

OmniPlan 2 for iPad



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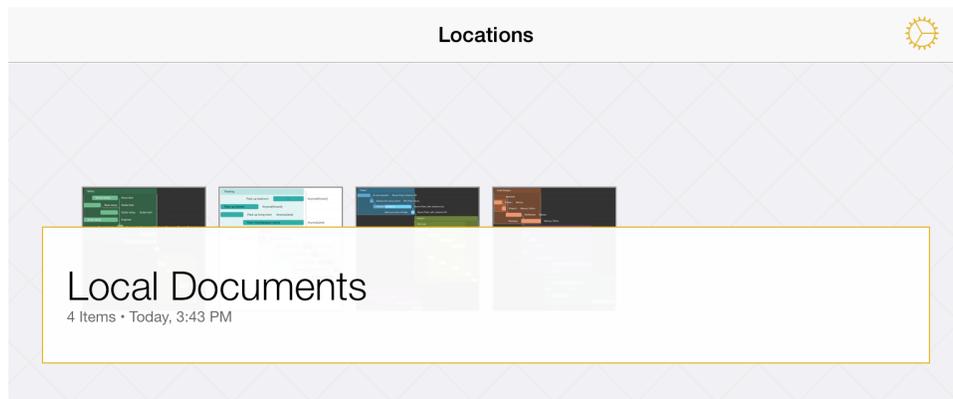
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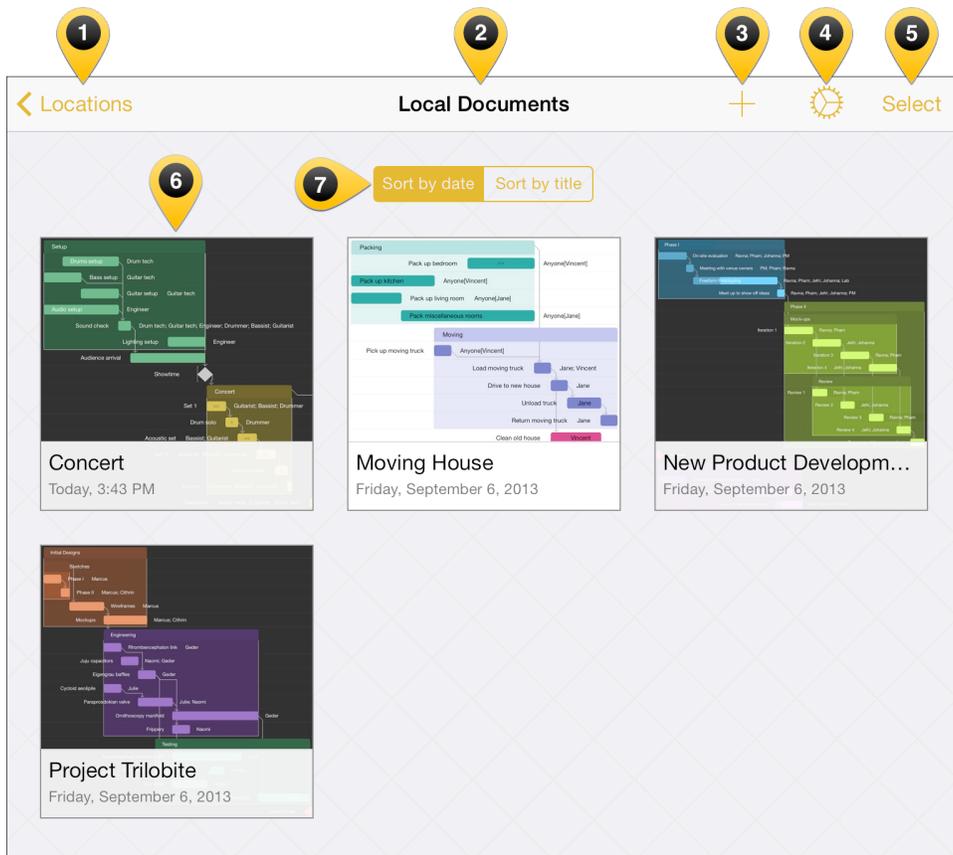
Interface Tour

Part I: The Document Browser

When you first open OmniPlan, you're taken to the Locations screen which is the place you go to access all of your documents. There is a Local Documents folder, which we've preloaded with some sample OmniPlan files that you can use as inspiration for the projects you create.



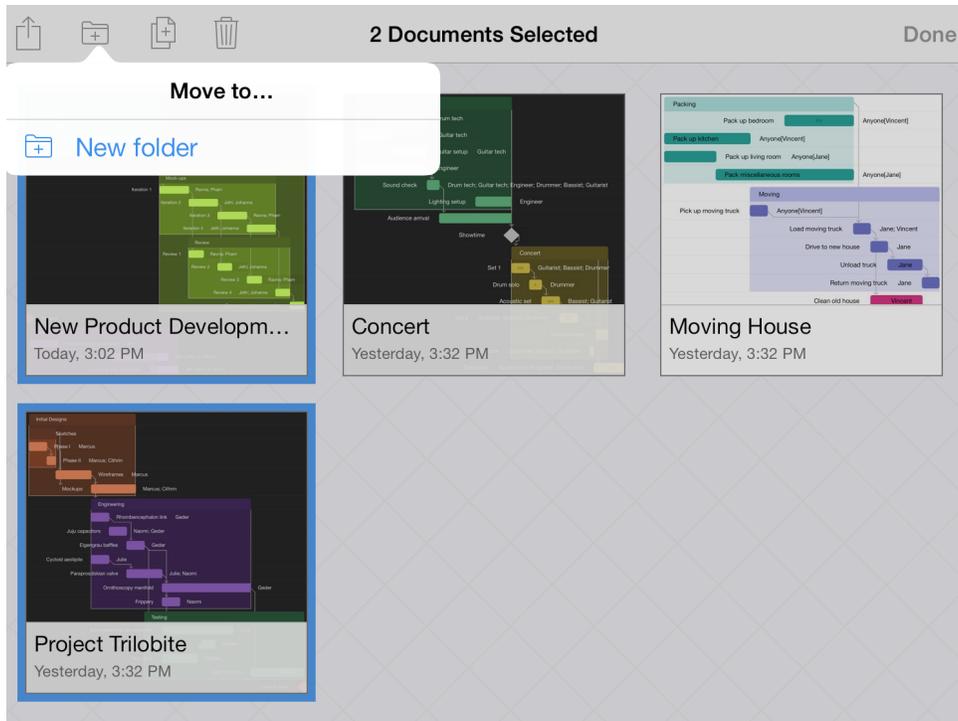
Tap the Local Documents folder to see what's inside. This opens the Document Browser, which is the place to view, create, and manage your projects.



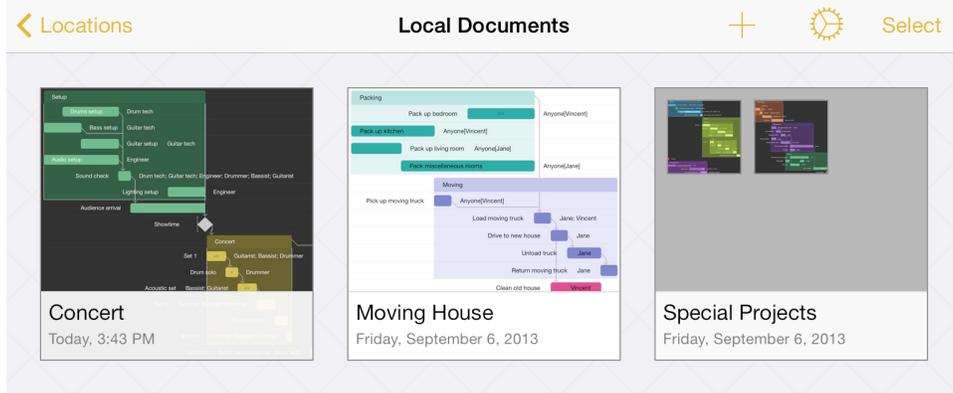
1. **Locations** — Tap here to go back to the main screen where you can view the Local Documents folder and any synced folders from the cloud.
2. **Folder Name** — This is the name of the current folder. Your default folder for storing files locally is titled **Local Documents**.
3. **Add/Plus** — Creates a new project.
4. **Settings** — Tap to reveal a popover menu with the following options:
 - **OmniPlan Help** — this takes you to the in-app help documentation (*You are here!*) for OmniPlan.

- **Contact Omni** — this queues up an email message that you can send to the kind and wonderful Support Humans here at Omni. Don't hesitate to ask us a question or send us feedback.
 - **Release Notes** — discover what's new in the latest version of OmniPlan.
 - **Restore Sample Documents** — if you previously deleted any of the sample documents that came with OmniPlan, tap here to restore them to your iPad.
 - **OmniPlan Transmogrifier** — this special In-App Purchase is an add-on for OmniPlan which you use to convert Microsoft Project (.mpp) files into an OmniPlan file.
5. **Select** — Tap to edit the contents of a folder. For example, you can select one or more documents and move them to another folder, to the trash, or create a subfolder within the current folder that contains the projects you've selected.
 6. **Projects** — These are your saved projects and any subfolders you've created in OmniPlan.
 7. **Sort** — When you pull down on the screen, the super secret **Sort** bar comes into view. By default, the projects you create are sorted by their creation date, or you can opt to sort them by title.

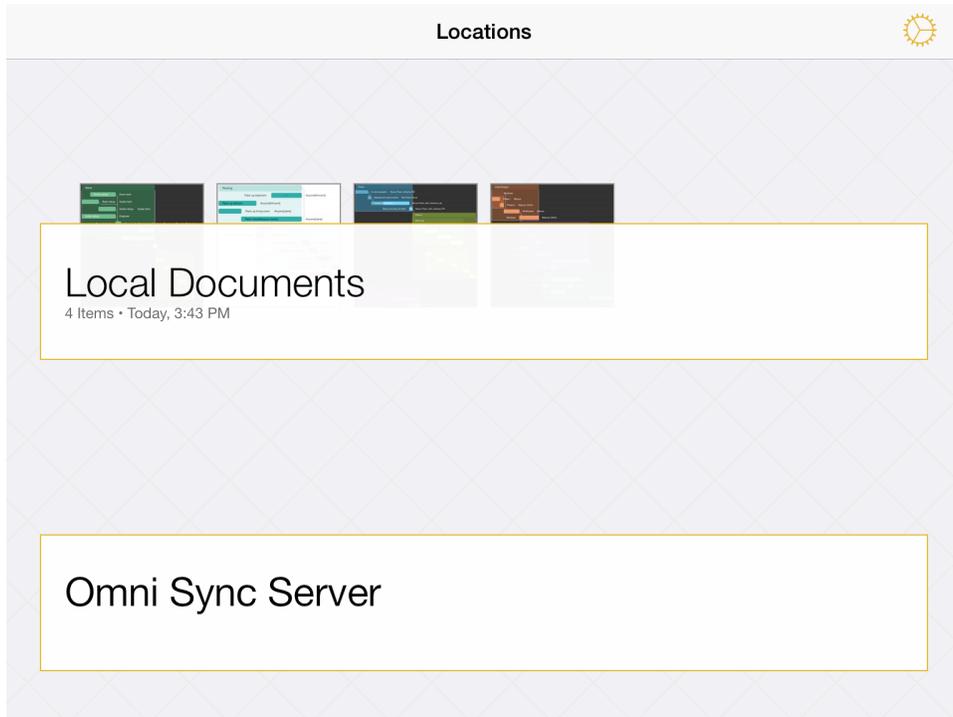
To create a subfolder, tap **Select** in the navigation bar, and then tap on and select one or more files in the Document Browser. Next, tap **Move to** in the upper-left corner and then tap **New folder**.



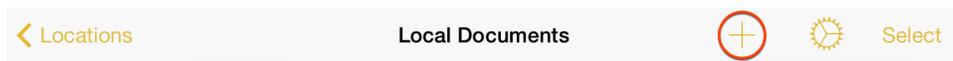
Enter a name for the folder and then tap Done. Subfolders have a dark gray background and display tiny icons for the projects it contains.



When you configure a Cloud Account, such as a free [Omni Sync Server](#) account (or connect to any WebDAV service you're subscribed to), you'll also see a folder on the Locations screen for any compatible file sharing servers to which you've connected OmniPlan.



To create a new project, go to the Locations screen, select the folder in which you'd like to store the new project file, and then tap the **Add** button (the + sign) in the navigation bar.



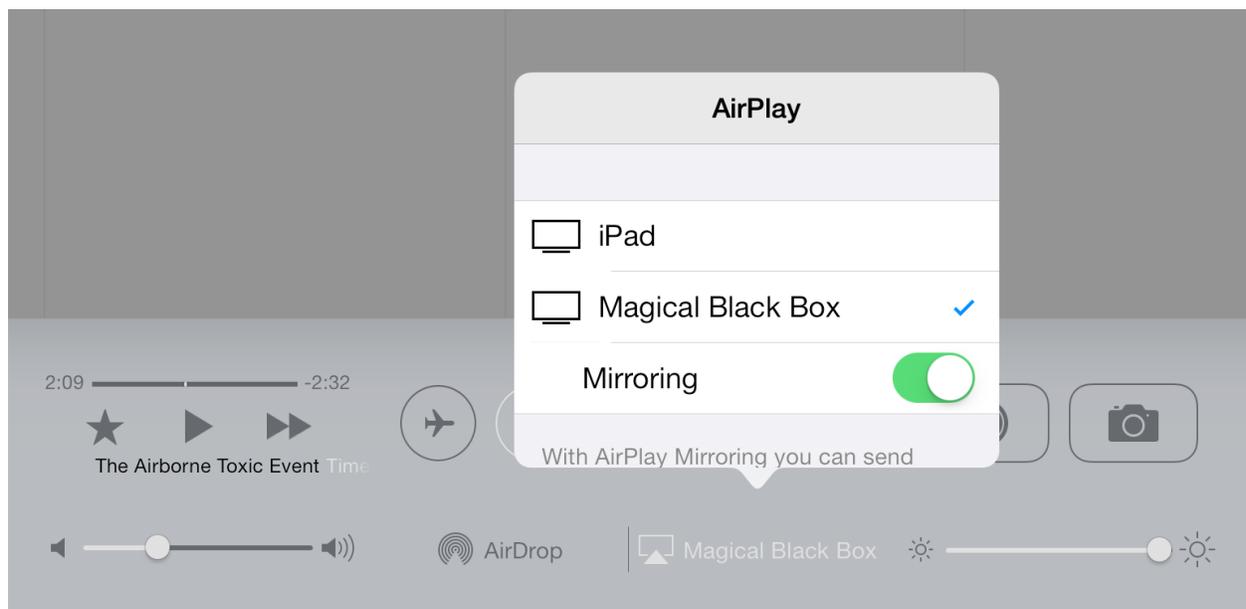
See [Using the Project Editor](#) for more details the project editor itself, or work through the [Starting a New Project](#) tutorial.

Part II: Using the Project Editor

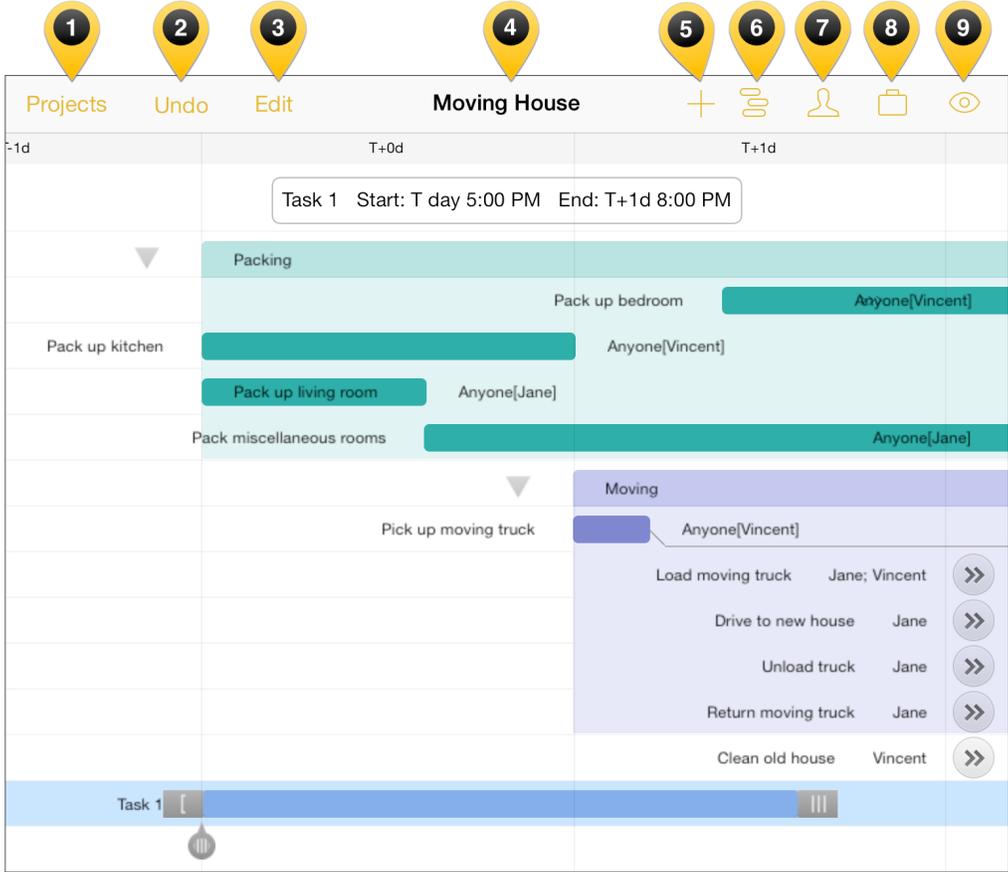
After creating a new project, you'll be faced with OmniPlan's Project Editor. However, the best way to get to know the Project Editor is to open one of the sample projects in the Local Documents folder.

Before we get going, there are a couple things that will make any project manager who's working with OmniPlan happy:

- **Landscape Mode** — Don't be afraid to rotate your iPad to work on your project in Landscape Mode.
- **Pinch to Zoom** — Most projects have many overlapping tasks, so when you need to view your entire project, use the Pinch Gesture to zoom in or out on your project.
- **AirPlay Mirroring** — Need an even bigger screen to work on your project? If you have an Apple TV, you can turn on AirPlay in iOS 7 by swiping up from the bottom of the screen to turn on AirPlay Mirroring.



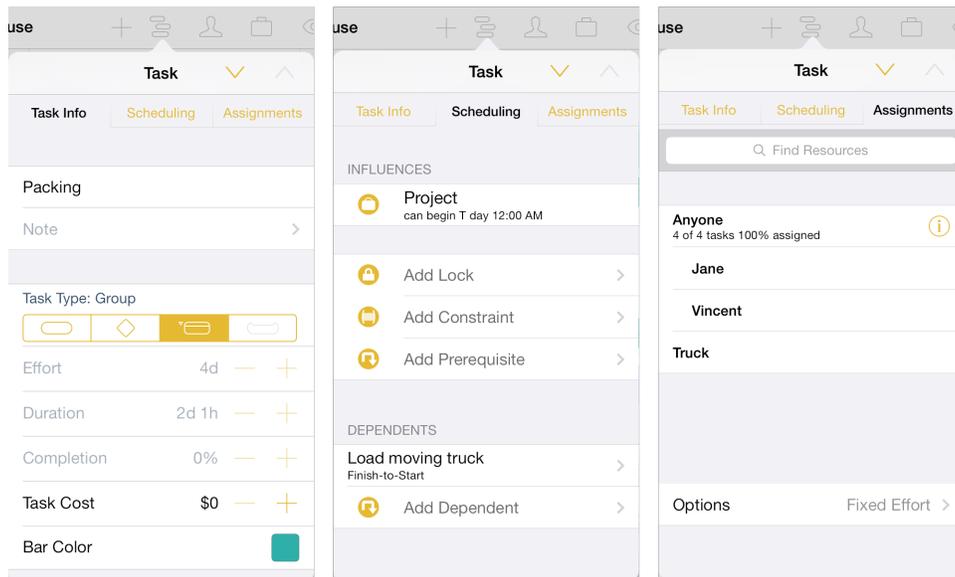
The Project Editor is where you will spend the majority of your time. Whether you're creating a new project or trying to see one to fruition, the Project Editor is where everything comes together in OmniPlan.



1. **Projects** — tap to exit the project you're working on and return to the current project folder.
2. **Undo/Redo** — tap to undo or redo the previous change.
3. **Edit** — with a task, milestone, or group selected, tap **Edit** to reveal the editing controls at the bottom of the screen:



4. **Project Title** — the name of the project.
5. **Add** — tap to add a new task to the project. If you **touch and hold**, a popover menu appears giving you the option to add a new **Task**, **Milestone**, or **Group**.
6. **Task Inspector** — tap to open the Task Inspector. There are three tabs in the inspector: **Task Info**, **Scheduling**, and **Assignments**.



7. **Resources Inspector** — lets you assign resources (Staff, Equipment, Materials, or a Group) to a task.
8. **Project Inspector** — use the Project inspector to set the parameters for your project, including:
 - **Sync** — configure the sync settings for this particular project. If you are using Omni Sync Server, you can specify an auto-update interval so that other members of your team can view and edit the project in OmniPlan on their iPad or Mac.

- **Dates** — choose from **Undetermined** or **Specific**, which basically means your project can start or end on a random or specific date, respectively.
- **Direction** — depending on your project type, choose from **Forward from Fixed Start** or **Backward from Fixed End**. Projects typically have a definitive start or end date (and sometimes both), so choose whichever is appropriate for your project.
- **Work Hours** — specify the expected working hours.
- **Start Date** — this option is only available if you have set a **Specific** start date for your project, rather than an **Undetermined** date.
- **End Date** — this option is only available if you have set a **Specific** end date for your project, rather than an **Undetermined** date.
- **Total Cost** — check here to see the total cost for your project.
- **Currency** — set the currency type for your project's expenses and costs.
- **Granularity** — choose from **Exact**, **Hourly**, or **Daily** to specify how precisely to schedule task start and end times.
- **Duration Format** — check here to see how long it will take to work through all of the tasks in your project. This popover contains a set of switches so you can toggle on or off **Years**, **Months**, **Weeks**, **Days**, **Hours**, **Minutes**, and **Seconds**.
- **Effort Format** — choose which units should be displayed when working with durations. This popover contains a set of

switches so you can toggle on or off **Years, Months, Weeks, Days, Hours, Minutes, and Seconds.**

- **Effort Conversions** — choose how many hours to count as one day, week, month, or year.

9. **View** — this popover lets you:

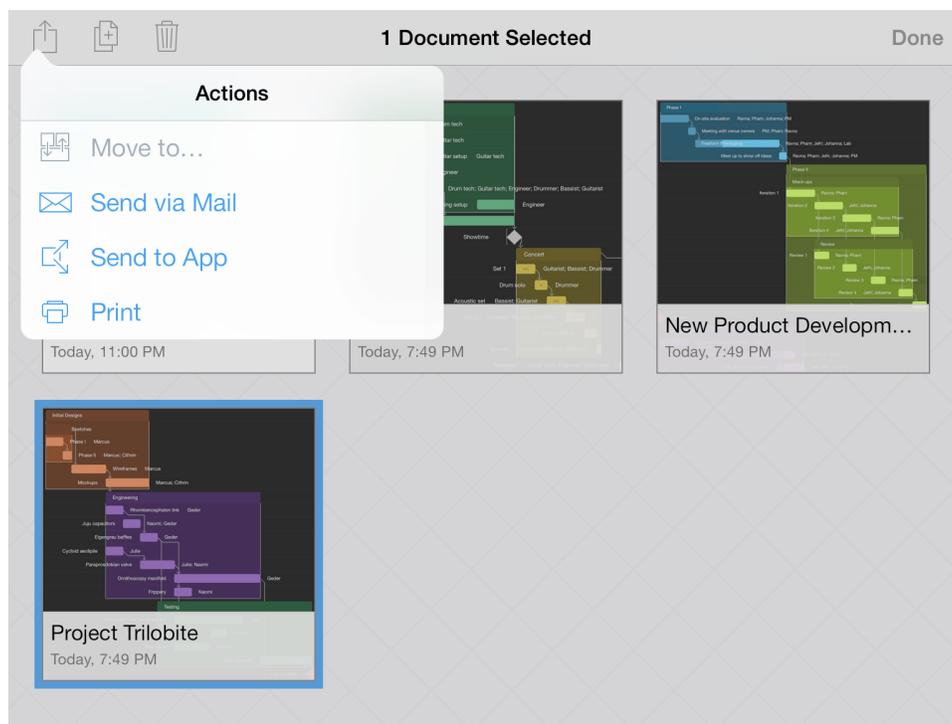
- Set a project **Filter**.
- Turn on **Change Tracking**, which is something you'll want if members on your team are making notes in or alterations to the project file.
- See if there are any **Violations** in your project.
- Check on any **Baselines** in your project.
- View any upcoming **Critical Paths**.

Part III: Sending and Sharing Project Files

Every now and then you'll find the need to share some document you've created in OmniPlan with someone else. But all of the files are on your iPad, how are you going to do this?

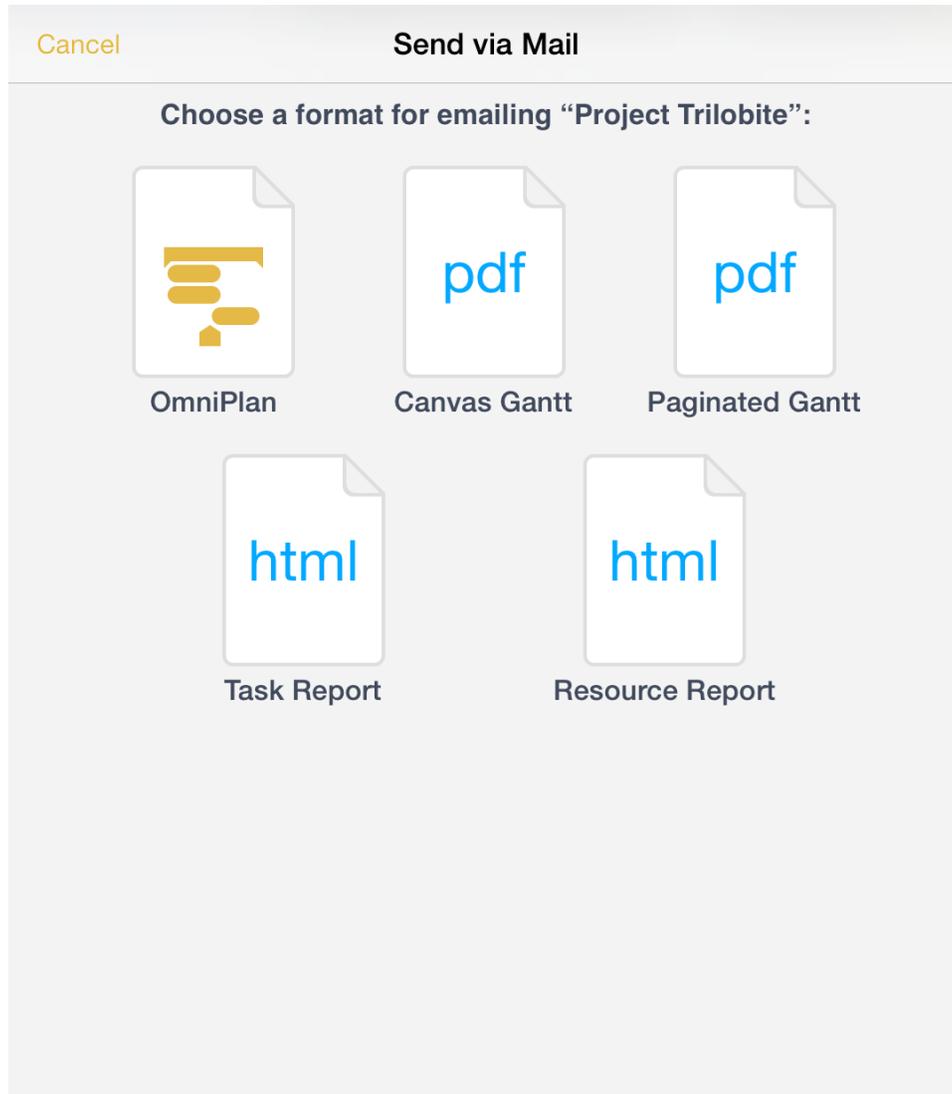
When you open a folder, such as your Local Documents folder, tap Select in the navigation bar, and then select the project that you'd like to share. This places a blue highlight around the file to let you know which file you have selected.

Now tap the Action button in the navigation bar and select from one of the following options:



- **Move to** — lets you move files between folders; for example, between subfolders or to a shared folder on Omni Sync Server.

- **Send via Email** — lets you choose a document format for the file you want to email, and then queues up an email message for your to send.



- **Send to App** — lets you open the file in a compatible app on your iPad, or, if you are on a Wi-Fi network with someone you know, you can share the file with another iOS 7 device using AirDrop. The two PDF options—Canvas Gantt and Paginated Gantt—can also be sent to iBooks or any other iPad app that can render a PDF file.

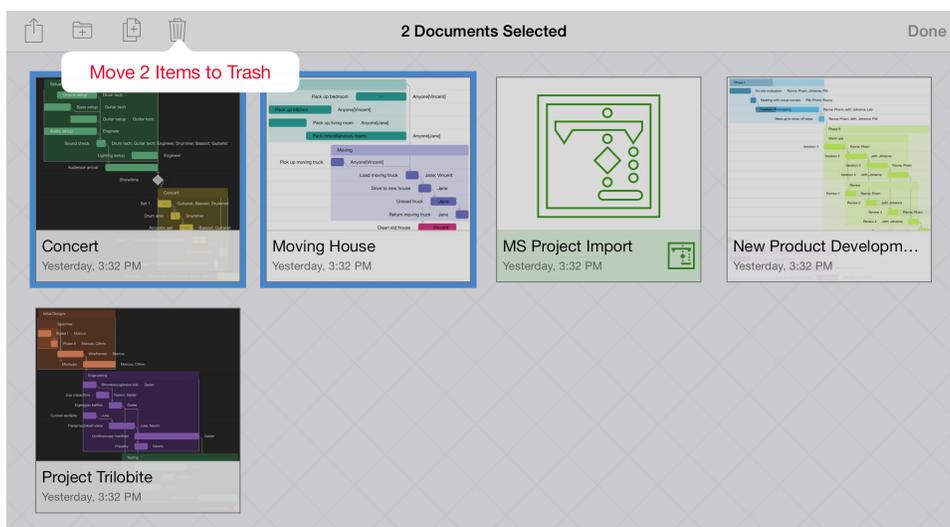
- **Print** — lets you the project to an AirPrint-compatible printer.

Part IV: Taking Out the Trash

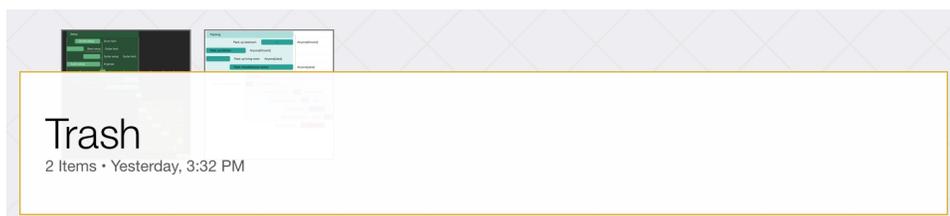
Every now and then, you'll find that it's time to do a little housecleaning in OmniPlan. Those projects for renovating the house are no longer relevant, so it's time to dump those documents into the trash and purge them from your iPad (or from your synced Cloud Account, if you have one of those configured) forever.

Fortunately, deleting files from OmniPlan is just as easy as it is to find someone to play Batman. When viewing a folder of documents, tap Select in the navigation bar at the top of the screen. Then tap on the documents you'd like to delete; you'll see that the files now have a blue highlight.

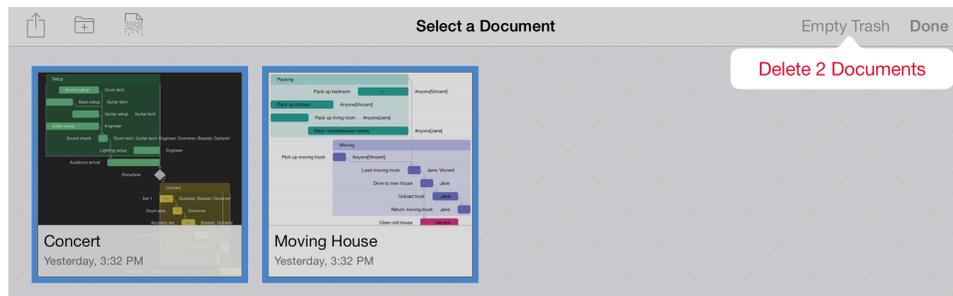
Tap the Trashcan in the navigation bar to move the document to the Trash.



If you tap Locations in the navigation bar, you'll see a Trash folder in your list of OmniPlan folders. Until you empty the trash, the files remain on your iPad.



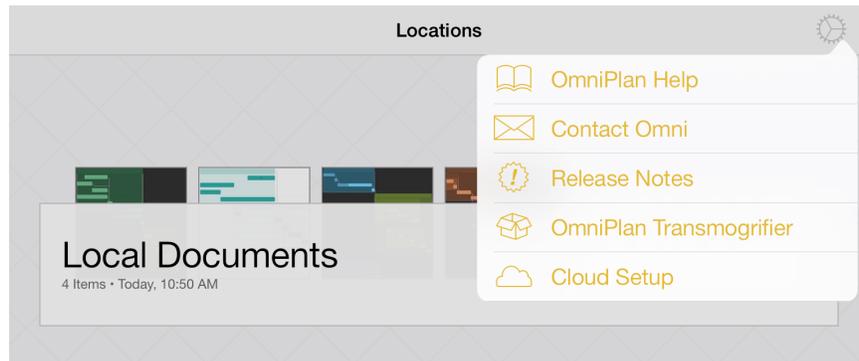
Tap the Trash folder to open it in the Document Browser, and then tap Empty Trash to permanently delete the files from your iPad.



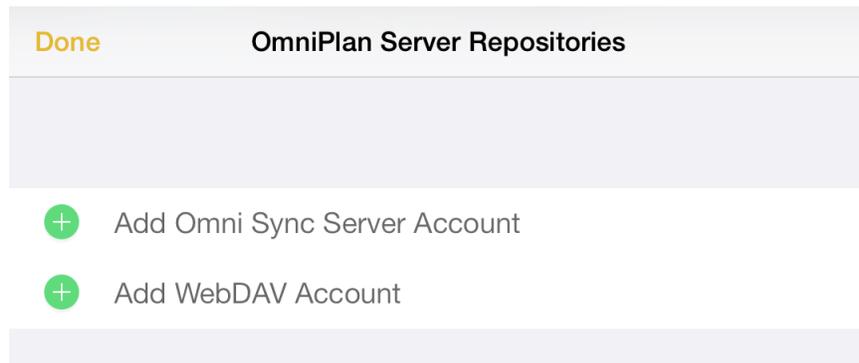
When the files are deleted, you're taken back to the Locations screen in OmniPlan.

Add a Cloud Account

To work on a project shared between multiple OmniPlan users, start by tapping Settings and selecting Cloud Setup in the popup menu.



You'll see the OmniPlan Server Repositories screen, from which you can choose either Add Omni Sync Server Account or Add WebDAV Account.



You can create a free Omni Sync Server account online at:

sync.omnigroup.com

For Omni Sync Server Accounts

On the **Server Details** screen that appears:

1. Enter your **Username**.
2. Enter the **Password** for your account.

3. Set the default **Path** (or folder) to use. By default, OmniPlan uses the root directory (as denoted by the slash, /), but you can change this to another folder; for example, using */OmniPlan* assumes you have a folder named *OmniPlan* at the root level of your OmniPresence directory.
4. Optionally, enter a **Description** that will be used on the Locations screen as the name for your synced folder.
5. Tap **Connect** to authenticate with Omni Sync Server.

< Back Server Details Connect

Account Info

Username omnidocwranglers

Password ●●●●●●●●●●●●

Path /

Description Omni Sync Server

Account verified.

When you tap **Connect** you'll see *Checking account...* at the bottom of the window. When your account information has been validated, the text

changes to *Account verified* and the Omni Sync Server folder is added to OmniPlan on your iPad.

For WebDAV Server Accounts

On the **Server Details** screen that appears:

1. Enter the **Address** (in the form of a URL) for your WebDAV server.
2. Enter your **Username**.
3. Enter the **Password** for your account.
4. Optionally, enter a **Description** that will be used as the name for your synced folder.
5. Tap **Connect** to authenticate with your WebDAV server.

< Back

Server Details

Connect

Address <https://disk.example.com/OmniDocWranglers/>

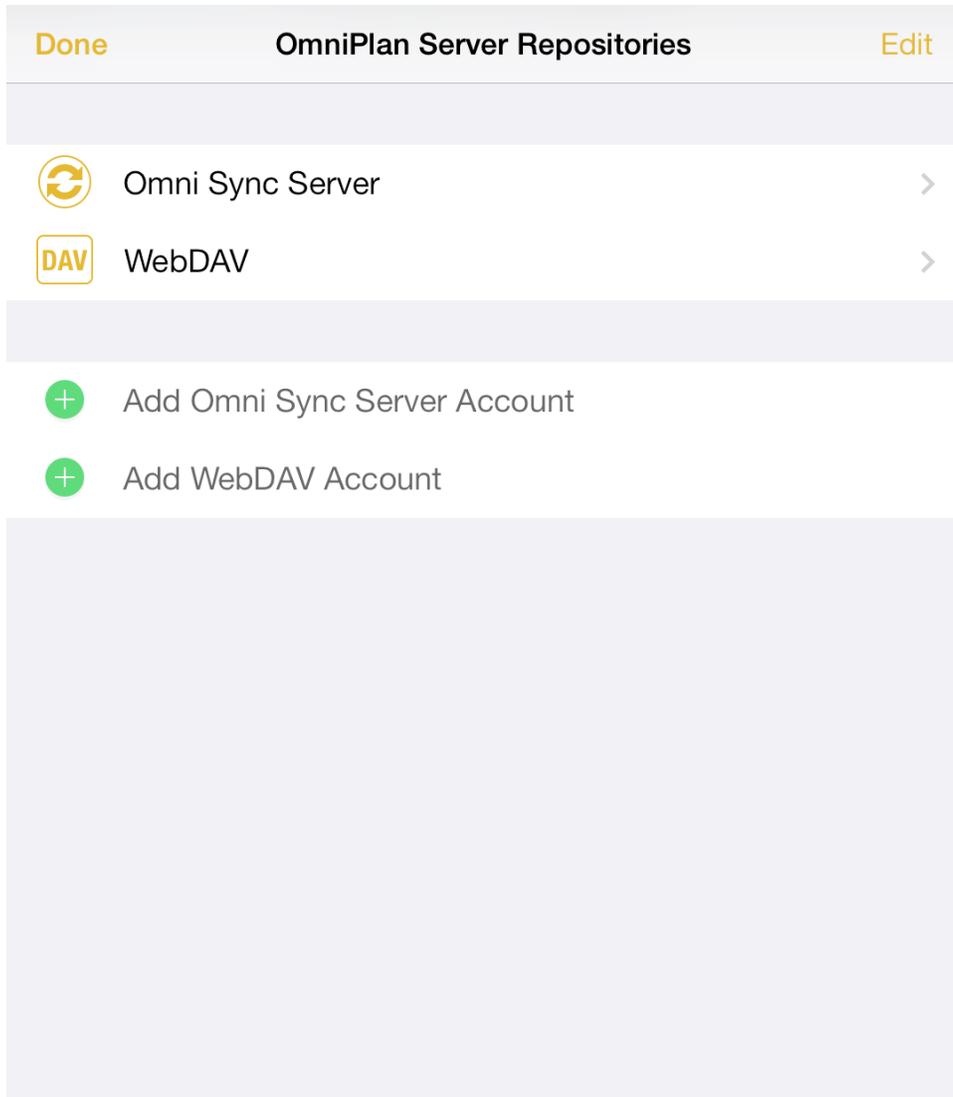
Username OmniDocWranglers

Password ●●●●●●●●●●

Description WebDAV

Account verified.

When you tap **Back**, you'll see a list of your active Cloud Accounts.



To remove an account, tap **Edit**; a delete handle appears to the left of the account name. If you tap the delete handle, the account name slides to the left and a Delete button appears on the right edge; tap that to delete the account. A quicker way to do this is to just swipe left across the account name to bring up the Delete button. If you change your mind before deleting the account, tap **Done** and the Delete button goes away.

OmniPlan Server Repositories

Done



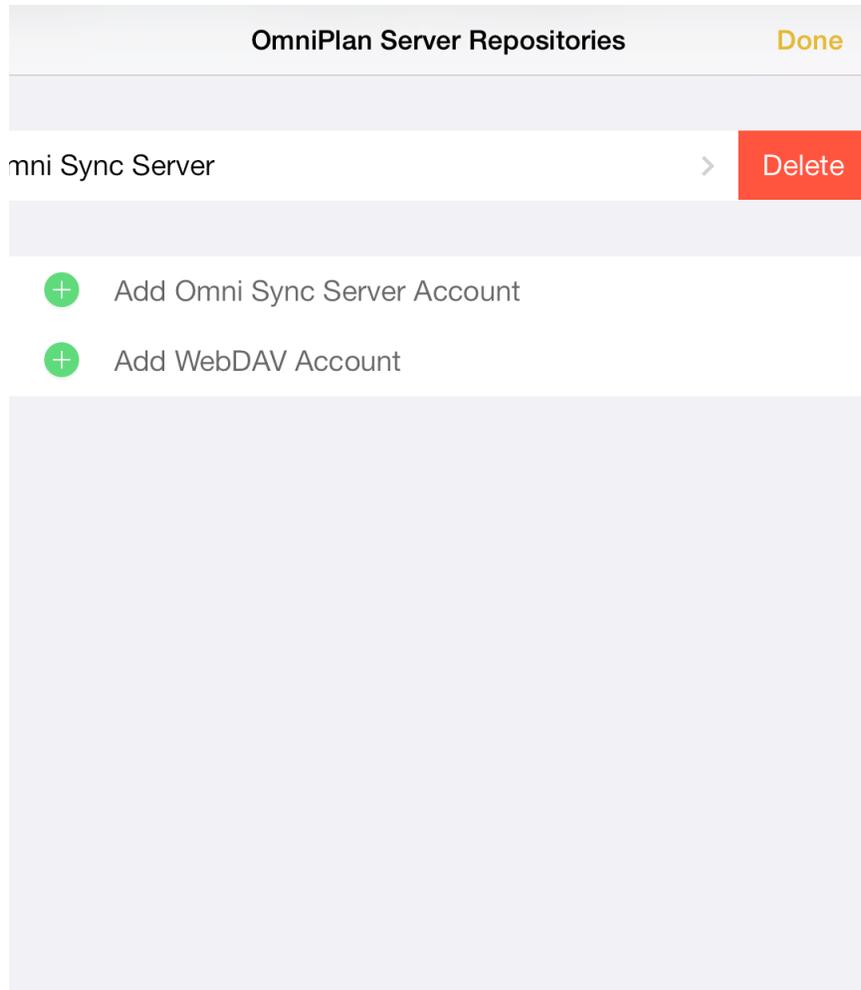
Omni Sync Server



Add Omni Sync Server Account



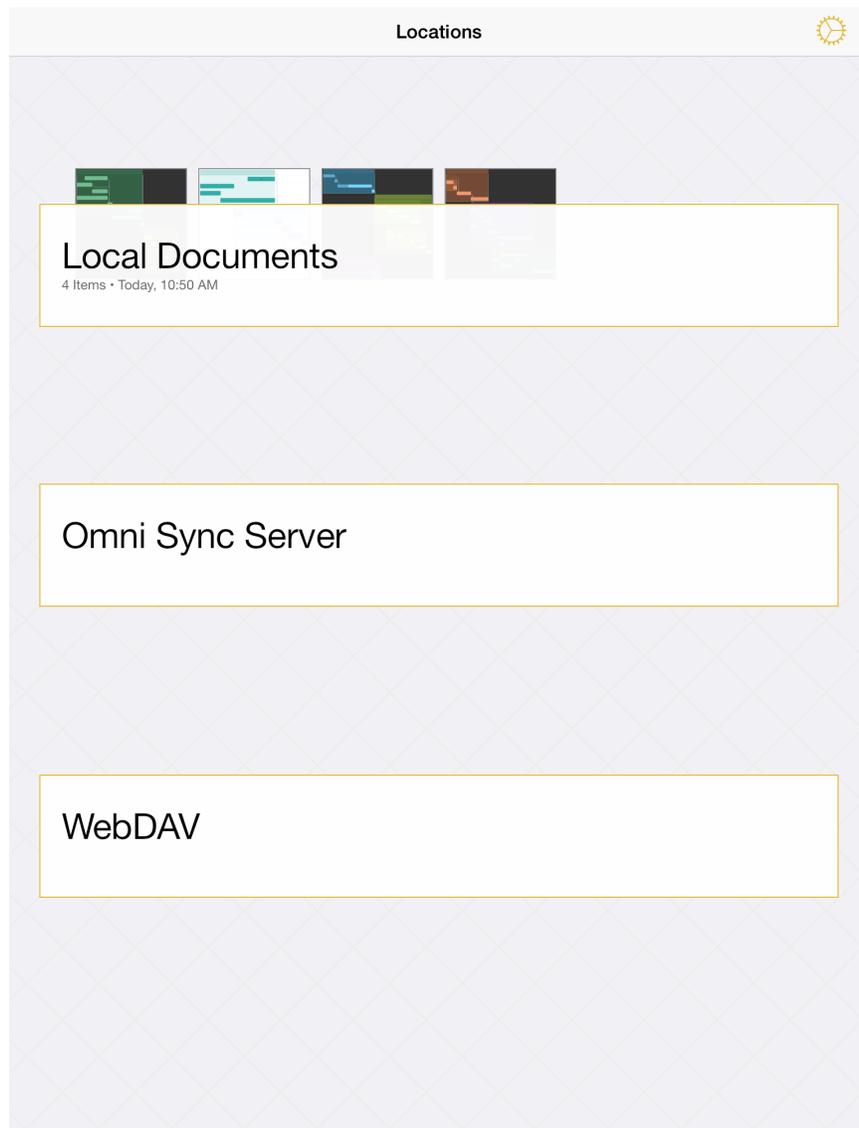
Add WebDAV Account



Warning

Undo will not restore an account that you delete. If you delete one (or all) of your Cloud Accounts, you will need to set those up all over again.

When you tap **Done**, you're returned to the Locations screen where you'll see the Local Documents folder along with any synced services you've added to OmniPlan.

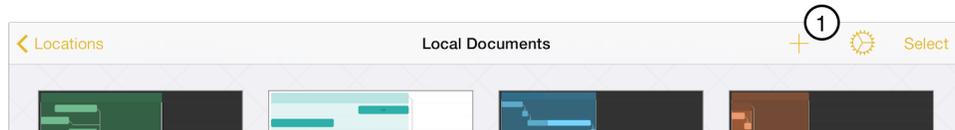


If you tap on a synced folder, such as the Omni Sync Server folder, you'll see a list of files which you can import from the server.

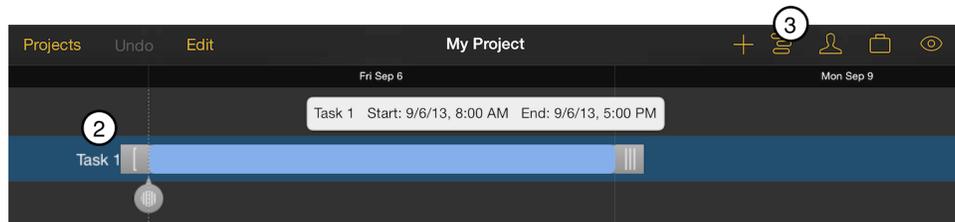
Starting a New Project

This is a quick start guide that covers the basics to help you get a new project up and running in OmniPlan 2 for iPad.

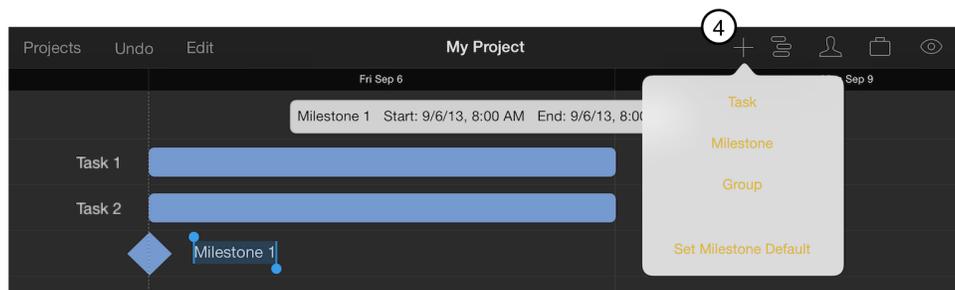
In the Document Browser, tap **Add/Plus (1)** to create a new project.



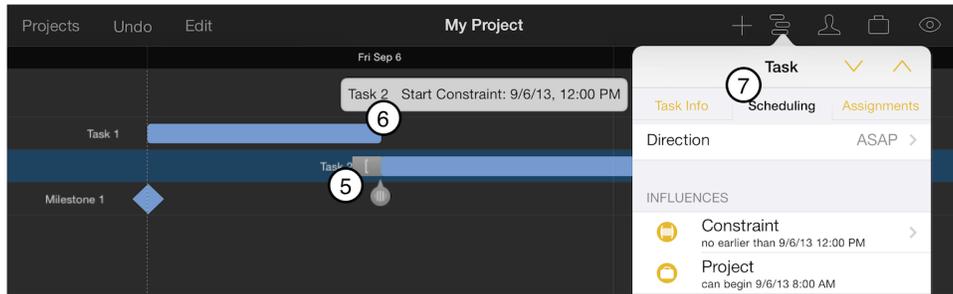
New projects begin with one task by default. You can rename this task to anything you'd like by double-tapping the task name **(2)**. Edit other properties of the task using the Task inspector **(3)**.



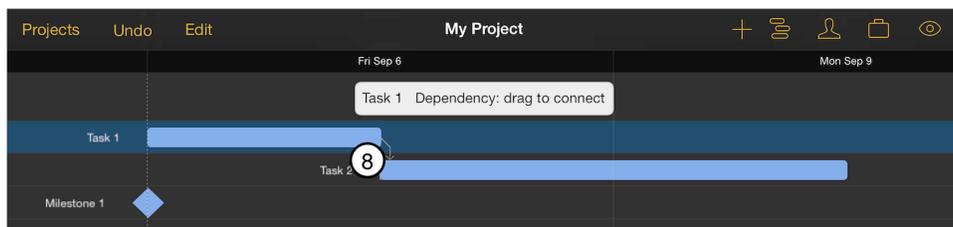
To add new tasks to your project, tap the Add/Plus button on the project screen **(4)**. Touch and hold Add/Plus to reveal a popup menu with options for creating a new Task, Milestone, or Group.



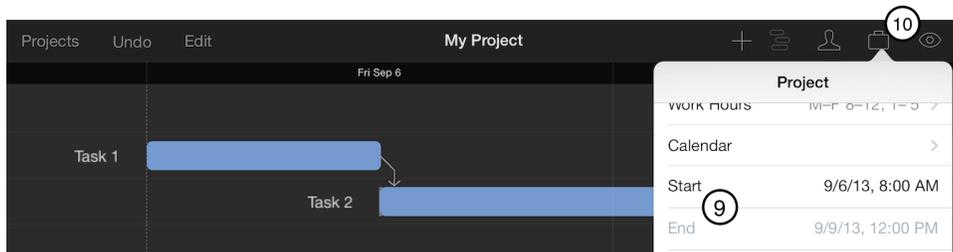
Adjust task start constraints **(5)** and durations **(6)** by tapping the task's bar graphic and dragging the left and right bracket handles, or in the scheduling pane of the task inspector **(7)**.



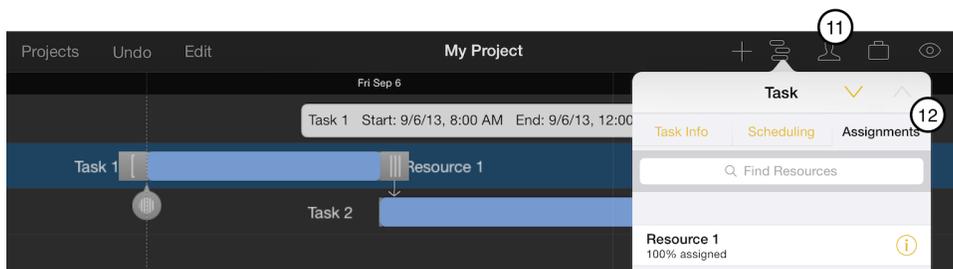
Double-tap a task to access dependency arrows (8) that can be dragged from one task to another, further defining your project workflow.



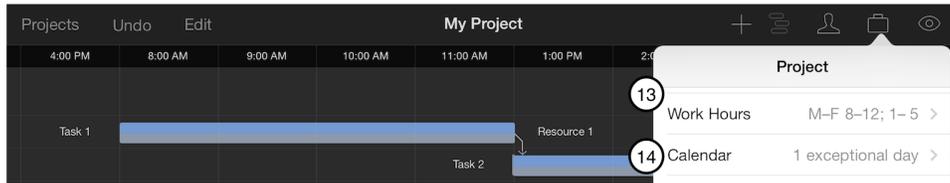
Add additional known factors that will influence the project, like the start or end date (9), using the project inspector (10).



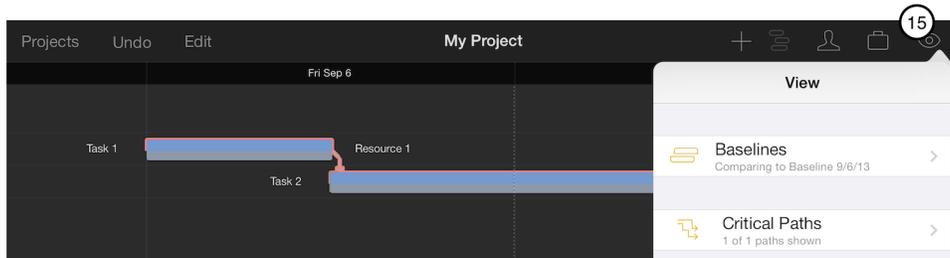
Add the people, tools, and materials that will be part of the project using the resource inspector (11). Assign them to tasks by tapping a task and choosing the Assignments pane (12) from the task inspector.



Define the schedule of a standard work week using Work Hours in the project inspector (13), then add exceptions like time off and overtime using the Calendar (14). Manage the schedules of individual team members using the resource inspector.



Set a baseline for expected progress and view a project's critical paths using the view inspector (15).



Share the project with other team members by publishing to an OmniPlan server repository from the sync settings (16) in the project inspector. Enable change tracking in the view inspector to monitor other team members' revisions and contributions.



Credits

PLCrashReporter

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Contact Omni Support

We're here to help! The list of frequently asked questions on our support site is a good place to check first:

<http://www.omnigroup.com/products/omniplan-ipad/support>

On the support site, you'll also find links to our email and phone support for any questions that aren't answered in the FAQ.