Working in
OmniOutliner 4

Contents

About This Tutorial

If you've read through OmniOutliner's in-app help (**Help ▸ OmniOutliner Help**), you've had a chance to absorb all the fine details about OmniOutliner. You saw how the sidebar and inspectors work, how you could tweak OmniOutliner's preferences, and more. Now it's time to all of that new-found logic to the test.

This hands-on tutorial takes you through the process of creating your first OmniOutliner document. Along the way, you'll learn how to create a custom template (or theme) that you can later use on the documents you create.

You'll learn some of the basic mechanics of OmniOutliner: how to enter text, move around, and ways to organize your content. Following that, you'll dive in deeper to take a closer look at OmniOutliner's layering and style model as you build out the styles for your own template.

By the time you've reached the end of the tutorial, you'll have mastered OmniOutliner and should be able to create templates and styles with, well, style.

Let's get started!

It All Starts with a Template

When you open OmniOutliner, one of the first things you'll see is the Resource Browser. This handy window gives you access to the existing templates we've included with OmniOutliner, as well as any files you've recently worked on. It's quite handy, actually. If for some reason you don't see the Resource Browser, go ahead and choose **File ▸ Resource Browser** (**Shift-Command-N**).

The Resource Browser makes it easy for you to locate and open files you've recently worked on (in the **Recents** section), or to create new documents using one of the existing **Templates**. Selecting the main **Templates** heading in the sidebar shows you all of the available templates.
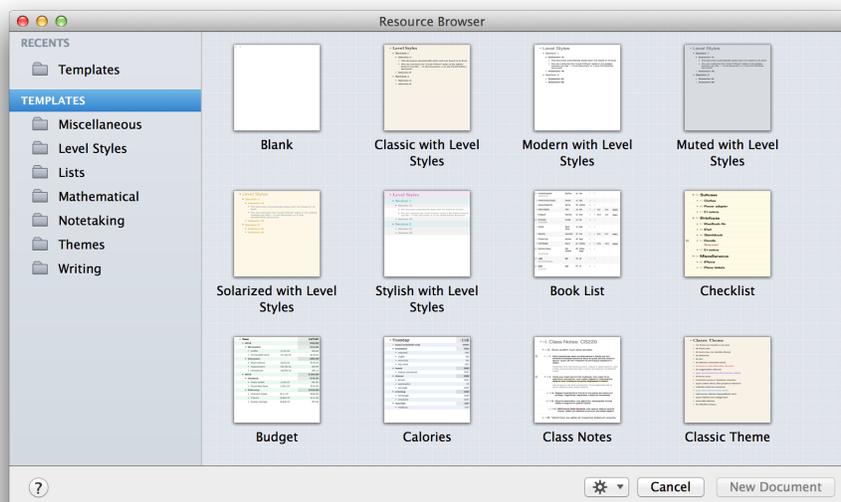
The templates are also categorized based on their style and purpose. For example, you'll find the **Book Draft** template in the **Writing** folder. In the sidebar, select **Level Styles** folder and then select the **Modern with Level Styles** template. To get a closer look at the template, press the Spacebar to open a QuickLook view.
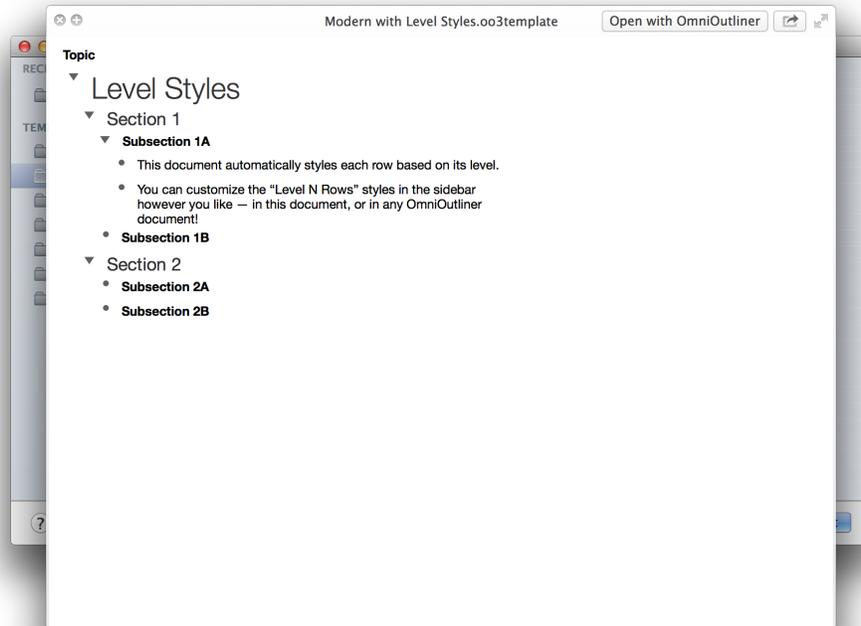
Go ahead and tap the Spacebar again to close the QuickLook popup. As you can see, the Modern with Level Styles template is fairly sparse. It has a white background, and some cleanly styled text for the various levels. You can quickly distinguish which level you're on based on the text styles: Level 1 rows have larger text, and the styles get progressively smaller and less stylish as you go into the Level 2, 3, and 4 rows. This is perfect, and will be the basis of this tutorial, so go ahead and choose the **Modern with Level Styles** template and then click **New Document**. OmniOutliner creates a new Untitled document based on the style theme in the Modern with Level Styles template.
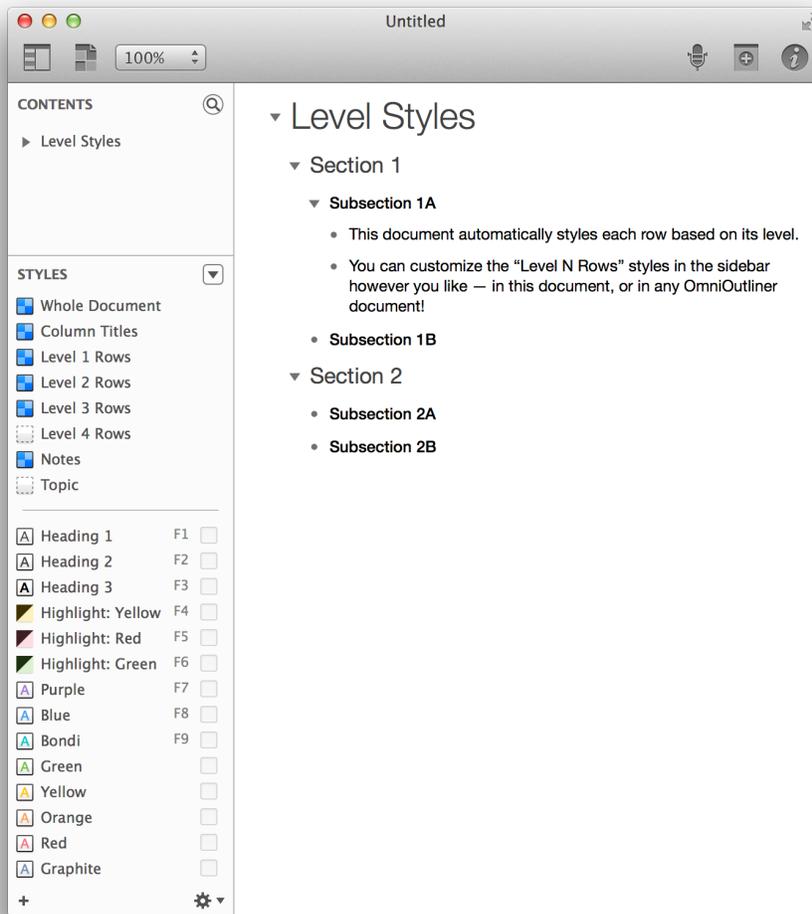
Document Features and Styles

Before going too much further, it's important to understand some of the structure of an OmniOutliner document. To help illustrate this, do the following:

- Choose View ▸ Column Headers ▸ Show

- Choose View ▸ Show Status Checkboxes

The Outline area should look like the following:

Level Styles

  ▾ Section 1

   ▾ Subsection 1A

   • This document automatically styles each row based on its level.

   • You can customize the "Level N Rows" styles in the sidebar however you like — in this document, or in any OmniOutliner document!

   • Subsection 1B

  ▾ Section 2

   • Subsection 2A

   • Subsection 2B

Along the top of the Outline area, you'll see the **Topic** column heading, which is the default column heading for the primary (or Topic) column in any OmniOutliner document. You'll also notice that little checkboxes are placed between each row handle and that row's content; these are known as **Status Checkboxes**, and can be used to check things off in a list of things you need to do.

If you move the mouse over the very first row—Level Styles—you'll notice that a little ▤ icon pops up along the left edge. This is the Notes icon. To add a Note to a row, click this icon and an area opens up along the bottom of the row where you can add some additional text. Go ahead and type something in; yours should look something like the following:

Level Styles

Notes are useful for adding additional content for rows. You can also hide these by choosing **View > Hide Note** or **View > Hide All Notes**.

After you've entered a Note, you'll notice that the ▤ icon is a little darker and is always visible (not just when you move the mouse pointer over a row). This makes it easy for you to see which rows have Notes when you've hidden them with **View ‣ Hide Note** or **View ‣ Hide All Notes**.


Note

(**Pro**) If you have OmniOutliner 4 Pro, you can opt to have Notes appear in a pane along the bottom of the Outline area. To view your Notes in a pane, choose **View ‣ Notes ‣ Display in Pane**.


Get Your Mind in the Gutter

The point of this exercise—unbeknownst to you—is to highlight all of the things that appear in an outline's Gutter: the Notes icon, a row handle, and a status checkbox. Depending on how you like to view the content of your outline, you can choose to hide or show all of these independent of one another.

- To hide the Notes column, choose **View ‣ Columns ‣ Notes**.

- To hide the Status Checkboxes column, choose **View ‣ Hide Status Checkboxes**.

- (**Pro**) If you have OmniOutliner 4 Pro and you want to hide the row handles, open the Style inspector (**Window ‣ Inspector ‣ Style**). Look for the Handles section in the middle of the Style inspector.

Style

A𝐴 | Helvetica Neue ▼

18 ▼ | ▬▬▬ ▲▼

B ▼ | *I* ▼ | S̶ ▼ | U̲ ▼

≡ | ≣ | ≡ | ≡

Line height: ▲▼
Background: ▲▼

Handle: [•] [•↖] [○] ⊗
Numbering: None ▼
Gutter: ◥ ▲▼

Row padding: 4 ▲▼
Above note: 0 ▲▼
Above children: 0 ▲▼
Below children: 0 ▲▼
Start a new page: Yes | **No**
Indent children: **Yes** | No

Included styles: None ▼
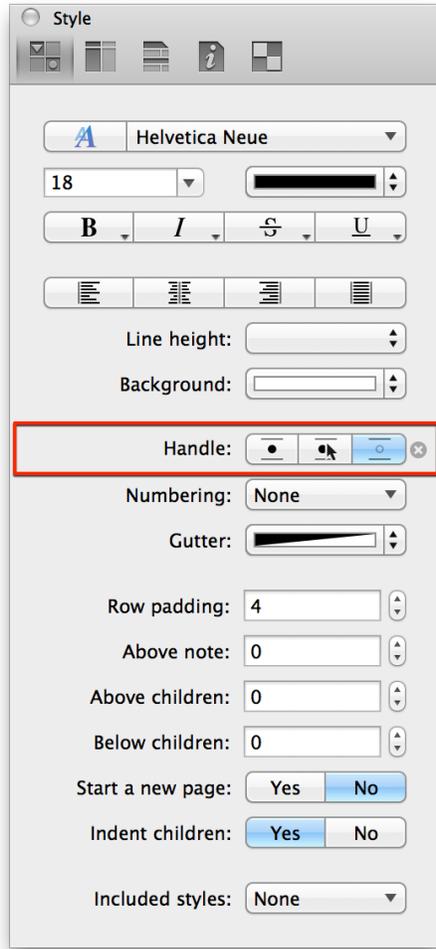
Row Handle Visibility	Button State
Always Visible	[•] [•↖] [○]
Visible on Mouseover	[•] [•↖] [○]
Always Hidden	[•] [•↖] [○]

10

With the Notes, Status Checkboxes, and row handles neatly tucked away, your outline takes on a bit of a cleaner feel. If you click in the Gutter (the space to the left of a row's content), you'll see that you can still select individual rows.
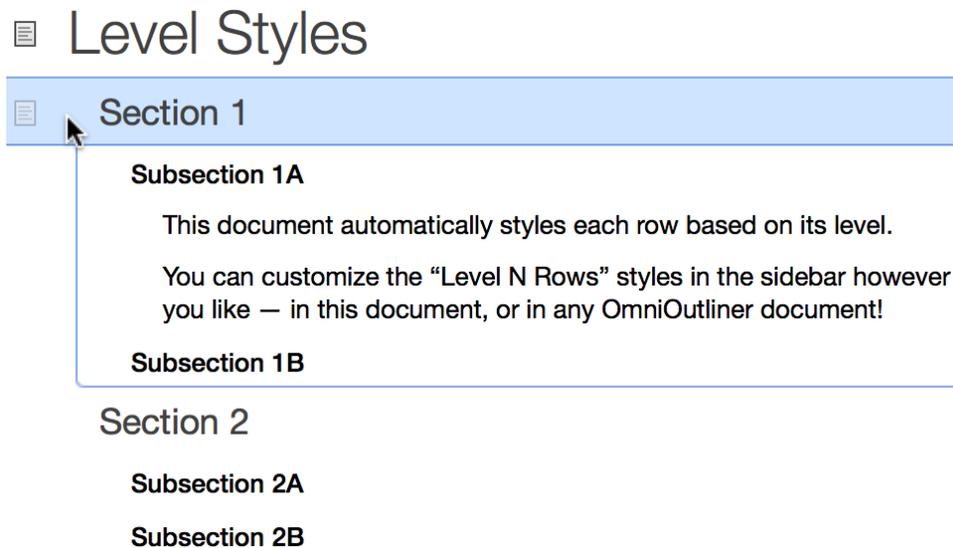
Get a Handle On Things

Row handles come in two styles: **bullets**, which means the row doesn't have any children, and **disclosure triangles**, which means that the row has child rows indented underneath.

Row handles are handy because they allow you to expand and collapse rows, and they give you something to grab onto when you want to move sections around in your outline. You can still do this when row handles are hidden; just use the **Expand** and **Collapse** options in the **View** menu, or in the **Organize ▸ Move** submenu. Don't worry about these right now; all of this is covered later in **Organizing Your Content**. Now closely examine the different row handles in the following screenshot:

▤ ▾ Level Styles

    ▾ Section 1

        ▾ **Subsection 1A**

            • This document automatically styles each row based on its level.

            • You can customize the "Level N Rows" styles in the sidebar however you like — in this document, or in any OmniOutliner document!

   • **Subsection 1B**

    ▸ Section 2

(**Pro**) If you have OmniOutliner 4 Pro and you've hidden your row handles, go ahead and turn row handles back on again.

Rows with children—indented rows with additional content—have a **disclosure triangle** as their row handle. When the triangle is pointing downward, the row has been expanded so you can see the content within. If the triangle is pointing to the right, as with the Section 2 row in the previous image, it means the row has been collapsed to hide its contents. Click on the closed disclosure triangle to expand the row, or click in the gutter to select the row and choose **View ▸ Expand Row** (**Command–9**).

Collapsed Row (Disclosure Triangle Closed)

▤   ▸ Section 2

Expanded Row (Disclosure Triangle Open)

▤   ▾ Section 2

     • **Subsection 2A**

     • **Subsection 2B**
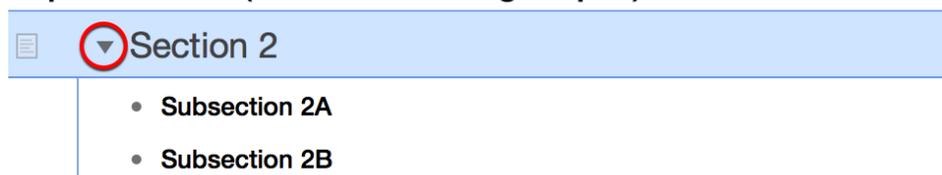
You can also use the Left and Right Arrow keys to expand and collapse rows as long as the row is selected. To give this a try, click gutter of the Section 1 row to select it, and then press the Right Arrow key to collapse the list, and then press the Left Arrow key to expand it again.

One trick you'll find that comes in handy is **Option-clicking** the disclosure triangles. When you Option-click a disclosure triangle, it automatically hides or expands everything at that level. For example, Option-click the disclosure triangle for the Section 1 row to collapse all of its children.

If you just click on the row handle for Section 1 (the right-pointing disclosure triangle), you'll see the following:

▤ ▾ Level Styles

Notes are useful for adding additional content for rows. You can also hide these by choosing **View > Hide Note** or **View > Hide All Notes**.
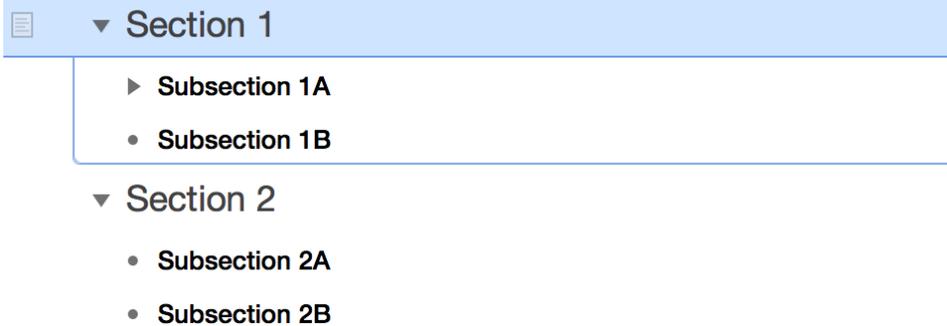
▤ ▾ Section 1
- ▸ **Subsection 1A**
- • **Subsection 1B**

▾ Section 2
- • **Subsection 2A**
- • **Subsection 2B**

Notice that the contents of **Subsection 1A** are collapsed and hidden from view. However, if you were to **Option-click** on the disclosure triangle instead, all of the rows within that have children also expand.

▤ ▾ Level Styles

Notes are useful for adding additional content for rows. You can also hide these by choosing **View > Hide Note** or **View > Hide All Notes**.
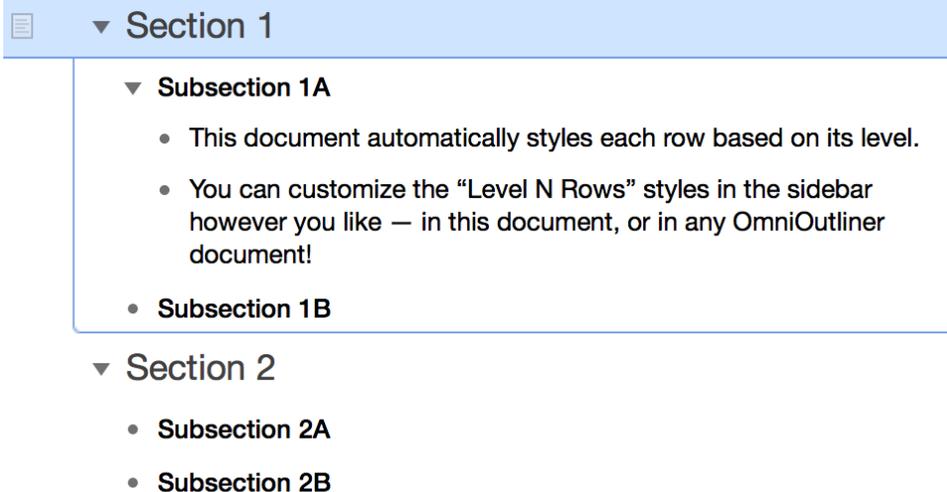
▤ ▾ Section 1
- ▾ **Subsection 1A**
  - • This document automatically styles each row based on its level.
  - • You can customize the "Level N Rows" styles in the sidebar however you like — in this document, or in any OmniOutliner document!
- • **Subsection 1B**

▾ Section 2
- • **Subsection 2A**
- • **Subsection 2B**

Take some time to play around with the disclosure triangles to collapse and expand the rows, using a mixture of clicking and Option-clicking so you get the hang of how this works.

# Styles, the Style Attributes Inspector, and You

One of the many things that makes OmniOutliner such a fantastic outlining tool is the ability to add style to your content. We have included a bunch of templates and themes with OmniOutliner 4 (none of them are exclusive to Pro users) that you can use wholesale or as a starting point for the outlines you create. And that's exactly what we're doing here in this tutorial.

If the Inspector window isn't open, go ahead and choose **Window ▸ Show Inspector**. You could also click the Inspector button in the toolbar, but since you're trying to learn everything about OmniOutliner, try using the keyboard shortcut, **Shift-Command-I** to open the Inspector window.

You can move the Inspector window around, and when you move it alongside the main window, you'll notice that it kind of snaps into place. This doesn't mean that the Inspector window moves in concert with the main window, it's just something cool that we thought you should know. Give it a try.

In the Outline window, click anywhere beneath the content; somewhere in the vast white space at the bottom of the document. This deselects all of the rows, and leads you to the next step: learning about the Style Attributes inspector.

In the Inspector window's toolbar, double-click the far-right button (it looks like a checkerboard) to open the Style Attributes inspector. This places a little green lock on the inspector so it always remains active.
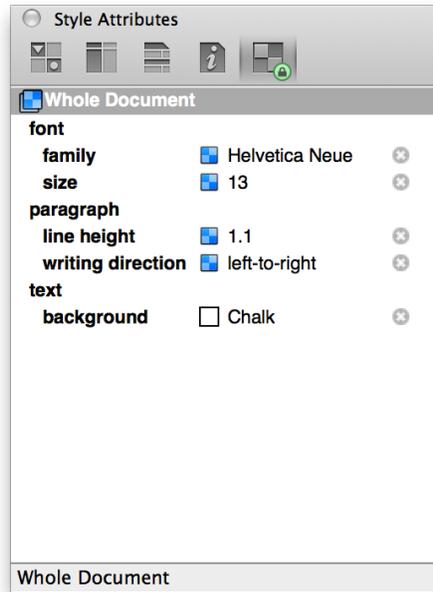
The styles you see for **Whole Document** are the base styles for this particular template. Let's quickly run through what you see here:

- Under **font**, there are two properties: **family** and **size**. These set the base font family (Helvetica Neue) and font size (13 pt) for the document.

- Under **paragraph**, there are two properties: **line height** and **writing direction**. This sets the line spacing for rows, and defines how text is aligned.

- Under **text**, there is one property, **background**, which defines the background color (in this case, a white background named **Chalk**) for the document.

In the **Styles** pane of the sidebar, select **Level 1 Rows** and watch what happens with the Style Attributes inspector; the inspector changes to show you the styles for Level 1 Rows.
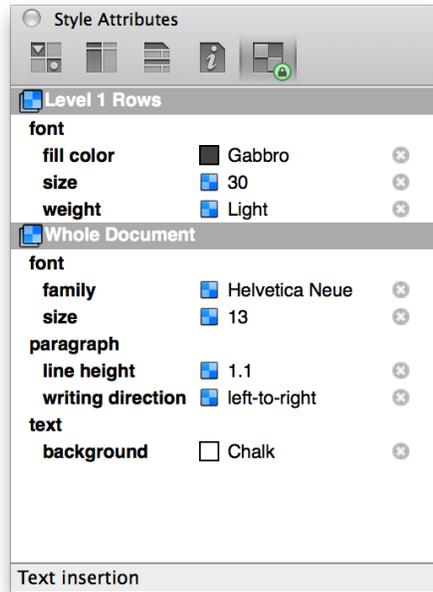
If you look at the **Level 1 Rows** section of the inspector, you'll see that defines a **fill color** for the text (Gabbro), the font **size** (30 pt), and the **weight** (Light), but no actual font. This is because the font family is defined under the **Whole Document** styles. What this means is that Level 1 Rows are styled as dark gray, 30 point Helvetica Neue Light. As you may have guessed, the **Whole Document** styles set the base "layer" of styles for your document, while the various row styles can be defined independently so they adopt attributes of the Whole Document style.

The order of the styles in the Style Attributes inspector shows the style hierarchy for the row you've selected. To "read" the styles, you start at the bottom of the Style Attributes inspector and work your way up to the top combining properties as you go. For example, if you were to read the Style Attributes inspector to interpret how Level 1 Rows are styled, you could translate that as follows:

> Level 1 Rows are dark gray with a white background. Text is left-aligned, 30 point Helvetica Neue Light, with a line height of 1.1×.

Click on the **Section 1** row in the outline and see how the Style Attributes inspector changes.
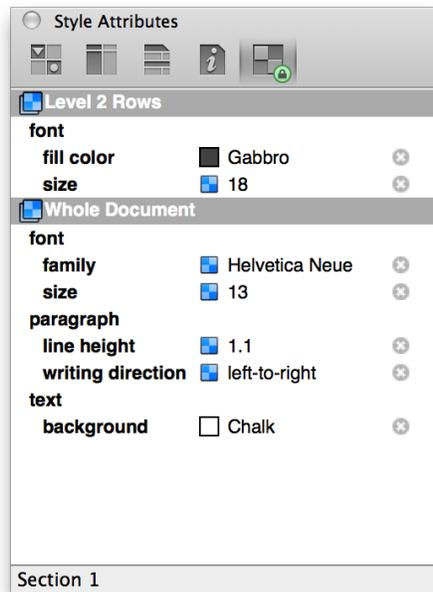
This reads as follows:

> Level 2 Rows are dark gray with a white background. The text is left-aligned, 18 point Helvetica Neue.

And let's do this again by first selecting the **Subsection 1A** row:
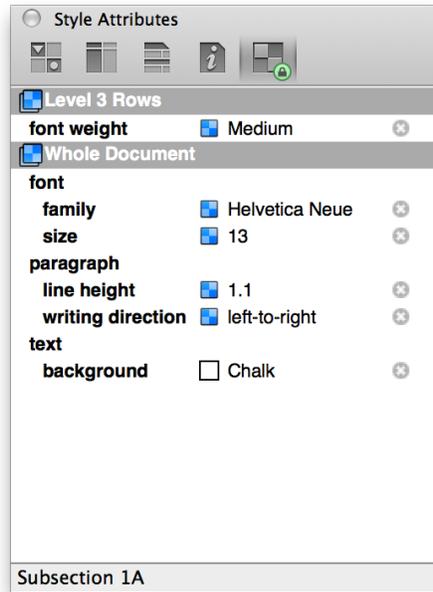
Which reads as follows:

> Level 3 Rows have a white background. The text is left-aligned, 13 point Helvetica Neue Medium.

There's one more thing you should know about the Style Attributes inspector. Click in the lower portion of the outline (in the white space) so you see just the Whole Document styles.
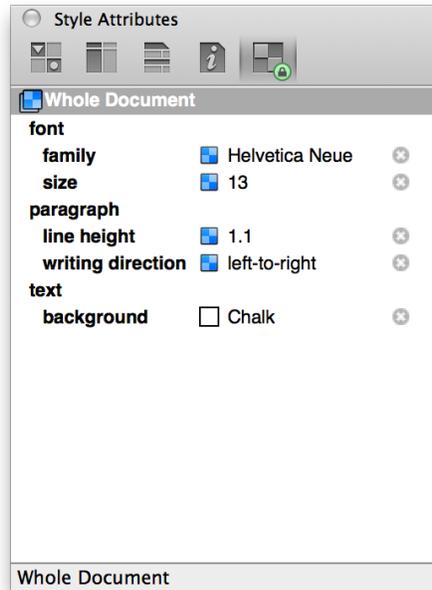
If you look to the right of each of the style attributes, you'll notice a little ⊗. As you might guess, if you click on that little ⊗, it removes that style attribute from the list. Go ahead and click the ⊗ next to **text background**. Nothing changes in the main window (because OmniOutliner's default background color is white), but now that style attribute is no longer defined for the Whole Document style.
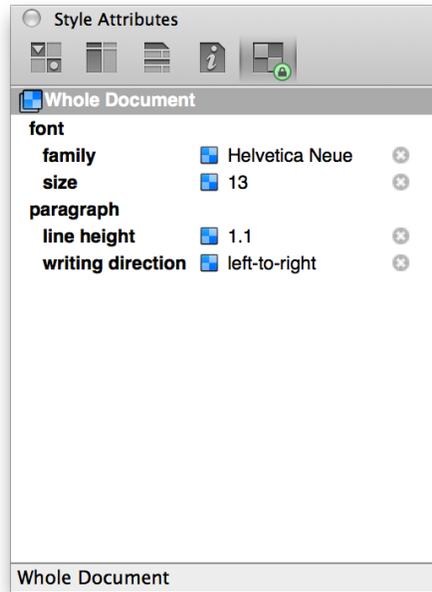
To bring the text background style back, choose **Edit ▸ Undo Delete Style Attribute**, or use the **Command-Z** keyboard shortcut.

Removing the Template Styles

Yes, that's right: the next thing you're going to do is to clear out all of the styles in the document you've been using. In the sidebar, select all of the styles in the top portion of the Styles pane. Then, click the Action menu at the bottom of the sidebar and choose **Clear Style** from the menu.
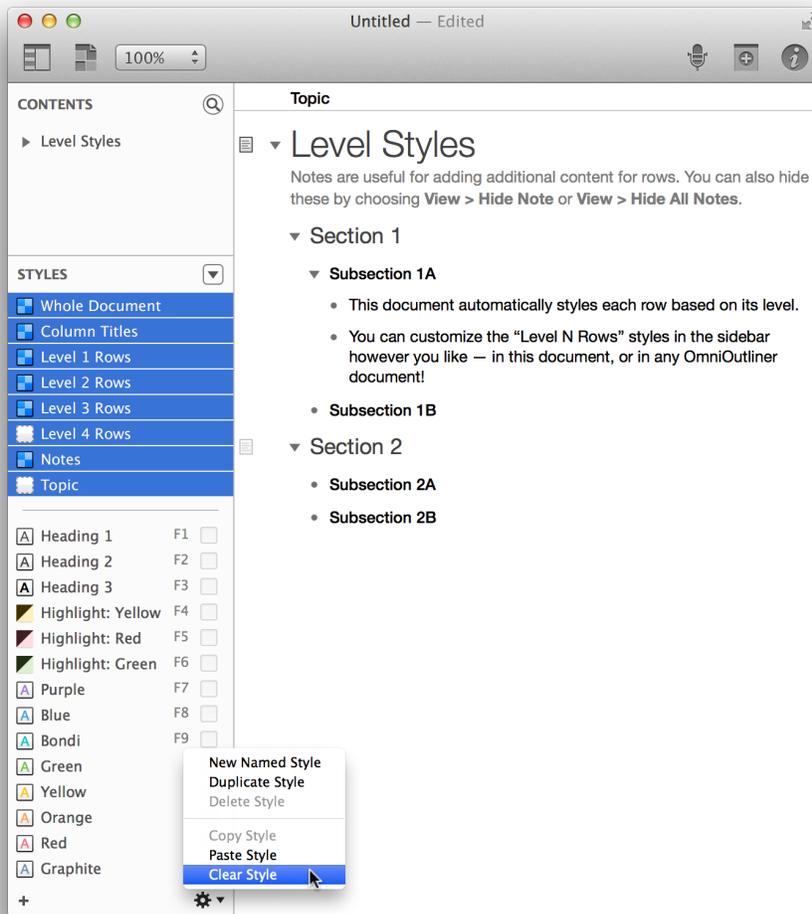
The document looks a lot different, doesn't it?

Topic

Level Styles

Notes are useful for adding additional content for rows. You can also hide these by choosing **View > Hide Note** or **View > Hide All Notes**.

- Section 1
  - Subsection 1A
    - This document automatically styles each row based on its level.
    - You can customize the "Level N Rows" styles in the sidebar however you like — in this document, or in any OmniOutliner document!
  - Subsection 1B
- Section 2
  - Subsection 2A
  - Subsection 2B

You'll also notice that all of the style chits in the Styles pane of the sidebar are also empty.

STYLES

- Whole Document
- Column Titles
- Level 1 Rows
- Level 2 Rows
- Level 3 Rows
- Level 4 Rows
- Notes
- Topic
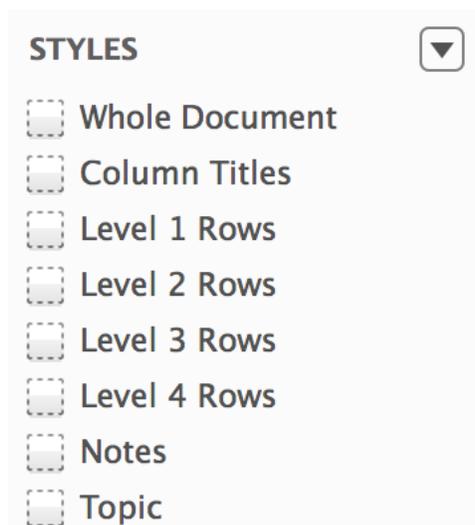
This is exactly what we want, because in the remainder of the tutorial, you'll learn how to create and style your own template. Before moving on, though, choose **File ▸ Save** (**Command-S**) to save this document as **My Level Styles.oo3** anywhere on your Mac's hard drive.

Save As: My Level Styles.oo3

Tags:

OmniOutliner 4 Tutorial

FAVORITES
Dropbox
chuck
Applications
Desktop
Documents
Downloads
Music
Movies

OmniOutliner 4 Tutorial

File Format: OmniOutliner

New Folder   Cancel   Save
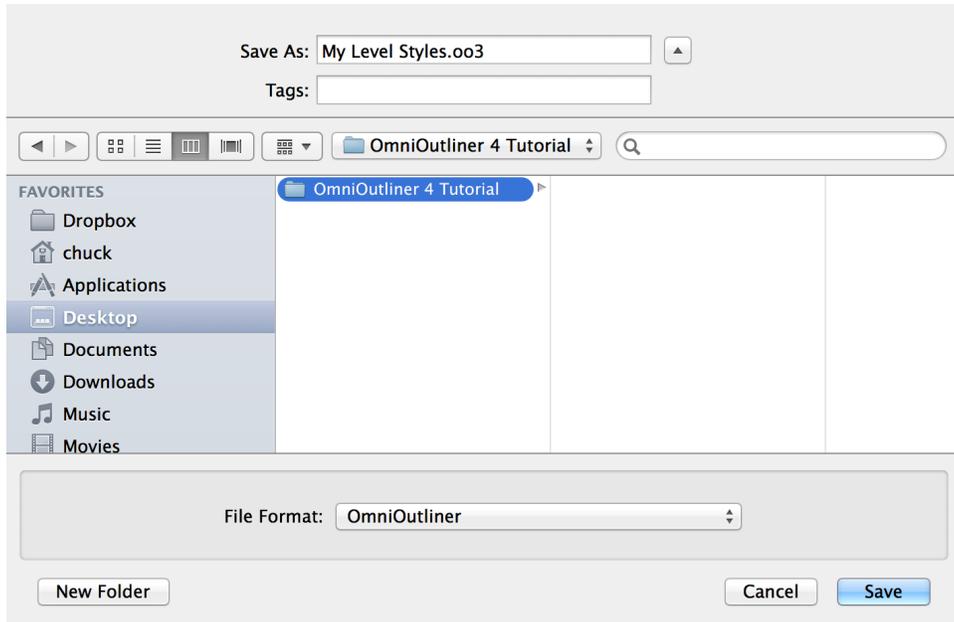
Entering Text and Moving Around in OmniOutliner

The next thing that you're going to learn about OmniOutliner—and this is a bit of a diversion from styling—is how to enter text, move around, and organize the contents of your outlines. While this might sound trivial, it's an important part of the learning path.

To get started, click somewhere in the white area beneath the text in the outline, and choose **Edit ▸ Select All**, or use the standard keyboard shortcut, **Command-A**. Now press **Delete** to clear all of the text out of the outline. As you can see, both the document, and the Style Attributes inspector, are clear of any content. The only thing that remains is the **Topic** heading for the outline; you can leave that alone for right now.
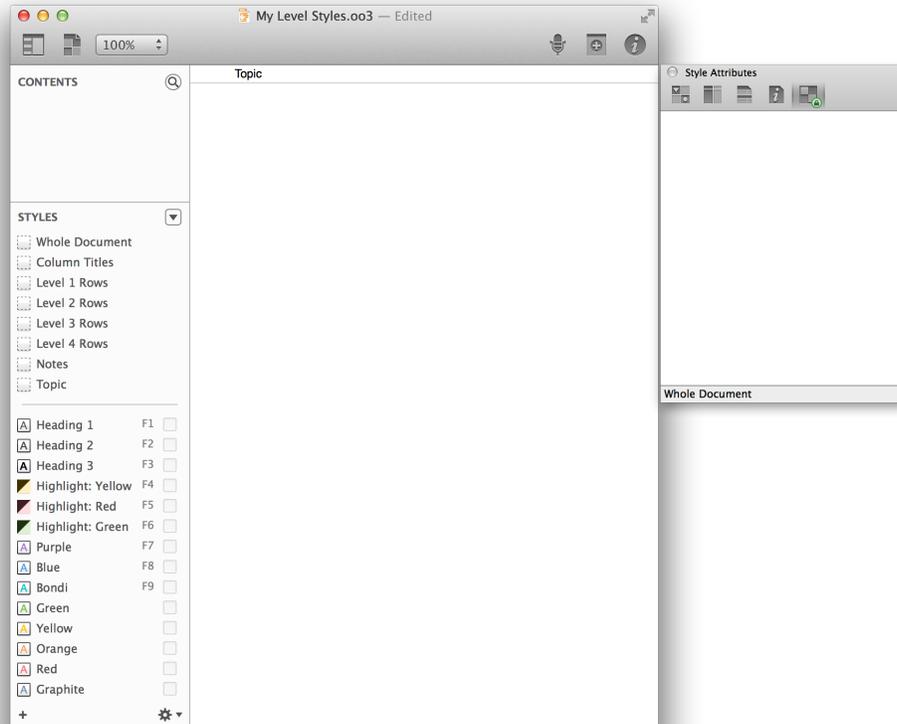
Entering text is simple. Start out by double-clicking on the **Topic** heading and enter **My Level Styles**. This will be the new Topic heading for the contents of your outline. To enter text on the rows of your outline, click beneath the **My Level Styles** heading and enter **Level 1 Row**. Pressing **Return** at the end of the first line moves you down to the next row.


A couple things you'll notice is that the **Contents** pane of the sidebar recognizes the text you enter as you're entering it into the outline area. Also, the rows get row handles by default. To add more rows, do the following on the next and subsequent rows:

- Enter **Level 2 Row** and press **Return**

- Enter **Level 3 Row** and press **Return**
- Enter **Level 3 Row** and press **Return**
- Enter **Level 2 Row** and press **Return**
- Enter **Level 3 Row** and press **Return**
- Enter **Level 3 Row** and press **Return**
- Enter **Level 1 Row** and press **Return**
- Enter **Level 2 Row** and press **Return**
- Enter **Level 2 Row** and press **Return**
- Enter **Level 1 Row**

Your document should look like the following:
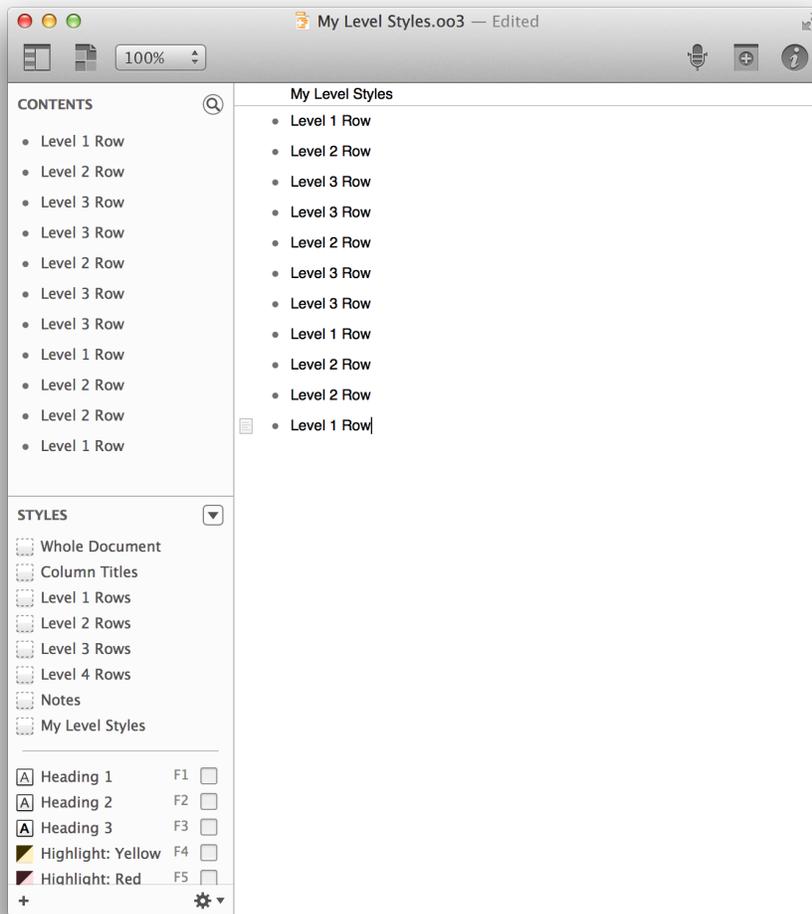
Now let's add some depth to the outline by indenting the rows. To navigate around in the outline, use the **Up** and **Down** arrow keys on your keyboard. You can also just click in a row gutter to select a row. If you want to select multiple rows, **Command-click** in the row gutters. Go ahead and **Command-click** on the row handles for all of the rows that say **Level 3 Row**. Your document should look like this:
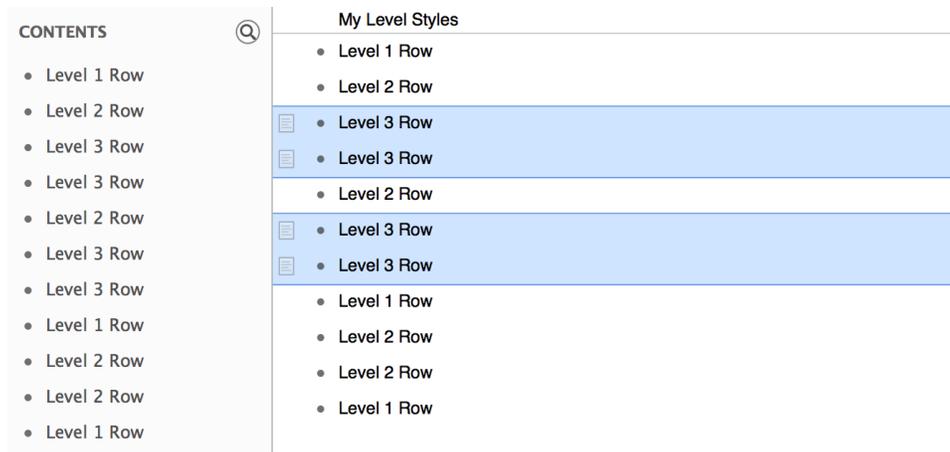
There are a couple of ways that you can indent these Level 3 Rows. The easiest way is to just press the **Tab** key; the other way is to choose **Organize ‣ Indent (Command-])**. As you can see, the Level 3 Rows are indented, and the rows that precede them now have a disclosure triangle.
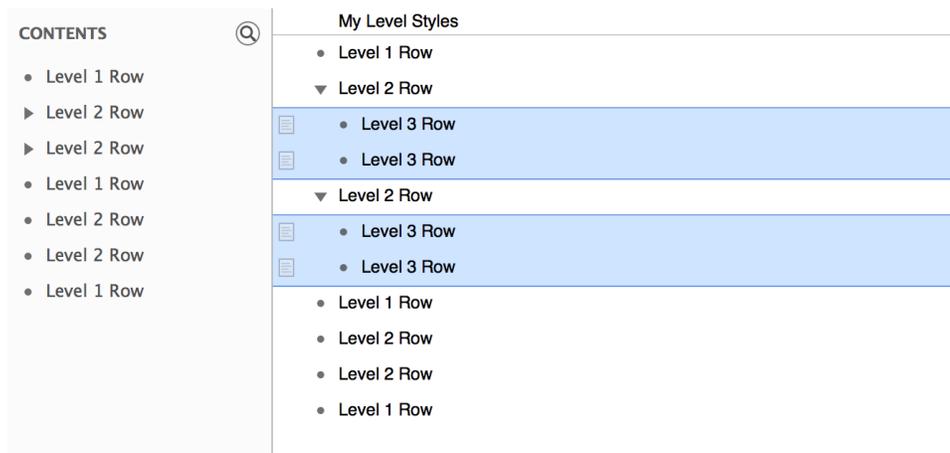
Now do the same with the **Level 2 Rows**:

- Command-click all of the Level 2 Rows

- Press **Tab** or use **Command-]** to indent the selected rows

Your document should look like this:
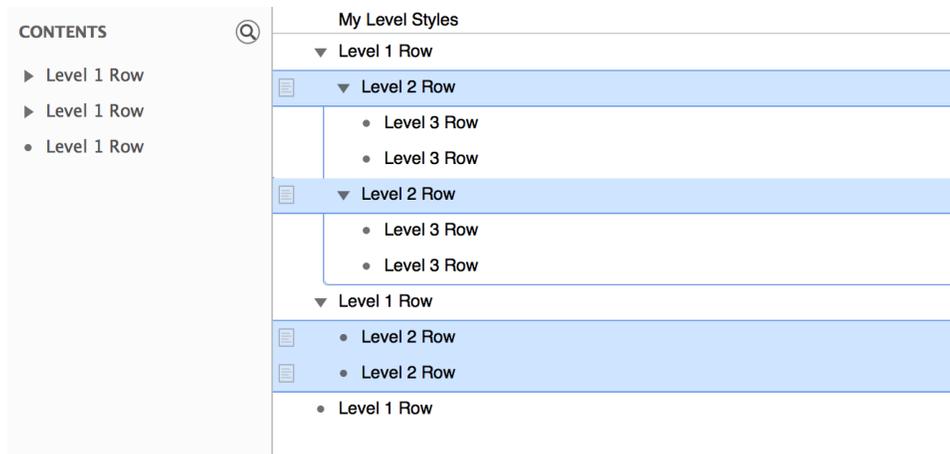
As you can see, the Level 2 Rows are children of the Level 1 Rows, and the Level 3 Rows are children of the Level 2 Rows, making them grandchildren of the Level 1 Rows. Indentation adds hierarchical depth to your outlines, making it easy for you to organize lists of information quickly.

Before moving on to the next section, one final bit of text entry you should do is to add some text to the Notes for the Level 1 Rows. You do this by moving the mouse pointer over row and then click the Notes icon in the gutter.
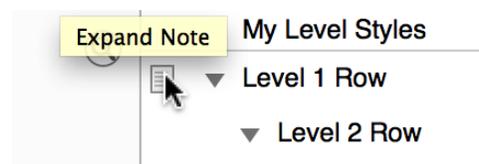
It doesn't really matter what you enter there—it could be your address, or the name of your favorite *Rush* album—just as long as you have some text in place that you can style later in this tutorial. When you've finished, your document should look something like the following:

List Hierarchy, On the Fly

In case you missed the earlier hint, you can quickly add depth to your outlines by pressing **Tab** after you press **Return** at the end of a row. Pressing **Tab** indents the row to the next level, and pressing **Shift-Tab** outdents the row to the previous level.

To use the earlier exercise of entering text as an example, you could have done the following and ended up with a document that looks like the previous image:

- Press **Tab**, enter **Level 2 Row** and press **Return**

- Press **Tab**, enter **Level 3 Row** and press **Return**

- Enter **Level 3 Row** and press **Return**

- Press **Shift-Tab** to back up a level, enter **Level 2 Row** and press **Return**

- Press **Tab**, enter **Level 3 Row** and press **Return**

- Enter **Level 3 Row** and press **Return**

- Press **Shift-Tab** twice to back up two levels, enter **Level 1 Row** and press **Return**

- Press **Tab**, enter **Level 2 Row** and press **Return**

- Enter **Level 2 Row** and press **Return**

- Press **Shift-Tab**, enter **Level 1 Row**

While that might look complicated, it really isn't; give it a shot. It won't take long before you're hooked on using **Tab** and **Shift-Tab** to add depth to your outlines while you're creating them.
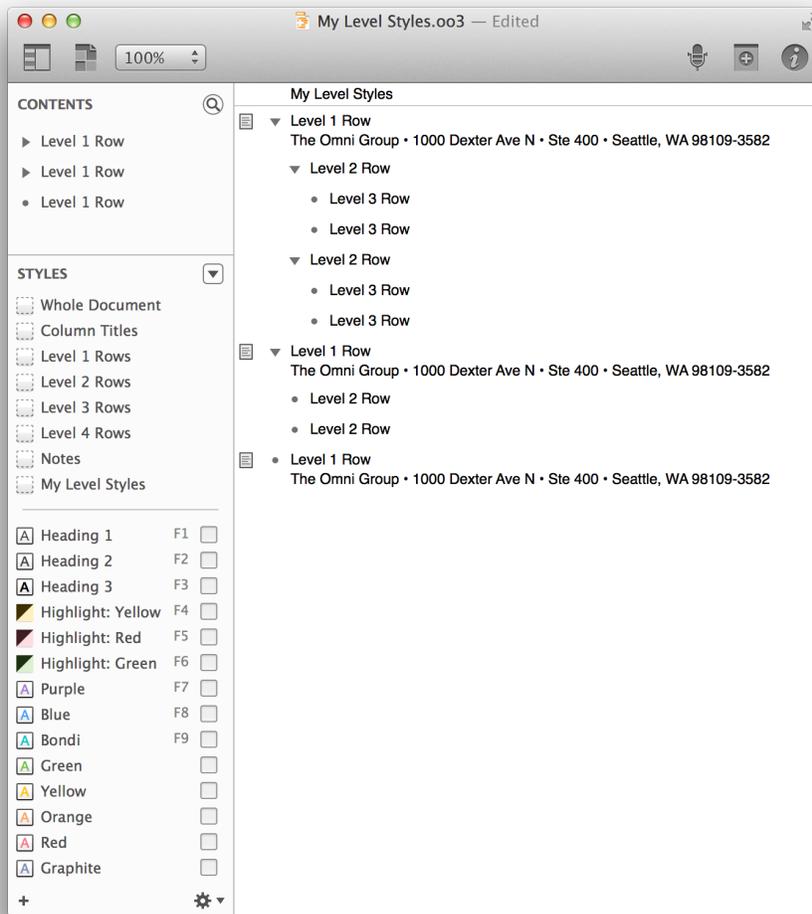
This now gives you enough content to use as placeholder text for the document you'll eventually turn into a template. Go ahead and choose **File ▸ Save** (**Command-S**) to save the document before moving on to the next section.

Organizing Your Content

OmniOutliner helps you create detailed lists, and to go with that, it includes some powerful features for helping you organize the content in your outline. Here we'll show you how to move whole sections around using the Move menu options and how to create Groups to add depth to your content.

Reorganizing and Moving Content Around

There are a few ways you can reorganize the content in your outline. The most frequent—and often misused—way is with Cut and Paste from the Edit menu. In many cases, you don't want to Cut the content from your document, you just want to move it around, and for that, look to the options in the **Organize ▸ Move** menu.

To use these options, you can either click on the text within a row or click in the gutter for the row that you want to move. If you click in the gutter of a row that has children, the parent row and the children are selected. For example, click in the gutter of the second **Level 2 Row**; you'll notice that the two Level 3 Rows are also selected.
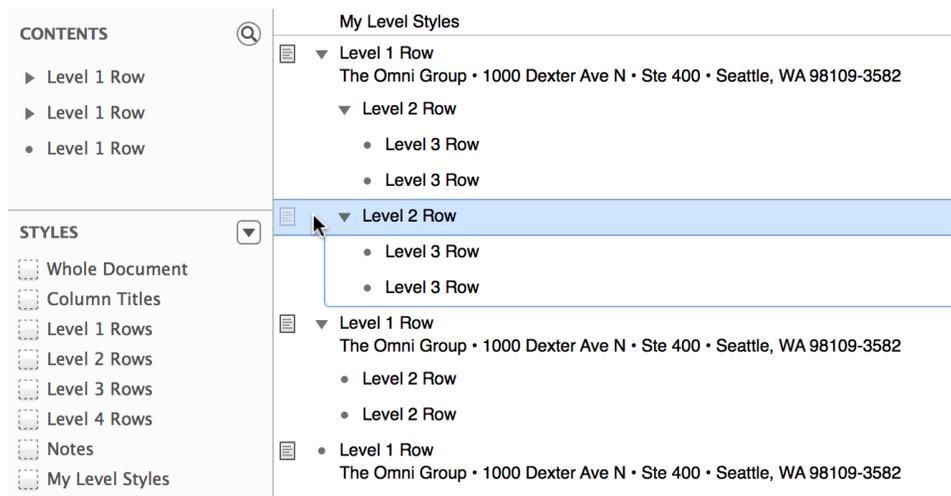
Now let's say that you wanted to move the second Level 2 Row and its children to the last Level 1 Row so it has some children. You can click on the row handle (in this case, the open disclosure triangle) and drag it downward and drop and insert it within the list. As you start to drag the content down, you'll notice a couple of things that will help you find the right place to relocate the content.
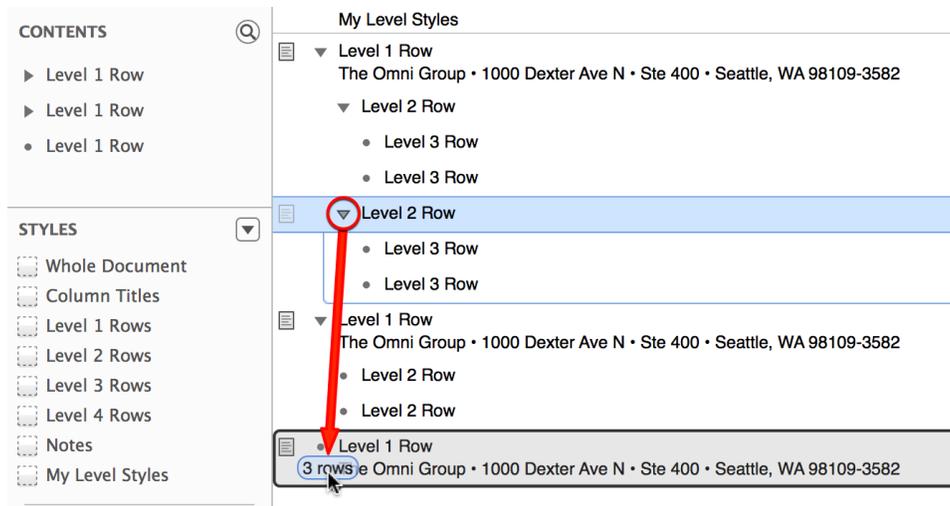
- First, you'll notice a little bubble just above the mouse pointer that tells you how many rows you're moving (in this case, you're moving **3 rows**).

- Next, you'll see an insertion bar appear in the content list to show you where the content will be placed when you let go of the mouse button. As you drag the Level 2 Row and its children downward, the insertion bar pops in between rows to indicate a possible drop point.

- And finally, if you are moving something into another section, the parent row for that section is highlighted temporarily to indicate that you're moving content to that section.

When you let go of the mouse button, the content you've dragged drops into place and takes up residence as new child rows for the parent row.
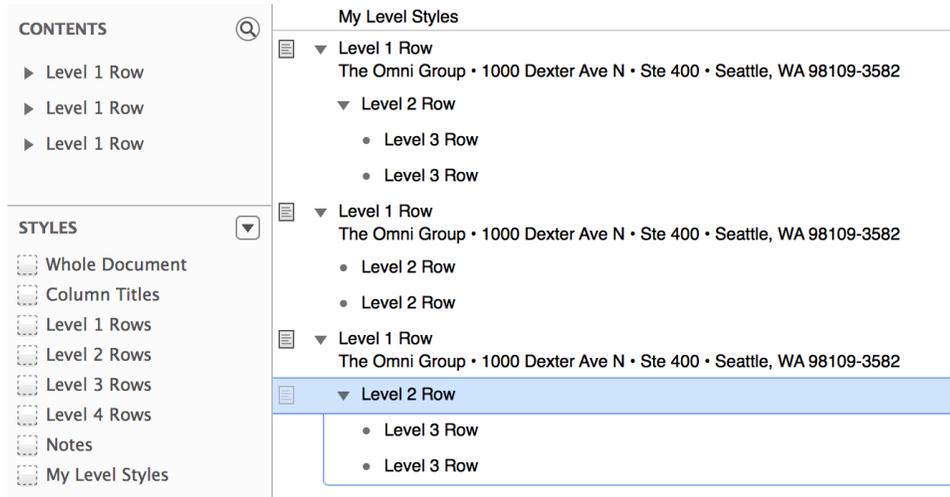
If you click the disclosure triangle on the last Level 1 Row, you'll notice that the rows you've moved there collapse within. Click the disclosure triangle again to open it back up.

Another way you can organize the content is by using the **Move** options within the **Organize** menu. Let's say that you want to move that final Level 1 Row and its children up to the beginning of the document. Start by clicking in the gutter next to the final Level 1 Row to select it and its children:
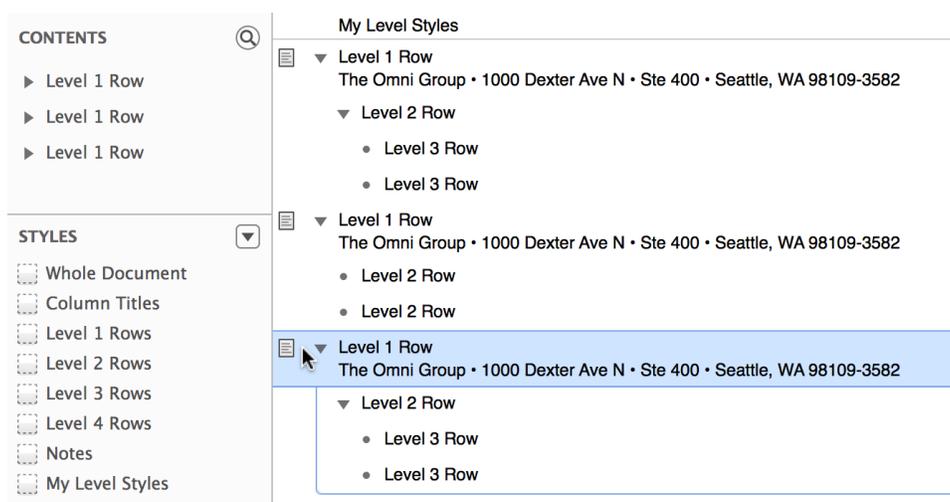
Next, choose **Organize ▸ Move ▸ Move Up**; you'll notice that it moves up above the previous Level 1 Row to take the middle position in the document.
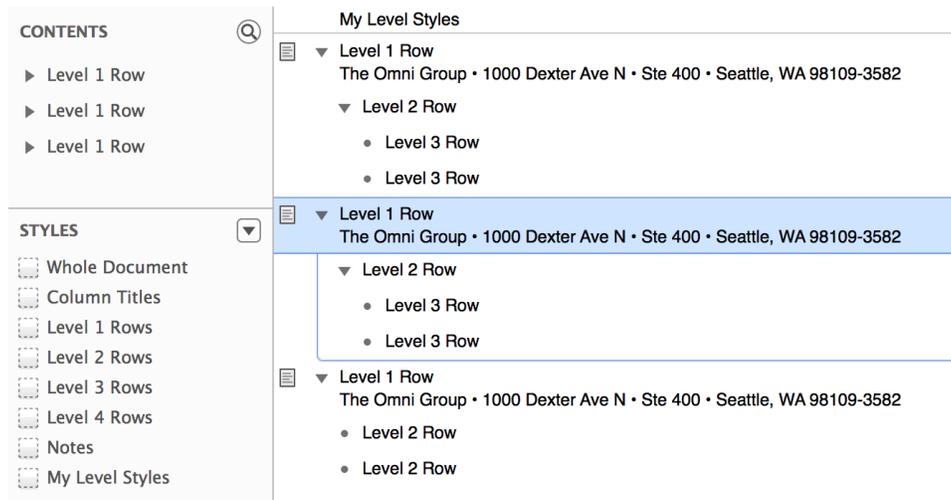
Choose **Organize ▸ Move ▸ Move Up** again to move the middle section up to the top of the document.
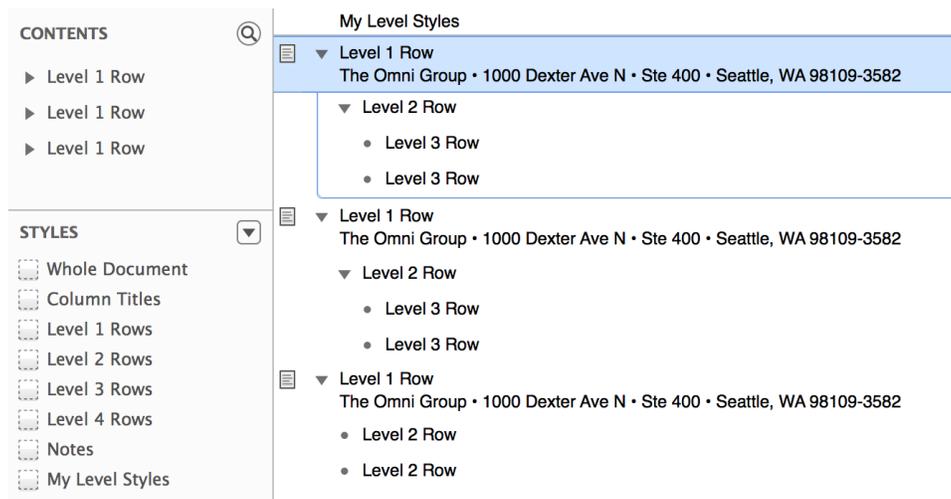
Tip

An easier way to move that final Level 1 Row and its children up to the top would have been to use the **Move Up** command's keyboard shortcut. Instead of navigating through the menu

hierarchy (twice!) to find the option you wanted, you could have just entered the **Control-Command-Up Arrow** keyboard shortcut twice.

Also found in the **Organize ▸ Move** menu, you'll see options for **Move Right** and **Move Left** (with corresponding keyboard shortcuts of **Control-Command-Right Arrow** and **Control-Command-Left Arrow**, respectively). These options are analogous to the **Organize ▸ Indent** and **Organize ▸ Outdent** menu options. You can use these interchangeably based on whatever's easier for you to do.

The important thing to keep in mind when you move a row left or right is that you're changing the row's level. If you have a Level 1 Row and you move it right, it now becomes a Level 2 Row and it adopts that row level's style. Conversely, if you move a Level 2 Row left, it becomes a Level 1 Row and it adopts that row level's style. It's hard to visualize this right now, because we've cleared out all of the template styles from the example document, but you'll see how this works later on.

Creating Content Groups

Sometimes when you're working on an OmniOutliner document, you'll find a bunch of rows that you'd like to group together. These rows can follow one another or be non-contiguous, but all you know is that they belong together. For this, you'll want to group the rows together using **Organize ▸ Group** (or **Option-Command-G**).

To show you how this works, go ahead and click at the end of the last row in the document, after **Level 2 Row**. You'll see a flashing insertion point (**|**). Press **Return** and then press **Shift-Tab** to outdent the next line to create a new Level 1 Row.

CONTENTS

▸ Level 1 Row
▸ Level 1 Row
▸ Level 1 Row
•

My Level Styles

▾ Level 1 Row
The Omni Group • 1000 Dexter Ave N • Ste 400 • Seattle, WA 98109-3582
  ▾ Level 2 Row
    • Level 3 Row
    • Level 3 Row
▾ Level 1 Row
The Omni Group • 1000 Dexter Ave N • Ste 400 • Seattle, WA 98109-3582
  ▾ Level 2 Row
    • Level 3 Row
    • Level 3 Row
▾ Level 1 Row
The Omni Group • 1000 Dexter Ave N • Ste 400 • Seattle, WA 98109-3582
    • Level 2 Row
    • Level 2 Row
  • |
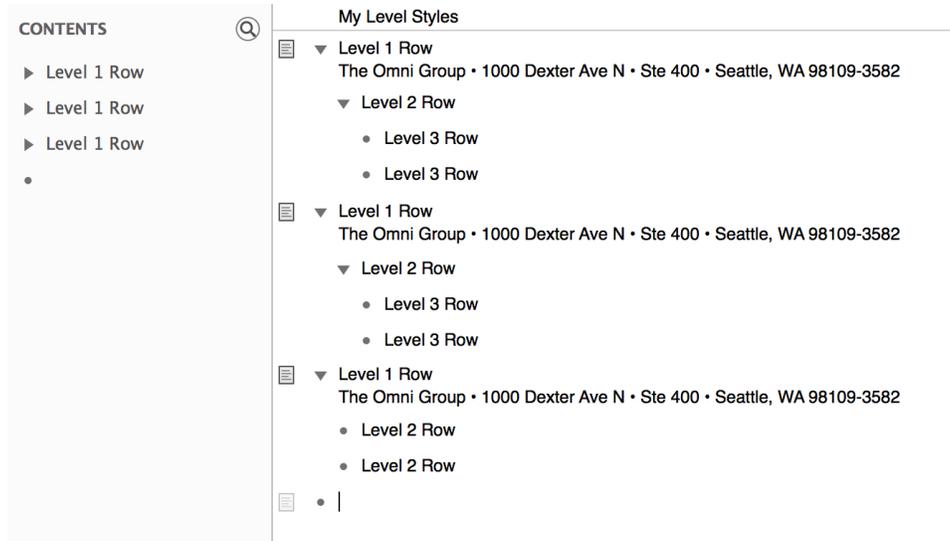
Enter the following:

- **Red** and press **Return**

- **Green** and press **Return**

- **Blue** and press **Return**

Your document should look like this:

CONTENTS

▸ Level 1 Row
▸ Level 1 Row
▸ Level 1 Row
• Red
• Green
• Blue

My Level Styles

▾ Level 1 Row
The Omni Group • 1000 Dexter Ave N • Ste 400 • Seattle, WA 98109-3582
  ▾ Level 2 Row
    • Level 3 Row
    • Level 3 Row
▾ Level 1 Row
The Omni Group • 1000 Dexter Ave N • Ste 400 • Seattle, WA 98109-3582
  ▾ Level 2 Row
    • Level 3 Row
    • Level 3 Row
▾ Level 1 Row
The Omni Group • 1000 Dexter Ave N • Ste 400 • Seattle, WA 98109-3582
    • Level 2 Row
    • Level 2 Row
  • Red
  • Green
  • Blue

To create a group from these rows, do the following:

1. Select the Red, Green, and Blue rows by Command-clicking in their gutters.
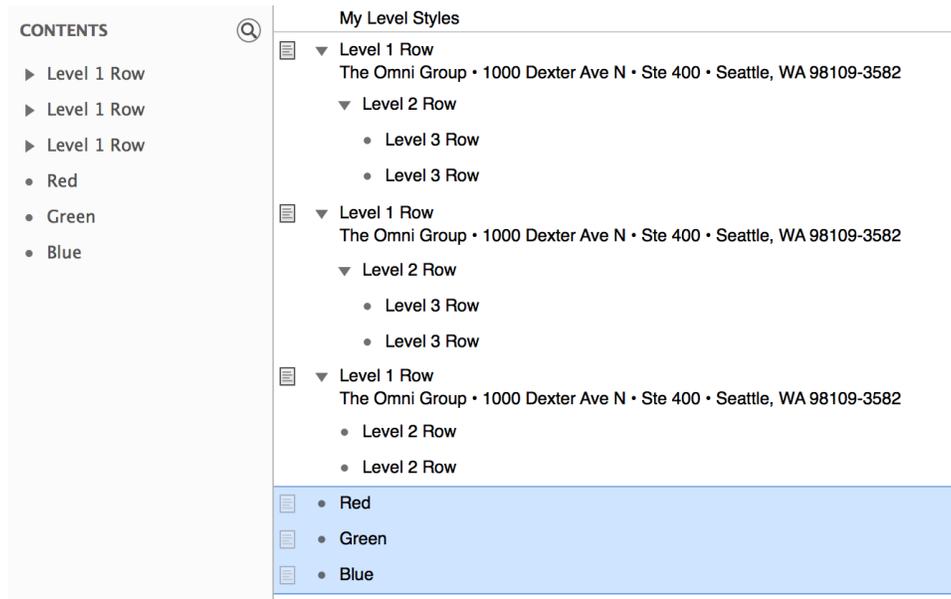
2. Choose **Organize ▸ Group** (or **Option-Command-G**). This indents the Red, Green, and Blue rows (converting them to Level 2 Rows), and inserts a new Level 1 Row above them.
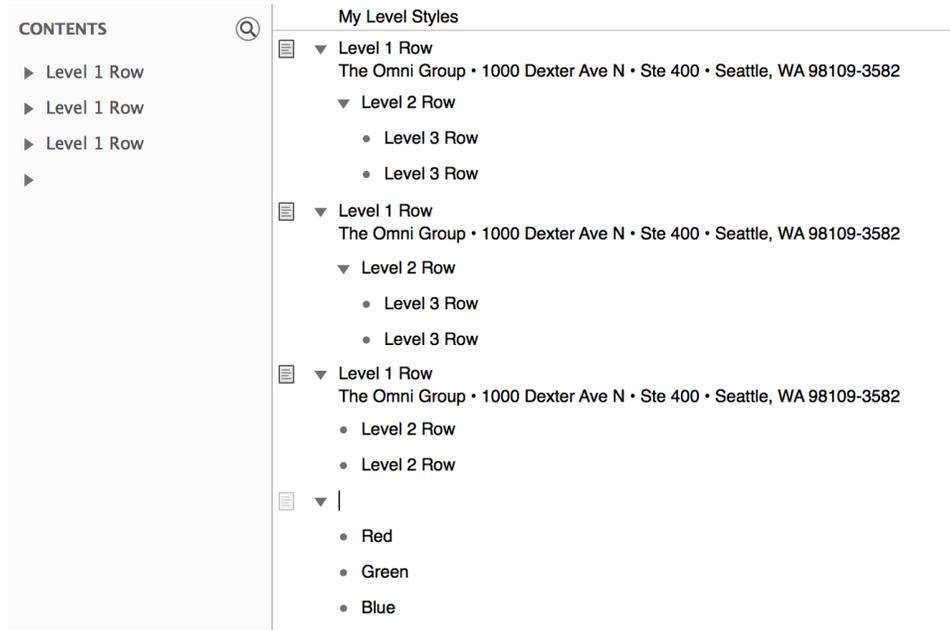
3. In the empty Level 1 Row, enter **Additive Primary Colors**. This gives a "title" for the parent row of the newly created child rows.
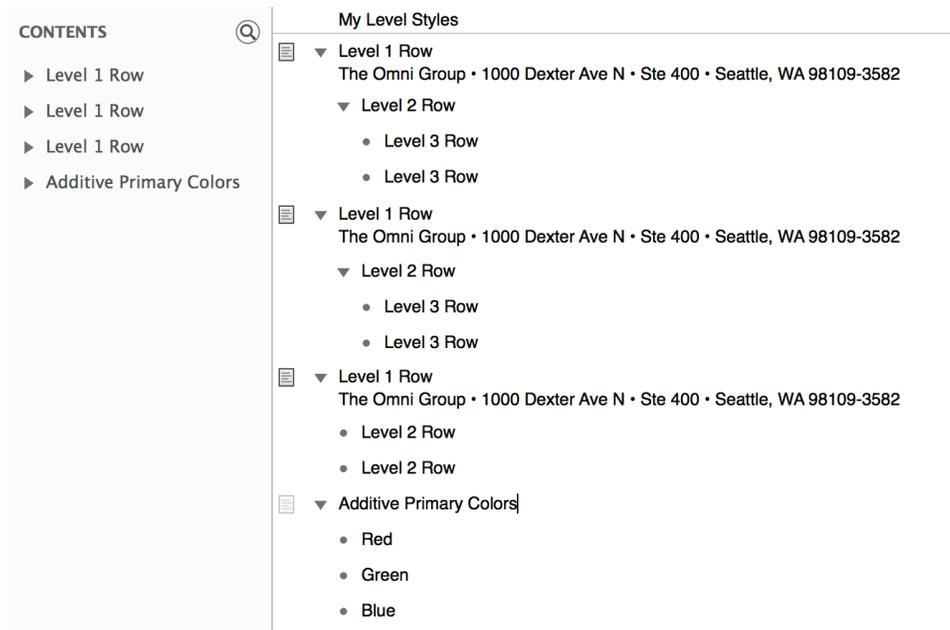

There is also an **Ungroup** option in the **Organize** menu which can only be used on rows with children for when you want to dismantle the organization. Click in the gutter next to **Additive Primary Colors** and

choose **Organize ▸ Ungroup** (or **Option-Command-U**). You'll see that the **Additive Primary Colors** row maintains its Level 1 Row status, and that the Red, Green, and Blue rows are outdented Level 1 Rows, too.
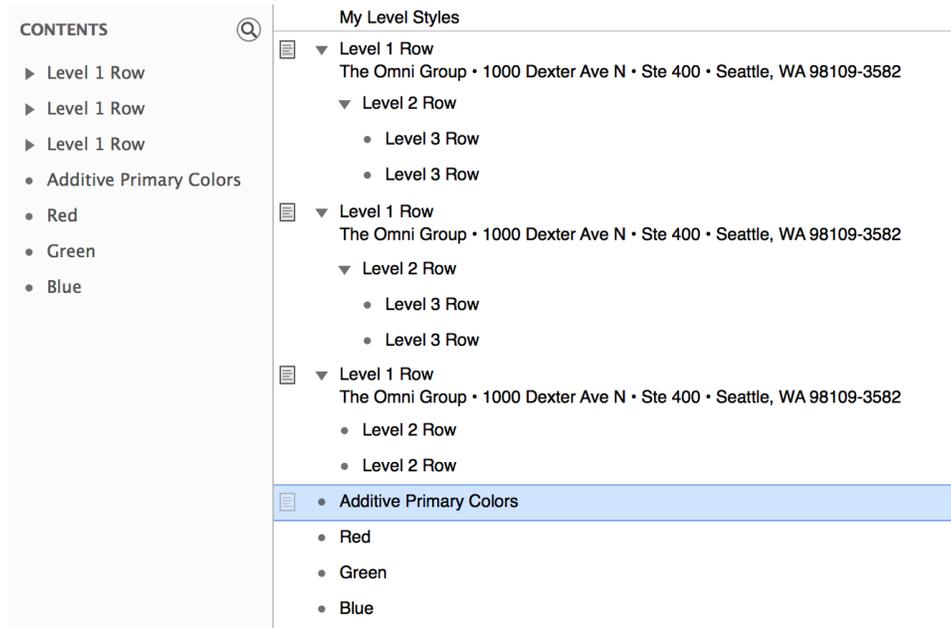
However, since we want that **Additive Primary Colors** list for a later part of the tutorial, go ahead and press **Command-Z** to undo the ungrouping. You'll see that the **Additive Primary Colors** row now has a closed disclosure triangle as its row handle and that the Red, Green, and Blue lines have disappeared. Don't worry, though. If you click the disclosure triangle, the row pops open to reveal its child rows.
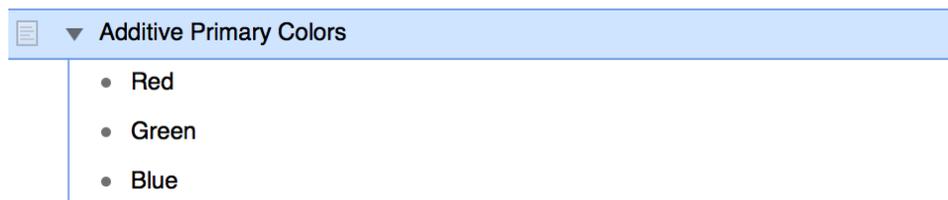
Choose **File ▸ Save** to save the changes you've made to the document.

Note

If you're looking for a place to take a break, this might be a good time to do that. The remainder of this tutorial takes you through the process of styling the document before saving a version of it as a template which you can reuse later on. We won't lie, it gets pretty intense, and you'll want to pay close attention to the things you're doing. So go ahead, take a walk around the office, grab a coffee, or go pet your cat, and then come back and be prepared for some fun.

Styling Your Content

Up to now, you've learned all kinds of things about OmniOutliner. You've created a new document based on a template, and have then stripped out all of the template styles before learning how to enter and create hierarchical lists of information, including moving and grouping content.

Now it's time to take things to the next level by showing you how to create styles for your content. There's a lot that's involved here, but before this goes too far, it's important to understand OmniOutliner's style layering model.

> **Note**
>
> If you'd like to see an example of just how versatile OmniOutliner's styling features can be, choose **Help ‣ Welcome** from the menu bar. OmniOutliner's Welcome document was created with OmniOutliner 4.

Understanding OmniOutliner's Style Model

As mentioned earlier, when showing you how to use the Style Attributes inspector, OmniOutliner's styles stack upon one another. The base layer of styles for your document is the **Whole Document** style. This is the foundation of your document, and the various Level styles you set can adopt, amend, and even override the Whole Document styles.

There are two kinds of styles in OmniOutliner: **Level Styles** and **Named Styles**:

- **Level Styles** reside in the top portion of the Styles pane of the sidebar, and consist of the Whole Document style, styles for the various numbered Level Rows (Level 1 Row, Level 2 Row, and so

on), as well as styles for Column Titles, Notes, and the main Topic column.

- **Named Styles** are found in the lower portion of the Styles pane in the sidebar, and can be applied to anything in your document. When applied, a Named Style amends the existing Level Style with its own properties. For example, you could apply a Heading named style on top of a Level 1 Row style to make the text bigger or change the font. All of the templates come with some pre-defined Named styles, which you can use, delete, or edit to suit the needs of your document.

The styles you set for the various Level Rows, headings, and text all stack on top of the styles you designate for the Whole Document. This is very much like the web's Cascading Style Sheets (CSS), if you've ever used that for web design.

Using the Colors Palette

One thing you may not have noticed is that OmniOutliner's sidebar (**Option-Command–1**) is also layered on top of your content. If you change the background color of your OmniOutliner document to something other than white, you'll notice that the sidebar takes on a slight tint of that color. That's because the sidebar's default color uses opacity to let the underlying background color bleed through.

To see how this works, click in the white space beneath the content of the outline, and then do the following:

1. Open the Inspectors window by clicking the ⓘ button in the toolbar, or with the **Shift-Command-I** keyboard shortcut.

2. Make sure you're in the Style inspector by clicking the left-most icon in the Inspector window's toolbar. Your Inspector window should look like this:
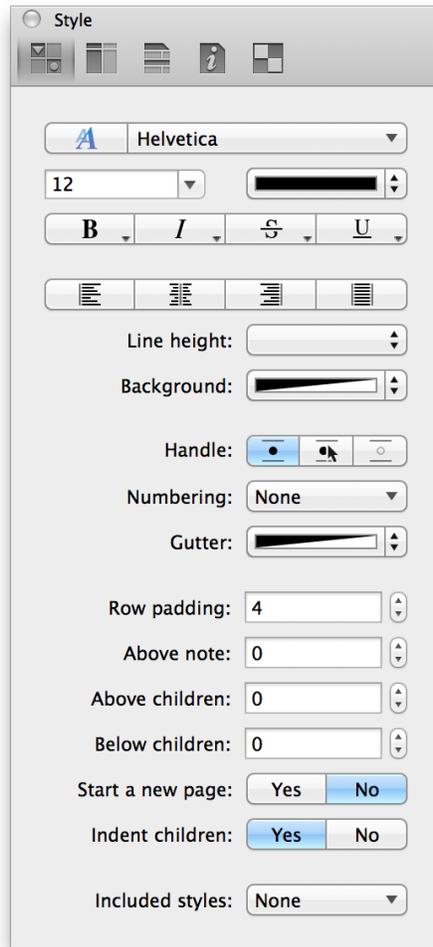
3. Click on the half-black, half-white color bar next to **Background** (don't click on the little arrows on the right edge). This opens the Colors palette.
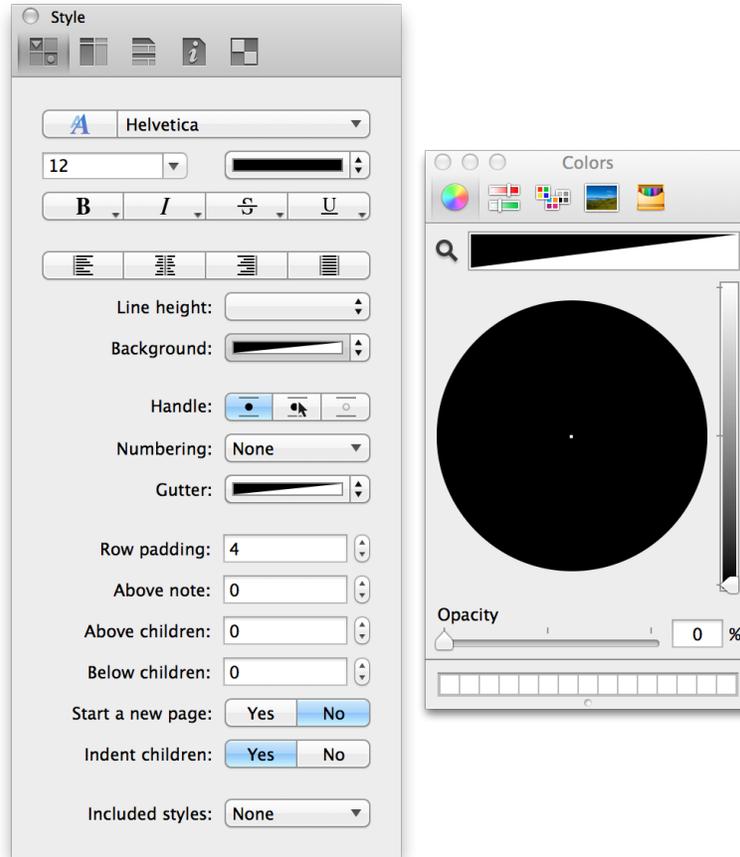
4. Along the right edge of the Colors palette, grab the slider handle and move it to the top. As you slide this upward, you'll notice that the black disc in the middle (known as the Color Wheel) changes to a rainbow of colors (much like that spinning beachball you sometimes see on your Mac when its trying to make up its mind).
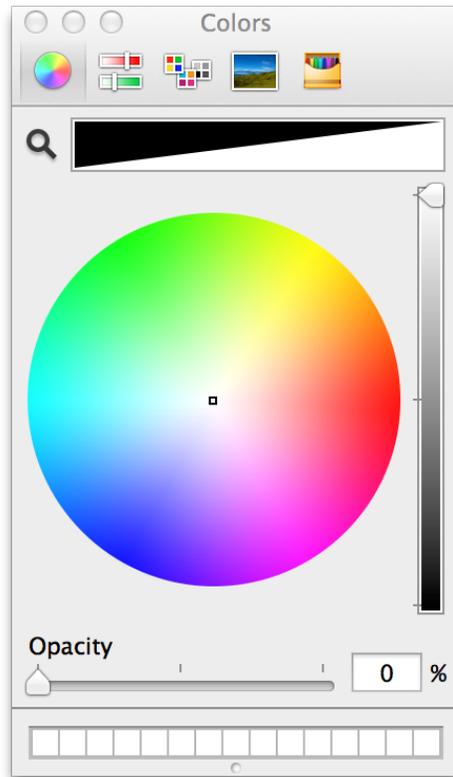
5. Near the bottom of the Colors palette, you'll see the **Opacity** slider. Drag that from left to right so that the Opacity is set to 100%.
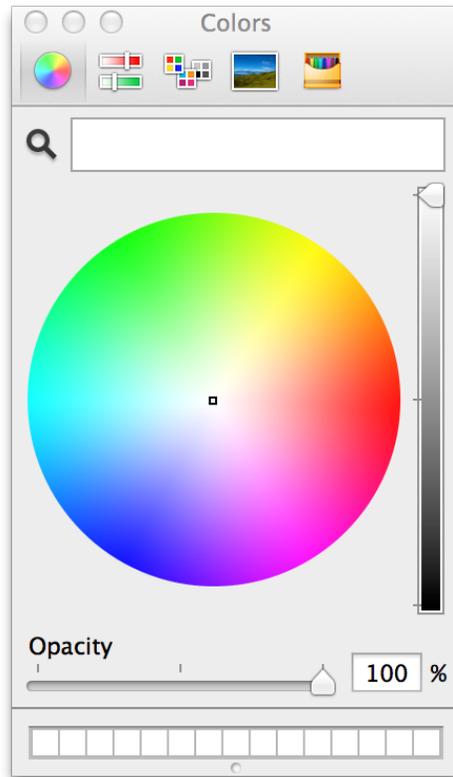
6. Click anywhere within the Color Wheel and hold down the mouse button. Now drag the mouse pointer around within the Color Wheel until you find a color you like. Notice how the outline's background color changes as you move the mouse around, and how the sidebar also takes on a slight tint of those colors as well.
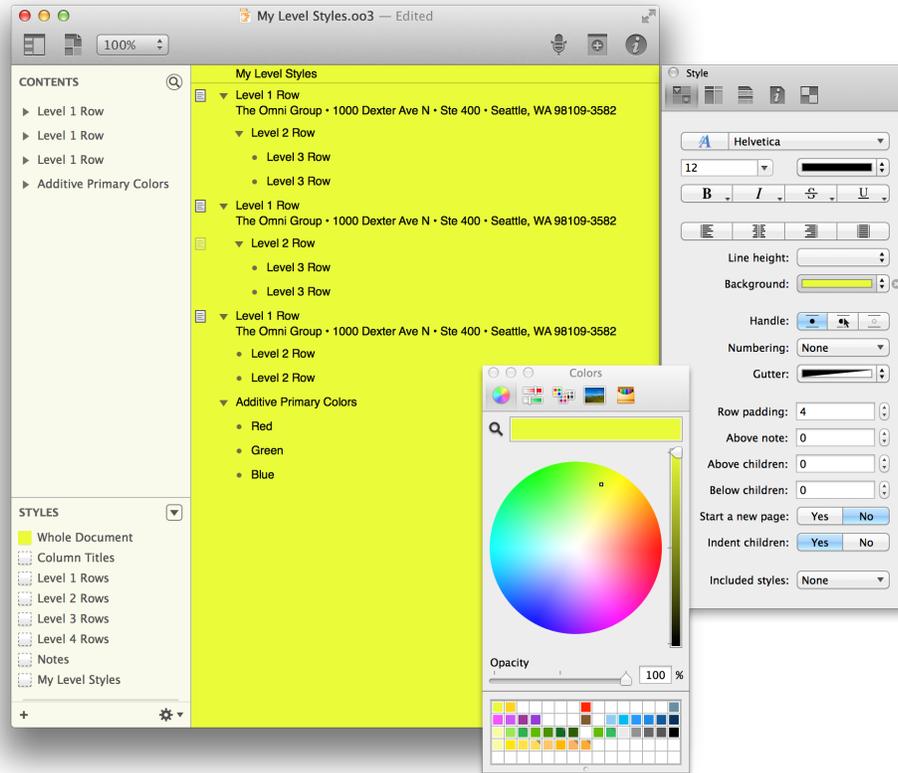
If you haven't used the Colors palette much in the past, there are some additional things you should know about. For example, you can switch from the Color Wheel to other color-choosing options by clicking the icons along the top of the Color palette.

Just above the Color Wheel, you'll see a magnifying glass next to a rectangle that contains the color you've selected in the Wheel. This is the Color Inspector. If you find a color you like, you can click and drag it to the empty color chits along the bottom of the window.
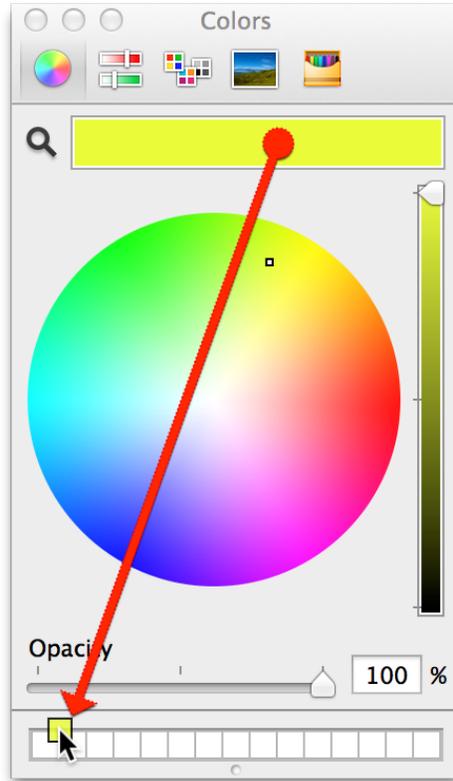
Don't fret if you run out of color chits at the bottom of the Colors palette. If you click and drag on the little dot handle at the bottom of the window, you can expand the chit collector to reveal more rows. You can drop colors in randomly, and later reorganize them into color groups, if you'd like.
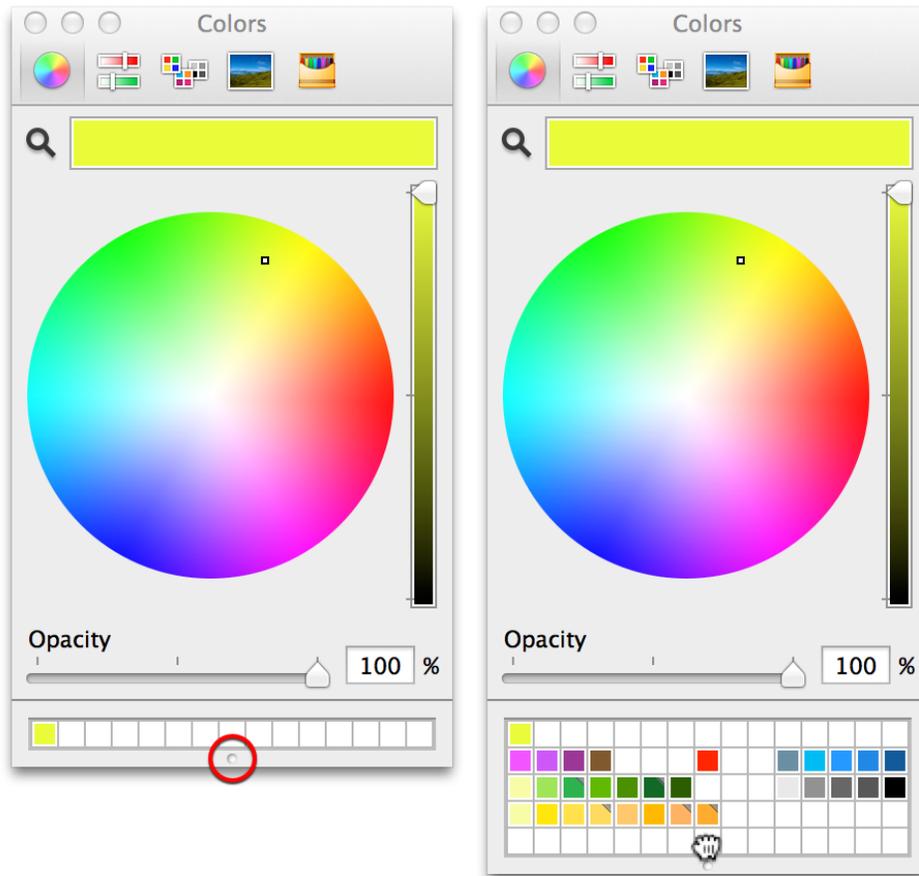
To close the Colors palette, move your mouse over the three window control buttons at the upper-left of the palette and click the red Close Window button at the far left.
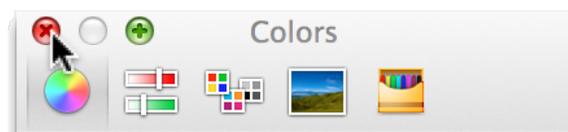
Back in OmniOutliner, open the Style Attributes inspector. You'll notice that the **Whole Document** style now has a **text background** color property which reflects the color you've chosen.
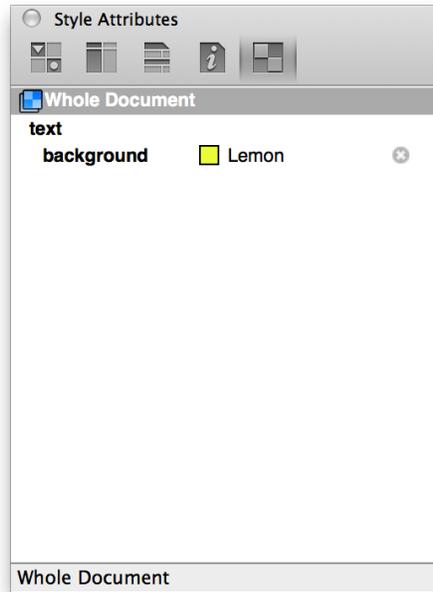
There's much more to show you about the Colors palette, including how to use the Opacity slider for creating varying shades of the same color. For now, though, click the ⊗ to the right of the **text background** property in the Style Attributes inspector to remove the background color you've set.

Setting the Whole Document Styles

Now it's time to get to work on building out the styles for what will evolve into a new template you can use in OmniOutliner. Before you get started, take some time to think about how you would like your template to look:

- What colors should it have?

- What fonts and font styles are needed?

- Does it need status checkboxes?

- What about columns and layout?

- (**Pro**) Are row handles necessary?

All of these—and more—can factor into how you design and create the template. As noted earlier, however, the **Whole Document** styles set the foundation for the rest of your template, so that's where we'll start.

1. In the **Styles** pane of the sidebar, select **Whole Document**.
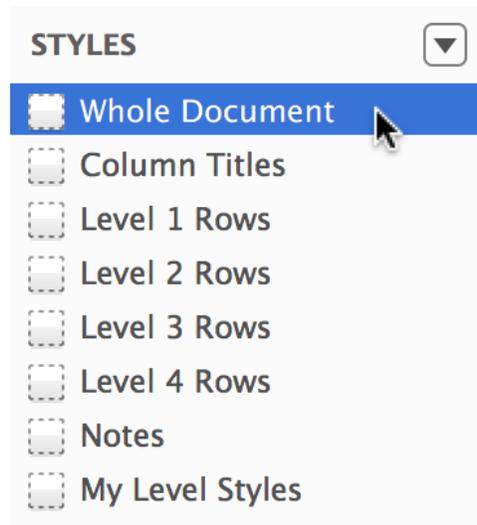
2. Choose **Window ▸ Inspectors ▸ Style** to open the Style inspector.
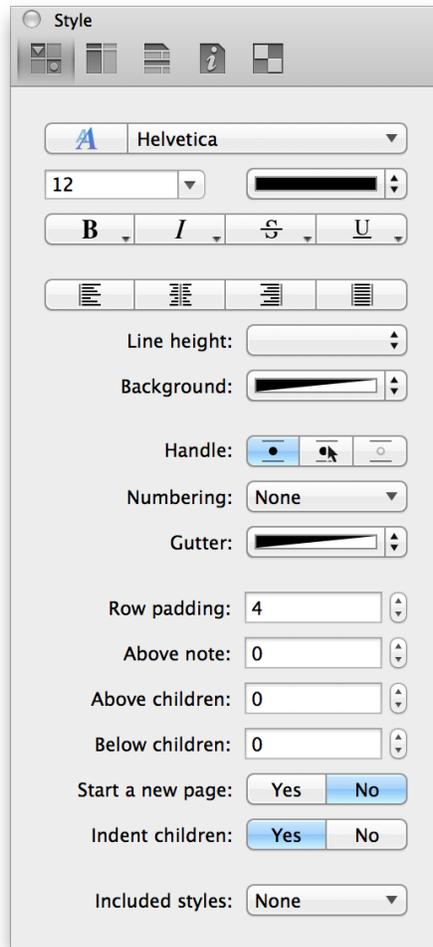
3. To set a base font for the document, click the font family pop up at the top of the Style inspector, and choose **Modern ▸ Helvetica Neue**.
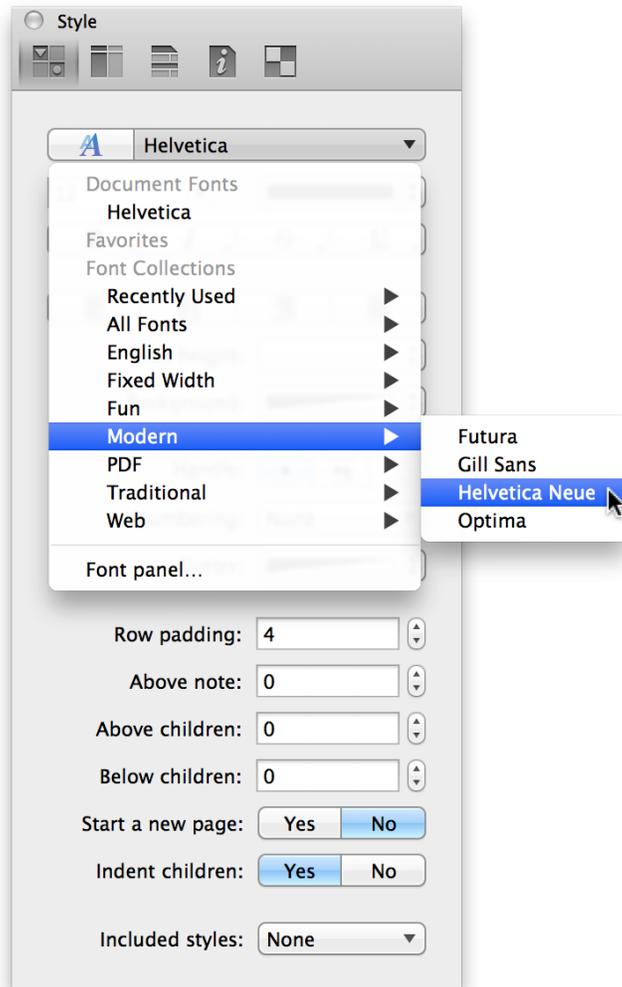
4. In the Font Size selector, choose **13** as the font size (in points).

5. Click the **Align Left** button.

6. Click on the half-black, half-white portion of the **Background** color chooser to open the Colors palette.

7. In the Colors palette, slide the Darkness slider on the right side all the way up, and slide the Opacity slider over to the right. If you'd like to follow along, choose a light blue background color, or select your favorite color and go with that.
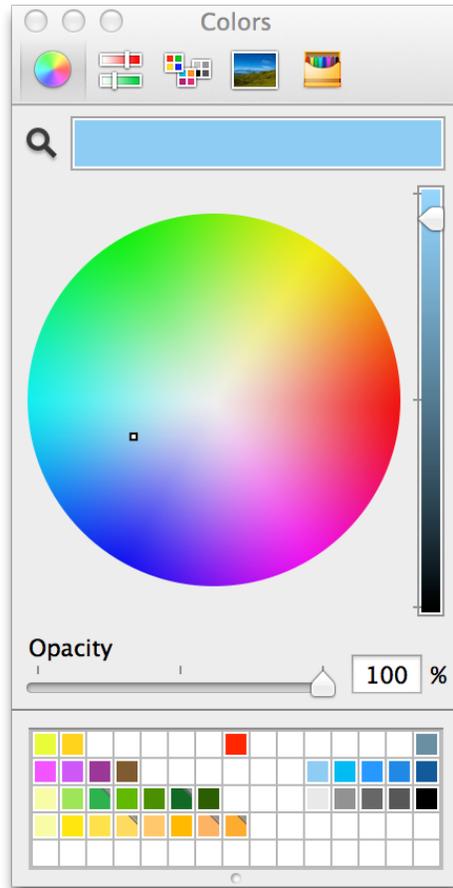
The outline now has a light blue background, and its default font type and size is 13 point Helvetica Neue. You can verify that these styles have been applied to the **Whole Document** style by switching over to the Style Attributes inspector.
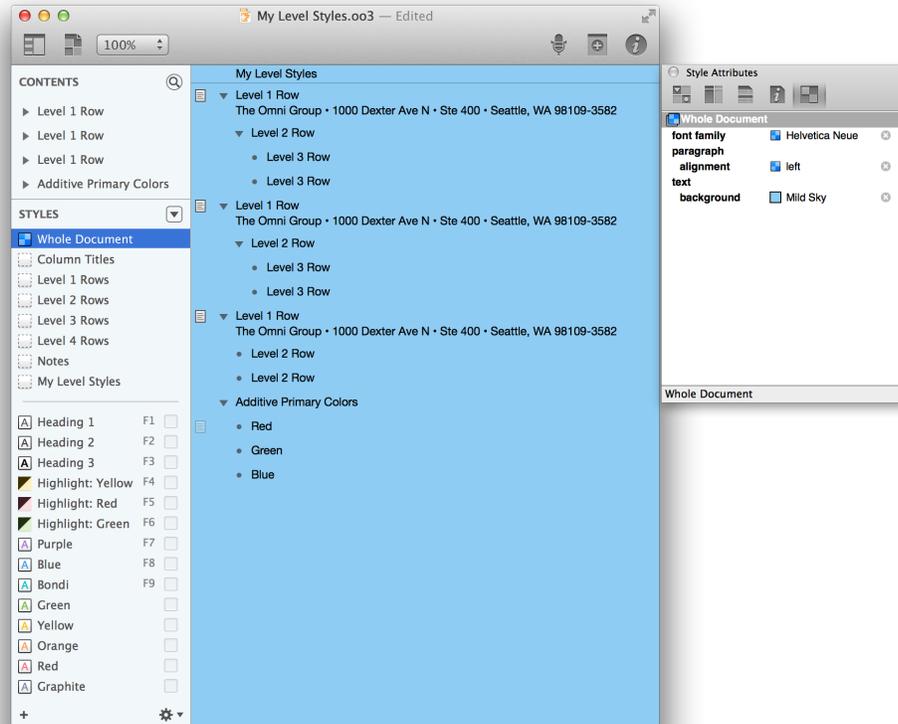
Setting the Column Titles Styles

Now let's create a title banner across the top of the document.

1. Go ahead and switch back to the **Style** inspector and then select **Column Titles** in the Styles pane of the sidebar.
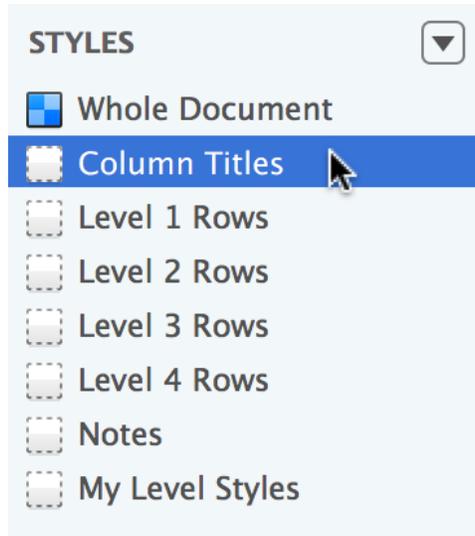
2. In the Style inspector, do the following:

- In the Font Family bar at the top, click the **A** icon to open the Fonts window. In the **Typeface** column, choose **UltraLight**, and then change the **Size** to **48**.
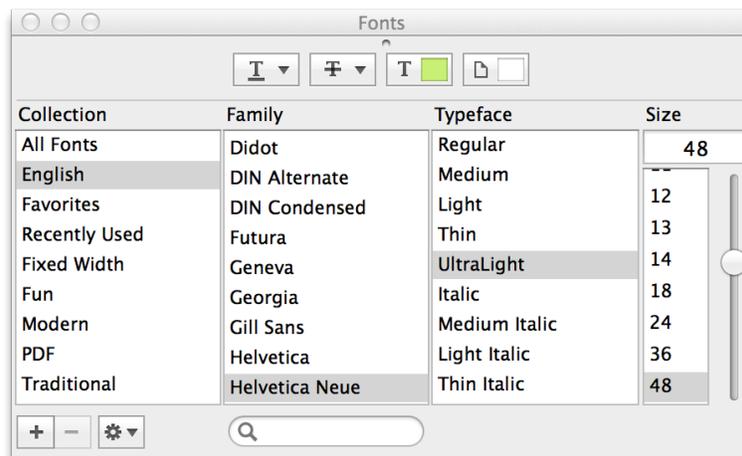
- Change the font color to **White**. You can do this easily by clicking on the little arrows to the right of the color bar and selecting **White** from the available options.

- Change the text alignment to **Centered**.

- Change the **Background** color to a dark (almost black) blue. This will make the white text really stand out at the top of the document.

Your document should look similar to the following:
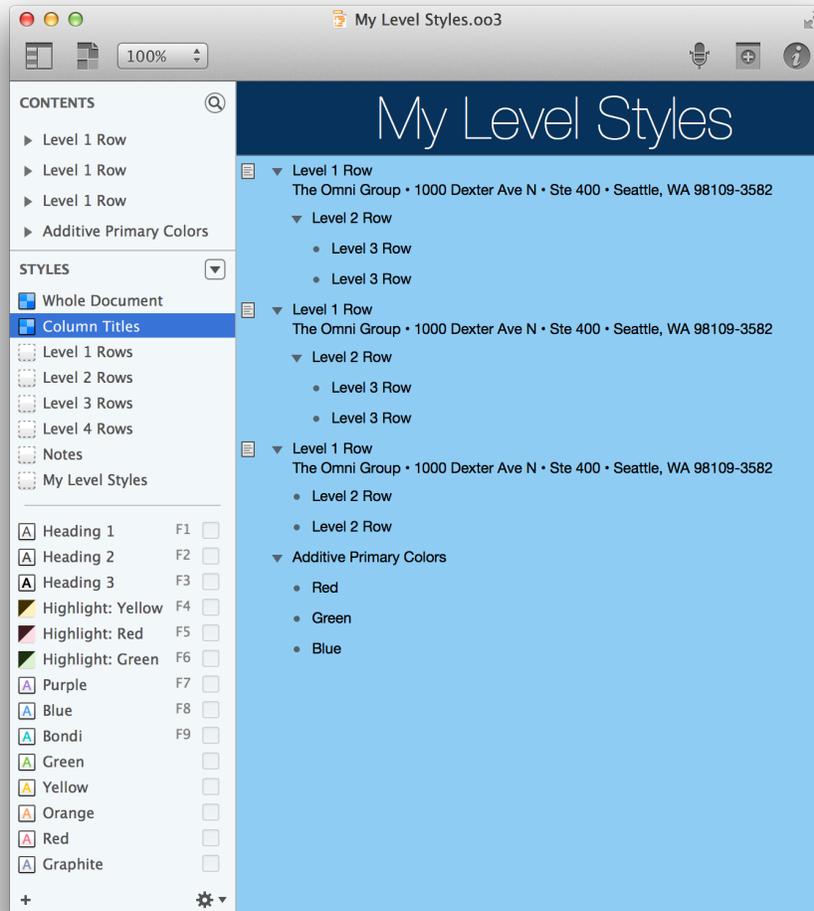
And you can verify the styles in the Style Attributes inspector, too.
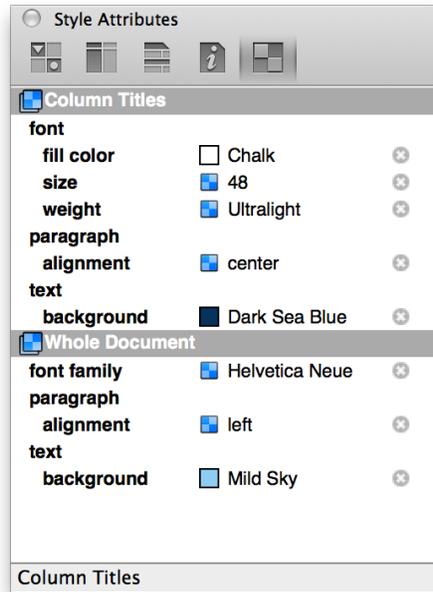
Setting the Row Level Styles

Now it's time to turn our attention to the row levels. As you might recall from earlier in this tutorial, the Level Styles template used variations on the same font for the different row styles. We'll do something similar here, but we'll also add a background color to a couple of the rows so you can see how to layer colors on top of the background color specified in the **Whole Document** style.

Let's get started!

1. In the Styles pane of the sidebar, select **Level 1 Rows**.
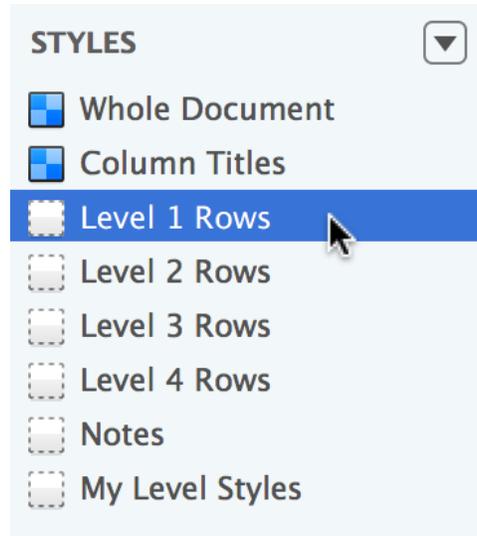
2. In the Style inspector, do the following:

- Open the Fonts window and change the **Typeface** to **UltraLight**.

- Change the font size to **24** points.

- Change the **Background** color to White, but set the Opacity in the Colors palette to **50%**. This creates a transparent background that lets the light blue background from the **Whole Document** style bleed through.

Your document should look similar to the following:
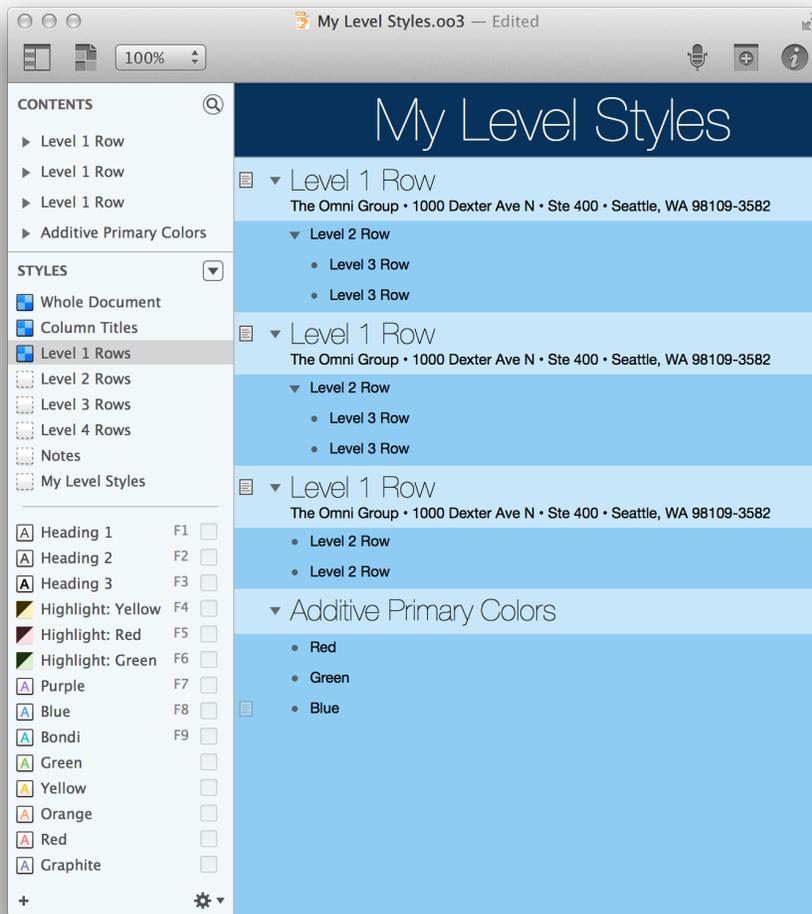
And for reference, the Colors palette, and the Style and Style Attributes inspectors should look like this:
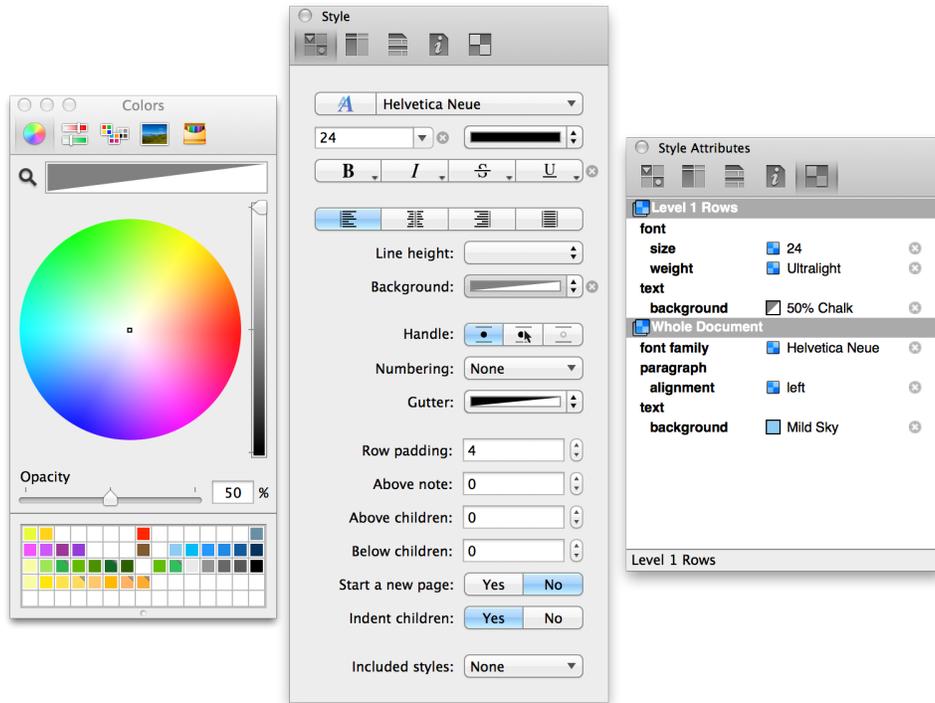
3. In the Styles pane of the sidebar, select **Level 2 Rows**.
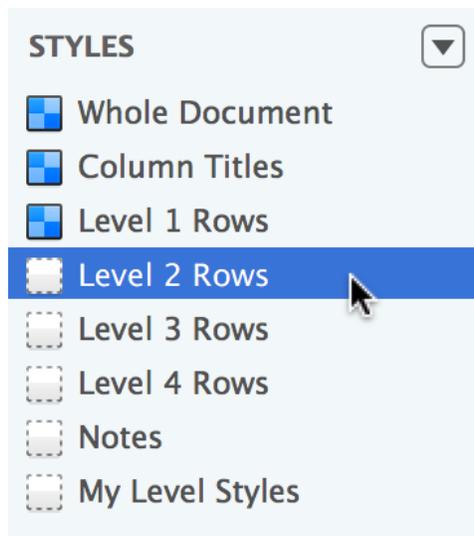
4. In the Style inspector, do the following:

- Open the Fonts window and change the **Typeface** to **Medium**.

- Change the font size to **14** points.

- Change the **Background** color to Black, but set the Opacity in the colors palette to **10%**. This gives the Level 2 Rows a slightly darker background color.

Your document should look similar to the following:
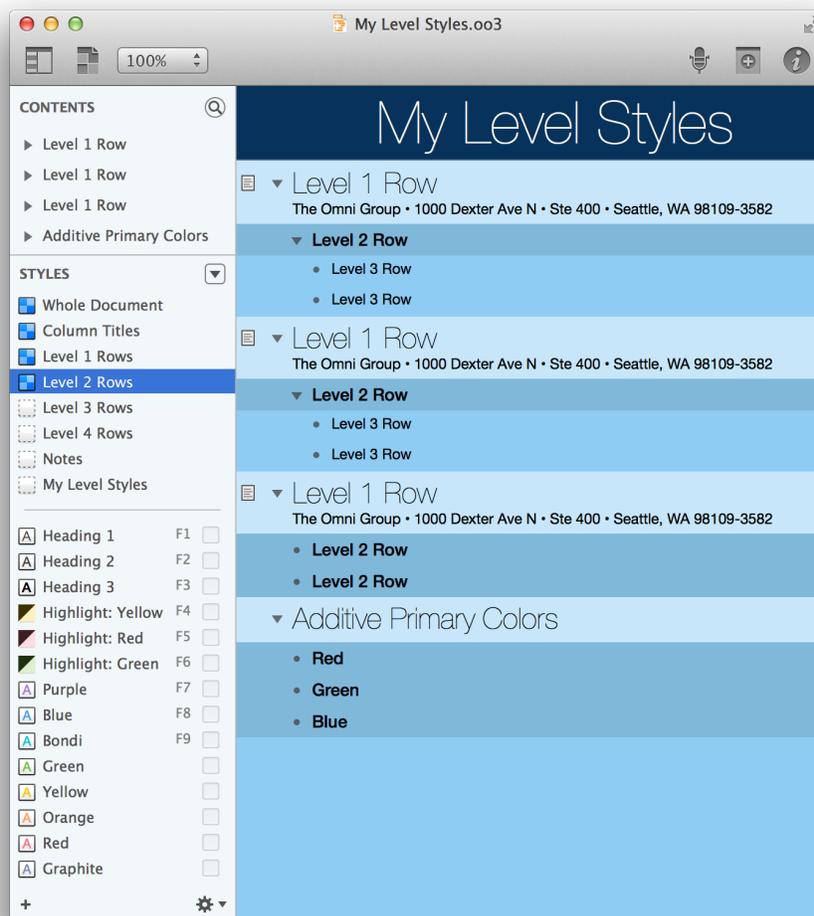
And for reference, the Colors palette, and the Style and Style Attributes inspectors should look like this:
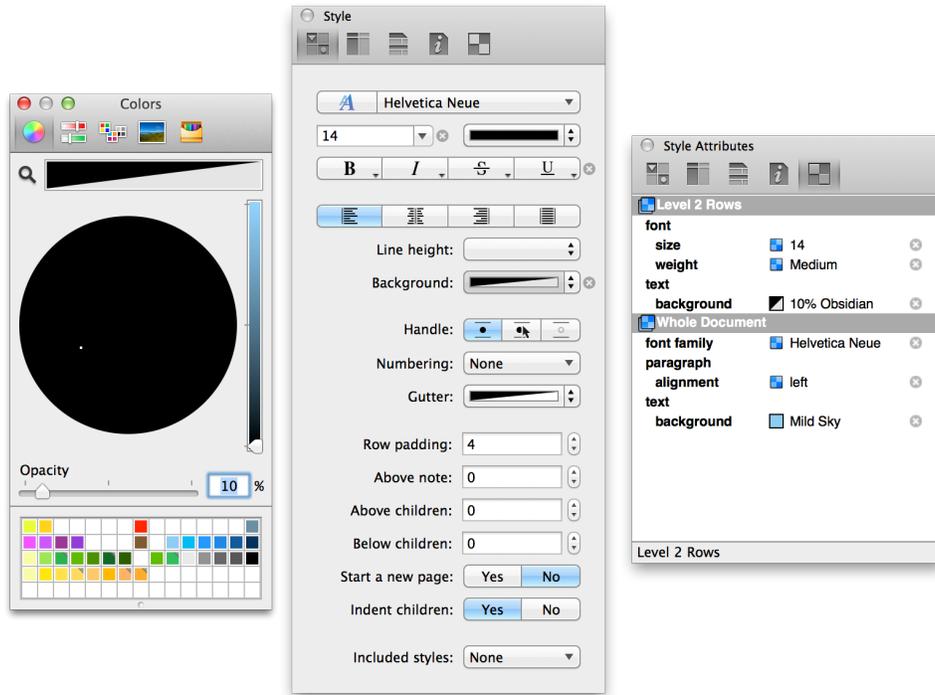
5. In the Styles pane of the sidebar, select **Level 3 Rows**.
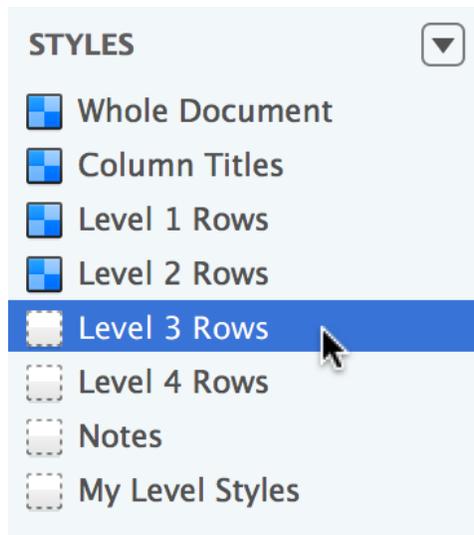
6. In the Style inspector, do the following:

    • Change the **Background** color to **Light Gray** by clicking on the little arrows on the right side. This background color

automatically has a 20% opacity set to it, which makes the row slightly lighter than the Level 2 Rows, but darker than the light blue background color specified in the **Whole Document** style.

Your document should look similar to the following:
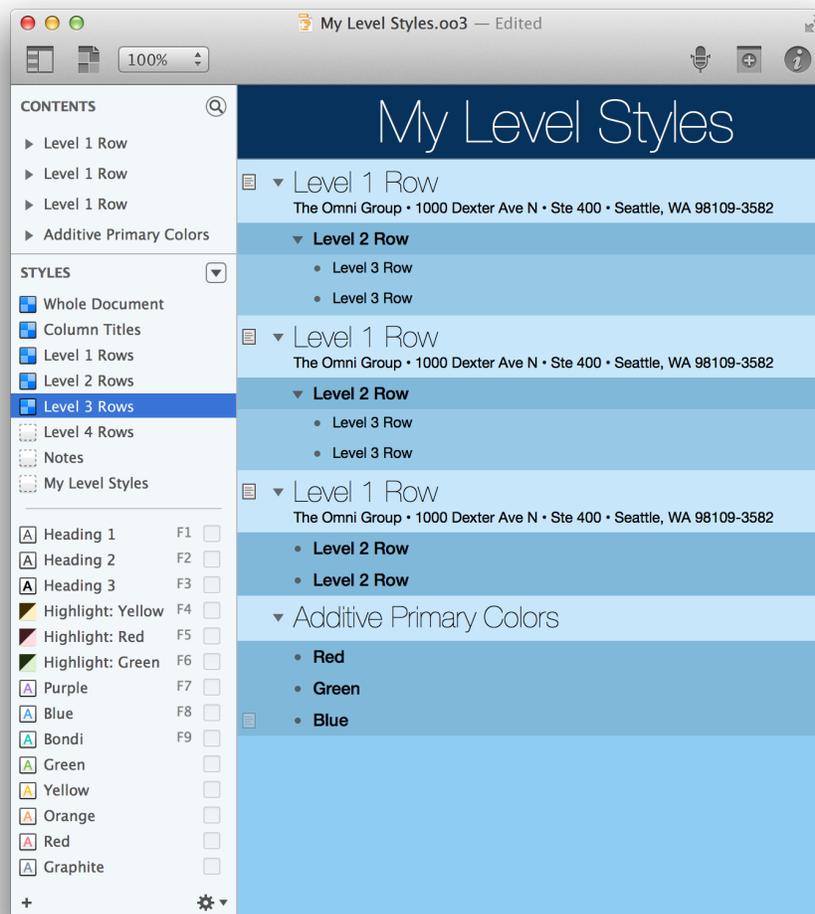
And for reference, the Colors palette, and the Style and Style Attributes inspectors should look like this:
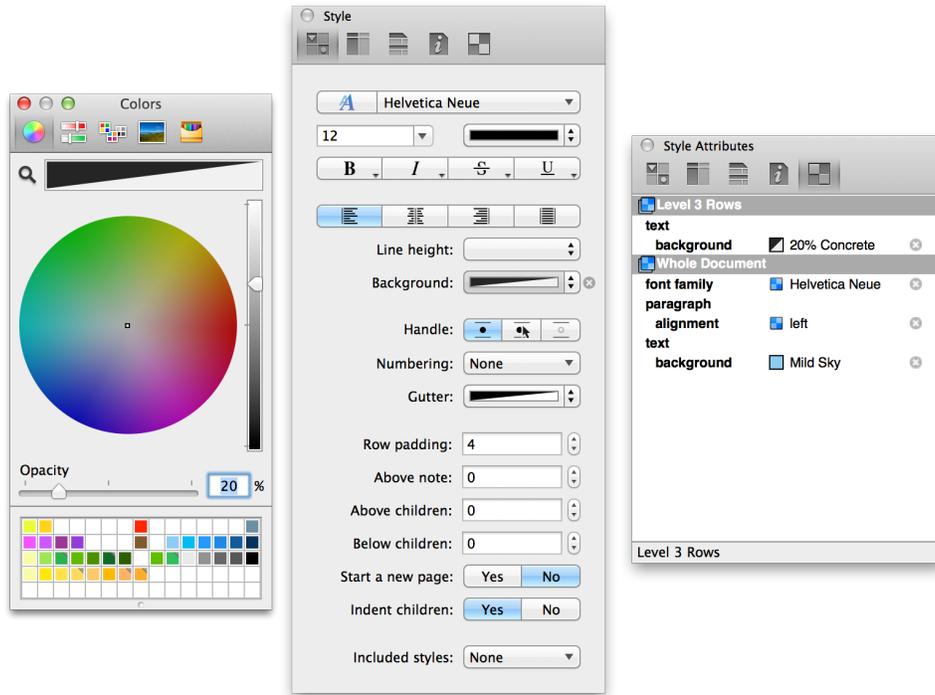
7. In the Styles pane of the sidebar, select **Notes**.
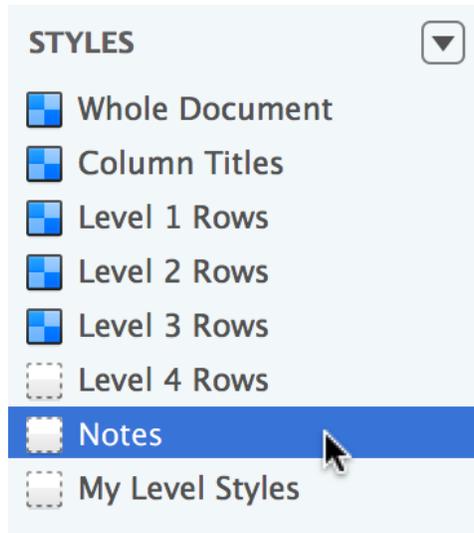

8. In the Styles inspector, do the following:

- Open the Fonts window and change the **Typeface** to **Medium**.

- Change the font size to **11** points.

- Change the font color to **Dark Gray**. You can do this easily by clicking on the little arrows to the right of the color bar and selecting **Dark Gray** from the available options.

Your document should look similar to the following:
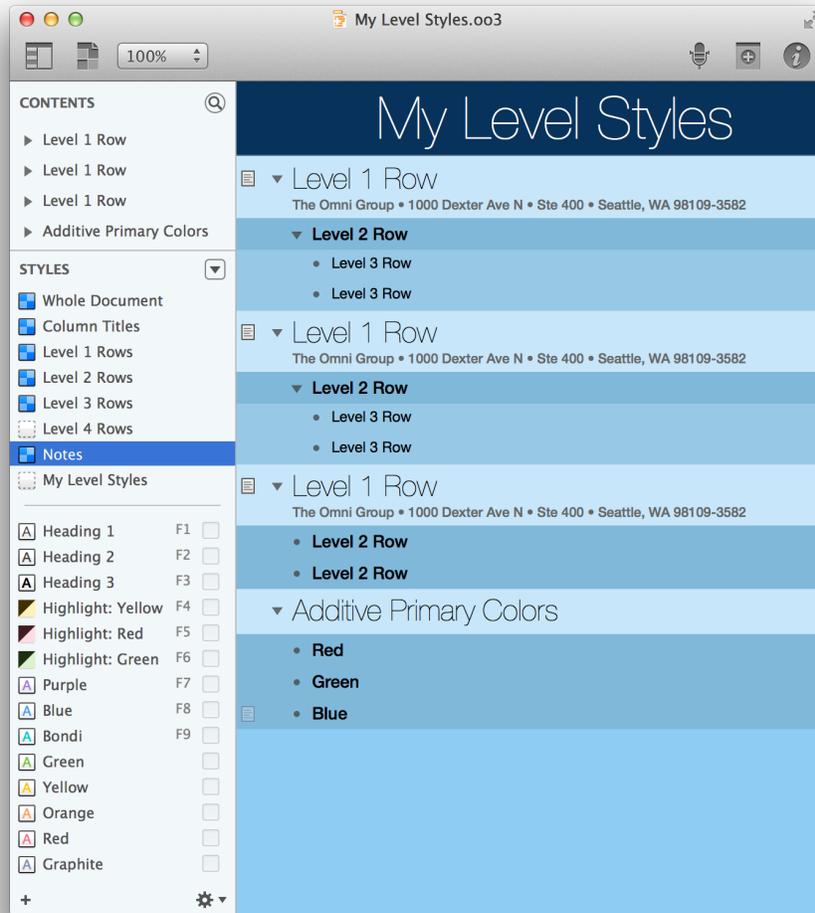
And for reference, the Style and Style Attributes inspectors should look like this:
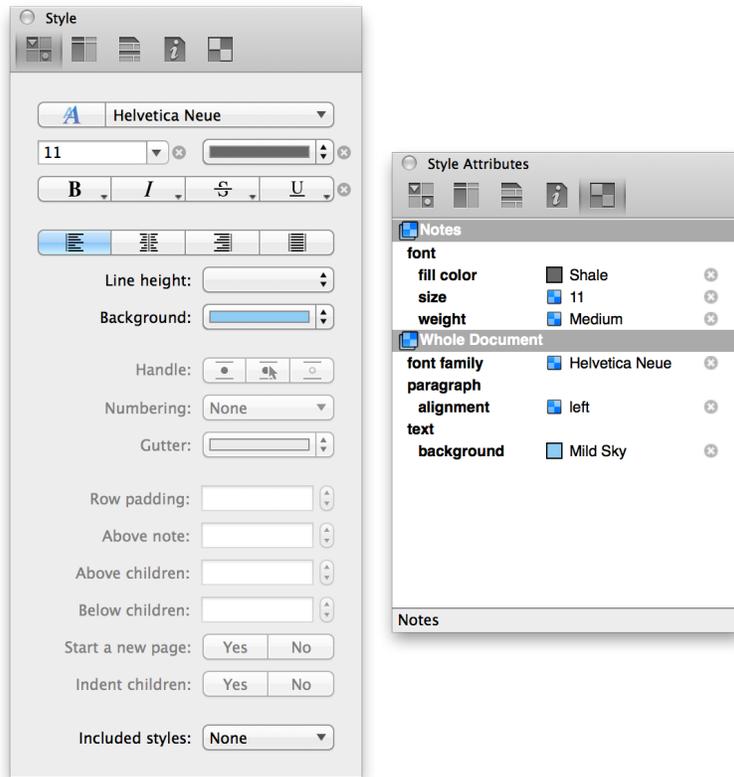
Creating New Named Styles

Finally, let's create some new Named Styles that we can use on the Red, Green, and Blue text under the Additive Primary Colors row.

Start by deleting the Named Styles that came with the Modern with Level Styles template; follow these steps:

1. In the Styles pane of the sidebar, **Command-click** on each of the Named Styles at the bottom of the pane.
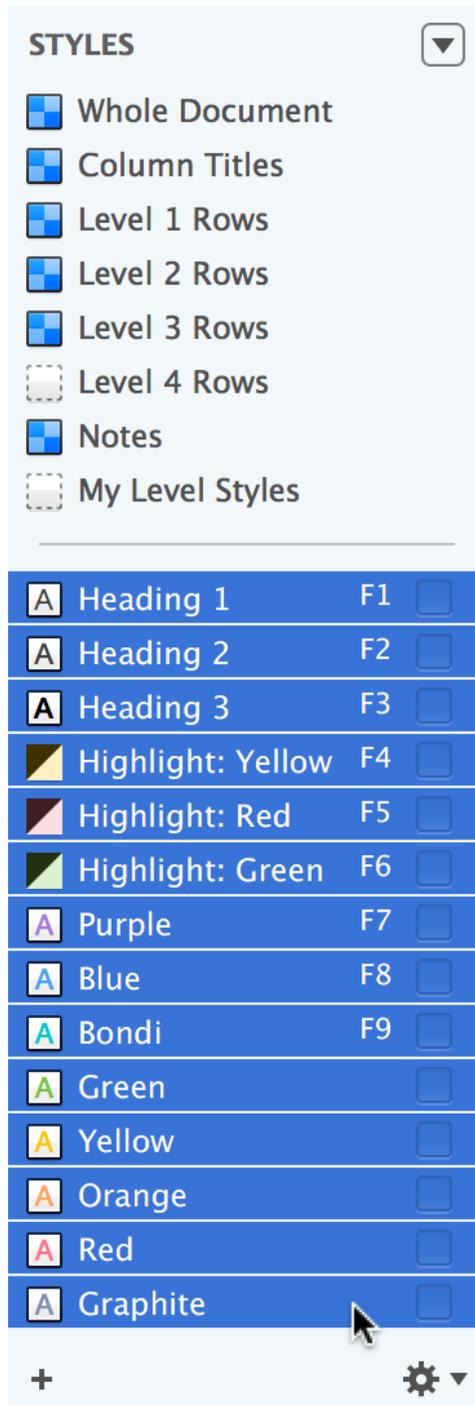
2. Click the **Action** menu to the right and underneath the Named Styles, and choose **Delete Style** from the popup menu.
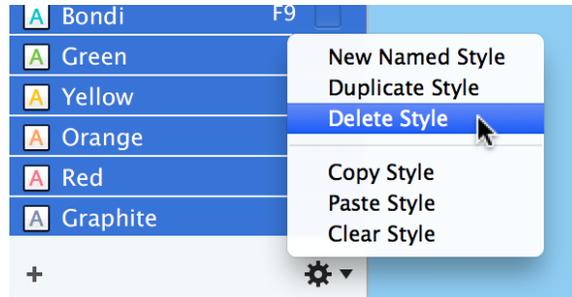
3. Click the **Action** menu again and choose **New Named Style** from the popup menu.
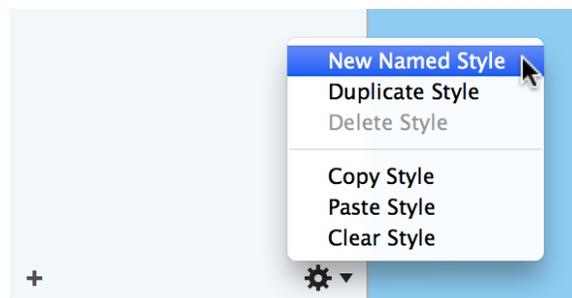

This creates a new named style in the lower portion of the Styles pane, which you can assign a name to. Let's keep this simple; type in **Red** and press **Return** to avoid ambiguity.

| STYLES ▼	STYLES ▼	STYLES ▼
■ Whole Document	■ Whole Document	■ Whole Document
■ Column Titles	■ Column Titles	■ Column Titles
■ Level 1 Rows	■ Level 1 Rows	■ Level 1 Rows
■ Level 2 Rows	■ Level 2 Rows	■ Level 2 Rows
■ Level 3 Rows	■ Level 3 Rows	■ Level 3 Rows
⬚ Level 4 Rows	⬚ Level 4 Rows	⬚ Level 4 Rows
■ Notes	■ Notes	■ Notes
⬚ My Level Styles	⬚ My Level Styles	⬚ My Level Styles
⬚ New Style F1 ☐	⬚ Red F1 ☐	⬚ Red F1 ☐
+ ⚙▾	+ ⚙▾	+ ⚙▾
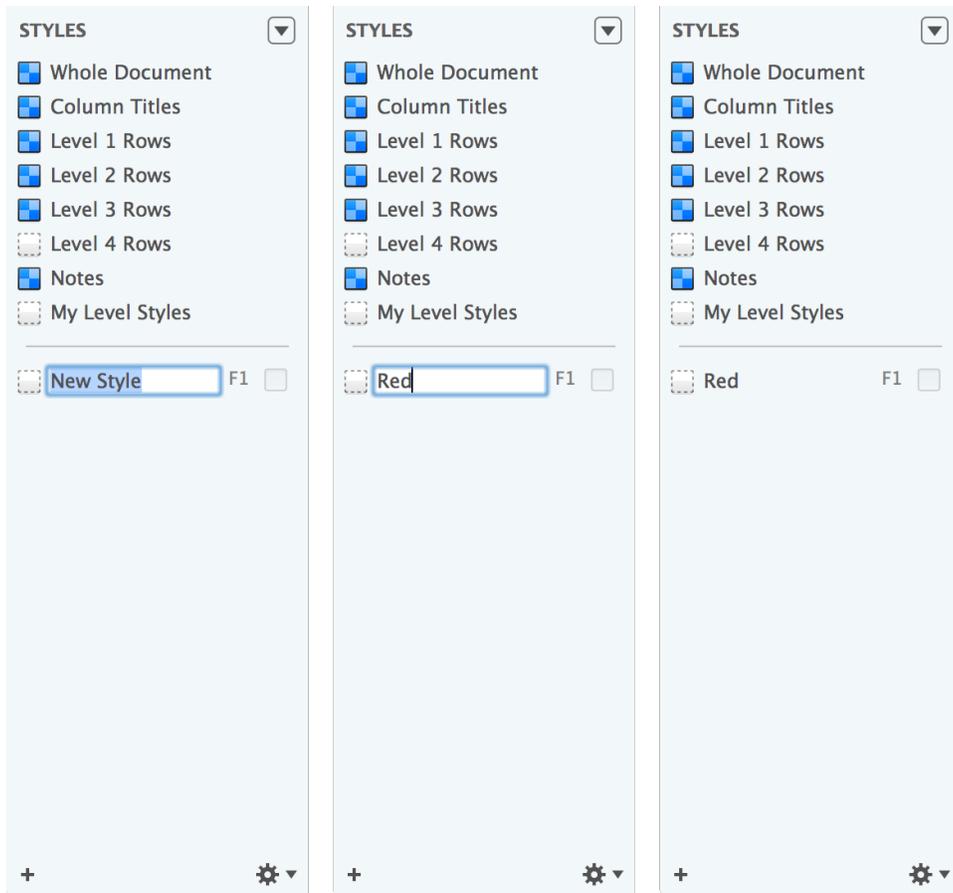
4. Select the Red named style in the Styles pane.
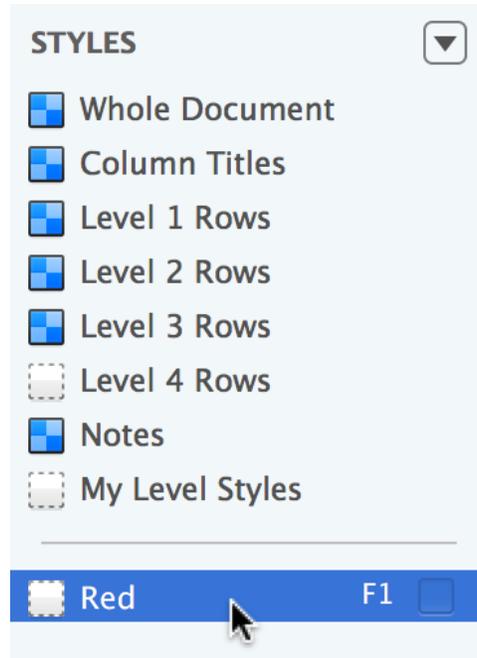
5. In the Style inspector, do the following:

- Open the Fonts window and change the **Family** to **Helvetica Neue**, the **Typeface** to **Regular**, and set the **Size** to **14** points.
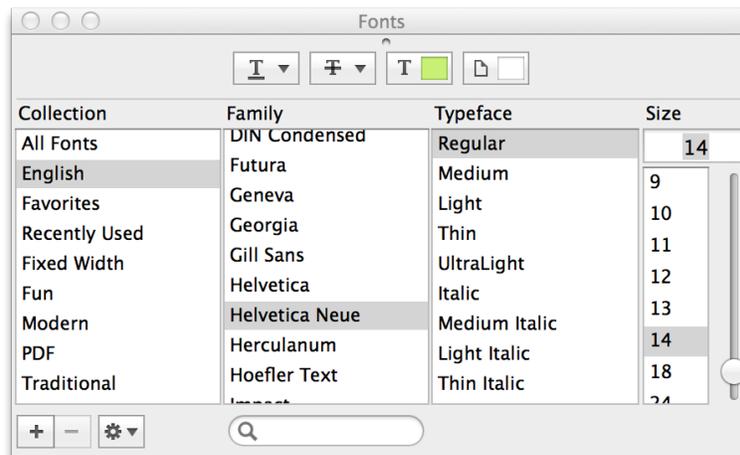

- Click on the little arrows next to the color selector and choose **Red**.
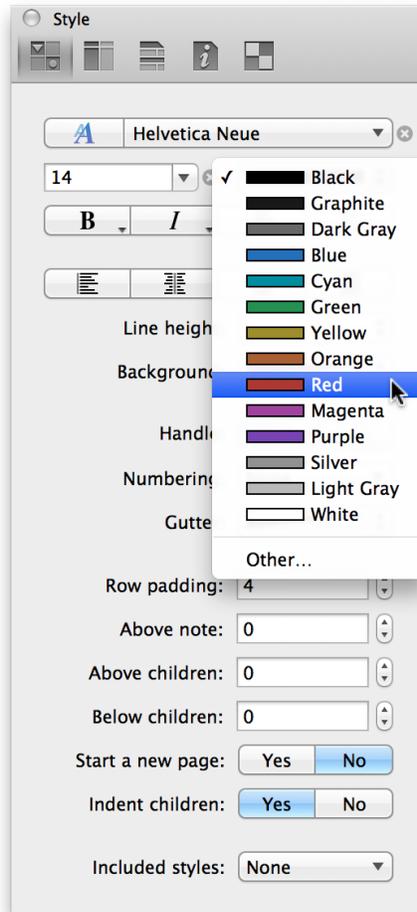
When finished, the Style inspector should look like this:
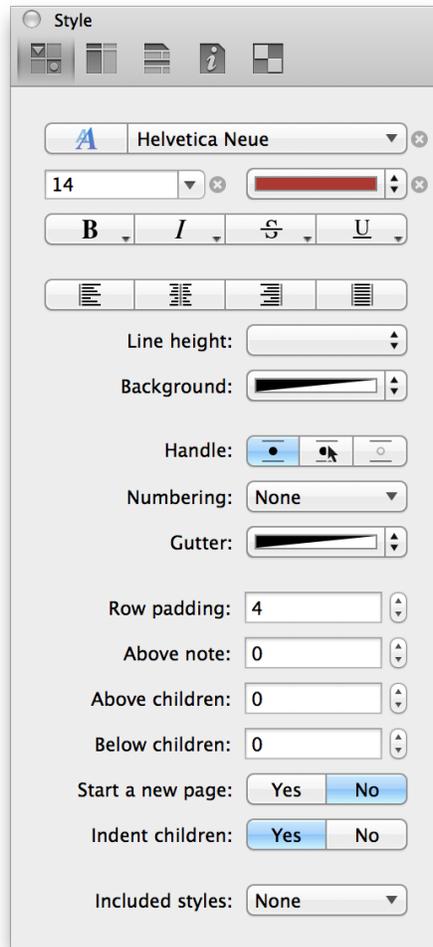
And you'll see that the Red named style in the Styles pane has a red "A" in its style icon.
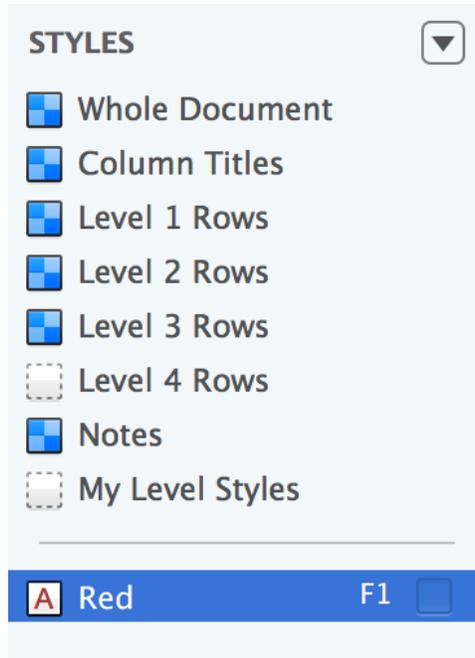
To put this new named style to the test, click in the gutter of the Red row to select it, and then click the checkbox next to the **Red** named style to apply it to the text.

Repeat Steps 1–5 and create new named styles for Green and Blue. With the Blue style, you'll have to get a little creative (use the Color Wheel) so you can find a shade of blue that stands out against the background colors. When you're finished, the Additive Primary Colors section should be similar to this:
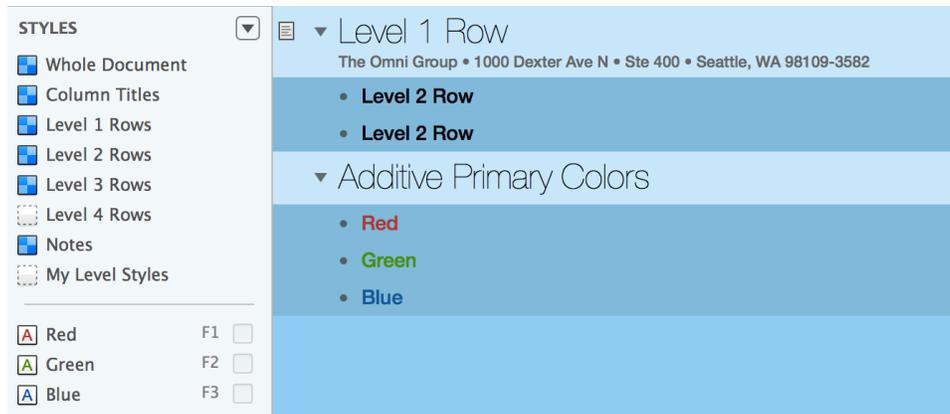
You can also create named styles that you can apply, such as a transparent highlight color or a strikethrough for editing purposes, to the contents of the outlines. Take some time to explore what's possible with named styles.

Creating Named Styles from the Level Styles

Every now and then, you might find the need to apply one of the Level styles (found in the upper portion of the Styles pane) to a lower-level row. The trick to making this work without changing a row's indentation level is to make duplicates of the Level styles so they also appear as named styles. Let's do that.

1. Click on the **Level 1 Rows** style in the Styles pane, hold down the **Shift** key, and then click on the **Level 3 Rows** style. As you can see, this also selects the **Level 2 Rows** style.

STYLES ▼

- ▦ Whole Document
- ▦ Column Titles
- ▦ **Level 1 Rows**
- ▦ **Level 2 Rows**
- ▦ **Level 3 Rows**
- ⬚ Level 4 Rows
- ▦ Notes
- ⬚ My Level Styles

Ⓐ Red	F1	☐
Ⓐ Green	F2	☐
Ⓐ Blue	F3	☐
▦ Strikethrough	F4	☐
◢ Yellow Highlight	F5	☐

+ ⚙▾
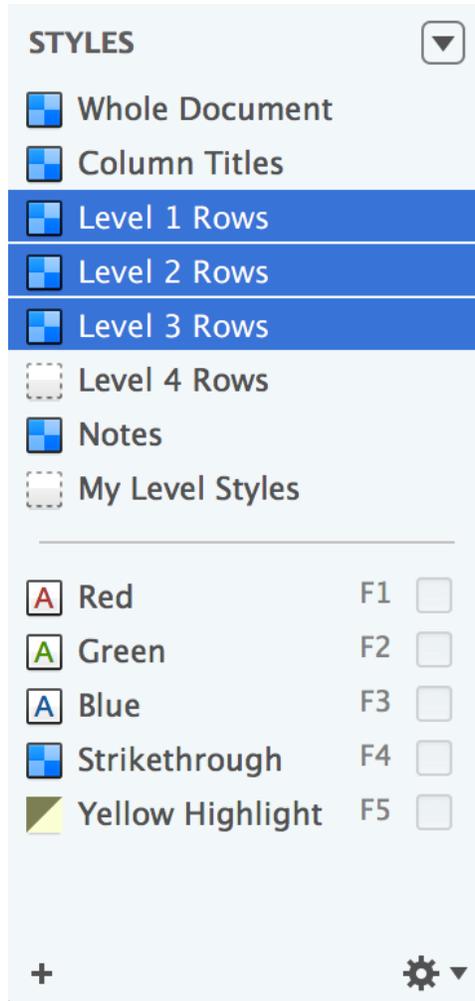
2. Click the **Action** menu at the bottom of the sidebar and choose **Duplicate Style** from the popup menu.
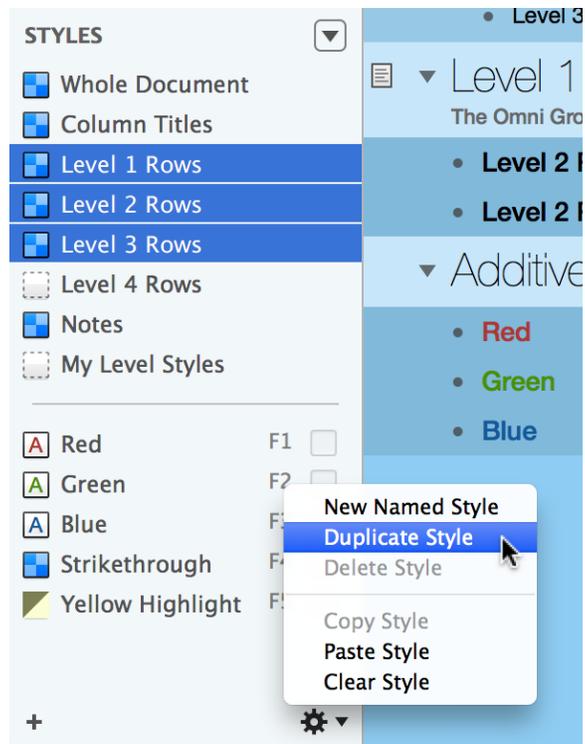
This copies the three styles you've selected and places them at the bottom of the named styles list.
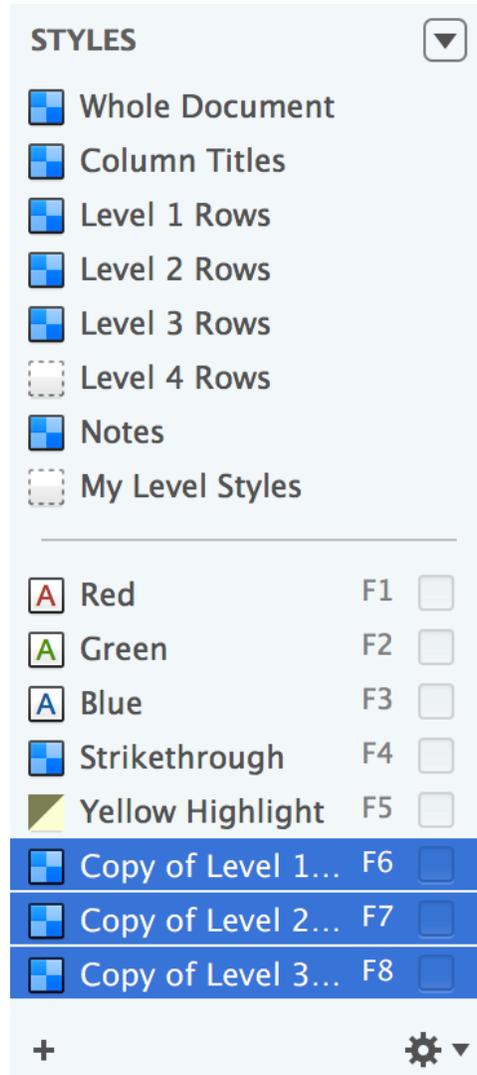
3. As you can see, the names of the styles are truncated because "Copy of" has been added to the beginning of each style. Let's fix that. For each of these styles:

- Select the style name and press **Return** to highlight and make the style name editable.

- Delete the words "Copy of" and "Rows" from each style.

4. What remains are three named styles—Level 1, Level 2, and Level 3 —which carry the same style properties as their corresponding levels.
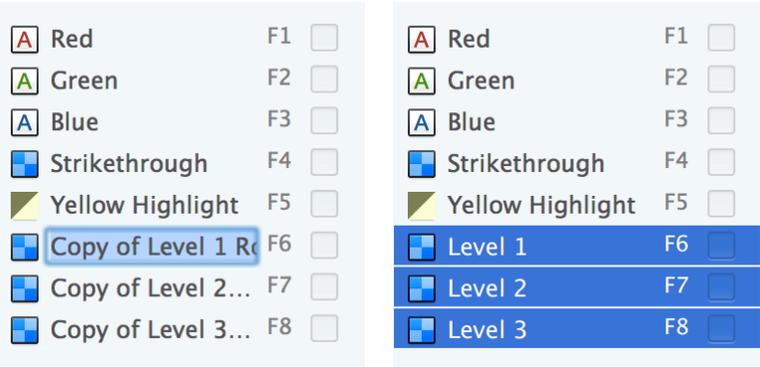
You can either leave the Level 1, Level 2, and Level 3 named styles at the bottom of the list, or you can drag them up to another location in the named styles section.
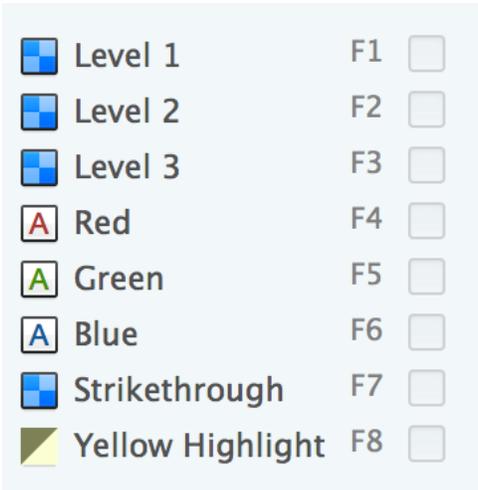
Creating and Using the My Level Styles Template

Up to now, you've done a lot of work on this one OmniOutliner document, and it'd be a shame to have to redo all of that design work again. When you find a design that you really really like, you can save the OmniOutliner file as a template and then later create new documents with that template, or apply its styles as a "theme" to an existing document.

Here's what you need to do to create the template:

1. Before creating the template, choose **File ▸ Save** (**Command-S**) to save all of the changes you've made to the **My Level Styles** file.

2. Choose **File ▸ Save As Template**. A sheet slides down from under the toolbar, giving you the option to change the filename or change the location to where the file will be saved. Go ahead and ignore these and just click **Save**.
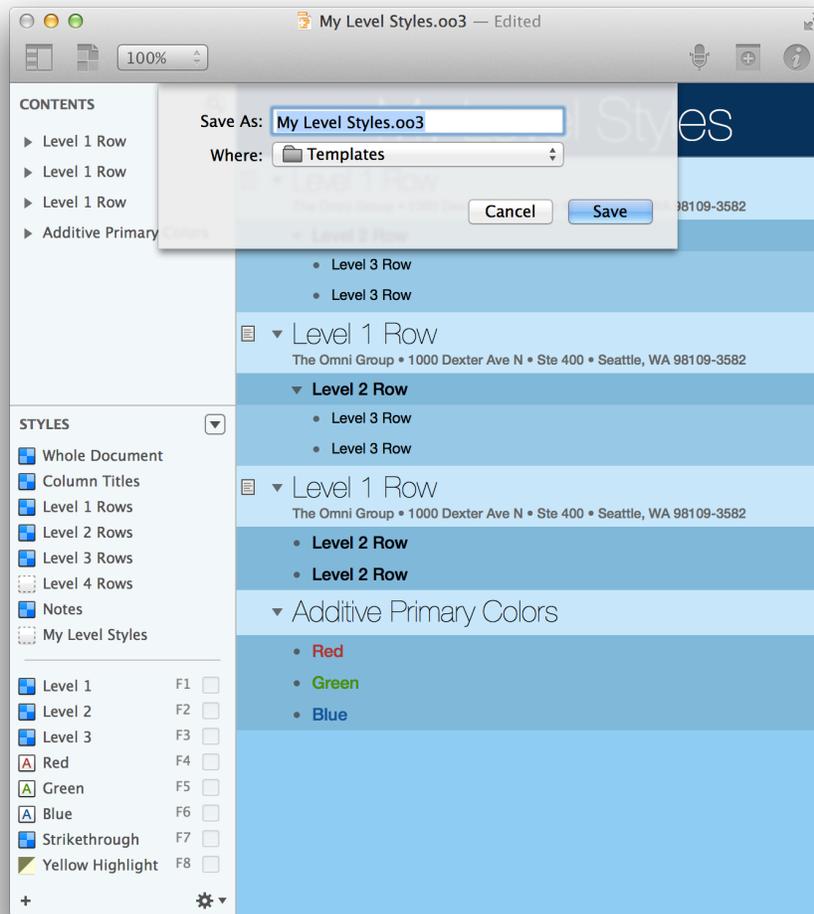
When you save the template, OmniOutliner places a *.oo3template* file extension onto the file.

3. Close the OmniOutliner window by choosing **Window ▸ Close Window**, or with the standard **Command-W** keyboard shortcut.

To use the template as the basis for a new document, choose **File ▸ New** or **File ▸ Resource Browser**, and look for your template under **Templates ▸ Miscellaneous**. Select the **My Level Styles** template and click **New Document**.
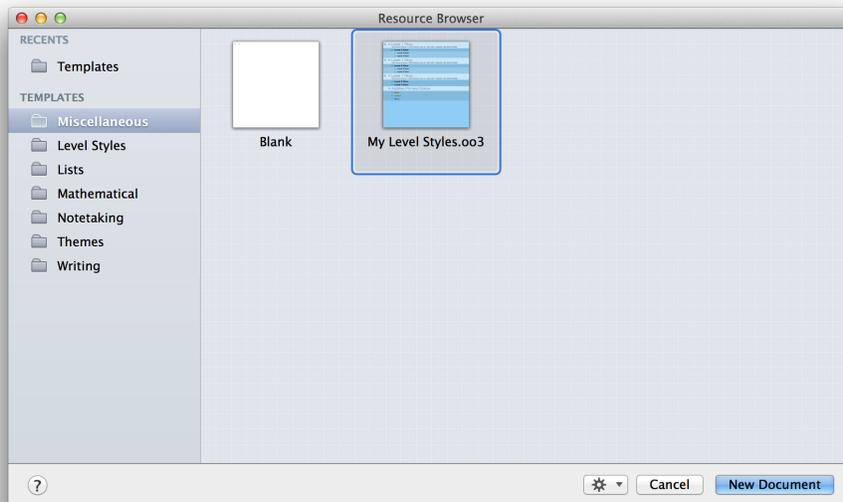
If you ever need to make changes to a template, you can select it in the
Resource Browser, and then choose **Edit** from the Action menu (the gear
icon) at the bottom of the window.
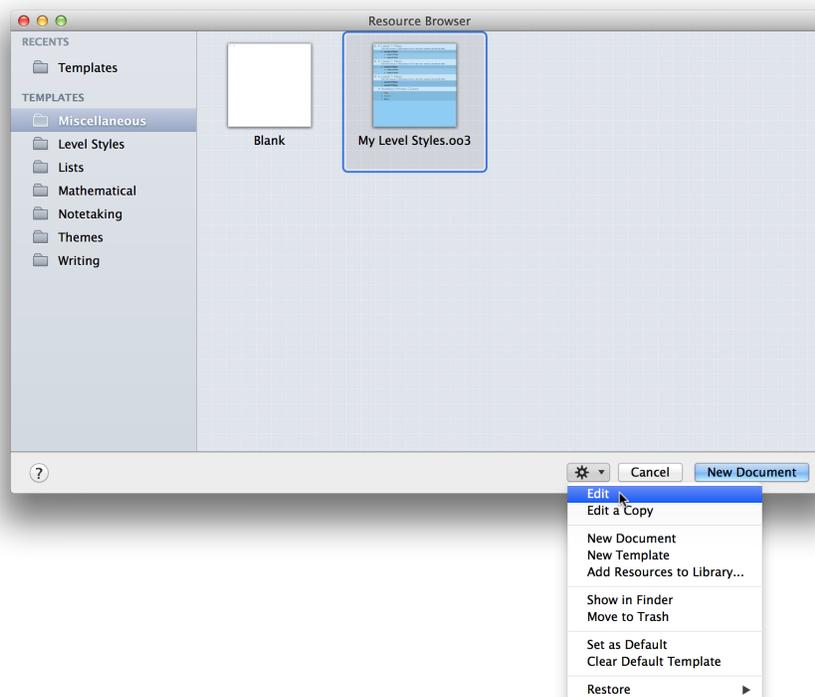
You'll know you're editing a template file if you look at the top of the window and see **[TEMPLATE]** next to the filename.

My Level Styles.oo3.oo3template [TEMPLATE]

100%

Applying a Template as a Theme

As you might have noticed, when you create a new file using one of the templates, the new Untitled file also includes the contents of the original template file. Not just the styles, but all of the text on the rows and columns, if applicable. However, there is a way for you to apply the styles from a template—its *theme*—to another document you're working on.

1. Start by opening the Resource Browser (**File ▸ Resource Browser**).

2. Select **Level Styles** in the browser's sidebar, and then double-click the **Modern with Level Styles** template to open it. Look familiar?
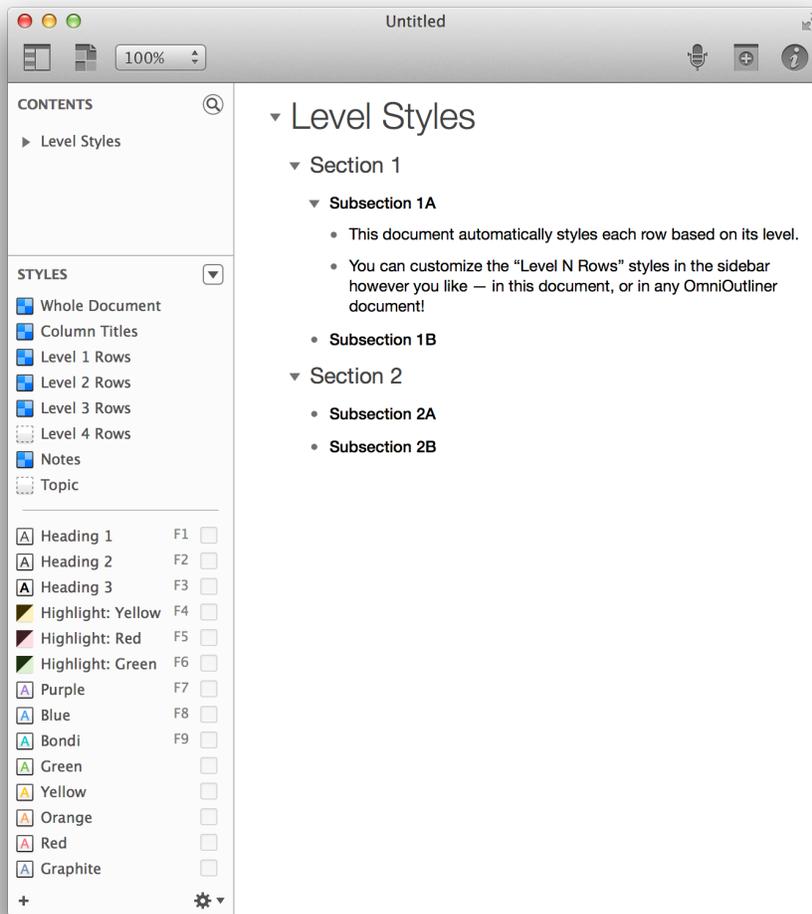
3. Choose **Format ▸ Apply Template Theme**; this opens a Resource Browser-like sheet from which you can select a template to apply.

4. In the sheet's sidebar, choose **Miscellaneous** and then select the **My Level Styles** template.
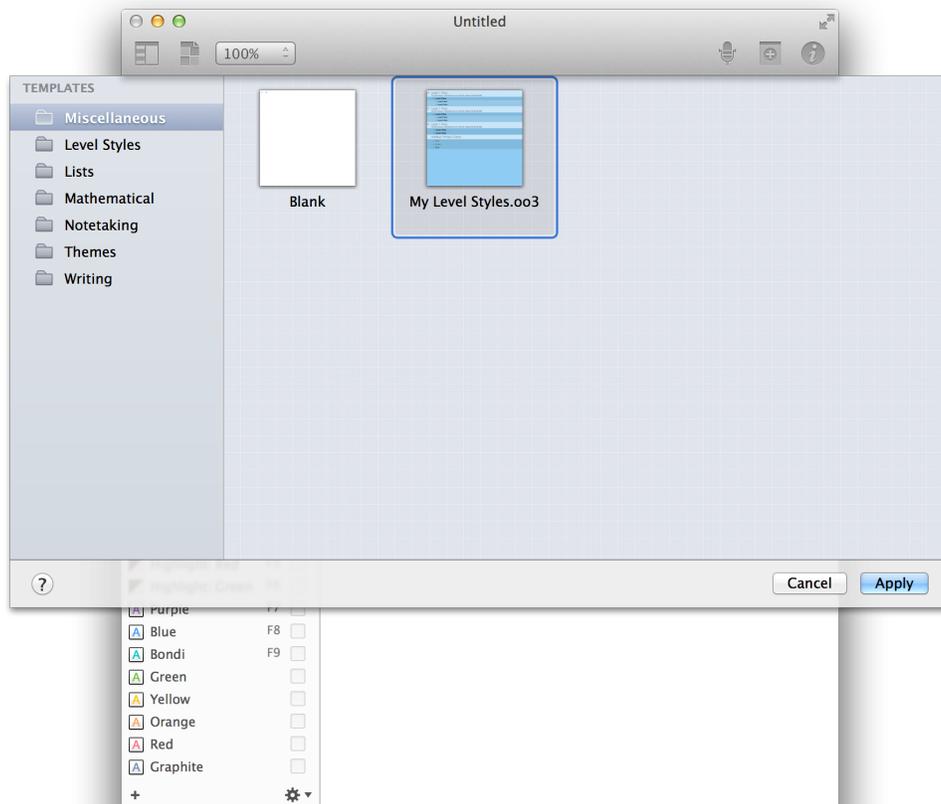
5. Click **Apply**.

The document takes on all of the characteristics of the **My Level Styles** template you created without overwriting all of the content on the rows.
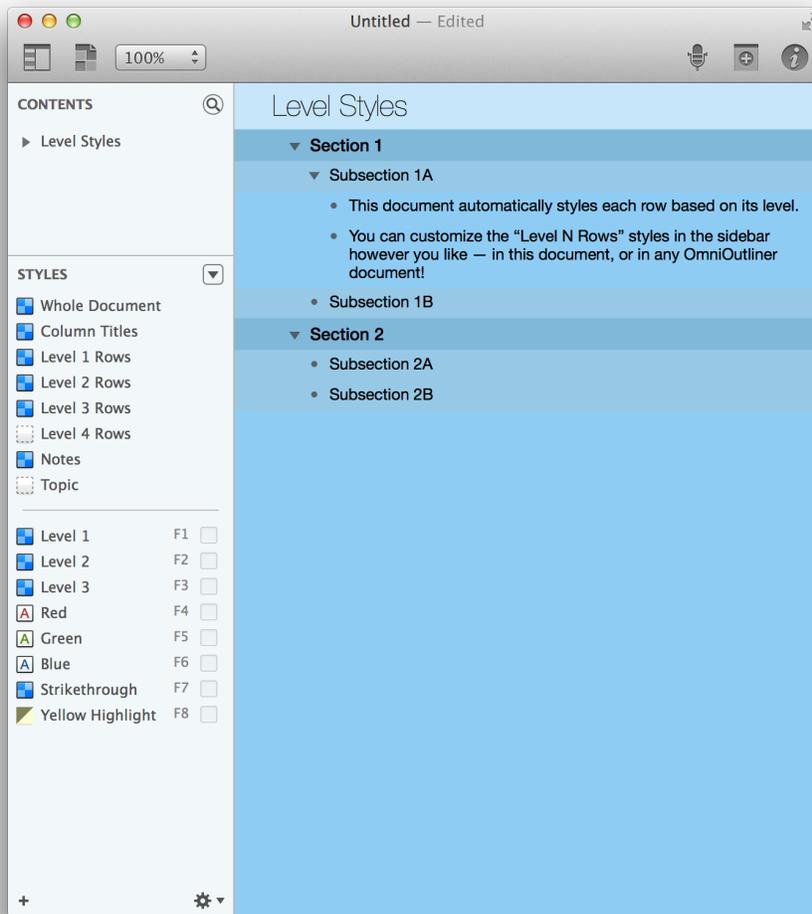
Keep this in mind when you're working on a document and looking for creative ways to style the content. If you don't like the way a particular theme looks, you can use **Command-Z** to undo the theme and resort back to the previous styling.

Where to Go From Here

This tutorial took you through the process of stripping one of OmniOutliner 4's templates down to the bare metal and then building up a new template from scratch. Along the way, we showed you how to create hierarchical lists of information on different rows, how to move and organize your content, and also how to create groups.

Take some time now to explore everything that OmniOutliner has to offer. If you downloaded a timed trial of OmniOutliner from our website, all of the OmniOutliner 4 Pro features are available to you, so why not put those to the test. Try creating styles that make use of Pro-only features, including:

- Adjusting the line height of a row

- Control the visibility of row handles

- Set padding around a row's contents

- Add space above Notes and Children

- Add space below Children

- Force a page break before a particular item when printing

- Decide whether child rows are indented

You can also add multiple columns to an outline and use them for laying out content. Be sure to use the Horizontal and Vertical grid lines (found in the Outline inspector) to apply grid lines to your outline to assist in laying things out.