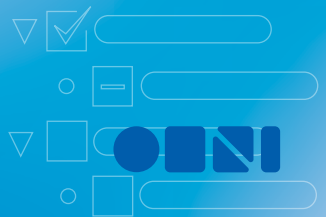
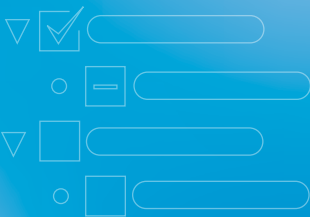


OmniOutliner PRO Manual



OmniOutliner PRO Manual



Version 3.0



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Welcome to OmniOutliner

We all have ideas knocking around in our heads. OmniOutliner is for getting those ideas out into the open where you can see them, shuffle them around, neatly present them, and share them with other people. With it, you can quickly jot down notes into a list, or you can forge monumental masses of information into shape with pixel-by-pixel precision.

Hierarchical lists and tables can be used to express nearly any idea you have. You probably already write them all the time on paper or with word processors and spreadsheet programs. But OmniOutliner is specifically built for list and table creation, so it's more powerful than a word processor, while being lighter and cleaner than a spreadsheet.

OmniOutliner is designed to be fast and simple, so you can jump in, start getting things done right away, and worry about the intricacies later. But it's also powerful, so that once you are ready, you can exert a nearly supernatural level of control over your data. We're not kidding; it's spooky.

Welcome to This Manual

OmniOutliner seems simple at first, and you can actually use it quite happily without delving into its innermost features. But then you'd be missing out on much of the fun. This manual is here to introduce you to some of the things you might not discover on your own; not everyone is the rash, adventurous type who goes selecting every menu item just for amusement.

You can refer back to this manual for general guidance and ideas. If you have a question about a specific detail, try the searchable help files in OmniOutliner's **Help** menu.

This is just a list of the most prominent new features; for actual explanations of how they work, check the appropriate sections of this manual or use OmniOutliner's **Help** menu.

Interface Improvements

- **Inspectors**

The Info panel has been replaced by five Inspectors you can arrange around the screen however you like. They let you control every aspect of your outline, from whether you want the file to be compressed on your hard drive, to setting each letter's underline to a different color thus making a rainbow underline, just because you can.

- **Batch Find**

You can now search your whole outline at once. All of the matching results will show up in the Utility drawer and update with each letter you type, so you get results now *now* NOW.

- **Inline Notes**

Now you have the option of displaying notes right beneath the items they're associated with, rather than in a pane at the bottom of the window. This way you can see all of your notes without having to select each item in turn, opening up all sorts of new uses for the notes feature.

Document Improvements

- **File Attachments**

You can now put any kind of file right inside your outline. Images are viewable, audio and movie files are playable, and any other kind of file will open in the appropriate application when clicked.

- **Styles**

OmniOutliner 3 has a hugely improved style system with which you can apply styles on several different levels, with attributes cascading into lower levels.

- **Automatic Backup**

Your outlines can be automatically backed up at regular intervals, so that you don't lose data in the event of a power outage or (horror!) a crash.

Printing Improvements

- **Filtering**

You can choose to print only certain columns, only checked or unchecked items, only selected rows, or any combination thereof.

- **Scaling**

Outlines can be automatically scaled to fit within the printed page's width.

Pro Features

The new Professional edition of OmniOutliner includes these additional features, as if it weren't already cool enough.

- **Clippings**

You can use OmniOutliner as a clipboard by sending useful or interesting text clippings to it from other applications. Say you're reading some web page and you come across a brilliant joke, or a tasty-looking recipe, or a practical and renewable clean energy source. Just highlight it and use the **Services** menu send it to OmniOutliner, where it'll be stored away in a special outline of your choice, organized by date.

- **Multiple document templates**

Create several different document templates that have all of the formatting and preliminary structure set up just how you like them for different kinds of work.

- **Audio recording**

Pro users will find a **Record** button in their toolbars, with which audio files can be recorded and placed right into the outline. Save an audio version of the lecture you're taking notes for, hum the melody of the song you're writing, or just record your extraordinarily vocal cat's yowling.

- **Named styles**

Combine several attributes into custom named styles, then use them across and between documents.

- **Row folding**

Multi-line rows can have their text folded into one line until you select them, compressing your outline down to a more viewable size.

- **Microsoft® Word export**

Now you can associate with people who use Microsoft Word again.

- **Multi-column sorting**

The Professional edition can sort items based on values in several different columns at the same time.

- **Headers and footers**

You can set up custom headers and footers for your printed outline, with different settings for the first page and the rest of the pages. Headers and footers can contain page numbers, modification dates, and other bits of information that automatically update themselves as you work.

1. Mount the Disk

If you have a physical OmniOutliner disk that came in a box, put the disk in your Mac's CD or DVD drive. If you have downloaded an OmniOutliner disk image, double-click it (the **.dmg** file) to mount it.

2. Copy the Application

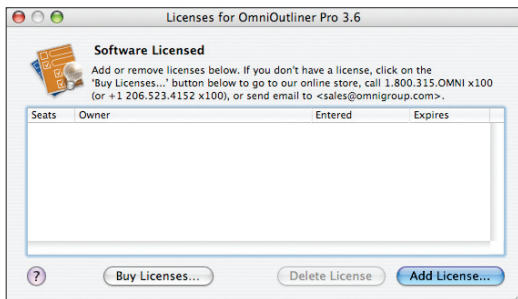
Drag the OmniOutliner application icon from the disk into your Applications folder. This can be the Applications folder in the top level of your hard drive (so that all users on your Mac can use it) or the one in your home folder (so that only you can use it).

3. Run OmniOutliner

Double-click OmniOutliner to run it; if this is the first time you've used it, and you don't have any licenses installed yet, you'll see the Licenses dialog. If you don't see it, and you want to install a license, select **Licenses** from the **OmniOutliner** menu.

4. Add a License

Click the **Add License** button. In the sheet that appears, type your name into the Owner field, and your license key into the **License Key** field. If you bought OmniOutliner in a physical box, your license key should be printed on the CD sleeve. If you bought OmniOutliner online, you can copy the license key from the e-mail receipt into the **License Key** field.



Choose from the three different types of OmniOutliner licenses:

- A **Computer** license can be used by you and any other user on your computer. This is the most basic type of license.
- A **Personal** license can only be used by you, the user who installed it. You can, however, install and use it on any number of different computers.
- A **Network** license is for settings such as companies and schools, to allow a certain number of users on the network to use the software at once.

Once your license key is accepted, click the **Save** button and you're set!

Meet the Outliner

Sections list

OmniOutliner Pro's **sections list** gives you an overview of your outline and a quick way to focus on one portion of it.

Batch find

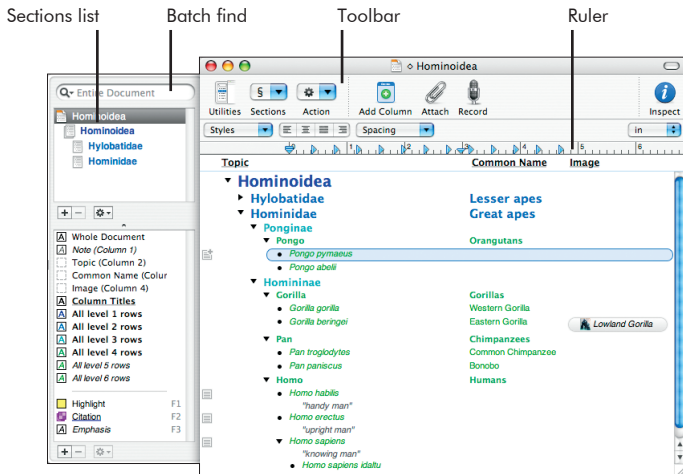
Use the **batch find** field to search your entire outline instantly.

Toolbar

The customizable **toolbar**. You've probably seen this on a lot of fine Mac OS X applications; it works just as you'd expect.

Ruler

OmniOutliner fully supports Rich Text formatting; use the controls on the **ruler** to whip that text into shape.



Meet the Outliner

Attachments

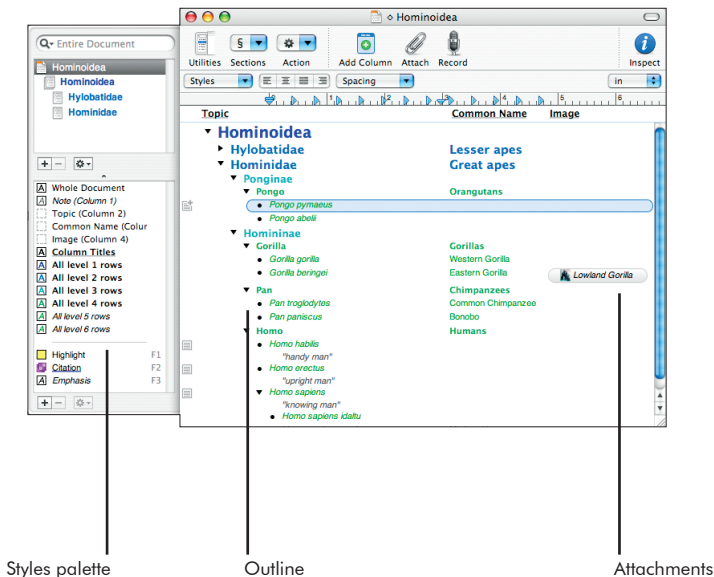
Attach files and view them directly from within the outline.

Outline

Your **outline** can have as many items, columns, and levels of indentation as you like.

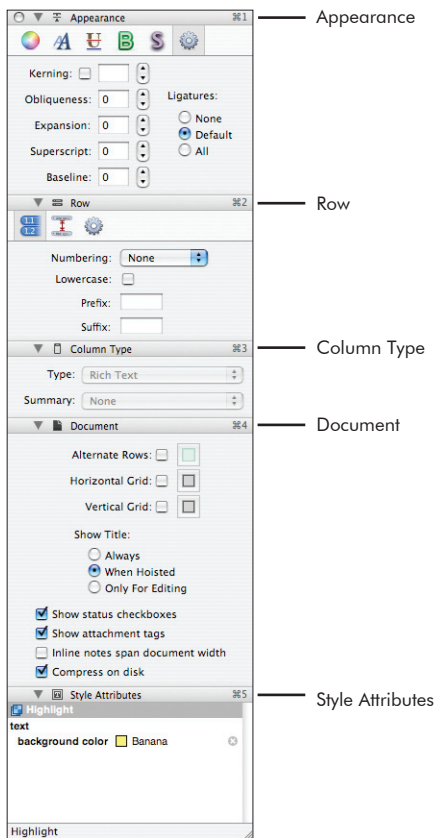
Styles palette

Ah, the **styles palette**. Set up custom styles based on row, column, and level, or use OmniOutliner Professional to create your own named styles for use wherever you like.



Inspectors

Five friendly **inspectors** contain a cornucopia of controls, and politely go away when you don't need them.



Mini-tutorial: Essential Keys

OmniOutliner is colossally useful right away. For the most part you can start typing an outline just as you would in, say, a word processor.

There are just a few special keys you should know about:

- **Return**

Hitting **return** will create a new item below the currently selected one. **Shift-return** will create one above it instead.

- **Tab**

Hitting **tab** will indent the selected item, making it a child of the item above it. **Shift-tab** will outdent it.

- **Escape**

Escape (probably **esc** on your keyboard) will switch between selecting a row and editing the text of that row.

That's all you really need to know right off the proverbial bat (but note that the behavior of Return and Tab can be customized in the Keyboard preferences). Armed with this knowledge, you can make all sorts of nicely organized lists and outlines. Feel free to experiment; you can always Undo all the way back to the last time you saved. Coming up are some more detailed tutorials; you can read them later if you'd like to play around with the program for a while first.

OO3 TIP

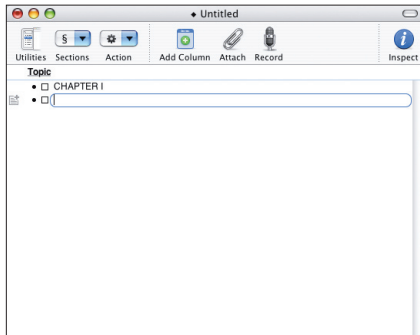
About familial relationships

When outlining, we use familial terms to refer to the relationship between items. Think of your outline as a family tree; if you have an item that “contains” other items, it is their “parent”, and they are its “children”. So in your shopping-list outline, the parent item “Cereal” might contain the child items “Corn Flakes” and “Chocolate Frosted Sugar Bombs”. This metaphor extends to the use of words like “grandparent” and “cousin” as well. Furthermore, an item’s children, grandchildren, and so on are collectively called its “descendants”, while its parent, grandparent, and so on are called its “ancestors”. Remember, though, that while an item can have multiple children, it can only have one parent, grandparent, or any other level of ancestor.

Tutorial: Selecting, Moving Around, and Styling

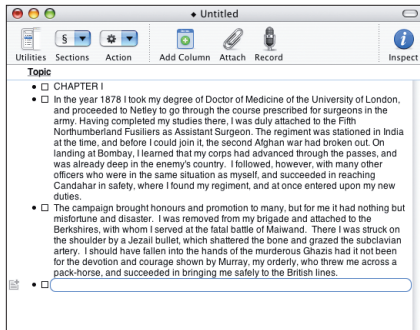
1. Welcome

We're going to write a little story, and in the process learn about some of the basics of OmniOutliner. Create a new, empty outline by selecting **File ▶ New**. Type "CHAPTER I" and hit return. This puts your cursor at the beginning of a new bulleted item on its own row. *Are you excited yet!?*



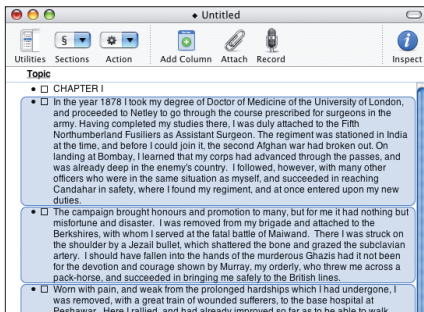
2. Creating Items

Go ahead and type some paragraphs, hitting return after each one just like you would in a word processor. Each time you hit return, a new row will be created below the one you were just editing.



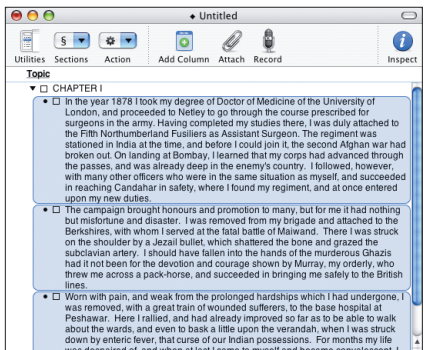
3. Selecting Multiple Items

Let's put the paragraphs you typed inside the chapter heading. Select all of the paragraphs by clicking in the first row's gutter, that is, the empty area just to the left of its bullet, and dragging down through the gutters of all the rows you want to select.



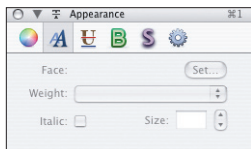
4. Indenting Rows

With all of your paragraphs selected, press Tab and they will all be indented, becoming children of the chapter heading row above them. The chapter heading's handle will change from a bullet to a triangle, showing that you can now expand or collapse it as you please.



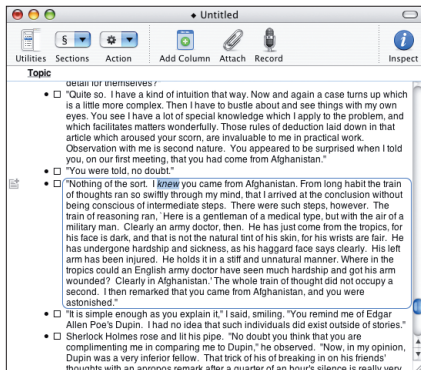
5. The Appearance Inspector

You can use Rich Text formatting to style your documents. On your screen you should see the Appearance inspector, which lets you control the formatting of any text in your outline. If someone closed the Appearance inspector on you, just select it from the **Inspectors** menu.



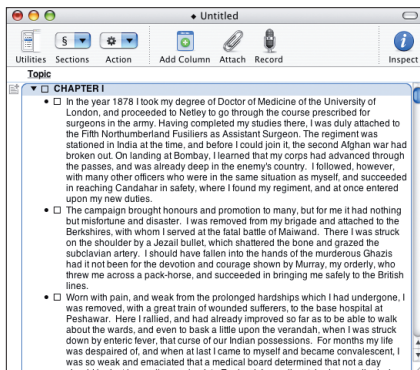
6. Styling text

In one of your paragraphs, highlight some text you'd like to italicize. In the Appearance inspector's Font section, click the **Italic** checkbox. Congratulations, you have set the style of that particular text to italic.



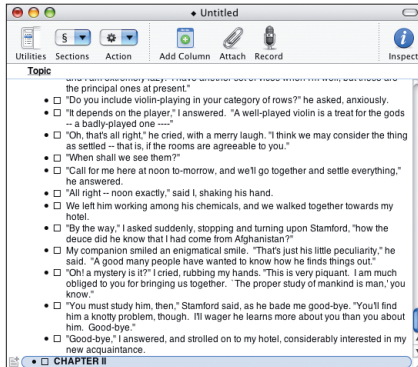
7. Styling a Row

Particular bits of text within a row are the most specific place to which you can apply styles, but by no means are they the only place. You can, for example, set the style of a whole row. Select the parent row that contains your chapter heading. That is, don't just select the text inside, but select the row itself by clicking its gutter. Then click the **Weight** pop-up menu in the Appearance inspector and select **Bold**. Okay, great, the chapter heading row is now bold. But it gets better.



9. Automatic Level Styles

Put your cursor at the end of your last paragraph and hit return to create a new row. Type “CHAPTER II”. Outdent this new row by hitting shift-tab or dragging its handle to the left. Something cool has happened! The row automatically becomes bold, just like the other chapter heading. See, OmniOutliner watches as you create rows, and if all of the rows on a certain indentation level have the same style, it creates a level style that gets applied to any new rows at that level. Yes, a level style. Not only can individual pieces of text or whole rows have styles, but so can indentation levels.



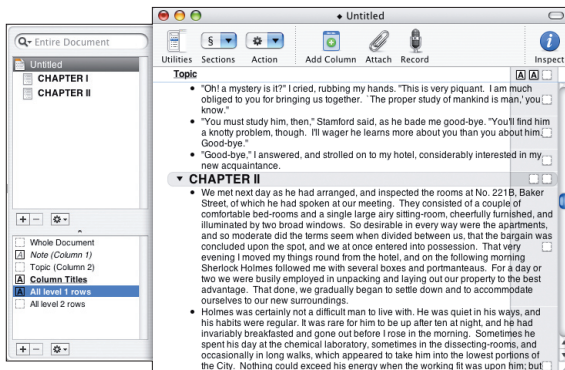
OO3 TIP

Turning Off Our Helpful Features

OmniOutliner is set up so that most people will be able to get most of their work done without ever having to fiddle with any controls. That's why things like Automatic Level Styles are on by default. If you'd rather OmniOutliner didn't automatically create level styles for you, just deselect the Automatic Level Styles item in the Format menu.

10. The Style Palette

Let's visit the style palette and learn more. Open up the utility drawer by clicking its toolbar icon or by selecting it from the **View** menu. At the bottom of the utility drawer is a style palette that contains all sorts of styles you can set up for your outline. For each style there is a little square chit that approximates what the style looks like. You should see your bold style already set for **All level 1 rows**; this was automatically set because all of your level 1 rows were bold.

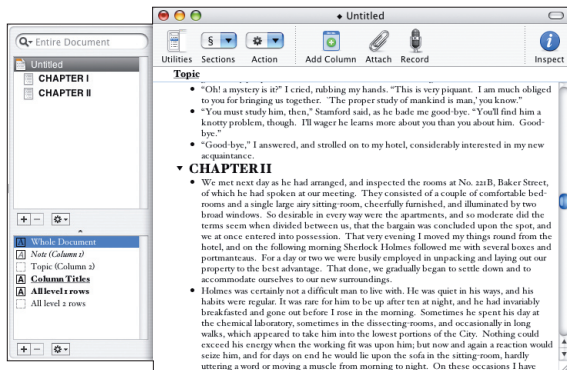


You can explicitly set these styles, too, instead of just letting them happen automatically. Try clicking the **All level 1 rows** entry and then increasing the font size with the Appearance inspector. All of your level 1 rows will obey the new style. *We're really cooking now!!*

Okay, more styles. If you haven't noticed yet, styles are a major part of this application. Say you don't care for the default font and you'd like to see your story in a different one. You could click **Whole Document** in the style palette and then set a new font that would apply to every bit of text in the whole file. That's another place where we can set styles: the whole document.

11. The End

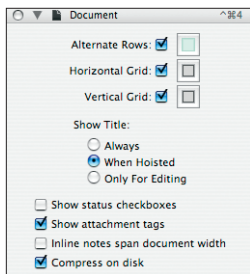
You can continue on like this and OmniOutliner will automatically format any new items according to the styles you have set up. That about wraps up this tutorial.



Tutorial: Columns, Notes and Sorting

1. Document Settings

Great, now let's balance your monthly budget. "Whoa," you say, "the same application I use to write the Great American Novel can also be used to keep track of my cheese-snack-cracker purchasing habits?" Absolutely. Open up a fresh, new outline and let's get started. Just to make it look all official and stuff, turn on alternate row coloring in the Document inspector and pick a nice financial-looking color. While you're at it, turn on the horizontal and vertical grid, and turn off status checkboxes since you won't be needing them.



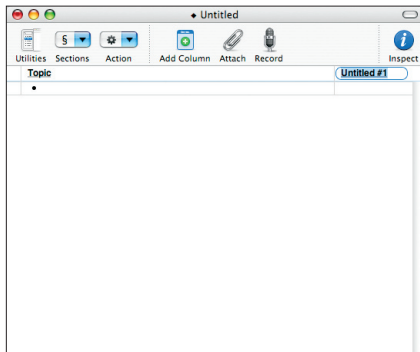
003 TIP

Status Checkboxes

The little boxes between an item's handle and its text are called status checkboxes. They are just there for your convenience, if you're making something like, say, a to-do list. They don't have any inherent meaning, so you can use them however you see fit. You can also turn them off in the Document inspector. By the way, parent items' checkboxes automatically update based on the values of the child items' checkboxes, and vice versa.

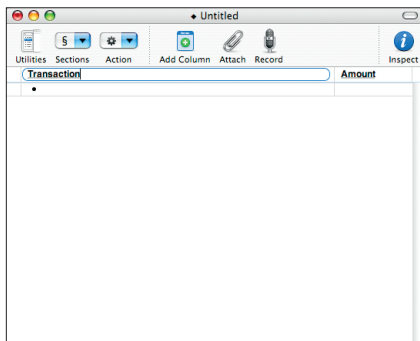
2. Adding Columns

It's time to enter *the second dimension!* Or, *the second-and-a-half dimension!* Or something. You can use columns to keep track of several different types of information about the same item. Add a column by clicking the **Add Column** button in the toolbar or by selecting it from the Reorganize menu.



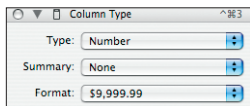
3. Naming Columns

When you first add a column, the insertion point moves into its title so you can come up with some brilliant name for it. Go ahead and call this new column "Amount". While you're at it, double-click the title of the Topic column and rename it something like "Transaction".



3. The Column Type Inspector

Let's set up your Amount column. Click the column title to select the whole column, and then open the Column Type inspector from the **Inspectors** menu if it's not open yet. In the Column Type inspector, change the type to **Number**. This makes OmniOutliner realize that you want to put numbers in this column, that it might be doing some math with the numbers, and that it shouldn't let you put any other kind of data in there. When you change the type, another pop-up menu appears for setting the number format. Go ahead and set the format to whatever your currency is (this can be set in System Preferences, in the International pane). This will automatically format any number you enter to look like a monetary amount.



4. Entering Values

Now enter some items in the Transaction column, perhaps things you've spent money on so far this month, or income sources. Group some things together; you can make an item for a category and then make child items for the specific transactions within that category. For each specific transaction, put a value in the Amount column. Make sure you enter expenses as negative numbers and income as positive numbers.

The image shows the OmniOutliner application window titled "Untitled". The table has two columns: "Transaction" and "Amount". The data is as follows:

Transaction	Amount
Expenses	
Restored WWI aircraft	
• Fokker D.VII	(\$1,400,000.00)
• Sopwith Camel	(\$1,000,000.00)
Rare Neo Geo cartridges	
• Metal Slug	(\$3,000.00)
• Kizuna Encounter	(\$10,000.00)
• Flight to Perth	(\$2,600.00)
• Diamond-encrusted iPod	(\$1,500.00)
Groceries	
• Bacon	(\$2.76)
• Lettuce	(\$1.13)
• Tomato	(\$1.75)
• Mayonnaise	(\$3.23)
• Bread	(\$0.98)
Income	
• Bake sale	\$17.05
• Lemonade stand	\$6.75

5. Column Summaries

See the **Summary** pop-up menu on the Column Type inspector? You can use this to have parent items calculate their own values based on their descendants' values. With your Amount column selected, click **Summary** and choose **Total**. This will make items with children display the total value of all of their descendants added together. Summaries will be slightly darkened so you can tell them apart from individual editable values.

The screenshot shows a spreadsheet window titled "Untitled" with a toolbar and a menu bar. The menu bar includes "Utilities", "Sections", "Action", "Add Column", "Attach", "Record", and "Inspect". The spreadsheet displays a tree structure of transactions under the heading "Transaction". The "Amount" column is highlighted in blue, indicating it is selected. The values in the "Amount" column are calculated as the sum of their descendants.

Transaction	Amount
Transaction	(\$2,417,109.84)
Expenses	
Restored WWI aircraft	(\$2,400,000.00)
Fokker D.VII	(\$1,400,000.00)
Sopwith Camel	(\$1,000,000.00)
Rare Neo Geo cartridges	(\$13,000.00)
Metal Slug	(\$3,000.00)
Kizuna Encounter	(\$10,000.00)
Flight to Paris	(\$2,600.00)
Diamond-encrusted iPod	(\$1,500.00)
Groceries	(\$9.84)
Bacon	(\$2.75)
Lettuce	(\$1.13)
Tomato	(\$1.75)
Mayonnaise	(\$3.23)
Bread	(\$0.98)
Income	\$23.80
Bake sale	\$17.05
Lemonade stand	\$6.75

6. Adding Notes

Perhaps you'd like to add a note to one of your items, some text that you'd like to include but that you can tuck away when you don't need it. A little "add note" icon appears on the far left of whichever row you have selected; click it and you can type in some text for your note. When you're done, a note icon remains to let you show and hide the note, so you can write pages and pages of text about each item and then hide them away until you want to read them.

The screenshot shows the OmniOutliner Professional application window titled "Untitled". The interface includes a menu bar with "Utilities", "Sections", and "Action", and a toolbar with icons for "Add Column", "Attach", "Record", and "Inspect". The main content area displays a table with a tree view on the left and a numerical column on the right.

Transaction	Amount
Expenses	(\$2,417,109.84)
Restored WWI aircraft	(\$2,400,000.00)
• Fokker D.VII	(\$1,400,000.00)
• Sopwith Camel	(\$1,000,000.00)
Rare Neo Geo cartridges	(\$13,000.00)
• Metal Slug	(\$3,000.00)
• Kizuna Encounter	(\$10,000.00)
European version	
• Flight to Perth	(\$2,600.00)
First class	
• Diamond-encrusted iPod	(\$1,500.00)
Groceries	(\$9.84)
• Bacon	(\$2.75)
• Lettuce	(\$1.13)
• Tomato	(\$1.75)
• Mayonnaise	(\$3.23)
• Bread	(\$0.98)
Income	\$23.80
• Bake sale	\$17.05
• Lemonade stand	\$6.75

003 TIP

The New Document Template

Say you find yourself using notes a lot, and there is a certain way you always like your notes to be styled. You could use the Note entry in the styles palette to set the style every time you create a new document, but there's a better way: click the Edit New Document Template button in the General preferences. The document that shows up is a template that will be used any time you create a new document. You can set up your styles palette, your Document inspector, window size, utility drawer placement, and just about anything else in the document, however you see fit. Then once you save it, any new document will be born looking just like the saved template. OmniOutliner Professional even lets you easily set up multiple templates with the Save As Template... and New From Template commands in the File menu.

7. Grouping Rows

Let's see the grand total. Select all of your existing rows and choose **Group** from the **Reorganize** menu. This moves them all in one level as children of a new item. Name the new parent item after this month, and its value in the Amount column will be the total of all its descendent items.

Transaction	Amount
▼ November	(\$2,417,086.04)
▼ Expenses	(\$2,417,109.84)
▼ Restored WWI aircraft	(\$2,400,000.00)
• Fokker D.VII	(\$1,400,000.00)
• Sopwith Camel	(\$1,000,000.00)
▼ Rare Neo Geo cartridges	(\$13,000.00)
• Metal Slug	(\$3,000.00)
• Kizuna Encounter	(\$10,000.00)
• Flight to Perth	(\$2,600.00)
<i>European version</i>	
<i>First class</i>	
• Diamond-encrusted iPod	(\$1,500.00)
▼ Groceries	(\$9.84)
• Bacon	(\$2.75)
• Lettuce	(\$1.13)
• Tomato	(\$1.75)
• Mayonnaise	(\$3.23)
• Bread	(\$0.98)
▼ Income	\$23.80
• Bake sale	\$17.05
• Lemonade stand	\$6.75

8. Sorting Rows

You're on a roll!! How about sorting our rows by amount? No problem — select all of your rows, and from the **Reorganize** menu, choose **Sort Selected Rows ▸ Amount, Lowest to Highest**. All of the selected rows will keep their hierarchy but rearrange themselves into numerical order. Now you can see where your biggest money drains are — whoa, \$3.23 on *mayonnaise*!? You'd better go for the generic one next time, buddy.

Transaction	Amount
November	(\$2,417,086.04)
Expenses	(\$2,417,109.84)
Restored WWI aircraft	(\$2,400,000.00)
Fokker D.VII	(\$1,400,000.00)
Sopwith Camel	(\$1,000,000.00)
Rare Neo Geo cartridges	(\$13,000.00)
Kizuna Encounter	(\$10,000.00)
European version	
Metal Slug	(\$3,000.00)
Flight to Perth	(\$2,600.00)
First class	
Diamond-encrusted iPod	(\$1,500.00)
Groceries	(\$9.84)
Mayonnaise	(\$3.23)
Bacon	(\$2.75)
Tomato	(\$1.75)
Lettuce	(\$1.13)
Bread	(\$0.98)
Income	\$23.80
Lemonade stand	\$6.75
Bake sale	\$17.05

9. The End

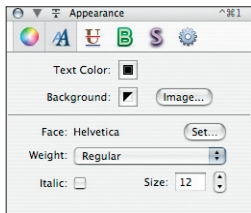
That's all for this tutorial; now you know of several ways to organize your information.

Inspectors

The inspectors are little windows with which you can control every aspect of your outline. You can drag them around by their title bars like any other window, but they also have some other useful features. If you drag them near each other or near the edge of the screen, they will snap to the edges for easy and neat positioning. You can collapse or expand them by clicking their title bar once or by typing their key combination. Dragging the top inspector in a stack of attached ones will move them all, and clicking its close button will close all attached inspectors as well. Inspectors with icons across the top have several different sections you can view; just click an icon to switch to its section. If you want to view more than one section at the same time, just Command-click the icons of the sections you want.

Appearance inspector

Whenever you have something selected in your outline, be it text, rows, style chips, or columns, the controls on this inspector will affect the appearance of whatever is selected.



• Color

Set the color of your text and its background, or use an image as a background.

• Font

Change the font face or size and make text bold or italic.

- **Underline**

Lavender dotted double-underlines, umber dashed heavy strikethroughs; get 'em in here.

- **Border**

Put an outline around your text.

- **Shadow**

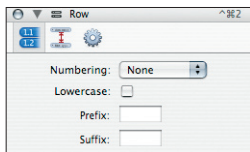
Drop a shadow behind your text. You can use the slider to control the blurriness of the shadow's edges. To set the shadow's offset from the text, you can drag the cross around or enter numbers in the fields on the right.

- **Advanced**

All sorts of advanced typographical settings can be changed here: Kerning, Ligatures, Obliqueness, and so on. These are for controlling the shape and positioning of characters.

Row inspector

This inspector is for customizing how rows behave in your outline. Obviously, you'll want to have some rows selected to use it.



- **Numbering**

Rows with numbering turned on will automatically assign themselves a number or letter as you create them and move them around. These are particularly useful when you assign different numbering schemes to different levels of your document with the styles palette.

- **Lowercase**

Check this to make any letters in the numbering scheme you chose lowercase.

- **Prefix and Suffix**

The prefix and suffix will be added to each number or letter in your numbering scheme. Some people like to put periods or right-parentheses after their numbers; this option is for them.

- **Spacing**

Here you can set the distance between rows and other rows, rows and their children, or rows and their notes.

- **Advanced**

- **Show handles**

If the little dots and triangles are bothering you, hide them until the mouse is over them or get rid of them altogether.

- **Gutter color**

The gutter can be a little easier to find when it's a different color; this helps to quickly determine a row's indentation level.

- **Sort Children**

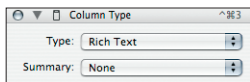
This checkbox controls whether the selected row's children will be allowed to be sorted by the Reorganize menu's sorting commands.

- **Pro feature: Page break before row**

In OmniOutliner Pro you can stick a page break just before the selected row; whenever you print your outline, this row will be at the top of a new page regardless of what was before it.

Column Type inspector

Here you can set up what kind of data each column will hold, and how it will treat that data. Select a column by clicking its title, or at least position the insertion point inside the column you want to edit.



• Type

Columns contain Rich Text by default, but you can set them up to deal with more specific kinds of data.

• Rich Text

This is text that can be styled however you like.

• Number

This column type is for... numbers. When you select this, a pop-up list appears for formatting the numbers as decimals, percentages, currency, and so on.

• Pop-up List

When you select this type, a field appears to let you compose a list of possible choices. Then each cell in the column gets a pop-up list containing those choices.

• Duration

You can enter spans of time in this column type. Durations can be represented by their first letters, so you could type “2w1d17h” and the column would understand that you mean 2 weeks 1 day 17 hours. You can also choose what kind of time system you would like with the **Setting** pop-up, or enter your own values.

• Date

Keep track of dates and times in a variety of different formats.

• Checkbox

This gives you a checkbox for each item, which you can turn on or off.

- **Summary**

When you turn on summaries, parent items' values in this column become dependent on their children's values.

- **None**

This is the default; parents' values ignore their children's values.

- **Total**

Parent rows' values will be a cumulative total of all of their children's values.

- **Minimum**

Parent rows' values will be equal to the lowest value among all of their children.

- **Maximum**

Parent rows' values will be equal to the highest value among all of their children.

- **Average Leaves**

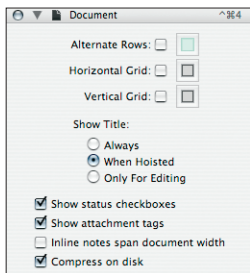
Parent rows' values will be an average of all leaves among their descendants. When we say "leaves", we mean items that have no descendants, like the leaves of a tree are at the ends of its branches.

- **Hidden**

Parents' values, whatever they are, simply won't appear in the outline.

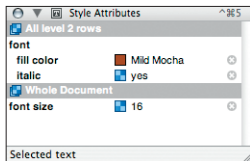
Document inspector

This inspector has settings that affect your whole document rather than certain parts of it. With it you can set up coloring and a grid to make the outline easier to read, change how the document appears, and choose whether to compress the file when saving it to the disk.



Style Attributes inspector

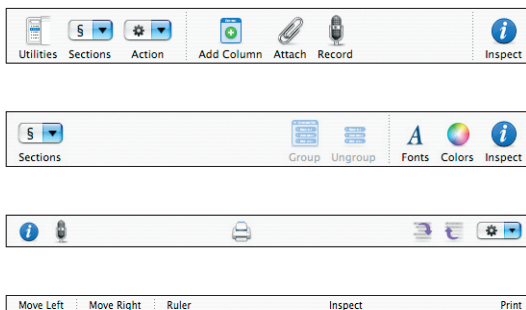
This inspector shows all of the different styles that are being applied to whatever you have selected at the moment. The style attributes are grouped under headings that indicate where they come from. Styles with higher priority will be listed above lower-priority styles. In general, locally-defined attributes (such as row styles) have precedence over more generally-defined attributes (such as whole-document styles). You can remove styles with the little X button next to each one.



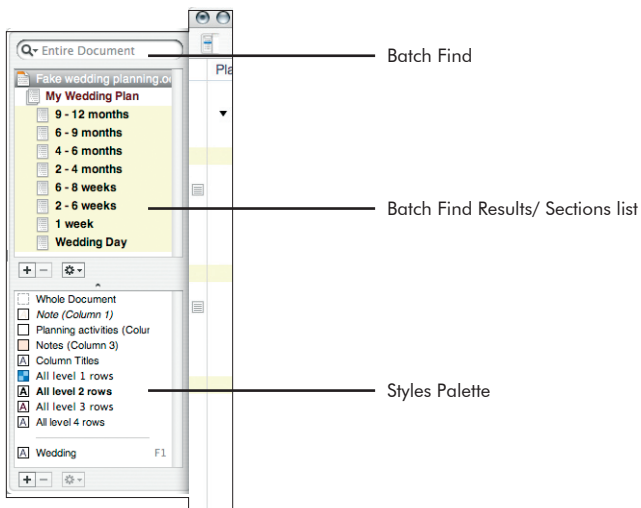
Toolbar

Just like in other Mac OS X applications, you can customize the toolbar to contain whichever controls you like, or hide it completely. Use the **View ▸ Customize Toolbar** command to set up the toolbar however you like it, and use the white lozenge on the right side of the title bar to show or hide the toolbar.

Most toolbar items are just analogs of menu items, available for one-click access. One exception is the **Action** pop-up menu. It replicates the menu you get from right-clicking or Control-clicking in the outline, in case you don't have a multi-button mouse or you don't like Control-clicking.



Utility Drawer



Batch Find

At the top of the utility drawer is a batch find field, which you can use to find all occurrences of a certain bit of text. You can search in the whole outline or just in the currently hoisted section. (See the page 40 for more about hoisting.)

Batch Find Results / Sections List

Below the batch find field is an area where its results show up.

- **Pro feature**

In OmniOutliner Professional, this area doubles as a Sections list; click a section to quickly hoist that section to the top level.

Styles Palette

The bottom part of the utility drawer is occupied by the styles palette. The top bit of the styles palette is for setting styles on a large scale: contents of a certain column, all rows on a certain level, all notes, and so on. The bottom bit contains named styles, which you can drag onto parts of your outline or turn on and off with the function keys. To edit any style in the styles palette, click it and then use the Appearance inspector.

- **Pro feature**

With OmniOutliner Professional you can create and edit as many named styles as you'd like. To create or delete named styles, use the little + and - controls underneath the styles palette.

OO3 TIP

About Style Chits

The little squares next to any style in the styles palette, the Style Attributes inspector, or the styles view, are called style chits. They serve a couple of purposes: First, they try their darndest to actually display the style they represent. When there is just too much style information to be displayed in such a tiny square, they resort to a generic checkerboard pattern. Second, they can be dragged around to add their style to other things. Drag a chit onto some text, some rows, a column, or another chit, and its style will be applied there. If you apply a named style, any subsequent changes to the named style itself will also be applied to wherever you dragged it.



Particularly Useful Features

Templates

From the General preference pane, you can set up a default template for your documents. You can then use that template as a starting point when creating new documents.

- **Pro feature**

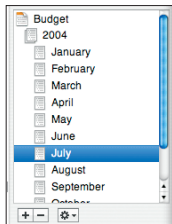
With OmniOutliner Professional you can create as many templates as you like with the **File ▶ Save As Template...** and **File ▶ New From Template** commands; the standard edition is limited to the default one.

- **Pro feature: Clippings**

OmniOutliner Professional puts a new item in your system-wide **Services** menu (under the application menu) for sending the currently highlighted text from any application into an outline. You can create clipping files in the Clippings pane of the OmniOutliner Professional preferences, and then when you use the service you'll be able to choose into which file you'd like to send the text.

Hoisting and Sections

If you'd like to concentrate on one part of your outline for a while, you can temporarily move it up to the top level by selecting it and choosing **Hoist** from the **View** menu. This hides all of the other sections of your document so that you can treat the hoisted section as its own outline. Remember, hoisting doesn't change your outline, just your view of it.



- **Pro feature**

In OmniOutliner Professional you can quickly hoist a section by just clicking it in the utility drawer's sections list.

Notes

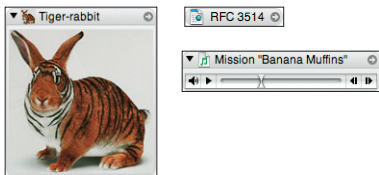
People use notes for all sorts of things. Notes can be used in a large outline to remind yourself how you plan to expand certain parts. They can be used to offer corrections and suggestions when editing someone else's outline. Some people writing whole books in OmniOutliner make an item for each section or chapter and then write the actual text in the note fields.

You can set the way notes are displayed in the **View** menu, under **Notes**. The **Display inline** command puts the notes in the outline directly below the items they are associated with, and you can see multiple notes at once. The **Display in Pane** command puts a pane at the bottom of the document window; select an item and its note will appear in the pane.

When viewing notes inline, clicking the gray note icon to the left of an item will show or hide that item's note, or add a note if it doesn't have one yet. You can press Command-apostrophe or Enter to move the insertion point between an item and its note.

File Attachments

You can insert files of any kind right into your outline. Just drag them from the Finder, your web browser, or any other application and drop them on the outline. Images, movies, and audio files can be viewed or played right inside the outline. Click the triangle on the left side of an attachment to expand or collapse it, and click the arrow on the right side to open the file in its associated application. To create a link to a file instead of inserting it, just hold Control while you drag and drop.



Sorting

There are two main ways to sort rows in your outline; both of them are available from the **Reorganize** menu.

You can use the **Keep Sorted** submenu to set rules for sorting your whole document. The rules continue to be in effect, automatically sorting each row you create, until you turn them off. A small triangle icon will appear by the sorted column's title to indicate the sorting direction. You can temporarily turn off sorting by selecting **Reorganize** ▶ **Keep Sorted** ▶ **Postpone Sorting**.

Amount ▲
\$15.32
\$71.11
\$74.88
\$98.17
\$150.45
\$212.65

- **Pro feature**

OmniOutliner Professional can follow multiple sorting rules which are honored in the order you set them.

Sort Selected Rows will sort only once and then leave your rows alone.

Preferences

The preferences are general application settings; that is, they are not specific to the document you are working on. To see them, Select **Preferences** from the **OmniOutliner** menu.

Open documents...

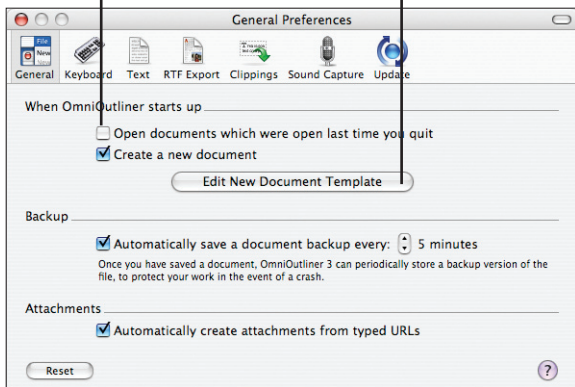
If you tend to work on the same documents across a few sessions, this option lets you pick up right where you left off the last time you used OmniOutliner.

Edit New Document Template

Click this button and the default new document template appears. Change it as much as you like, then save it; whenever you create a new document it will look just like the template.

Open documents

Edit New Document Template



Backup

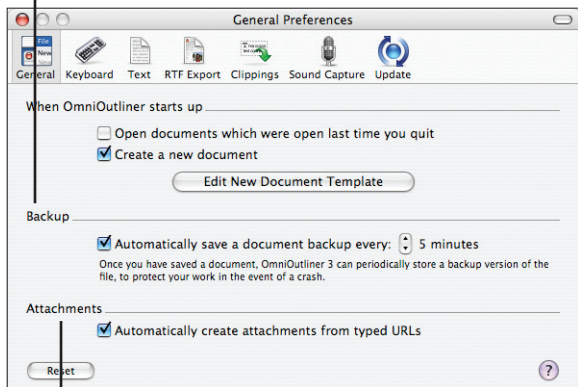
Once you have saved your outline to a file, OmniOutliner will periodically save a backup version to the file as well. Then, if you have a crash or otherwise lose your document without saving it, the next time you open the file, you'll have the choice of using either the backup version or the last saved version.

There are some tricky implications to this feature, so if you plan to use it extensively you should probably consult OmniOutliner's **Help** menu for more information.

Automatically create attachments from typed URLs

OmniOutliner can turn anything you type that looks like a URL (web site addresses, FTP addresses, and so on) into a location attachment. That way you can click the attachment to open the address in the appropriate application. Of course, you can always just drag addresses into your outline from other applications as well.

Backup



Automatically create attachments from typed URLs

Keyboard

Use this pane if you'd like to customize the behavior of certain keys and key combinations. For example, people accustomed to word processors might expect the tab key to indent a row, while people accustomed to spreadsheets might expect it to move to the next column. You can choose which you prefer here, and set other keys' behaviors as well.

Text

The controls in this pane are for setting up how OmniOutliner imports and exports text files. The Bullets, Checkboxes, and Spacing sections control how outline elements are represented when exporting to plain text format. Many different encoding schemes exist for storing text. The Encoding setting determines how OmniOutliner should interpret text files when importing, and how it should write them when exporting.

RTF Export

This is just like the export settings on the Text pane, except that these control exporting to rich text rather than plain text. Rich text supports more precise formatting so you will generally get a better result than with plain text.

Update

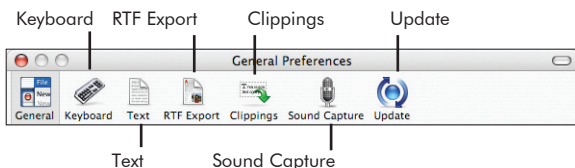
You can always be sure that your copy of OmniOutliner is up to date by letting it automatically check for new versions of itself. Of course, OmniOutliner will only check when you have an active internet connection.

- **Pro feature: Clippings**

In this pane you can set up clippings files for use with OmniOutliner Pro's system-wide clippings service.

- **Pro feature: Sound Capture**

Here you can set up OmniOutliner Pro's behavior for recording audio.



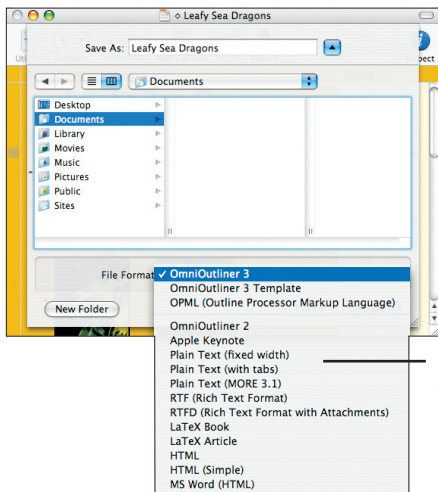
Import, Export, Save, Print

Importing from other formats

OmniOutliner can import lots of file types; all you have to do is open the file just like you would normally with **File ▶ Open**. You can view files from the applications MORE, Acta, Concurrence, and Keynote, among others. Remember that when you import a file you get a copy of it converted to OmniOutliner 3 format, so going back to another format requires you to export the file.

Exporting to other formats

OmniOutliner can export to a variety of formats. Just choose **File ▶ Export** and choose whichever format you'd like. Settings for Plain Text, Rich Text, and Keynote formats are available in OmniOutliner's preferences. Remember that when exporting, OmniOutliner will create a new copy of your document in the selected format, leaving the one on your screen as it is.



OmniOutliner can export to a variety of formats.

Saving

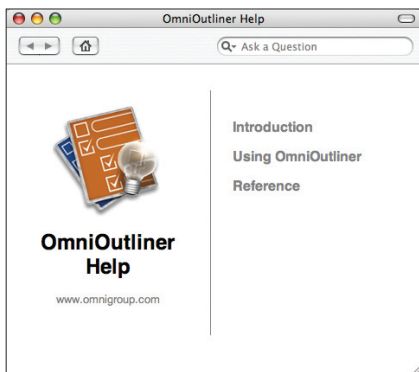
Saving in OmniOutliner is pretty straightforward. Just select **File ▶ Save** or **File ▶ Save As** like you would in any other application. Generally you'll be saving in OmniOutliner 3 format. You can also save in OPML format if necessary, but this will cause you to lose any formatting that isn't supported by OPML.

Printing

Both **Page Setup** and **Print** in the **File** menu have an OmniOutliner pane that you can use to set up how you want your document to look on paper. You can create headers and footers (in OmniOutliner Pro), set the page margins, choose which columns you'd like to print, and plenty more.

Try the Online Help

When you've got a specific question that goes beyond the scope of this manual, you need the nitty and/or gritty details of how a feature works, or you simply feel like learning more, check out OmniOutliner's online help. Just select **OmniOutliner Help** from the **Help** menu; it's a searchable, browsable veritable treasure-trove of information.



Keyboard Commands

Many commands have keyboard equivalents; they can save you a lot of time and mouse-work. For a list of all the keyboard commands available in OmniOutliner, select **Keyboard Commands** from the **Help** menu. Next thing you know, you'll have cobwebs on your mouse.

Further Help

Our web site is a nice first place to look for the latest information about OmniOutliner.

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

There's a OmniOutliner users' mailing list, and you're invited! Someone in the community just might be able to help you.

<http://www.omnigroup.com/mailman/listinfo/omnioutliner-users>

If you're really stuck, or if you just want to let us know what you think, go ahead and e-mail us. Select **Send Feedback** from the **Help** menu to conjure up a message addressed to us, or just write to

omnioutliner3@omnigroup.com.

We'll do our best to help you out.

