

# OmniPlan for iPad

Manual version 1.0.1

## The Basics

### What is OmniPlan?

OmniPlan is a tool for organizing, scheduling, and administrating complex projects with multiple team members and moving parts. It's ideal for any endeavor that takes a diverse group of people and resources to complete, with features for managing multiple work schedules and assigning tasks based on goals being met.

OmniPlan for iPad lets you manage your projects on the go, collaborating and updating the project status easily from anywhere you can reach an iPad.

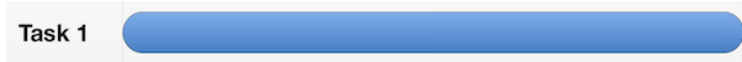
#### Use OmniPlan when you:

- Organize a folk music festival
- Research and develop a new microprocessor
- Build a new wing of the campus student union
- Convert a vacant lot to a community garden
- Coordinate a photo safari, and publish the results
- Open a coffee shop
- Launch a social networking site
- Put on a family reunion

# Planning your Project

At its most fundamental, the purpose of OmniPlan is to coordinate the activities of a team working toward a shared goal. The process of attaining that goal, and the steps required to reach it, are collectively known as the *project* at hand. There are three fundamental areas that converge when looking at a project in OmniPlan.

The first are *tasks*, the parts of the project that need to be completed to reach the goal. Tasks are visually represented in OmniPlan as horizontal bars, where the length of the bar represents the duration of the task.



The second aspect of a project are *resources*. These are the staff, equipment, and materials that you need to get the job done. These three types of resources all work in slightly different ways; your team members have schedules and take vacations, equipment can often only be used to accomplish one task at a time, and raw materials have a finite supply.



The final aspect of the project is its *calendar*. This is what anchors your project in time, dictates constraints on what must be done when, and helps establish priority when assigning resources to tasks.



The intersection of tasks, resources, and calendar is depicted visually in your project in the *Gantt view* – a cascading sequence of tasks. This sequential relationship is created using *dependencies*; connections between tasks that describe how they are related.

Laying out your project in OmniPlan is as simple as bringing together these concepts, and then letting OmniPlan do the heavy lifting:

## 1. Add tasks.

List the steps of the project that need to be completed. These can include *groups* of tasks to represent phases or related segments of a larger project, and *milestones* that act as deadlines within the project or significant waypoints to be cleared.

## 2. Add resources.

Describing the resources available to the project, and then assigning them to the tasks they're best suited for, is the next phase of planning. Your staff may have individual scheduling needs — OmniPlan can account for them and adjust task assignments accordingly.

## 3. Set dependencies.

After you give tasks to your team and provide them with the tools for the job, deciding on the order of task completion is the last big piece of the puzzle. If widget A has to be designed before part B can be assembled, OmniPlan's Gantt view will make it clear what comes first.

## 4. Level.

Once all the pieces are in place, the last step is easy: one tap of a button will arrange the work to make sure your team is at its most productive throughout every step of the project. This is called *leveling the workload*, and OmniPlan can do it automatically based on the tasks, resources and dependencies you provide.

If it all seems a bit overwhelming, not to worry! This manual will guide you through the process of creating, maintaining, updating, and completing your project using the full suite of tools available in OmniPlan for iPad.

# Interacting with OmniPlan

## Using the Document Browser

The Document Browser is where you'll land when you first open OmniPlan for iPad. It's the home for all of your project files, where you can create new projects or manage current projects. It's also where you'll set up a connection to a server repository where you can store or access projects with other members of your team, or across multiple devices.



### 1. The New Project Button

Tap the New Project button to start a new OmniPlan project. A new project document will be created and you'll be brought to the project screen, ready to start adding tasks and resources.

### 2. The Repositories Button

If you're sharing your projects between multiple users or devices, tap the Repositories button to access the Server Repositories panel, where you can access or edit an existing OmniPlan repository or add a new one.

### 3. The Documents Header

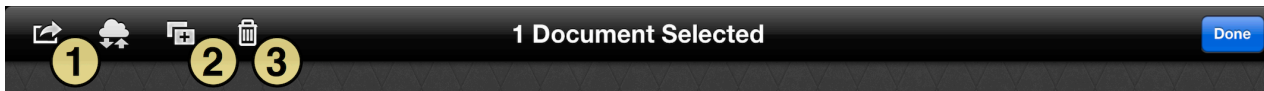
The header text of the document browser doubles as a button that lets you toggle between sorting methods. Display projects ordered by date, or alphabetically by title.

### 4. The Gear Menu

Use the gear menu to browse this help document, contact us via email, or read the release notes for the current version of OmniPlan for iPad.

## 5. The Edit Button

The edit button enables the document browser's edit mode, where you can share, duplicate and delete your OmniPlan projects. In edit mode, tapping a project file will select it instead of opening it. You can also enter edit mode by touching and holding a project's icon until it's selected.



### 1. The Share Menu

The share menu becomes available when a project is selected in edit mode. Tap here to send your project via email.

### 2. The Duplicate Button


Tap to create copies of each selected project file.

### 3. The Delete Button

Tap to delete all of the projects you've selected (this will only remove copies stored on your iPad).

# Syncing and You

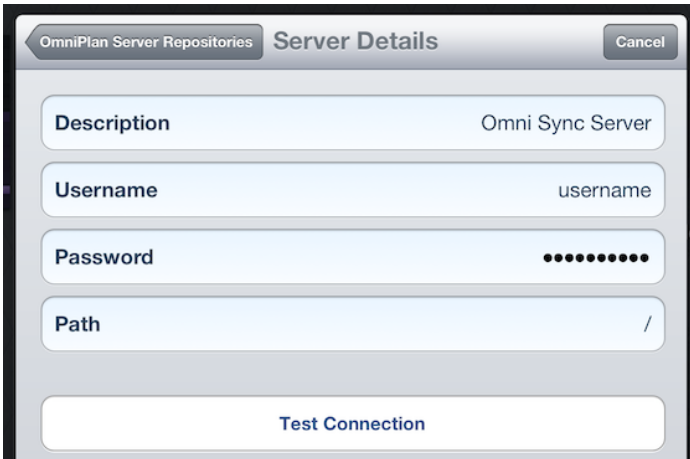
One of the most powerful features of OmniPlan for iPad is the ability to collaborate with colleagues, storing your projects on a shared server where each team member can access the latest project information and update it as necessary. This sync extends to full compatibility with OmniPlan for Mac, so you can access your projects at your office computer and update them when you're on the go.

To set up sync, start in the document browser and tap the servers button. 

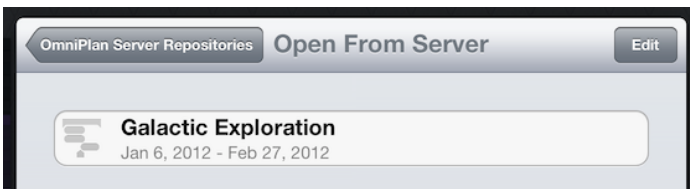
You'll see the Server Repositories screen, where you can create a new connection to an existing Omni Sync Server account or to a WebDAV server. An Omni Sync Server account is free!



Tap either **New Omni Sync Server Account** or **New WebDAV Account** to bring up the Server Details screen. Enter a description for the server, and enter the login details and directory path associated with the account. If your repository is not at the top level, you can enter the folder path to it.



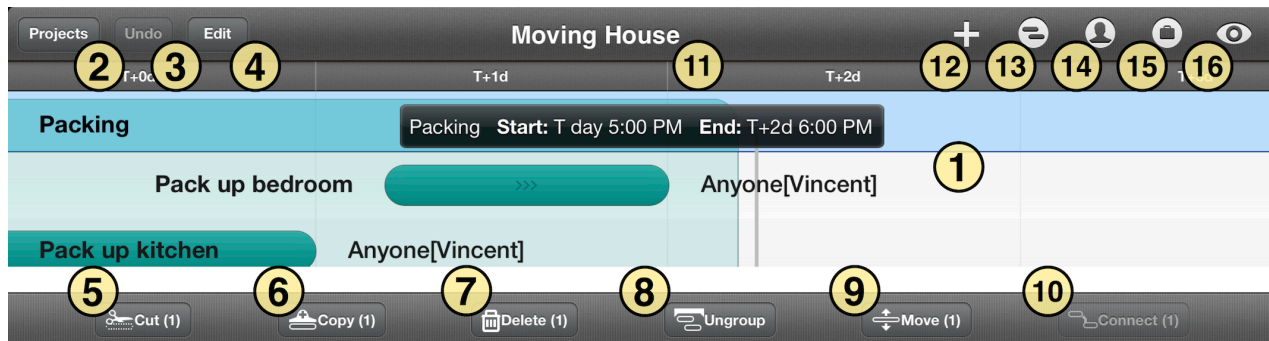
With the correct login information provided, the message “account verified” will appear below the entry fields (tap Test Connection to double check). You can then return to the server repositories screen and tap the name of the newly created account to access your OmniPlan projects on the server. Tap a project to load a copy of it from the server onto your iPad.



Once you've created an account, tap the blue arrow next to your repository to access and edit connection details. To remove an account from the list of repositories or to reorder the list, tap Edit. Likewise, tap Edit on the Open From Server pane to delete files from the server. Swiping across an item will also bring up the delete button.

# The Project Screen

The project screen is where the work gets done when you open a project in OmniPlan for iPad. Adding tasks and resources, setting start and end dates, establishing schedules, creating dependencies between tasks, leveling resource use for optimal productivity, and many other features are all accessible here.



## 1. The Gantt View

The Gantt view is where you'll interact with all of the tasks that make up your project. Tap a task once to access the completion percent slider and duration and start constraint brackets (found on either side of the task's graphical bar); tap it again to access dependency arrows that can be dragged from one start or end of a task to another. Pinch vertically to zoom in and out, and pinch horizontally to adjust the time scale.

## 2. The Projects Button

Returns to the document browser to view and manage your OmniPlan projects. This exits the project screen and saves all changes to the current project.

## 3. The Undo Button

Removes the latest change made to the project. Tap and hold the undo button to access redo, which restores a change that was removed by undo (as long as no other subsequent changes were made).

## 4. The Edit Button

Enters task editing mode and displays the edit bar at the bottom of the screen. While editing, tapping a task will select it so the following commands can be applied.

## 5. Cut

Deletes the selected tasks and copies them to the clipboard to be pasted elsewhere.

## 6. Copy

Creates copies of the selected tasks. (Paste is available in the menu that appears when you touch and hold a task bar.)

## 7. Delete

Removes the selected tasks from the project.

## 8. Group

Combines the selected tasks into a group. If the selected tasks are already grouped, this becomes the "ungroup" command instead.

## 9. Move

Prompts to tap where you want to move the selected tasks. Options include above, below, or inside the tapped destination.

## **10. Connect**

Connects two or more unconnected tasks using finish-to-start dependencies. If the selected tasks are already connected, this becomes the “disconnect” command.

## **11. The Project Title**

Double-tap to rename the currently active project.

## **12. The New Task Button**

Adds a new task of default duration (one workday) to the project. Tap and hold to add a milestone or a group instead.

## **13. The Task Inspector**

When a task is selected in the main view the task inspector becomes available. Use it to adjust all of a task’s attributes, including name, duration, amount of effort it will take to complete, notes, and more.

## **14. The Resource Inspector**

Add, manage, and assign resources to tasks using the resource inspector. Resources include personnel, equipment, and material used to complete the project.

## **15. The Project Inspector**

Control overarching aspects of the project with the project inspector. These include controls related to time and scheduling, as well as calendar hours and exceptions. Sync settings are also available here.

## **16. The View Inspector**

Set the scope of the information you’re shown in the main view using the view inspector. Set filters based on resource, status, type, and date range, enable change tracking, fix violations, and set baselines for progress comparison here.

# Tutorial

## Step 1: Create a Project

For the purpose of this tutorial we'll be looking at the development process of a game being put together by an independent team of intrepid designers, coders, and testers.

Starting off in the document browser, tap the new project button. 

This opens the project screen, where a first task is waiting to be customized or edited. Before we get to that, let's rename the project to something more interesting.

Double-tap "My Project" in the toolbar to edit the project title.

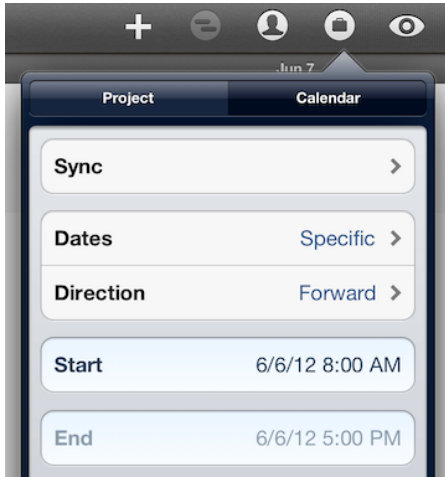




## Step 2: Choose a Start or End Date

When setting out to build a project, one of the most important aspects is the timeframe. This, in turn, is dictated by any deadlines or start constraints that exist for the project.

In the case of our game development scheme, we don't have a hard deadline for the project to be finished - we want it to be done when it's ready (but as soon as reasonably possible). To indicate this, we'll go to the project inspector and set the start date as today:



Conveniently, this is the default setting for any new project.

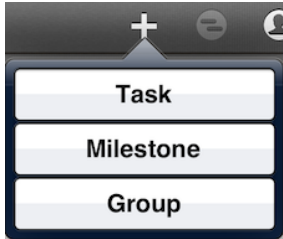
If you're planning a project in the abstract without a fixed start or end date, you can change the dates from Specific to Undetermined until the timeframe is more set in stone. You'll get dates that display as T+1d, T+2d... instead.

If you're planning a project with a specific do-or-die deadline, you'll want to switch the direction from forward to backward and put the deadline date in the **End** field. Tasks will be scheduled back from this date, filling in the time from project completion to the present.

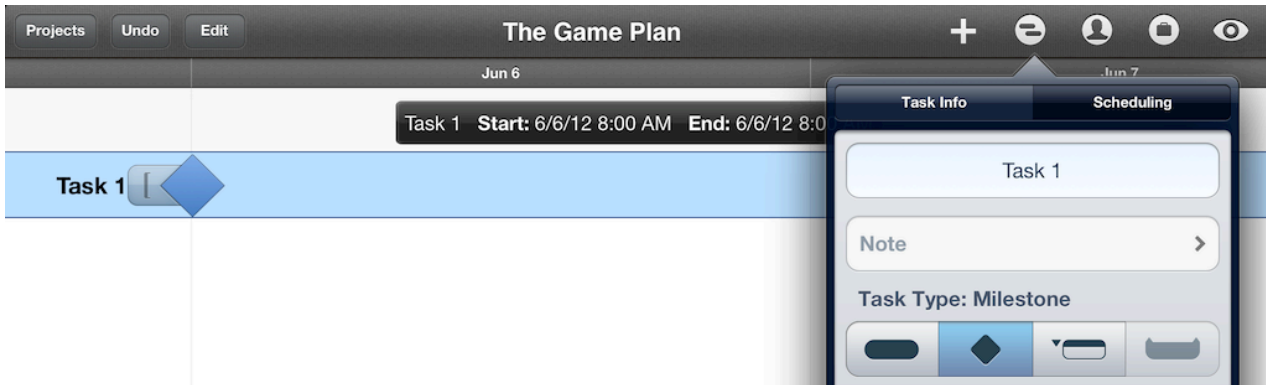
### Step 3: Create Milestones

Milestones are the anchor points in your project that mark important shifts in focus or unlocking a new phase of the project. Clarifying these will help break a dauntingly large project down into more manageable sections, and help dictate the tasks leading up to and following the milestone.

To create a milestone, tap and hold the new task button until the option appears:




Alternatively, tap the currently existing task (“Task 1”) to select it, then open the task inspector. You can change the task type from a regular task to a milestone here.



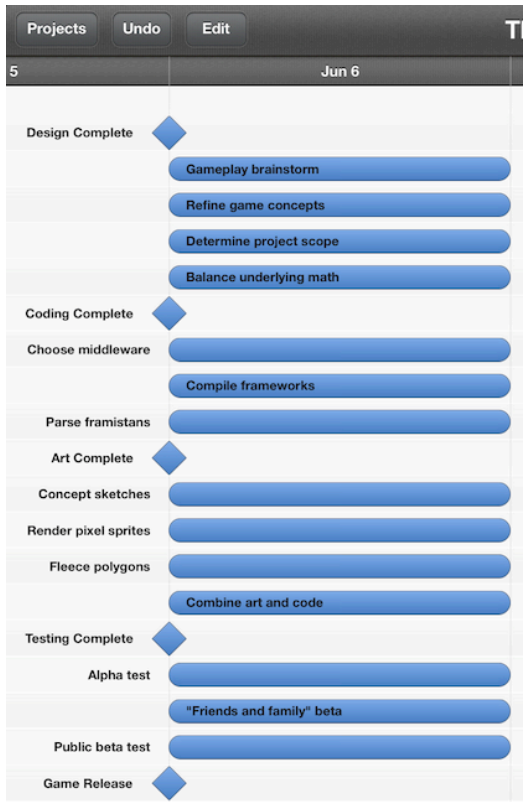
We'll change the name of “Task 1” by double-tapping it or editing the name field in **Task Info** (seen above), create a few more milestones for our game plan, and then go on to reinforce our milestones with tasks.

## Step 4: Create Tasks

Create a task by tapping the new task button. 

New tasks appear below the currently selected item in the Gantt view, or at the bottom of the list if no tasks, milestones, or groups are selected.

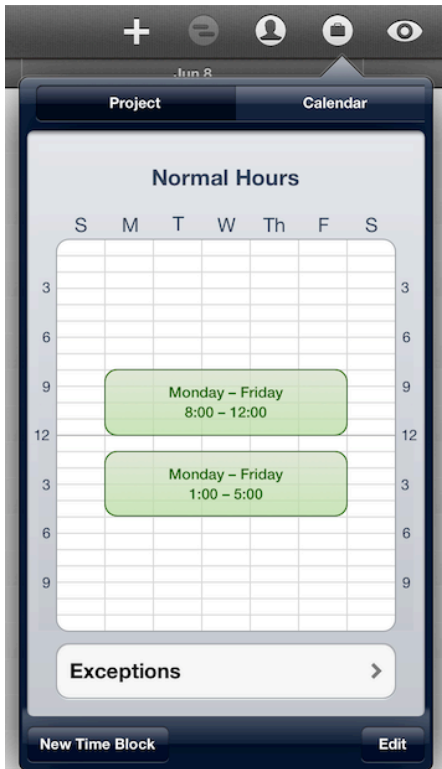
For our project we'll create several tasks beneath each milestone that they're related to. Since we now have more items than will fit on the screen at once, pinch vertically on the Gantt view to change the view scale.



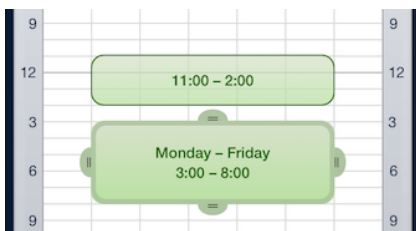
## Step 5: Edit the Work Week

Now that we're starting to see the game plan come together, we'll set tasks aside for the moment and start setting up the work schedule for our project.

Tap the project inspector and then the calendar button to access the regular weekly work schedule for the project. By default, working hours are Monday through Friday from 8:00 to 5:00, with an hour-long break for lunch at noon.



Since we're working with a bunch of more nocturnal folks, let's change the schedule to reflect that. Tap and hold one of the time blocks on the calendar to bring it to a new position, or drag one of the side handles to change the size of the block. We end up with a schedule that fits our needs:



Time blocks can be created for individual days to indicate longer or shorter regular working hours (tap New Time Block), and deleted by tapping Edit.

## Step 6: Set Schedule Exceptions

Even the most accommodating work week will occasionally have days that are out of the ordinary. Whether it's a national holiday, a team-wide training seminar, an industry expo or conference, or just a patch of bad weather that keeps folks out of the office, setting exceptions to the regular work schedule can be key to keeping a project on track.

One that we know is in the future for our project is the upcoming Labor Day. We can add that to our schedule right now by tapping Exceptions beneath the normal hours of our schedule on the Calendar pane of the project inspector.



Green days on the exceptions calendar indicate regular work days. Swipe to scroll down to September, then tap on the week of Labor Day (the 3rd) to access the exceptions calendar for that week.

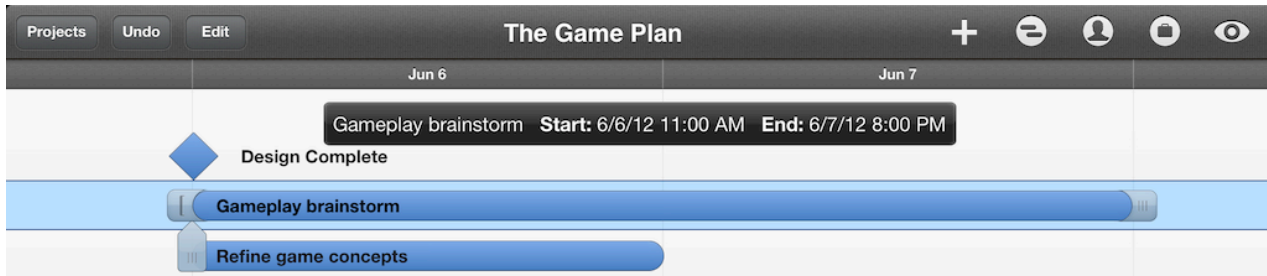


We know we want to take Labor Day off, but we can also predict that this week will be crunch mode for the team. We use the Add Time Off button to create a block of time that covers the 3rd, and then replace that lost time with evening overtime hours through the rest of the week.



## Step 7: Set Task Durations

Returning to our tasks in the Gantt view we can begin to scope out how long each task will take. With estimated times for their completion in mind, tap a task and drag the right handle that appears to the appropriate length for the task's duration (in this case, two full workdays).

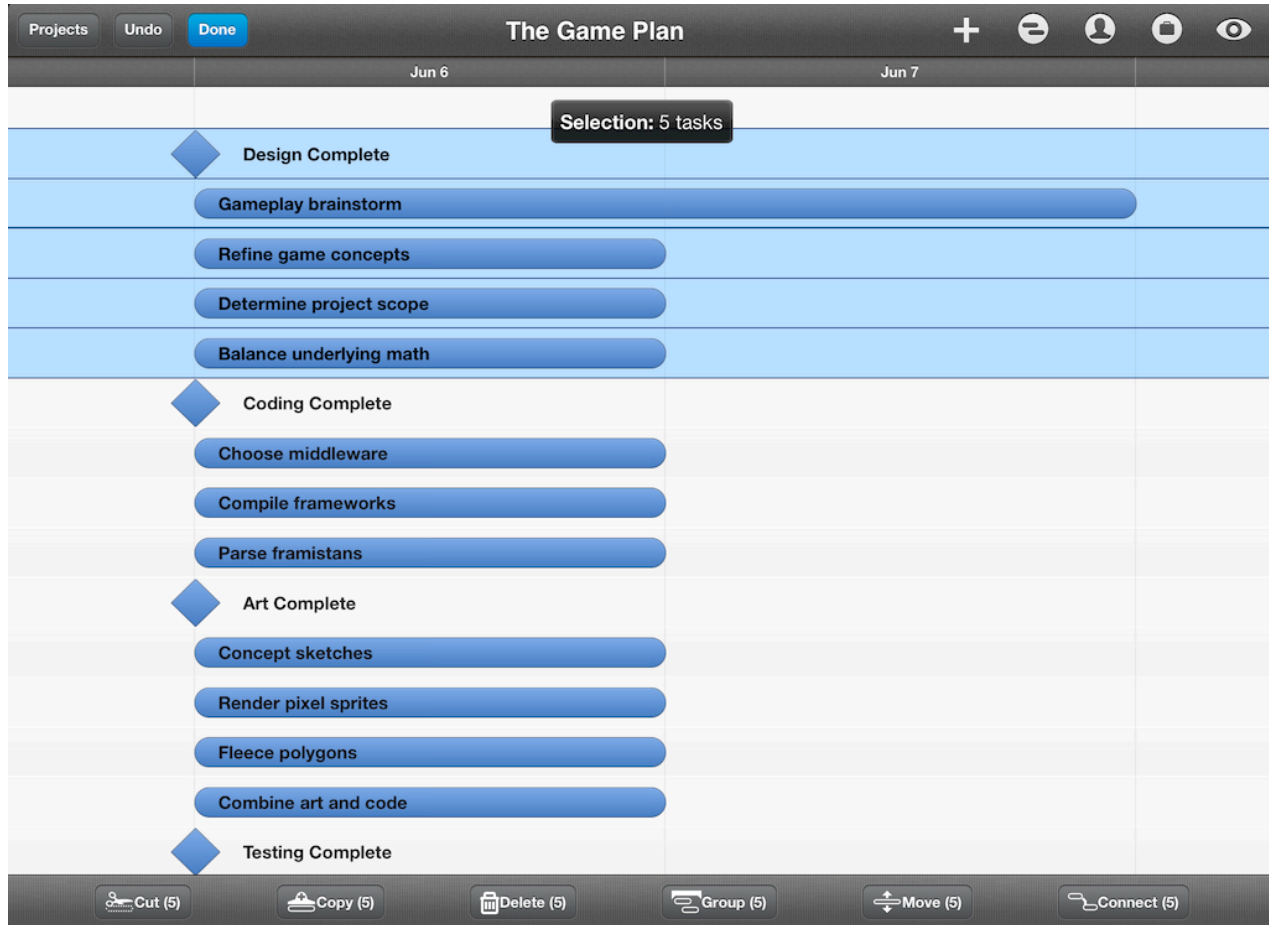


Task duration can also be set using the task inspector.

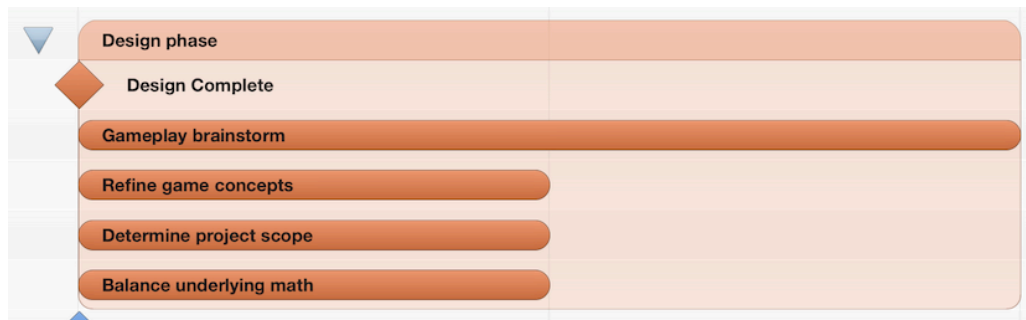
## Step 8: Group Tasks

When tasks are closely related or interdependent it can be useful to put them in a group. Groups help organize a project conceptually, and also act as meta-tasks that can be linked via dependencies to other tasks or groups.

The easiest way to gather tasks into a group in edit mode. Tap Edit on the project screen, then tap to select all of the tasks and milestones to be grouped. Finally, tap Group in the bottom toolbar to complete the edit.



With all of the tasks in the group selected, this would be a good time to add a bit of visual distinction to the group as well. Open the task inspector and tap Bar Color to choose a color that will identify all of the tasks in the group.





## Step 9: Connect Tasks with Dependency Lines

The pieces are now in place to establish the ways that some tasks in the project are dependent on the status of others. There are four ways that tasks can rely on others:

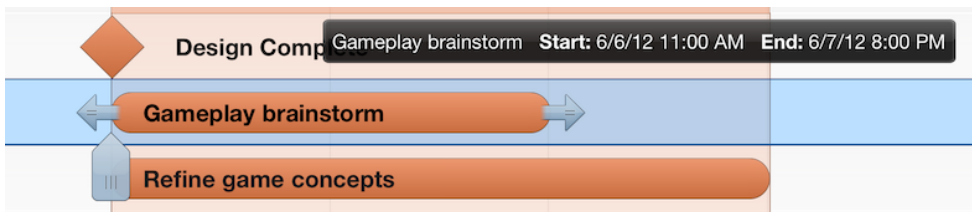
**Finish → Start dependencies** are the most common type, indicating that when task A finishes, task B can start.

**Start → Finish dependencies** indicate that when task A starts, task B can finish.

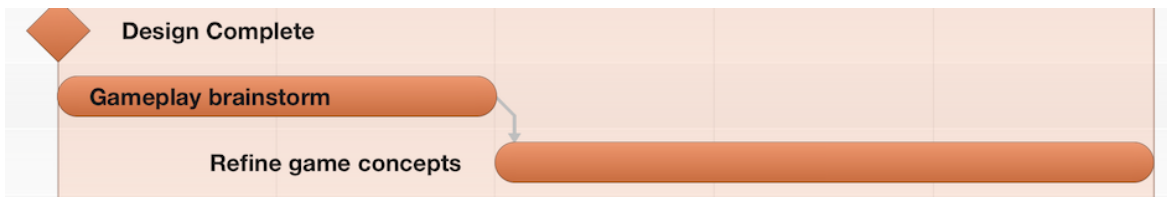
**Start → Start dependencies** indicate that when task A starts, task B can also start.

**Finish → Finish dependencies** indicate that when task A finishes, task B can also finish.

Connecting tasks in the Gantt view is as easy as tapping a selected task again, which puts dependency arrow handles on either side of the task bar.



Drag an arrow from the selected task to another task to create a dependency. The type of dependency is based on the start- and end-points of the arrow: dragging an arrow from the completion of one task to the beginning of another will create a finish → start dependency, and so on.



While in edit mode, you can use the Connect/Disconnect button to add finish → start dependencies or remove dependencies between any number of selected tasks simultaneously.

## Step 10: Create Hammock Tasks

A hammock task is one in which the duration is dependent on both when the previous task ends, and the next task starts. This type of task is useful when facing a hard deadline and deciding what can be compressed if the project is running behind schedule.

In our example we decide that alpha testing for the game must begin on July 11th. We give the “testing” group a start constraint of July 11th by dragging the left handle that appears when it’s selected, or entering the date in the Scheduling pane of the task inspector.

We decide that the “combine art and code” task is the one that’s going to give if the going gets rough. To convert it from a task of fixed duration to a hammock task:

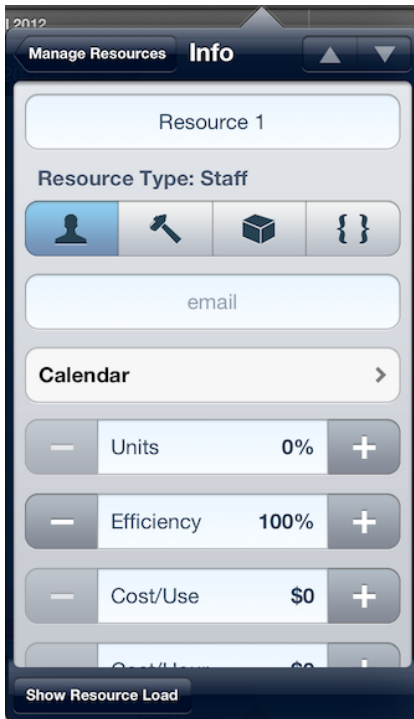
- First, make sure both the “coding” group and the “art” group are linked to “combine art and code” with finish → start dependencies.
- Then, create a start → finish dependency originating from the testing phase and linking to “combine art and code.”
- Finally, select the “combine art and code” task and open the task inspector. The fourth task type, Hammock, is available for selection.

The screenshot displays a project management application titled "The Game Plan" with a Gantt chart view. The chart shows a sequence of tasks: Design phase (orange), Coding phase (green), Art phase (yellow), and Testing phase (red). A purple task bar labeled "Combine art and code" is positioned between the Art phase and the Testing phase. The task inspector is open, showing the task name "Combine art and code" and its scheduling details: Start: 6/28/12 8:00 PM, End: 7/11/12. The task type is set to "Hammock". The inspector also shows fields for Effort (1w 3d), Duration (1w 3d), Completion (0%), and Task Cost (\$0). The Bar Color is set to a purple color.

## Step 11: Create Resources

Now it's time to start adding the team members, equipment and materials we'll be using to bring the project to fruition. Every person, piece of infrastructure, and raw ingredient that contributes to reaching the project's goal is counted as a **resource**, so let's open the resource inspector and get started.

One resource has been created by default for our project – a staff member. Tap it to access and edit their details, including name, resource type, and personal calendar. (Make their “units” are set to 100% so they're available as a fully participating team member).



When balancing workloads across multiple projects a staff member's email address is used as their unique identifier, so make sure their address is consistent across all the projects they're participating in.

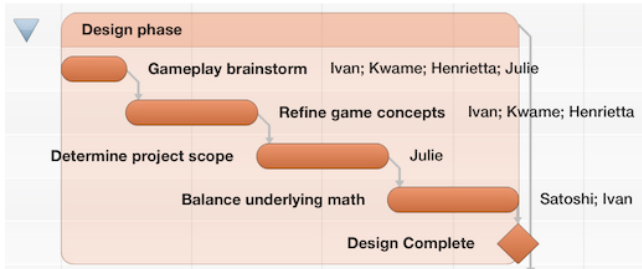


After editing the default resource we'll create a few more to fill out the list of our team members and the technology they're using to bring the game to life. Remove or rearrange resources at any time using the Edit button in the Manage Resources pane.

## Step 12: Assign Resources

Assign resources to tasks by selecting the desired tasks in the Gantt view (multiple tasks can be selected simultaneously using edit mode), then opening the resource inspector and switching to the Assign Resources pane.

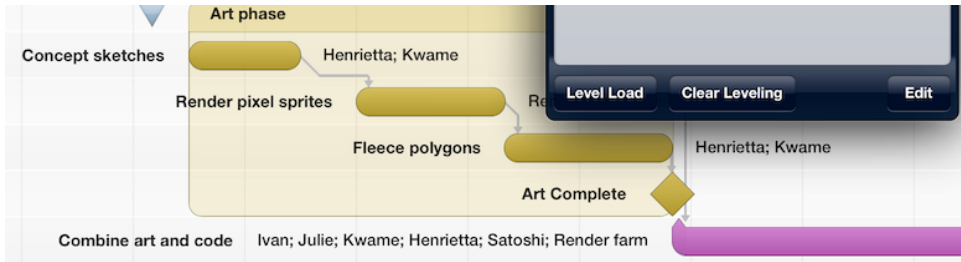
Tap each resource you'd like to assign to the selected task(s) and their names will appear next to each task that they're assigned to.



## Step 13: Level Resources

After assigning team members and equipment to the tasks that make up your project, you can ensure the team is at its most productive by leveling the workload across your resources and tasks.

To level the resource workload for your project, open the resource inspector and tap **Level Load**. Unless your staff is already in the optimal configuration you'll see the tasks in the Gantt view shift to accommodate the most efficient use of your resources' time.



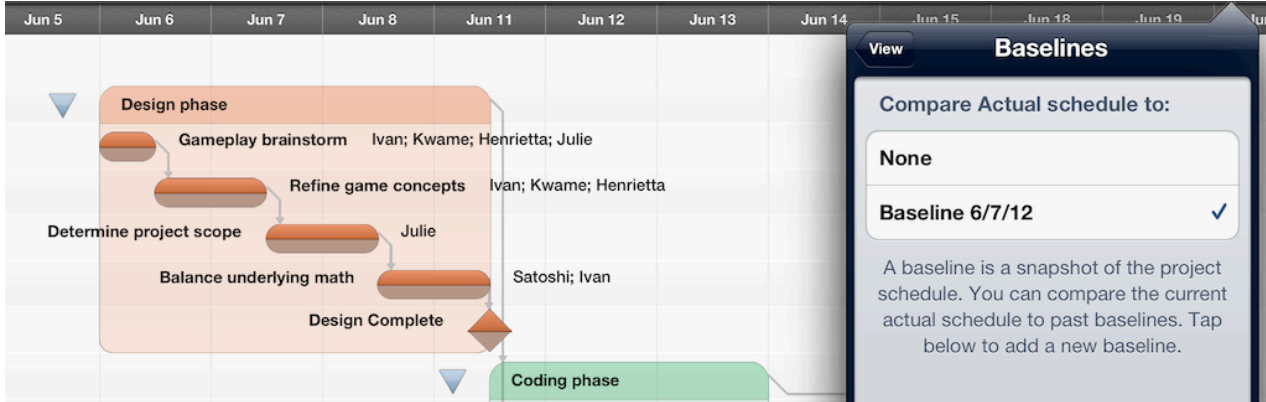
Optionally, turn on Automatically Level to have OmniPlan optimize your resource use every time a change is made to your project.

## Step 14: Set the Baseline

With tasks set and resources assigned and leveled, the state the project is in now may be a glimpse at its fate in the best of all possible worlds – one where unforeseen hindrances don't bog down progress, and where optimistic estimations rule the day.

This is the world that is captured when we **set a baseline** for progress, a feature used to compare how the project is actually doing against initial expectations, so milestones and resource allocation can be adjusted accordingly.

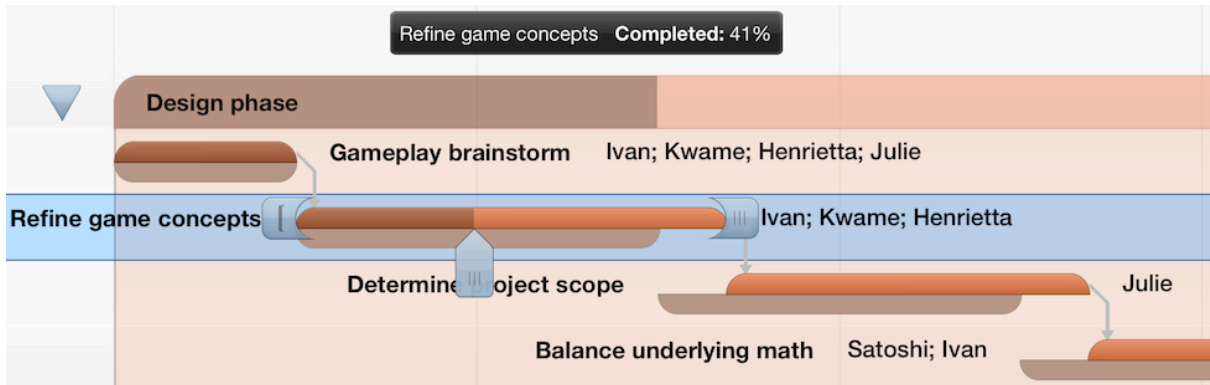
To set a baseline, open the view inspector and tap **Baselines**. Tap **Set Baseline** and enter a name (the current date is the default); it's now selected for comparison, and can be compared against subsequently set baselines as the project progresses.



## Step 15: Update Task Completion

As work on the project begins, you can track progress against the baseline you've set by tapping a task currently in progress and moving the slider along to the task's completion percentage (this can be edited in the task inspector as well).

If a task is behind schedule, update the expected duration and level resources again to compensate for the additional time needed.

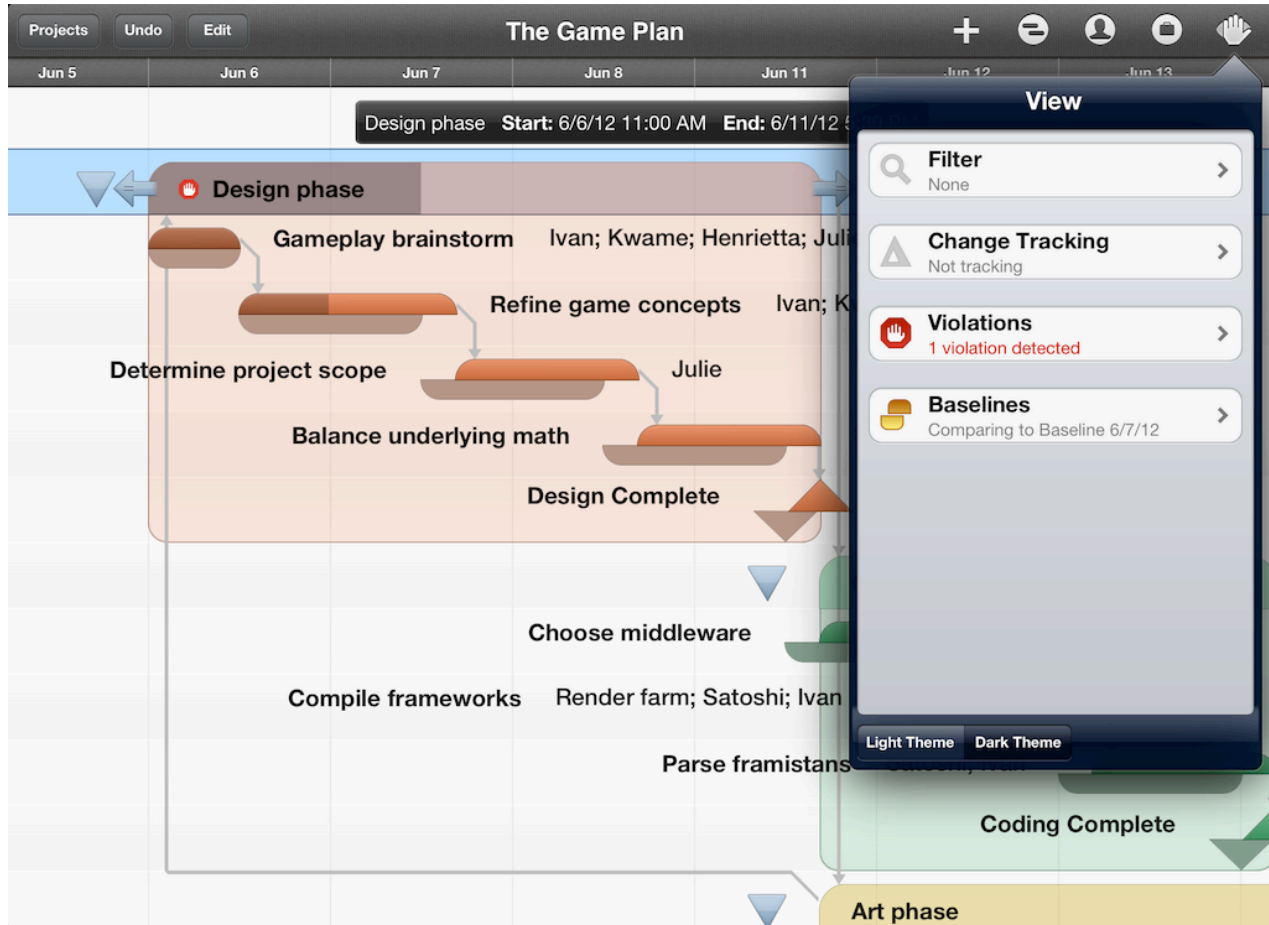




## Step 16: Resolve Violations

Occasionally situations will emerge that break the rules of logic you've set up for your project. When one of these occurs, OmniPlan will let you know with a red icon indicating a **violation** related to the adjacent task.

Violations can be fixed by opening the view inspector and tapping Violations. You'll find a description of the problem and a command to tap that should resolve it.



# Additional Resources

The OmniPlan for iPad website is complete with frequently asked questions, tutorial videos, and other support resources, and can be found at:

**[www.omnigroup.com/omniplan-ipad](http://www.omnigroup.com/omniplan-ipad)**

Or, contact Omni Support and we'll typically be able to help within 24 hours.

## **Email**

[omniplan-ipad@omnigroup.com](mailto:omniplan-ipad@omnigroup.com)

## **Phone**

1 206-523-4152

## **Toll Free**

1 800-315-6664