are several ways to drop a project:

- Select the project in the main outline, then use the Status control in the Project inspector to choose **Dropped**.
- Select the project in the sidebar, then choose **Dropped** from the gear menu at the bottom of the sidebar.
- Right-click or Control-click the project in the main outline or in the sidebar, then choose **Dropped** from the contextual menu.

To make a dropped project active again:

- Choose **Dropped Projects** from the view bar's project filter pop-up menu.
- Find the project, then use one of the same techniques as above to set the project's status back to Active.

Getting data into and out of OmniFocus

Printing

<NO DATA>

Clipping material from other applications

<NO DATA>

Synchronizing with iCal

<NO DATA>

Using the web interface

<NO DATA>.