



OmniPlan for Mac

Reviewer's Guide

2 Overview

What is OmniPlan?

OmniPlan is a professional-grade project management application that's designed with the Mac in mind. It can be used to manage projects of any complexity—without the complexity.



What's new in OmniPlan 2?

OmniPlan 2 has an updated look and feel along with many new features including collaboration, hammock tasks, split tasks, change tracking, and more. Share calendars, schedules, entire plans, or mix and match.

What makes OmniPlan 2 different from other Project Management Applications?

OmniPlan 2 is optimized for the Mac experience. The interface is familiar, friendly, and easy to use. OmniPlan starts off light and grows as your project grows, so everything is exactly as intricate or simple as it needs to be.

Who uses OmniPlan?

Business professionals, project managers, educators, and freelancers all rely on OmniPlan for its unparalleled project management functionality. From intricate projects to a three-step plan, some common-use examples include:

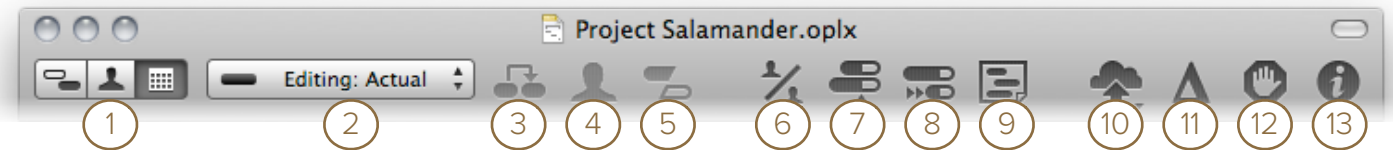
- Using calendar sharing to find out your colleague's availability
 - Planning and costing a web design project
 - Accepting and rejecting changes from collaborators with change tracking
 - Using notes to expand on a principal idea
 - Creating visual allure with styles
 - Creating calendar exceptions for holidays
 - Splitting tasks to reschedule unfinished work
 - Importing projects from Microsoft Project
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3 The Toolbar

When you launch OmniPlan for the first time, you can start adding tasks right away. The main interface elements you'll see are the toolbar and the inspectors.

THE TOOLBAR

The toolbar is located above your outline and contains several tools:



- ① Use the **view switcher** to view your tasks, resources, or schedule.
- ② Use the **baseline comparison** to see your intended schedule against the actual work that's occurred.
- ③ Click the **dependency** button to create a dependency between two items.
- ④ Use the **resource** button to assign a resource to your selection.
- ⑤ The **split task** button to divide a partially completed task and reschedule the remainder of its work for later.
- ⑥ Use the **level** button to reschedule your project to eliminate or avoid violations and resource over-usage.
- ⑦ Use the **catch up** button to update the completion of your tasks up to a particular date and time.
- ⑧ Use the **reschedule** button to reschedule tasks that are behind schedule.
- ⑨ Click the **baseline** button to commit the project to a particular planned schedule.
- ⑩ Use the **publish** button to publish your changes when sharing or syncing or configure your publish and subscribe settings.
- ⑪ Show or hide **change tracking**.
- ⑫ Show or hide the **violations** window.
- ⑬ Show or hide the **inspectors**.

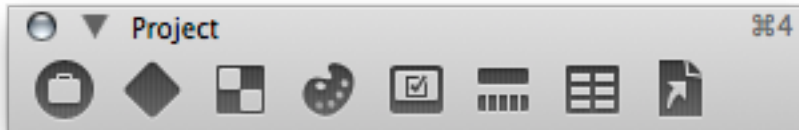
Naturally, the title is shown at the top. To rearrange your toolbar (or explore other toolbar options), select **Customize Toolbar** from the **View** menu.

4 The Inspectors

THE INSPECTORS



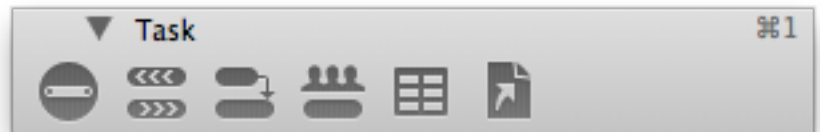
Information about your project, selection, and most items of interest as they pertain to your plan can be found in the **inspectors**. To show the inspectors, use the inspector button in the toolbar (pictured above) or choose **Show Inspectors** from the Inspectors menu.



The **project inspector** contains information for your project as a whole. For example, its title, when it starts and ends, and what formats it uses. From

left to right, the modules are as follows: information, which contains general information about your project; milestones, for milestone management; styles, for general task styling; colors, for general task and resource coloring; formats for dates, time, and currency; unit conversions to define how many hours are in a day; custom data; and attachments.

The **task inspector** contains information relevant to your tasks (or selected tasks). From left to right the modules are as follows: information,



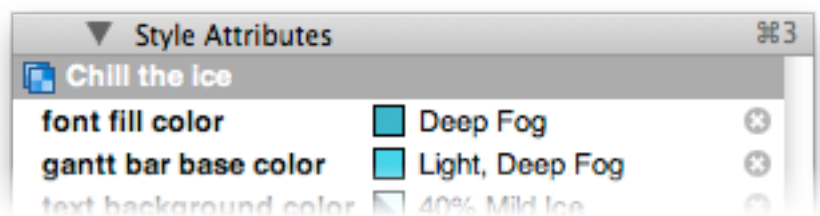
which features general information about your task, like how much effort it takes, what type it is, and how much is completed; schedule, to specify when it should take place, when it can't take place, and how it should be treated when leveling; dependencies, to see the relationships between tasks; assignments, to see who or what is working on the tasks; custom data; and attachments.



The **resource inspector** has information about your resources. From left to right, the modules are as follows: information, to provide details

about the resource, including what type of resource (staff? tool? material? group?), assign an email address or Address Book entry to the resource, and how much it costs; assignments, to see who or what that who or what is up to; custom data; and attachments.

Style attributes contain style information about your current selection.



5 The Task View

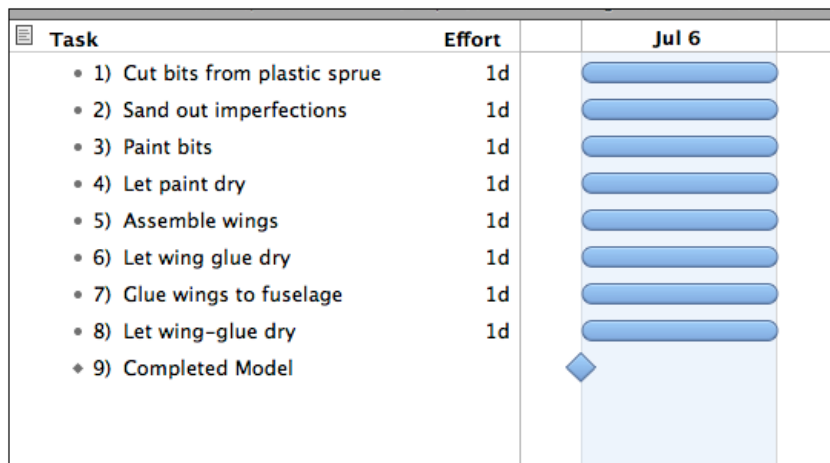
Now that we've covered the basics, let's dive a little deeper! This guide is designed to help familiarize you with how you can create, organize, and otherwise manage items in OmniPlan.

You can always access more information from the help menu, review the features listed at <http://www.omnigroup.com/products/OmniPlan/>, or watch the OmniPlan video tutorials located at <http://www.omnigroup.com/products/OmniPlan/videos/>.

THE TASK VIEW IN OMNIPLAN

A **task** is anything that needs to get done in order for the project to move toward completion. Each task has attributes such as start and end dates, a completion percentage, and resource assignments; these show up in the various columns of the task outline, and in the task Information and task scheduling inspectors. Tasks can be grouped together, and a task can be dependent on other tasks.

For now, let's just create the tasks and name them. Select your first task and press the Return key once (or twice, depending on how your keyboard preferences are set) to create new tasks. If you still have a "Task 1" hanging around, you can just delete it or change its name. Create a milestone by creating a task as usual, showing the task information inspector, and changing its type to **milestone**. A milestone is an important moment in a project. They don't take up time, they just mark significant events. When you're done, if your milestone is not the last item, click the bullet to its left and drag it down to the bottom of the list.



Task	Effort	Jul 6
• 1) Cut bits from plastic sprue	1d	[Bar]
• 2) Sand out imperfections	1d	[Bar]
• 3) Paint bits	1d	[Bar]
• 4) Let paint dry	1d	[Bar]
• 5) Assemble wings	1d	[Bar]
• 6) Let wing glue dry	1d	[Bar]
• 7) Glue wings to fuselage	1d	[Bar]
• 8) Let wing-glue dry	1d	[Bar]
◆ 9) Completed Model		[Milestone]

There are two other types from which to choose: group and hammock. **Groups** are a collection of tasks or, on their own, a placeholder for tasks to come. **Hammock tasks** are tasks whose length is dependent on the completion of the task that precedes it and the start of the task or milestone that follows.

Each task in the outline corresponds to a bar on the **Gantt chart**. The Gantt chart, as seen on the right, is a visual representation of your project.

6 The Resource View









CREATING RESOURCES

Resources are the people and things (tools or goods required to complete the project) that are necessary to make your project happen.

Creating resources works much like creating tasks. Switch to resource view (using the view switcher in the toolbar), which contains the resource outline. Use return to create a few resources and name them. Then click the **type** icon and choose whether it is Staff, Equipment, Material, or a group. (Resources can be grouped in the same way as tasks.)

A timeline appears on the right side for each resource you create, but it is empty until you assign the resource to some tasks.

ASSIGNING RESOURCES

Type	Resource	Units	26 - Jul 2
	• Me	100%	
	▼ Consumables	0	Me
	• Glue	0	
	• Paints	0	
	• Top-coat	0	
	• Airbrush	100%	

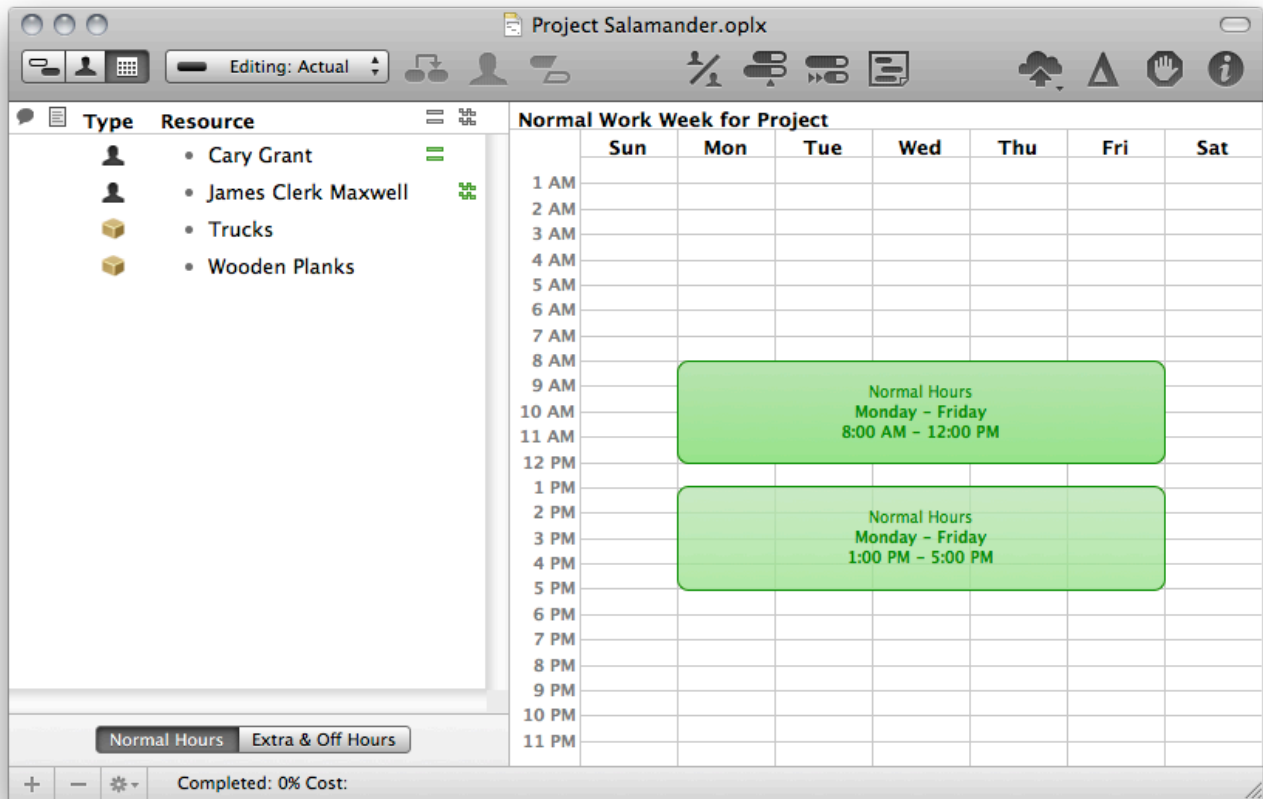
You can assign resources to tasks from task view or from resource view. In resource view, you can assign a task by dragging it from the **unassigned** timeline into a resource's timeline.

Use the task assignments inspector to assign multiple resources to a task and change its duration. For example, unloading boxes gets easier when more people help, so that task should get shorter when more resources are assigned. For these situations, the effort is considered fixed. However, showing an educational video takes the same amount of time no matter how many people attend; for that kind of task the duration is fixed, so you should choose to keep the duration fixed for this kind of work. (Of course, you can also fix both.)

LEVELING RESOURCES

Resource leveling analyzes your project and figures out the most efficient way to arrange it, taking into account things like dependencies and the amount of resources available. If you make some manual changes to the schedule, like rescheduling incomplete tasks, setting up dependencies, or changing resource assignments, you should then level the project again to make sure your resource usage is balanced out. To level a project, click the **level** button in the toolbar, then deselect the **Don't schedule any task before [date]** checkbox and click the **OK** button.

7 The Calendar View



Like the task and resource view, you can reach the calendar view with the view switcher. The calendar view is a place to establish and create exceptions to the working days and hours of your project. **Normal hours** are a general set of working hours to be followed in a typical week. This set of hours is applied to every week in the project, thus determining how many hours of effort can be completed in each day. Resources inherit their work week schedules from the project, but you can customize them individually if they work different hours.

When you select a resource in the outline, you can edit that resource's working hours. If nothing is selected, you can edit the working hours for the whole project. If the work week is customized, you can always revert it back to the default by clicking the small **x** button in the upper-right corner.

The green blocks represent blocks of working time. Drag in the empty space to set a day and time range or drag the edge of a block to edit its hours. Select a block to delete or hold the **shift** key and drag to delete part of a block.

Select the **Extra & Off Hours** button to create exceptions to the normal schedule (for holidays, for example) or an individual resource (for example, a vacation). The regular schedule appears with a green, dotted outline. Extra hours are represented by blue blocks and red ones represent off hours.

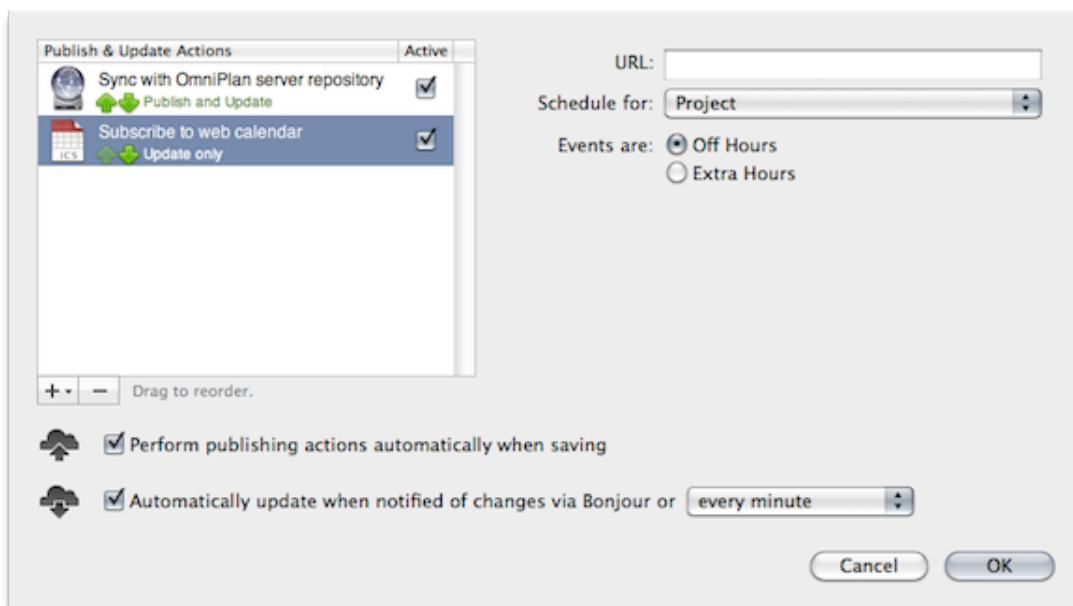
8 Publishing & Subscribing

SETTING UP ACCOUNTS

OmniPlan can publish and subscribe a project so that your tasks, resources, and calendars stay up-to-date between team members working on a common OmniPlan project. But first things first, you need to set up an account so that you and your teammates have a common ground by which to communicate.

To create a new account, go to the **accounts** module of preferences (found in the **OmniPlan** menu). Use the **add account** button (it's the plus) to add one to the list. Then, select an account type; CalDAV and Google are best for calendar publishing and subscription while the Omni Sync Server, MobileMe, and WebDAV are for syncing.

Each type asks for your account credentials. Once you've entered those, use the **test** button to make sure everything's running smoothly. (If not, OmniPlan helps you identify the problem with a bit of red text next to that button.)



PUBLISHING AND SUBSCRIBING

You can subscribe to or sync multiple elements of a project; go to publishing and subscription configuration by choosing **configure publishing and subscriptions** via the **publish** button in the toolbar. Use the **add action** button (there's that plus again!) to add a publish and subscribe Action.

These changes can be published upon save and updated via Bonjour (or at a specified interval). If you'd rather update manually, leave these options unchecked and use the **Update** and **Publish** menu items found in the **Project** menu or the publish button in the toolbar.

9 Fast Facts

FEATURE LIST:

Collaboration, including calendars and resources, to share and update your project between collaborators.

Change Tracking to review, accept, and reject changes to the project; accept changes individually or en masse.

Smart scheduling that accounts for the variance in schedule of an individual resource or the project as a whole.

Resource allocation to manage people and tools.

Visual timelines (Gantt charts) to see your project clearly.

Violation notifications keep scheduling conflicts at bay.

Multiple baselines show you the necessary steps to see a project to completion.

Optimized for the Mac experience.

OMNIPLAN 2 DESCRIPTION

OmniPlan 2 has all of the robust and familiar features of a Product Management app, with the effortless and intuitive experience of the Mac. With collaboration, Gantt charts, and easy scheduling, OmniPlan 2 makes project management a snap, so you can spend less time planning and more time doing.

ABOUT THE OMNI GROUP

Omni's distinctive productivity applications have won three Macworld Editors' Choice awards, a MacUser UK "Maxine" award, Macworld Expo Best of Show, two Mac Observer Editors' Choice Awards, an iPhone Alley Editors' Choice award, and five Apple Design awards. Founded in 1993, the Omni Group is located in Seattle, Washington.

In 1989, the founders of the Omni Group began working with some of the technologies that form the basis of Mac OS X. Since that time we've transitioned from a consulting/game porting business to the application developers we are today.

We currently develop productivity tools for Mac OS X, iPhone, and iPad, and have five products freely available to the Mac community.

10 Additional Resources

The Omni Group
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Phone: +1 800-315-6664

OmniPlan 2 website: <http://www.omnigroup.com/products/omniplan/>

OmniPlan in the Omni Group Store: <https://store.omnigroup.com/>

OmniPlan in the App Store: <http://www.omnigroup.com/download/appstore/omniplan>

Our blog: <http://www.omnigroup.com/blog/>

OmniPlan costs \$199.99.

The Omni Group offers a 30-day money back guarantee on all sales, including App Store sales.

Free technical support is available via phone and email.

Email us at omniplan@omnigroup.com, use the in-app Contact Omni button, or check our website for support information: <http://www.omnigroup.com/support>. On weekdays from 10am to 5pm Pacific time, you can also get phone support by dialing 800 315-6664 or +1 206-523-4152 and choosing the Support option.

Thank you for your time! Please don't hesitate to contact us if you have any questions.

