

# OmniFocus for iPhone

version 1.1  
Manual



# What OmniFocus Is

OmniFocus is a place for you to keep all of the stuff you're meaning to do, whether it's the stack of paperwork sitting on your desk that's due *now now now*, or the marble monolith in your garage you've been meaning to sculpt one of these years.

Of course, you could just make a big list on paper or in an ordinary text editing application. But OmniFocus is carefully crafted to understand task lists: it's *context-aware*, so it can show you just what you need to know right now in order to make progress on your many projects. It can remember which projects you are putting off for later, which projects you claim are important but which you haven't touched in weeks, and which projects may blow up if you don't do something about them right away.

The really, really cool thing about OmniFocus is that once you get the hang of it, you can really trust your system and know that nothing is slipping through the cracks. The reward is certainty that you're doing exactly what you need to be doing right now, or even that you don't need to be doing anything at all.

Now, with OmniFocus for iPhone, you can keep track of your projects wherever you are. The iPhone version works splendidly with the Mac version, but you can still get much of the power of OmniFocus by using the iPhone version all on its own.

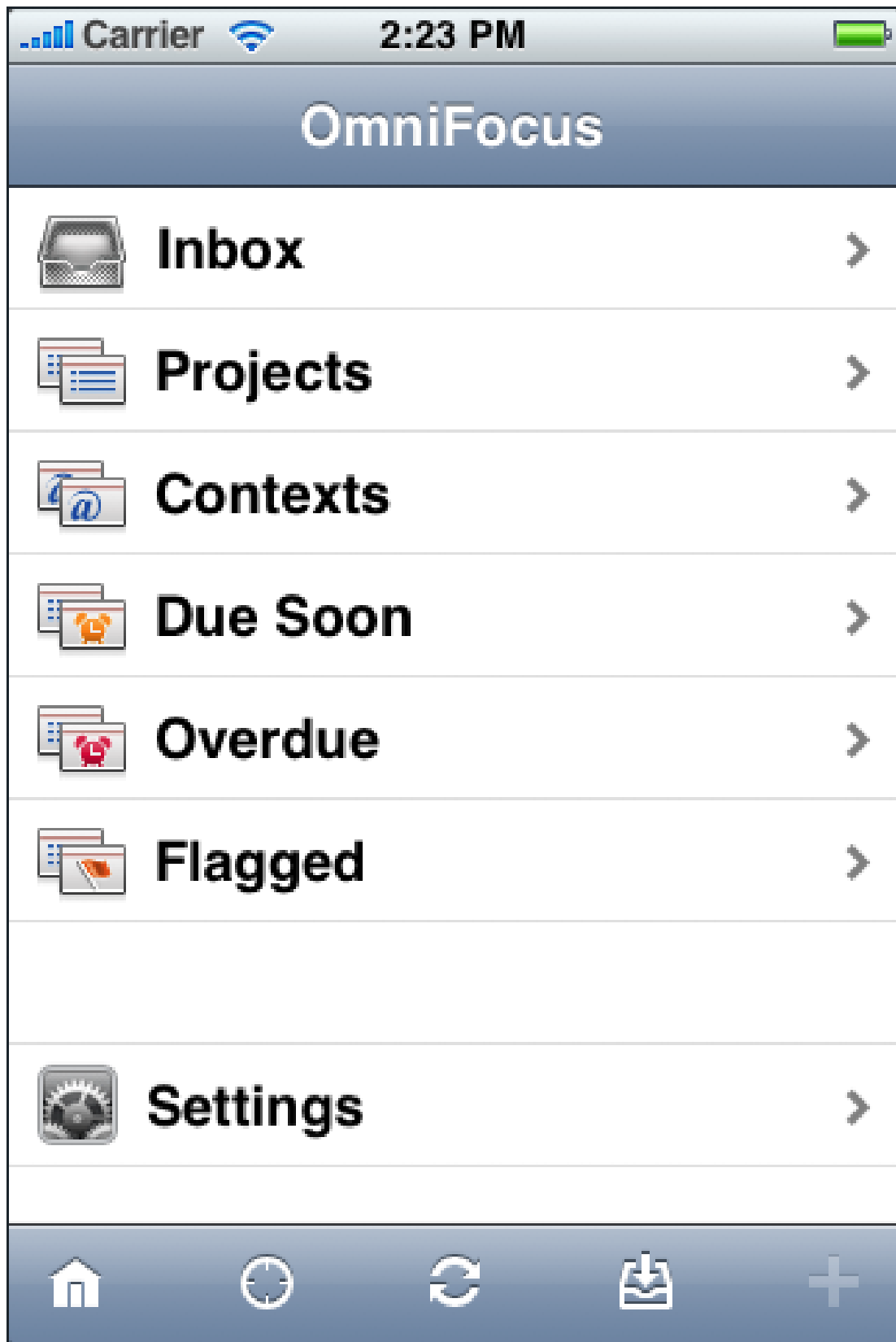
## Quick start video

We've put together an introductory video about OmniFocus for iPhone; watching it is probably the best way to get acquainted with the software. And then if you want to learn more, this manual will still be here when you're done!

The video is available in a couple of different formats on the OmniFocus for iPhone web site:

<http://www.omnigroup.com/applications/omnifocus/iphone/>

# Overview of the interface



This top-level screen is the starting point for using OmniFocus. You can always get back to it by tapping the Home button in the lower-left corner of the screen. From here you can get to all of the other screens of OmniFocus.

The **Inbox** is a place where you can enter new items as you think of them; see page 14.

In the **Projects** screen, you can see all of your work organized into projects, which in turn can be organized into folders; see page 16–17.

The **Contexts** screen contains the same actions as the Projects screen, organized by when and where you can get them done rather than by their logical hierarchy; see page 18–19.

The **Due Soon** smart group collects all items that have a due date in the next two days; you can adjust this time span in the Settings screen. See page 25 for more about due dates.

The **Overdue** smart group collects items whose due dates have passed.

The **Flagged** smart group collects items which you have marked with a flag. See page 27 for more about flags.

Visit the **Settings** screen to set up synchronization, change how OmniFocus behaves, and get help with using OmniFocus.

# Setting up synchronization with OmniFocus for Mac

OmniFocus includes the ability to synchronize your database with a server or a disk, so that your iPhone or iPod touch, and all of your Macs, will stay up to date.

You should set up synchronization on your Mac first, using OmniFocus Help (available in the Help menu) for guidance. Then, you can copy your sync settings from your Mac to your iPhone:

- If you are just starting to use OmniFocus for iPhone, tap **Get Settings from Mac** on the initial screen to be walked through the process.
- If you have already created a database on iPhone or iPod touch, you can use the **Get Settings from Mac** button on the Settings screen. You will need to replace the database on your device with the one on the server, or vice versa.

# Setting up synchronization and backup without a Mac

Even if you don't have OmniFocus for Mac, you may want to keep a copy of your database synchronized to a server for safekeeping. You could also synchronize your database between an iPhone and an iPod touch without getting a Mac involved. If you are just starting to use OmniFocus, tap **Manual Setup** on the initial screen. If you already have a database, use the **Synchronization** section of the Settings screen.

## Step 1: Choose a sync method

To synchronize, you need to keep a “server” or “sync” copy of your database somewhere, and let OmniFocus check up on it periodically. There are three types of places you can keep the sync copy:

**MobileMe** — This service from Apple includes iDisk online storage; if you have a subscription, this is the easiest way to put your OmniFocus database where all of your devices can sync with it over the Internet.

**Bonjour (Local Network)** — This method only works if you have set up OmniFocus Bonjour synchronization on a Mac. If you have, then your device will be able to find the database on the wireless network and synchronize with it.

**Advanced (WebDAV)** — This is a type of server for sharing files on the web; check with your hosting provider to find out whether you can set up your own WebDAV space. Be aware that providers which don't fully comply with the WebDAV standard may not work properly.

## Step 2: Choose a sync location

**MobileMe** — Just enter your MobileMe account name to get started. You can add a folder name to the end of the URL if you want to keep your database somewhere other than the top level of your iDisk.

**Advanced** — Enter your WebDAV address (such as `https://www.example.com/webdav/`) in the **Location** field. If your provider supports it, you can use `https` for a semblance of security while transmitting your data; otherwise, ordinary `http` also works.

## Step 3: Sync

Click the Sync button in the middle of the toolbar to start your first sync. If you don't have a sync database yet, this first sync will consist of creating one and copying all of your OmniFocus data into it. If you do already have a sync database, you will need to choose whether to replace the database on your device with the one on the server, or vice versa. If you want to keep using the database on your device, choose **Local**. If you want to keep using the sync database, and reset the one on your device, choose **Server**. The two databases can't be merged together, so you need to choose one or the other.

## Step 4: Set up other devices

Once you've fully synchronized your database to the server for the first time, you're ready to tell your other devices about it. Follow steps 1–3 with the same settings on those devices.

## Step 5: Stay in sync

If you have **auto sync** turned on in the **Settings** screen, OmniFocus automatically synchronizes with the server each time you open it. You can also manually sync by clicking the **Sync** button in the middle of the toolbar.

# The Settings screen

To get to the OmniFocus Settings screen, tap **Settings** at the top level screen.

At the very top of the Settings screen is a Help section with several buttons:

- **Send Feedback** — start composing an email to Omni's support staff.
- **Online Help** — see our condensed documentation.
- **Release Notes** — see what's new in the latest update.

Use the **In Projects** and **In Contexts** settings to choose what kinds of actions are visible in your project list and your context list:

- **Next** — only the very next action in each project, for minimal distraction. When you complete an action, the following one becomes visible.
- **Available** — items which aren't blocked by earlier actions in a sequential project, which aren't on hold, and whose start date isn't in the future. This is the default setting for contexts, as there you generally only want to see things you can actually get done.
- **Remaining** — items which are neither completed nor dropped, regardless of whether they're available. This is the default setting for projects, so that you can see everything that is left to be done, and plan accordingly.
- **All** — Everything in your library, even the completed and dropped items.

With the Synchronization settings you can share a database between mobile devices and the desktop version of OmniFocus. See the “Setting up synchronization” sections on pages 6–9 for details.

The **due soon** setting in the **Dates** section controls the orange badges and text coloring that appear to indicate that an item’s due date is coming up. When the due date is within the duration set here, an item counts as being “due soon”. Items also turn red when their due date passes, to indicate that they are overdue.

# How projects, actions, and contexts work together

## Actions



In OmniFocus, the things you need to do are represented by *actions*. Ideally, an action is a distinct chunk of work, described by a name 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 the nebulous “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 working toward a common goal. 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



### Miscellaneous

2 remaining

Some actions, like “Get a haircut”, don’t really fit into any particular project; they’re just individual little things you need to do. You can keep this kind of action in a single-action list. These lists are similar to projects, but they don’t assume that the actions they contain have anything to do with one another.

## Contexts



### Office

4 available

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**. If you think about it, almost any task requires you to be in a certain context to do it. You can use the Projects screen and the Contexts screen to look at your actions in terms of what project they belong to or what context they require.

## Adding stuff to 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 add a new item, just tap the New Inbox Item button in the toolbar. Type whatever's on your mind, tap **Save**, and get back to whatever you were doing!

When you are ready, you can process your inbox items by assigning them projects and contexts; see the next section for details.

## Processing inbox items

Items you put in the inbox stay there until you assign them a project or context (tap an item to edit it and assign these attributes). If you assign both a project and a context, then the item is filed away where it belongs. If you assign a context but not a project, the item moves to the **Miscellaneous** action list.

If you are synchronizing with OmniFocus for Mac, the iPhone version will adopt the preference that determines whether you need a project, a context, either, or both, in order to move an item from the inbox.

To assign a project or context to an item, first tap the item to open its Details screen. Then tap the **project** or **context** field and begin typing. With each letter you type, OmniFocus guesses which of your projects or contexts you might 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* when assigning a project, OmniFocus would find your “Adopt a Kitten” project. When you see the project or context you want to assign, tap it. To create a new project or context, enter a title and then tap **New Project** or **New Context**.

# Creating projects

Make a project any time you realize you have something you need to do which requires more than one step.

To create a project:

- At the top-level screen, tap **Projects**.
- If you want to put the project inside a folder, tap the folder you want.
- Tap the New Item Here button (the Plus sign on the far right side of the toolbar), then tap **New Project**.

Also, if you are creating or editing an action, you can tap the Project field, type in the name of a new project, and then tap **New Project** to create it and assign the action to it.

## Adding actions to a project

Add actions to a project whenever you think of something that you need to do in order to move the project forward.

To add an action to a project:

- At the top-level screen, tap **Projects**.
- Tap to open the project you want.
- Tap the New Item Here button (the Plus sign on the far right side of the toolbar). The Action Details screen appears; fill in as much information about the action as you like.

Or, to quickly add an action to a project from anywhere in the app:

- Tap the New Inbox Item button in the toolbar.
- Enter a title for the action.
- Tap the **project** field.
- Assign a project; you can type to narrow down the project list or to create a new project.
- When you save the new action, it bypasses the inbox and moves straight into the project you chose.

To move an action to a different project:

- Tap the action's title (not its checkbox).
- Tap the **project** field.
- Assign a project; you can type to narrow down the project list or to create a new project.

## Assigning contexts to actions

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:

- At the top-level screen, tap **Contexts**.
- If you want to put the project inside an existing context, tap the context you want.
- Tap the New Item Here button (the Plus sign on the far right side of the toolbar). If you are inside an existing context, tap **New Context**.

To assign a context to an action:

- Tap the action's title (not its checkbox).
- Tap the **context** field.
- Assign a context; you can type to narrow down the context list or to create a new context.

Also, if you are creating or editing an action, you can tap the Context field, type in the name of a new context, and then tap **New Context** to create it and assign the action to it.

Once your actions have contexts assigned, you can selectively view your actions by context, to see just the ones that are actually available to you wherever you are now.

## Assigning geographic locations to contexts

Thanks to iPhone's location awareness, OmniFocus can help you decide what to do next based on where you are. When you tap the Nearby Contexts button (the crosshair symbol, second from the left), OmniFocus shows you the available actions that are closest to you.

To assign a location to a context:

- At the top-level screen, tap **Contexts**.
- Tap the **Edit** button.
- Tap the context you want to edit.
- Tap one of the location buttons described below.

The available location buttons are:

- **Current Location** — Assign your current geographical location, expressed as latitude and longitude.
- **Contact** — Choose someone from your Contacts list and use their address.
- **Address** — Enter an address manually. This uses the same technology as the iPhone Maps application, so you can enter specific addresses or more general geographic descriptions (like “Beijing, China”).
- **Business Search** — Enter a term like “groceries” or “post office”, and OmniFocus searches for the nearest result each time.
- **Always Available** — Use this setting for contexts like “Phone Calls”, which are generally available no matter where you are. Contexts with this setting are listed first in the Nearby Contexts screen.

## Attaching notes, photos, and audio recordings

You can use the notes area of an action or a project to store extra information about the item:

- For a project, tap **Edit** and then tap the project. For an action, just tap the action itself.
- In the Details screen, tap the blue arrow button on the right side of the title area.
- On the screen that appears, you can add or edit notes for the item. Be careful: if your note had rich text styling (like bold or italic text), it will be lost when you edit the note on your mobile device.

To attach a photograph or an audio recording to an item (on iPhone, but not iPod touch):

- For a project, tap **Edit** and then tap the project. For an action, just tap the action itself.
- In the Details screen that appears, scroll down and tap the **Take Photo** or **Record Audio** button.
- The attachments are listed in the Details screen.

To delete an attachment, tap the **Edit** button above the Attachments area, then tap the red minus button next to the attachment.

If an item has an attachment that was synchronized from the notes area in OmniFocus for Mac, it is presented separately from the notes in OmniFocus for iPhone.

## Keeping track of the next action in each project

Any active project keeps track of the next action that you have yet to complete. 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 hide everything else:

- At the top-level screen, tap **Settings**.
- Change the **In Contexts, show** setting to **Next**.
- Now when you look at contexts, you will only see the next action for each project.

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 starts, like building a papier-mâché pterodactyl; 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. Action groups, just like projects, can be parallel or sequential.

To change whether a project is sequential or parallel:

- Tap **Edit**, then tap the project.
- In the **type** control, tap the setting you want.

## 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.

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

- Tap an action you want to move inside of another action.
- Tap the Reorganize button on the far right of the toolbar.
- Tap the action you want to move this action into.

Now, when you look at the project, the group has an arrow on its right side; tap the group to see its contents. If you mark a group complete, all of its child actions are also marked as complete.

You can even nest groups within other groups, but that can get pretty ridiculous pretty quickly. If you have more than two levels of hierarchy in one project, you might want to consider splitting things up into separate projects.

## 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, Recreation, and Papier-Mâché Pterodactyls.

To create a folder:

- At the top-level screen, tap **Projects**.
- Tap the New Item Here button (the Plus sign on the far right side of the toolbar).
- Tap **New Folder**.
- Type a name for your new folder.

To create something (a project or another folder) inside your folder:

- Tap the folder to go inside it.
- Tap the New Item Here button (the Plus sign on the far right side of the toolbar).

To move an existing project or folder inside a folder:

- Tap **Edit**, then tap the item you want to move.
- Tap the reorganize button in the lower-right corner.
- Tap the item you want to be the new location.

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* determines when something is considered overdue. You can use the Settings screen to set how long before its due date an item should be considered “due soon”.

Start and due dates can be entered in the Details screen for an action or a project.

To see actions whose due dates are soon or have already passed, tap the **Due Soon** or **Overdue** groups at the top-level screen.

## Marking actions complete

When you've finished an action, just tap its checkbox; its status changes to *completed*. If it was the project's next action, and the action that follows it is available, that action becomes the next action.

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 decide that there are no more actions to be added and you mark the project complete.

## Flagging projects and actions

In the details screen for any project or action, there's a **flag** setting 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.

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.

To see only items that are flagged, tap the **Flagged** smart group at the top-level screen.

## 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:

- At the top-level screen, tap **Projects**.
- Tap the New Item Here button (the Plus sign on the far right side of the toolbar).
- Tap **New Project**.
- In the **type** control, tap the blue shoebox. Your project changes to a single-action list.

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 keep them in folders, add actions to them from the Inbox, and so on. They are different in a couple of 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.

## Organizing contexts hierarchically

You can nest a context inside another context, creating a hierarchy as deep as you like. To move an existing context inside another context:

- Tap **Edit**, then tap the context you want to move.
- Tap the reorganize button in the lower-right corner.
- Tap the context you want to put this context inside.

When you navigate into a context, you can see all of the actions inside that context, and any subcontexts that the context may contain. 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”).

## Using on-hold or “waiting” contexts

You can set a context’s status to *on hold*; actions assigned to an on-hold context are considered unavailable, and they block the progress of sequential projects. There are two main situations in which you might want to use on-hold contexts:

First, you might create one or more “waiting” contexts for keeping track of actions that you’ve delegated to other people. You can’t actually do anything until you hear back from that person; all you can do is wait for them to finish it, and maybe nudge them about it every now and then. So an action like “get annotated pterodactyl brochure draft back from Dennis” might go in your “Waiting : Dennis” context.

Second, you might have some contexts that you don’t expect to be available to you any time soon. You could put your “Frankfurt” context on hold when you’re in London, or put your “Boss” context on hold until she comes back from vacation, and any assigned actions would be marked unavailable. This helps you see which actions and projects aren’t likely to make progress until your situation changes.

To put a context on hold:

- Tap **Edit**, then tap the context you want to put on hold.
- Tap the **Status** field.
- Tap **On Hold**.

To make a context active again, just edit it again and tap the normal context card icon instead.

## Dropping contexts

If there's a context you don't intend to use anymore, such as the office for a job you left, or a person who transferred to a different department, you can drop it just like a project. All of your old actions that were assigned to it stay assigned to it, but the context doesn't appear in your contexts list anymore. Any remaining actions still assigned to a dropped context become unavailable.

To drop a context:

- Tap **Edit**, then tap the context you want to drop.
- Tap the **Status** field.
- Tap **Dropped**.

Be careful! You can get your context back after dropping it only if you are synchronizing with OmniFocus for Mac. There isn't yet any way to retrieve a dropped context on iPhone.

## 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", "Carve Halloween pumpkins", or "Write pterodactyl novel", you can mark the project complete

- Tap **Edit**, then tap the project.
- Tap the **status** field.
- Tap the **Completed** button; the project's status changes, and it is filed away in your library for safekeeping.

## 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. On-hold projects are marked with a blue circle and a pause icon. If, in OmniFocus Settings, you have chosen to see only **Available** projects, the on-hold project will be hidden. Likewise, if you have chosen only to see **Next** or **Available** items in your Contexts list, the on-hold project's actions will also be hidden. Every now and then, you can change these settings to **All** or **Remaining**, then review which projects you'd like to make active, which ones you'd like to drop, and which ones you'd like to keep on hold.

To put a project on hold:

- Tap **Edit**, then tap the project.
- Tap the **Status** field.
- Tap **On Hold**.

To make the project active, just do those steps again and tap the **Active** status.

## Dropping a project

If you've decided not to work on a project any further, you can drop it completely. Unless you have chosen to see **All** projects in the Settings screen, the dropped project stays 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.

To drop a project:

- Tap **Edit**, then tap the project.
- Tap the **Status** field.
- Tap **Dropped**.

To make the project active, just do those steps again and tap the **Active** status.

## Getting help

The **OmniFocus web site** is a good place to find the latest information about OmniFocus:

<http://www.omnigroup.com/applications/omnifocus/>

The **Release notes**, available from the **Help** menu, list all of the changes to OmniFocus for each version. Check them out if you'd like to keep up with what's new.

If you're stuck, or if you just want to let us know how we're doing, go ahead and send us an e-mail. Choose **Send Feedback** from the **Help** menu to conjure up a message addressed to us, or just write to [omnifocus-iphone@omnigroup.com](mailto:omnifocus-iphone@omnigroup.com). A real human reads and replies to every message we get. We'll do our best to help you out.

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...Thanks!