

OmniOutliner 4 for Mac

User Manual



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What's New in OmniOutliner 4



Welcome to the new OmniOutliner 4!

Supporting the latest technologies in and optimized for OS X Mavericks, OmniOutliner 4 packs in more of the features long-time Outliner fans have been asking for, including:

- A brand-spanking new UI — Yes, that's right folks, we've totally redesigned the UI in OmniOutliner 4. Out with the old paradigms and in with the new.
- Resource Browser — Use the new Resource Browser to browse recently edited files, choose templates, apply themes to existing documents, and import your templates from OmniOutliner 3.
- Sidebar — We've done away with the old style drawer from OmniOutliner 3 and have created a new Sidebar that lists the Contents of your outline, Styles, and more!
- Inspector redesign — OmniOutliner's redesigned Inspector window is cleaner and fresher.
- Styles — To be more in line with OmniOutliner 2 for iPad, we've retooled the way styles work to create a great cross-platform experience. We've added style theming, too, so you can apply template styles to an existing document.
- Theming — You can now apply the styles from a template (its theme) to your outlines.

- Column visibility — Have a document with a lot of columns that you only need to access every now and then? We've added the ability to hide columns when you don't need them, and then make reappear when you want them back.
- Smart Match Technology — Pop-up List-styled columns benefit from the Smart Match technology we've used in OmniFocus. As you type characters in a Pop-up List cell, OmniOutliner tries to guess which item you mean—and the characters you enter don't have to be at the beginning or contiguous. If you type a new value that you'd like to add to the Pop-up List, just enter Command-Return to add the value to that list.
- Hyperlinks — URLs are converted into real links so you can click and open them in your default browser. What's more, if you don't want or like this behavior, you can toggle this off in OmniOutliner's preferences.
- Attachments — You can attach pretty much anything to an OmniOutliner document: images, video, audio, even other OmniOutliner files. Attached images autoscale to the column width, and you can attach audio clips which play right within the Outline. What's more, we've added a new attachment popover to replace OmniOutliner 3's tagging, so you can change the visibility of attached images, use alternative text rather than a filename, and direct how OmniOutliner 4 opens attachments.
- Date parsing logic — OmniOutliner's new date parsing logic lets you type stuff like *now*, *yesterday*, *2d*, *september*, *thu*, or *-5w* in a date column and have it know what you mean.
- Printing — All OmniOutliner-specific print options are now located in the print panel. You can customize page headers and footers, adjust scaling and margins, choose whether to include Notes, and more.

- Zooming — Text can now be magnified on screen without changing your print layout.
- Compatibility with existing files — OmniOutliner 4 is fully compatible with OmniOutliner 3 for Mac, and OmniOutliner 1 and 2 for iPad. As long as you have a .oo3 file, OmniOutliner 4 can open it.

What's Available in OmniOutliner 4 Pro

Whether you've purchased OmniOutliner 4 Pro, or are considering upgrading from the Standard edition, here are some features you'll only find in OmniOutliner Pro:

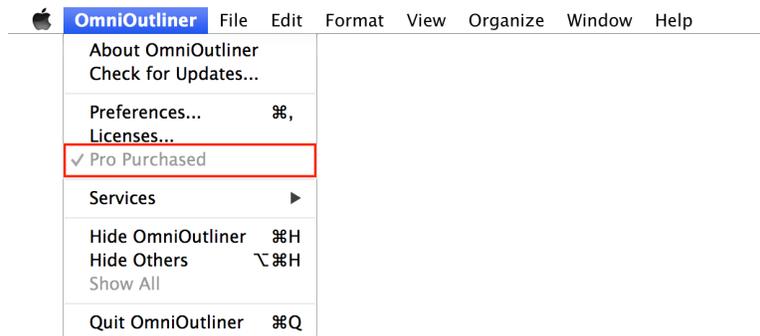
- AppleScript support — Automate your workflows with AppleScript.
- Export support for Microsoft Word — Export to Microsoft Word in either *.docx* or *.dohtml* format.
- Manual page breaks — Choose whether a row or a particular row style forces a manual page break when printing the document.
- Note customization — Adjust line height and padding for Notes.
- Display Notes inline or in a pane — Inline notes can sometimes get in the way. Rather than forcing you to hide and show them, we've added an option to view Notes in a separate pane at the bottom of the outline area.
- Row handle visibility — Use the Style inspector to change the visibility of row handles. You can even set row handles independent from one another so that some rows always have the handles visible while others only appear when you mouse over the row or not at all.
- Child indentation — Choose whether child rows will be indented, or if they are aligned with their parent rows.

- Adjust line heights and row padding — Use the Style inspector to tweak the line height and add spacing around rows
- Improved sorting options — sorting opt-out
- Hide columns — Show and hide columns to your hearts' delight.
- Document-specific toolbars — Create custom toolbars that contain only the buttons you need for that special document you've been working on.
- Folded editing — No, we don't mean that you can edit while in a pike position. We're talking about the ability to have the text within a row hide when you're not editing its content, and to reveal everything when you have the row selected.

All this in a snappier, faster UI built for OS X Mavericks and the latest Mac hardware, OmniOutliner 4 is where the future begins!

How Do I Know If I Have Pro?

There's one easy way to tell if you have OmniOutliner 4 Pro installed on your Mac. Choose the **OmniOutliner** menu, and look for **Pro Purchased**, as shown here:

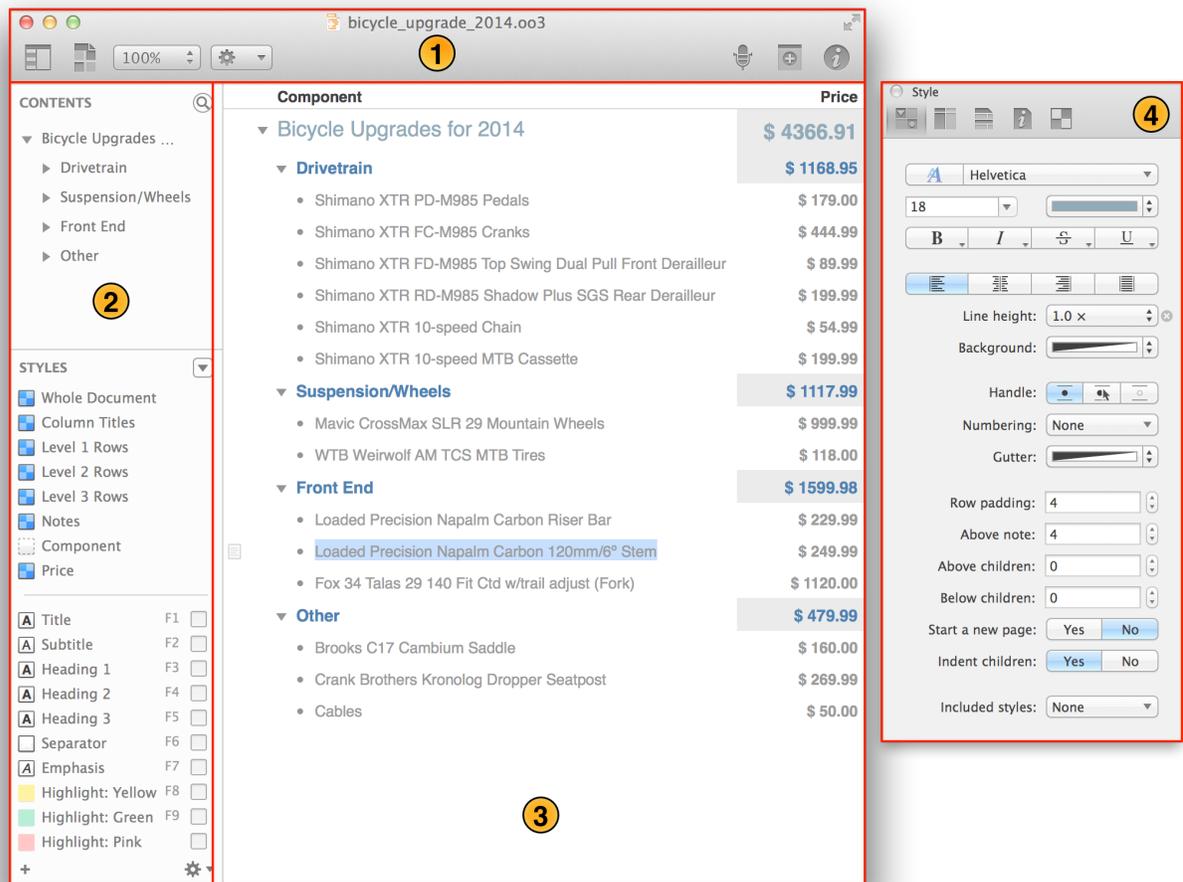


If you purchased OmniOutliner 4 Standard from the Mac App Store, that line in the menu will say **In-App Purchase**. Selecting this item opens a window from which you can buy the upgrade to OmniOutliner 4 Pro.

If you purchased OmniOutliner Standard from our store, that item says **Upgrade to OmniOutliner Pro**. Selecting this item takes you to our online store from which you can purchase an upgrade license for OmniOutliner 4 Pro.

Getting to Know OmniOutliner 4

When you first open OmniOutliner, you'll see two windows pop open: the editing window and the Inspector. The editing window is where you'll do all of your work, and the Inspector provides all of tools you need to style text, format rows and columns. Before diving in, let's take some time for a quick overview of OmniOutliner's user interface:



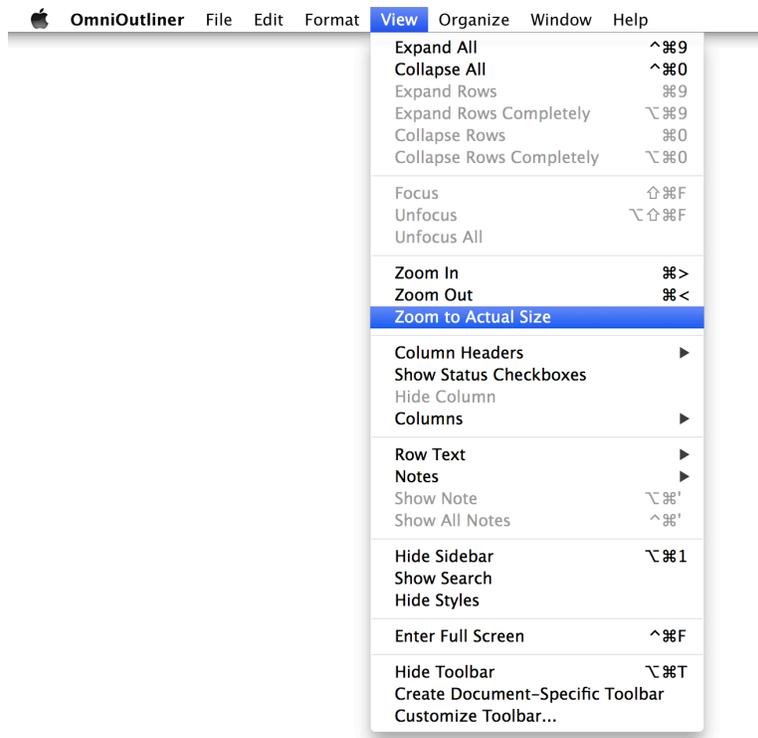
1. **The Toolbar** — Along the top of OmniOutliner’s window you’ll find a row of useful buttons in the Toolbar. Fully customizable—including document-specific toolbars—the toolbar makes it easy for you to add columns and attachments, record and embed audio clips, and a whole lot more. See [Using the Toolbar](#) for more details.
2. **The Sidebar** — Along the left side of OmniOutliner’s window is the Sidebar. Fully collapsible, the Sidebar provides an outline view of everything in the Editor and keeps tracks of the styles you’ve used in your document. To learn more about the Sidebar, see [Using the Sidebar](#).
3. **The Outline** — This is where you enter text in rows and columns, add notes, tick things off using the status checkboxes, attach images, embed audio clips, and a whole lot more.
4. **The Inspector** — Floating off in its own window are the Inspectors. Consisting of the Style, Column, Outline, Document, and Style Attributes inspectors, the floating window makes it easy for you to design your OmniOutliner documents with style, and when you don’t need it, you can just hit **Shift-Command-I** to make it go away until you need the Inspectors again. For more details about the Inspectors and what each of them do, see [Using the Inspectors](#).

Using and Setting Keyboard Shortcuts

From time to time, we'll mention keyboard shortcuts that you can use in OmniOutliner. If you're new to the Mac or aren't accustomed to using keyboard shortcuts, they can really help speed you along while working in OmniOutliner. Rather than having to grab a mouse or take your fingers off the keys while you're typing to use your Mac's Trackpad, you can just hit a keyboard shortcut to invoke certain menu commands.

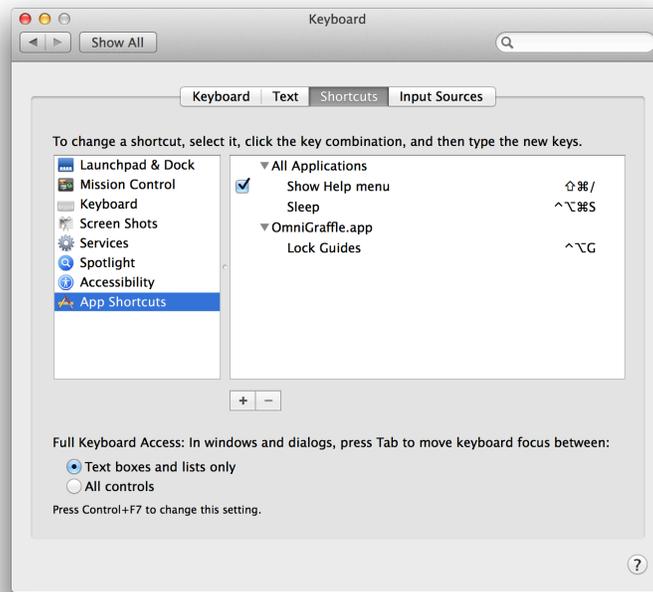
Not every menu option has its very own keyboard shortcut, though. If you find that you're using a menu option often enough that it warrants its own special keyboard shortcut—or if you want to change an existing keyboard shortcut to something else—you can do this with the System Preferences app on your Mac. To show you how easy this is to do, let's create your first custom keyboard shortcut for OmniOutliner—for the **Zoom to Actual Size** menu option.

1. Before you get started, the first thing you need to know is where the **Zoom to Actual Size** menu item resides amongst OmniOutliner's menu options. After some poking around, you find it in the **View** menu:



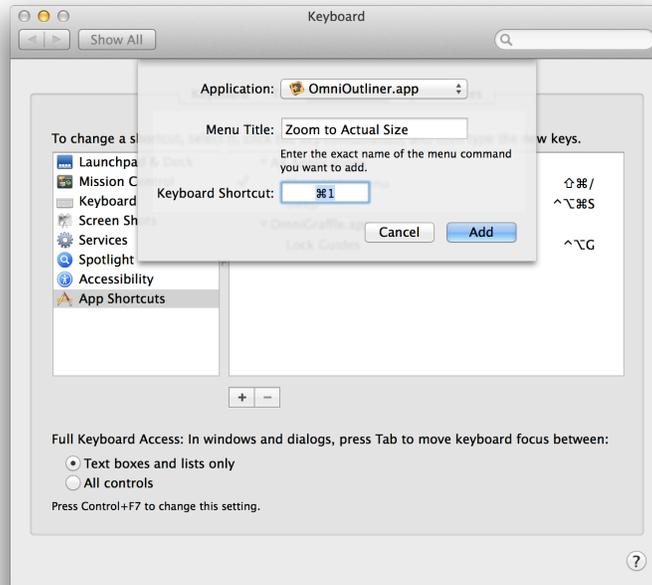
It's not that you need to know which menu the option is in (although, that is helpful in other ways), what you really need to know is *exactly* how that menu option is spelled out. When you go to create this keyboard shortcut, you'll need to know that. Of course, you can always switch back and forth between OmniOutliner and the Keyboard system preferences pane if you need to, but it's good to have this piece of information before you get too far along.

2. In the Dock, click **System Preferences**.
3. Open the **Keyboard** preferences panel, and then click on the **Shortcuts** tab.
4. In the sidebar on the left, click **App Shortcuts**; the area to the right lists any custom keyboard shortcuts you've created for other apps on your Mac.



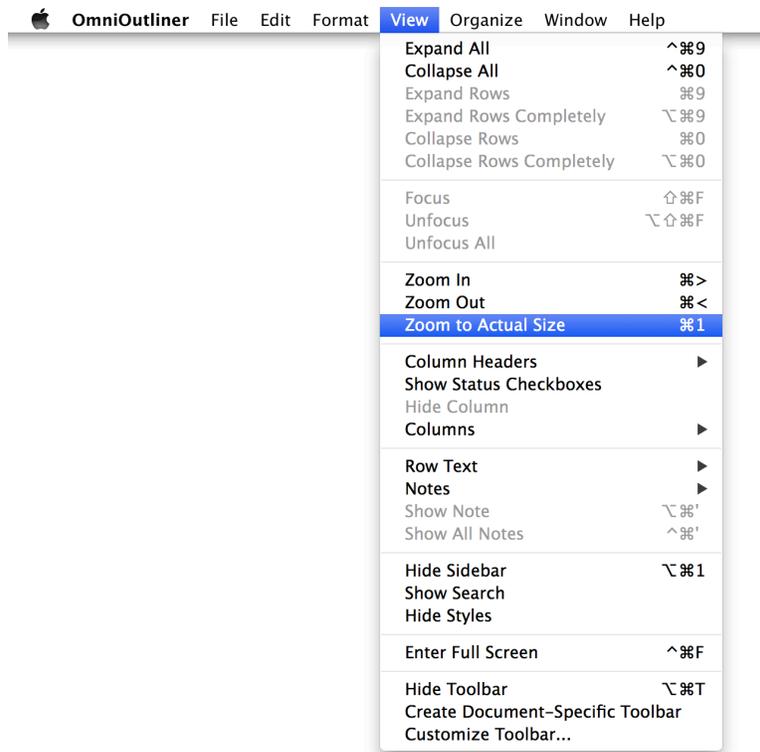
5. Beneath the listing of custom shortcuts, click the **Add** button; it's the one that looks like a plus sign (+). This opens a sheet in which you can create the custom keyboard shortcut.
6. In the sheet, do the following:
 - In the **Application** menu, choose **OmniOutliner.app**.
 - In the **Menu Title** field, enter **Zoom to Actual Size**. Be sure to enter the text *exactly* as it appears in the menu, otherwise this won't work.
 - In the **Keyboard Shortcut** field, enter the keyboard shortcut you would like to use. Since many popular design apps use **⌘-1** for zoom to actual size, that's what we've used here for this example; you can use whatever you would like, though.

7. When finished, the sheet should look similar to the following:



8. Click **Add** to create the new keyboard shortcut for OmniOutliner.

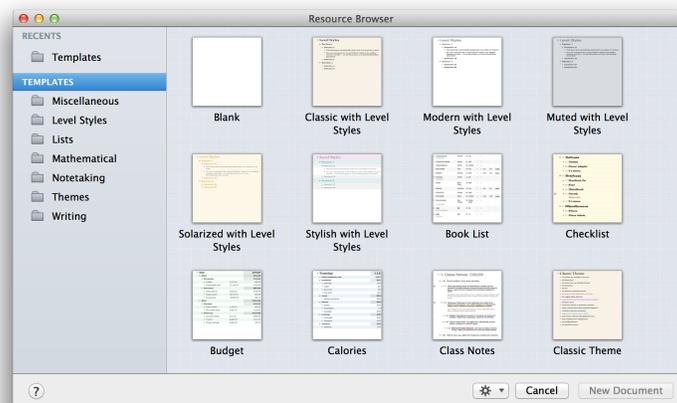
If you switch back to OmniOutliner and look in the **View** menu, you'll see your newly-created keyboard shortcut for **Zoom to Actual Size**.



To learn more about using keyboard shortcuts on your Mac, read [OS X Keyboard Shortcuts](#) on Apple's support website.

Using the Resource Browser

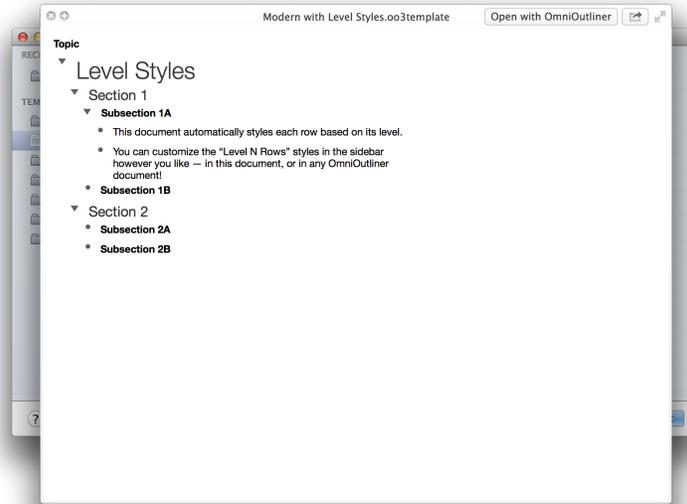
Unless you've set **OmniOutliner's preferences** differently, the first thing you'll see when you launch OmniOutliner is the new **Resource Browser**. The Resource Browser (**File** ▶ **Resource Browser**; **Command-N** or **Shift-Command-N**) makes it easy for you to open a recently-saved file, or to create awesome looking documents by starting out with a **Template**.



The sidebar on the left makes it easy for you to choose a file that you've recently worked on, or to select one of the pre-styled templates that we include with OmniOutliner 4.

The **Recents** section is similar to choosing **File** ▶ **Open Recent** from the menu bar. You'll find a list of recently-opened files from which you can select and open quickly.

The **Templates** section offers a quick and easy way for you to open one of the pre-styled templates we've included with OmniOutliner. If you're not sure which template to choose, you can click on one and tap the Spacebar to open a QuickLook view of the template file.



To close the QuickLook view, just tap the Spacebar again and the preview window goes away.

Managing and Working with Templates

Any file that you save as a template (**File** ▶ **Save As Template**) is available from the Resource Browser in the **Templates** section.

To manage your templates, use the **Action** menu at the bottom of the Resource Browser; it's the one that looks like a small gear (). First, select one of the templates, and then click the Action menu and choose **Show in Finder**. A new Finder window pops open and places you inside the Templates folder. Once here, there's no limit to what you can do with the templates. You can change their names, move the ones you don't want to the trash, or add subfolders so you can categorize template files for certain tasks.

Note

For the scripters or power users who need to know exactly where the Templates folder is, you can find it on your Mac's hard drive in the following location:

```
~/Library/Containers/com.omnigroup.OmniOutliner/Data/  
Library/Application\ Support/The\ Omni\ Group/  
OmniOutliner/Templates
```

If you've purchased OmniOutliner 4 from the Mac App Store, swap out `com.omnigroup.OmniOutliner` with `com.omnigroup.OmniOutliner.MacAppStore`, or `com.omnigroup.OmniOutlinerPro.MacAppStore` if you have OmniOutliner 4 Pro.

Using the Resource Browser's Action Menu

Use the **Action** menu () to open or create new templates, reveal where a particular resource lives on your Mac in the Finder, move an object to Trash, or set a particular template that you're fond of as the default.

If you would like to import your OmniOutliner 3 templates, you can choose **Add Resources to Library** to select a file or template you'd like to add to OmniOutliner's library.

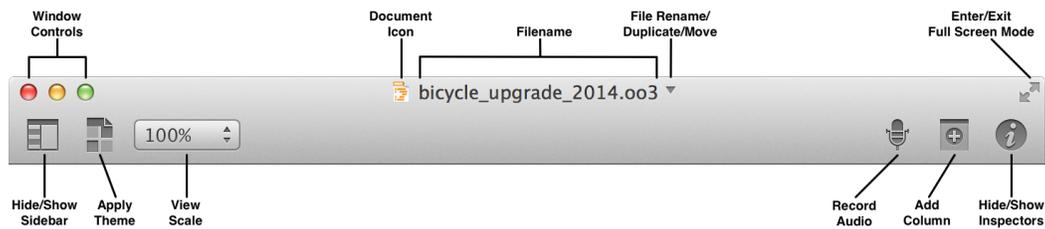
You can use the **Restore** option in the Action menu to restore any of the default templates that you might have trashed earlier. Even if you delete these files from the Templates folder, copies of the templates files reside within the app.

Let's say that one sleepless night you decided that you didn't need any of the templates we've included with OmniOutliner. Blurry-eyed, you open the Resource Browser, and then one by one, choose **Action ▶ Move to Trash**. After all that work, you empty the trash, close your laptop and drift off to sleep. Then, around 5:38 a.m. you awake with a start and have this incredible idea for what you know will be a best-selling novel. Great.

You've trashed the *Book Draft* template. What are you going to do? Fortunately, we thought about this for you. If you choose **Action ▶ Restore ▶ Templates** you can choose from any (or all) of the templates we've included with OmniOutliner and put them back on your Mac.

Using the Toolbar

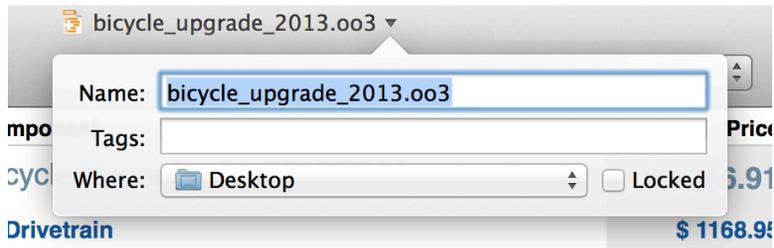
Along the top of OmniOutliner’s window is the **Toolbar**. Packed with buttons and fully customizable—even at the per-document level if you have OmniOutliner 4 Pro—the toolbar makes it easy for you to create spiffy outlines.



At opposing ends of the toolbar, you’ll find buttons for hiding and showing the Sidebar and the Inspectors. Above those, you’ll find the standard OS X window controls for Closing, Hiding, and Expanding the window, and for popping into Full Screen mode.

At the center of the toolbar along the top, you’ll see a **Document Icon** which you might assume does nothing other than tell you what type of file this is. But if you hold down the Command key (⌘) and click that icon, you’ll get a tiny menu that shows you where the file is stored on your Mac. This is sometimes handy for when you’re working on duplicated files and you can’t remember where you saved the last revision.

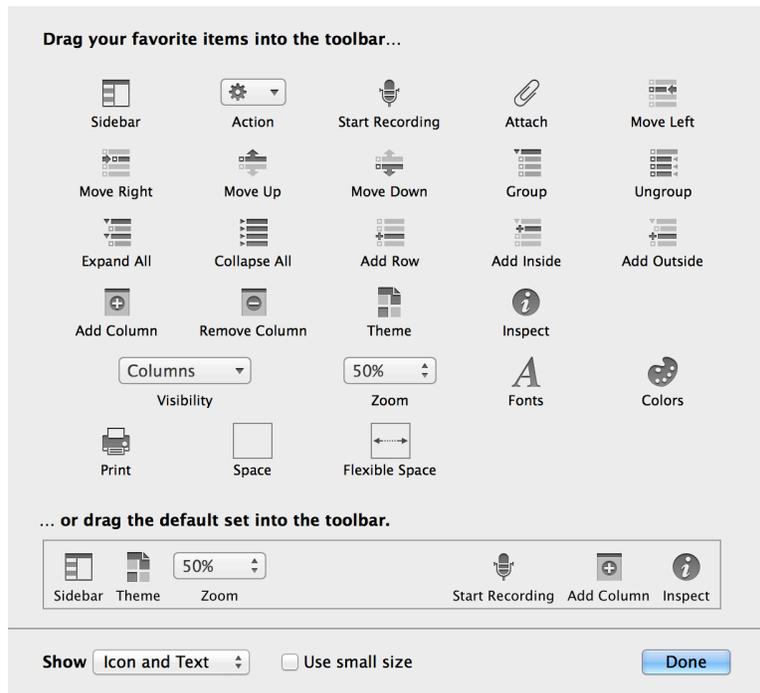
Next to the Document Icon is the **Filename**. If you hover over the filename with the mouse pointer, a small downward-pointing triangle appears to its right. Clicking this triangle opens a small popup window, in which you can change the name of the file, add keyword/metadata tags to help make the file easier to find using Spotlight, or even move the file to another location on your Mac.



Customizing the Toolbar

As noted earlier, the Toolbar is packed with a variety of tools. However, you can customize the toolbar by adding additional buttons or rearranging their order, to suit your needs.

To customize the toolbar, choose **View** ▶ **Customize Toolbar** or **Control-click** on the toolbar and select **Customize Toolbar**. When you do, a sheet slides down from under the toolbar, revealing a slew of function-related buttons that you can drag up to the toolbar. For example, you could add the **Group** and **Ungroup** buttons to the toolbar. When you've finished making changes to the toolbar, click **Done**.



If you don't like the changes you've made, or if you ever want to reset the toolbar to its default set, all you need to do is drag the bottom row up to the toolbar and then click **Done** to save the changes. The changes you've made to the toolbar are saved along with OmniOutliner's preferences, so that you'll see the same toolbar options with every document you create.

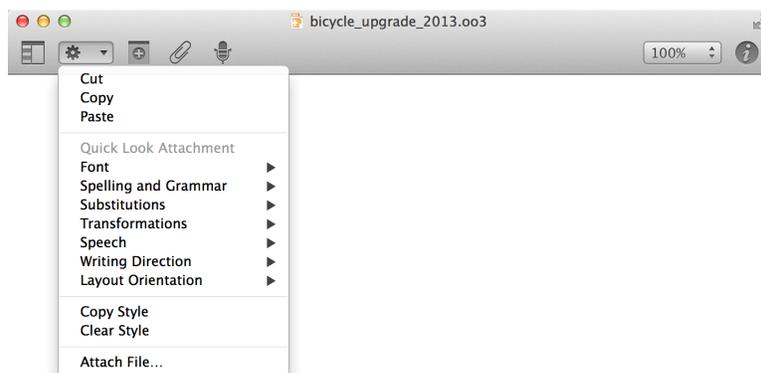
(Pro) If you have OmniOutliner 4 Pro, you can create document-specific toolbars by choosing **View ▶ Create Document-Specific Toolbar**.



You'll start out with a bare-bones toolbar—containing only the **Sidebar** and **Inspect** buttons along with a long **Flexible Space** “button”—to which you can add whatever buttons you'd like. If you decide later that you no longer want that custom toolbar, choose **View ▶ Remove Document-Specific Toolbar** and the toolbar reverts back to the default button set.

Using the Toolbar's Action Menu

If you've customized the toolbar to include the **Action** menu, you'll notice that it behaves slightly different from the Action menu you find in the **Resource Browser**.



The toolbar's Action menu includes many of the commonly used options that you'll find in the **Edit**, **Format**, **View**, and **Organize** menus. Rather than spreading these out over four different menus, we've placed the ones we feel you'll use most in this compact Action menu for every doc you're working on.

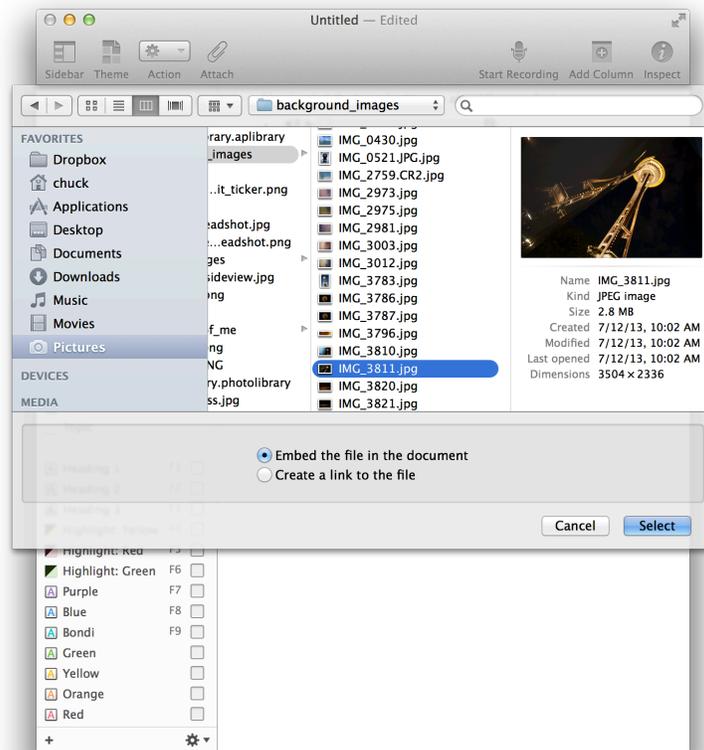
Attaching Files

Outlines aren't just about text. Sure, they mostly are, but every now and then you're going to want to attach something—an image, a movie clip you've shot on your iPhone, a PDF file, another OmniOutliner file—to the document you're working on. Fortunately, OmniOutliner can accommodate all your document-attaching needs.

To attach a file, you can do one of the following:

- Drag anything in from anywhere, including files from a Finder window or text and images from a webpage.
- Click the paperclip icon in the Toolbar.
- Choose Edit ▶ Attach File.
- Click the toolbar's Action menu and choose **Attach File**.

When attaching files by any method other than dragging and dropping things into OmniOutliner, you are presented with a file chooser, that looks very much like a Finder window. Use the file chooser to navigate through your Mac's hard drive until you locate the file you'd like to attach.



In the chooser, you'll notice two options that affect how the file is attached to your OmniOutliner document:

- **Embed the file in the document** — The default, this is fairly obvious what happens: A copy of the file you've attached is embedded within the OmniOutliner file you're presently working on.
- **Create a link to the file** — Rather than embedding an exact duplicate of the file, as with the previous option, this copies the file's location on your Mac's hard drive into the OmniOutliner document.

You may not notice the difference between those two options when you're working on your system. Attach a file using either option and the files appear within your Outline. The big difference, comes into play when you *send* your OmniOutliner document to someone else. For that, you'll want to go with the default option (**Embed the file in the document**) so the

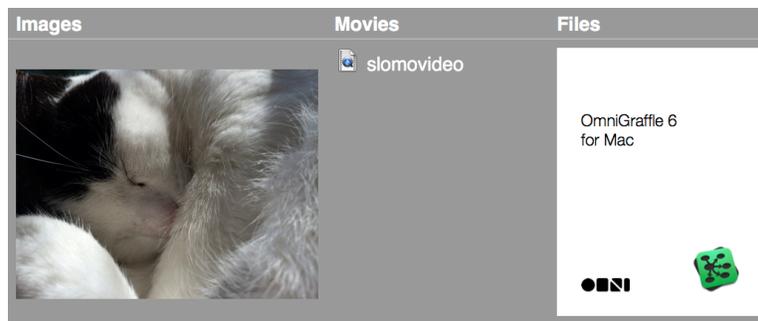
person you're sending the file to will also receive the attachment. If you choose the other option, all they'll see is an icon and the filename of the file you've attached from your Mac. The problem is, because that file is on your Mac, they won't be able to view or open that file.

Note

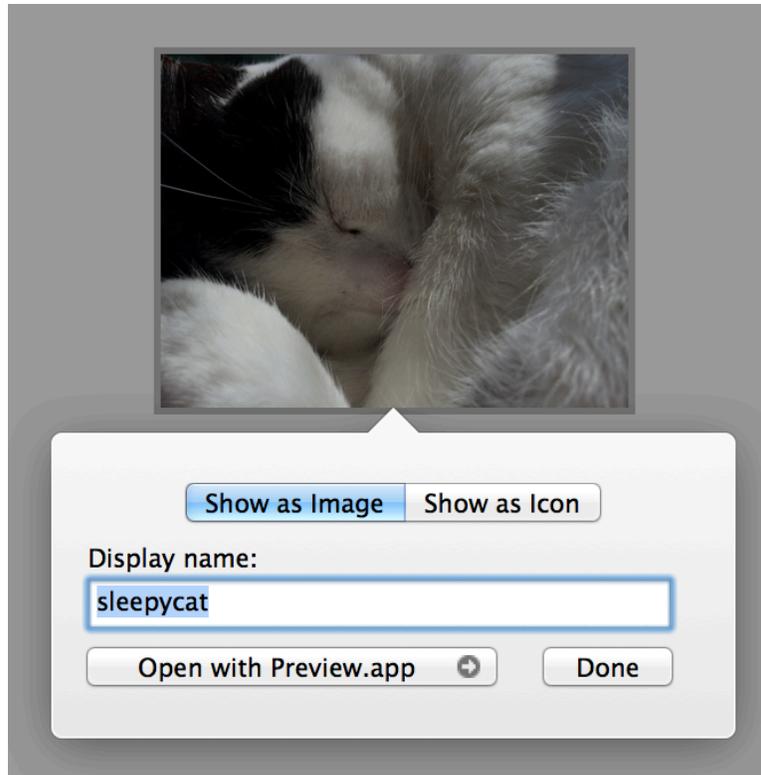
If you're the only person who will ever use your OmniOutliner files, you might consider using the second option (**Create a link to the file**) instead of embedding attachments. The linking option makes your OmniOutliner files smaller (since the attached file isn't included), and you can still view and access these attachments since the files reside on your Mac.

The disadvantage, however, comes when you delete a file that you've attached as a link. All you'll see is the file's icon and its filename. Do that, and even you won't be able to view the attachment, no matter how hard you try.

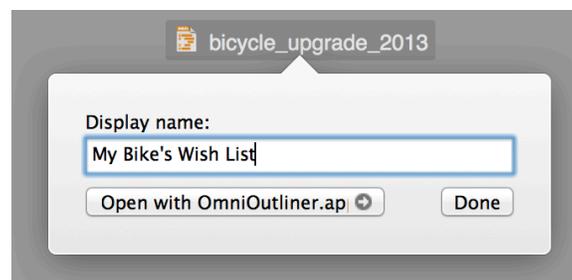
When you attach an image or PDF file, a preview automatically scales to the width of the column in which it appears. Other types of files appear as an icon with their filename.



If you click an image or PDF file you've attached, the following popover menu appears:



You can choose to have the attachment **Show as Image** or **Show as Icon**, and you can change the **Display name** for the attached file from its filename (the default) to something more descriptive. Non-image files won't have the **Show as Image** and **Show as Icon** buttons along the top. To open the file, click the **Open with** button, which recommends an app to use based on the kind of file you've attached.



Recording Audio

One of the many cool features in OmniOutliner 4 are the improvements we've made to its audio recording capabilities. To record something, click the **Start Recording** button in the toolbar; it's the one that looks like an old-timey microphone. OmniOutliner starts recording the instant you click that button. When you press that button, you'll also notice a couple changes in the user interface.



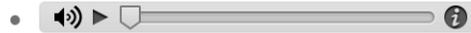
First, the text for the microphone button in the toolbar changes from **Start Recording** to **End Recording**. The button also has a small **Stop** button applied to it. The other change you'll notice is a red **Recording** bar appears just beneath the toolbar. If you've used [OmniOutliner 2 for iPad](#), this looks very familiar.

In the center of the Recording bar, you'll see a button to Pause recording, which changes the Recording bar's color to gray, and a checkmark button (Save) to stop recording. In the gray bar, you'll notice that **Recording** has changed to **Paused**, and the Pause button has been replaced with a Resume button.



Click the Resume button to continue recording where you left off, or click the checkmark (Save) button to stop recording. When you stop recording, an audio player clip shows up in your Outline.

▼ Here's what the team had to say about the new feature:

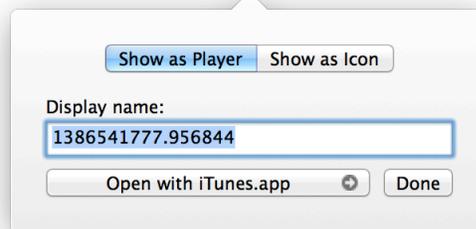


Note

Clicking the checkmark or the End Recording button in the toolbar has the same effect: your audio recording will cease and an audio file is saved into your Outline.

Much like attachments, if you click an audio clip's **Info** button (the little *i* icon at its right edge), a display options popover appears. Here you can opt to have the audio clip show up as a player (the default) or as an icon. More importantly, you can change the audio clip's **Display name** from a random number string, to something more descriptive. This is particularly important if you choose **Show as Icon** at the top of the popover.

▼ Here's what the team had to say about the new feature:



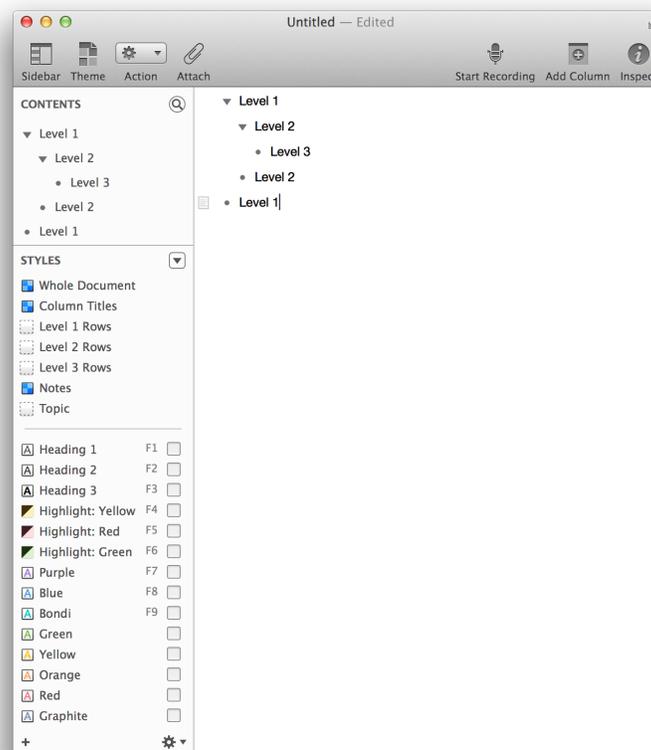
Tip

If you're using OmniOutliner to take notes while in a meeting, why not just record the meeting as it happens? That way, you can have a full audio recording of the meeting within the same document you're using for your notes. OmniOutliner can record up to six hours of audio in one stream.

Be sure to read the [Audio Recording Preferences](#) section later in this guide for more information about audio recording options in OmniOutliner.

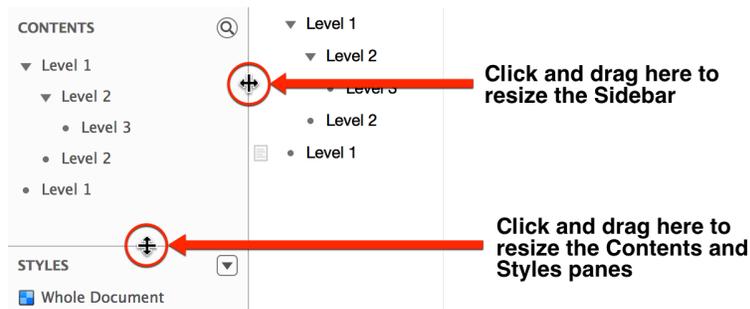
Using the Sidebar

Along the left edge of OmniOutliner's window is the **Sidebar**. The Sidebar lists the **Contents** of your outline along with the **Styles** you've used. At the top of the Sidebar, you'll also find a **Search** field that makes it easy for you to sift through your outlines and find the information you're looking for.



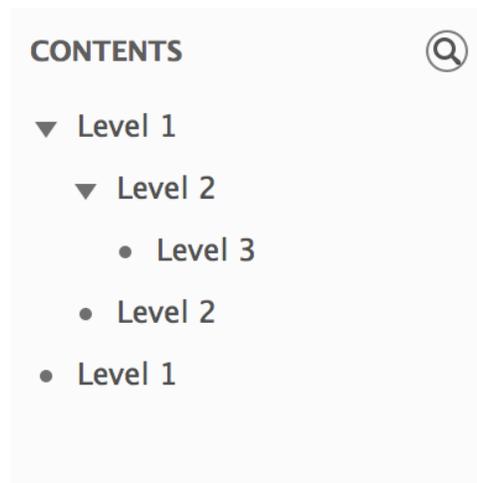
The Sidebar is open by default, but you can hide and show it again by choosing **View ▶ Hide/Show Sidebar (Option-Command-1)**, or by clicking the Sidebar button in the toolbar. The Contents and Styles sections are independently scrollable within the Sidebar, so they can handle all of the content and styles you throw at them.

If you mouse over the right edge of the Sidebar, or the split line between the Contents and Styles sections, you'll notice that the mouse pointer changes to a resizing handle. Click and drag the resizing handles to resize the sections of the Sidebar, or the Sidebar itself.



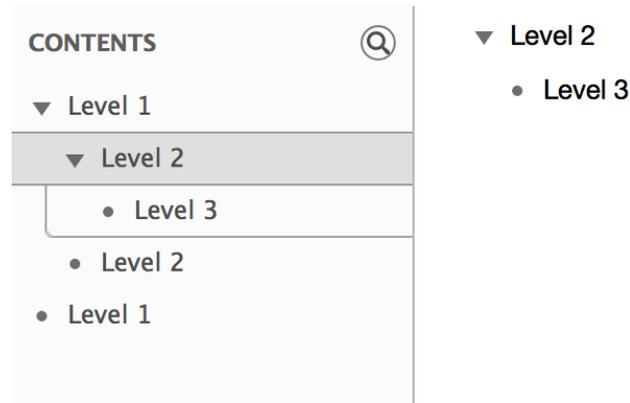
The Contents Pane

The upper half of the Sidebar displays the **Contents** of your outline in a collapsible, scrollable pane.



Rows with children have a disclosure triangle on the left edge. To view the children, click the disclosure triangle to flip open the list. Option-click a disclosure triangle to open or close all of the rows within.

When you click on the text for a row in Contents section, the Outline view changes to **Focus** on just that row and any of its children. This makes it easy for you to focus on one particular section of your outline without getting distracted by everything else in your document.



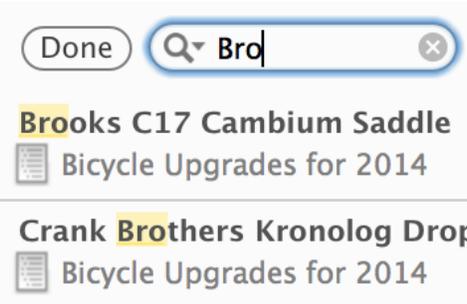
OmniOutliner retains a history of the rows you've focused on, and you can step back through that history by choosing **View ▶ Unfocus (Option-Shift-Command-F)**. To bring your entire document back into view, choose **View ▶ Unfocus All**.

Note

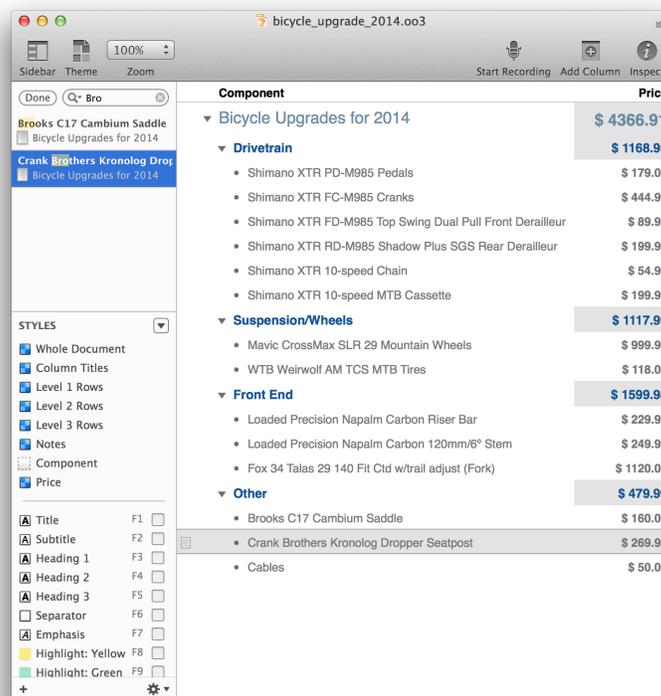
Optionally, you can Control-click on rows in the Contents pane to open a contextual menu that contains the **Focus**, **Unfocus**, and **Unfocus All** options.

Searching Within Your Outline

If you have a long document, OmniOutliner's integrated search field can save the day when you need to find something that's buried many levels deep in your outline. At the top of the Contents pane, you'll see a little magnifying glass icon (🔍); click that to reveal the search bar. You can also get to the search field by choosing **Edit ▶ Find ▶ Show Search (Option-Command-F)**.



OmniOutliner starts and adjusts the search criteria with every character you type, and the search results appear underneath the search bar. Click the item you're looking for, and OmniOutliner highlights the row in the outline.



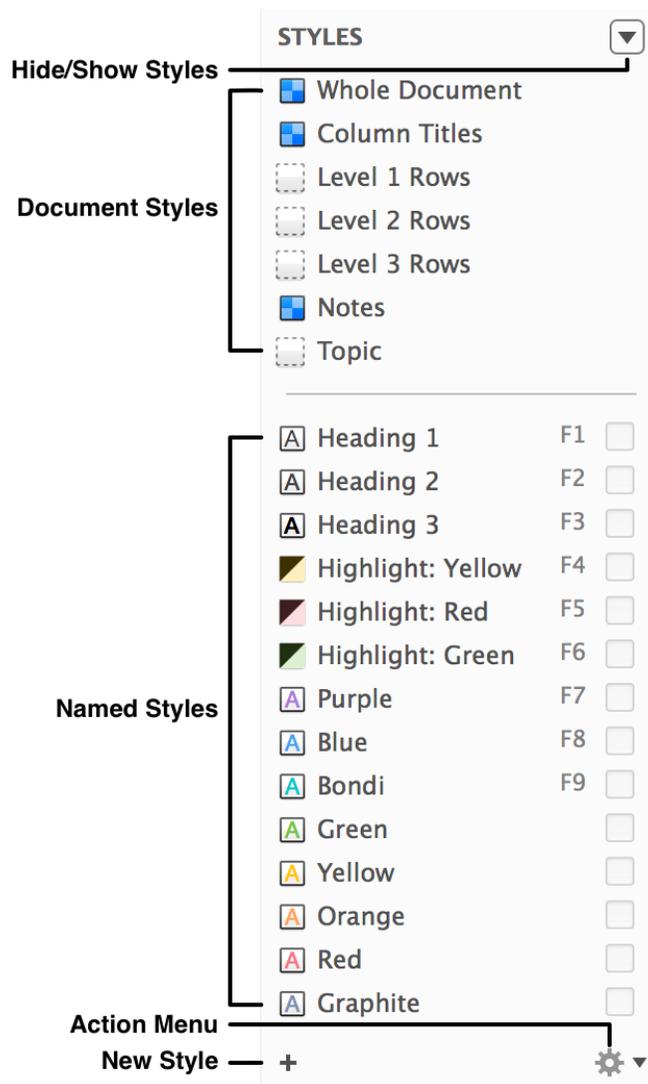
To clear the search field, press **Escape** or click the little **✕** at its right edge. When you've finished searching, click **Done** and the Contents pane reverts back to its former state of showing you everything in your outline. If you were previously focused on a particular row or section of your document,

OmniOutliner restores the Contents pane and the Outline view to where you were when you cancelled the search. Optionally, you can choose **Edit ▶ Find ▶ Hide Search (Option-Command-F)** to make the search field go away.

The Styles Pane

The lower half of the sidebar is the **Styles** pane. Just like the Contents pane, the Styles pane is independently scrollable within the sidebar. It also has a special flippy button (known as the **Hide/Show Styles** button) which, when clicked, hides and reveals the Styles pane.

When you click the **Hide/Show Styles** button, everything in the Styles pane goes into hiding, and the flippy button escorts itself to the bottom-right corner of the sidebar. Click the flippy button again and the Styles pane reappears. This is particularly useful for when all you're doing is working on your outline and you just want to focus on that in the Contents pane.



The area above the split shows the styled () or unstyled () elements in your document, including a **Whole Document** item. The area below the split provides you with some **Named** styles, such as headings, highlights, and a rainbow of eight text colors you can apply to the contents of your document.

The Styles themselves are separated into two distinct categories—
Document Styles and Named Styles:

- **Document Styles**, located at the top of the Styles pane, list all of the styleable elements in your OmniOutliner document. This includes a Whole Document item, Column Titles, Notes, a Topic column, and styles for the various rows in your document. Row styles are numbered according to their indentation level, and only appear in the list as they are created in the outline.
- **Named Styles**, located beneath the style separator line, mainly consist of the predefined styles included with the template you started from. Named Styles can be edited by first selecting the style name in the Styles pane and using the Style inspector to adjust the style attributes. To create a new Named Style, click the **Add** button (+) at the lower-left corner of the Styles pane. You can delete Named Styles by first selecting the style in the Styles pane, and then choosing **Delete Style** from the Action menu at the bottom of the sidebar.

To familiarize yourself with the Styles pane:

- Click the flippy **Hide/Show Styles** button a few times so you get the hang of how this works.
- Click the **Add (+)** button to create a new Named style.
- Click the **Action** button to open a mini-menu for creating new Named styles, duplicating or deleting a style, copying and pasting style properties, and for clearing styles from a selection.

By now you've probably been wondering what all of those little colored squares are that appear next to the styles in the Styles pane. We call these little squares **Style Chits**, and very soon, you'll see how powerful Style Chits can be.



Style Chits provide you with a visual representation of the style:



Style chits with a two-toned blue checkerboard pattern means that there are a multitude of style properties for that element.



An empty style chit with a dashed border means there are no styles for that particular row or column. These elements automatically adopt the Whole Document style for the template you've chosen.



A style chit that's split diagonally with a darker shade on the upper half means that the style applies a transparent background color to the selection.



Solid squares with a letter **A** inside are text-specific styles, such as the font and its color.

Using the Inspectors

The Inspectors reside in a floating window which you can open by clicking the Inspect icon  at the right edge of the toolbar. Other ways you can open the Inspector are by choosing **Window ▶ Show/Hide Inspectors**, or by using the **Shift-Command-I** keyboard shortcut.

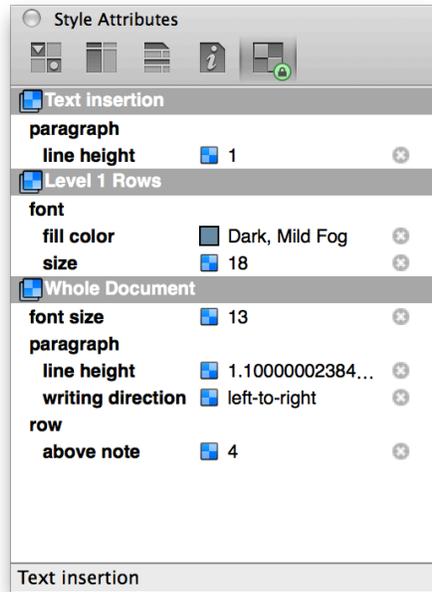
To switch between the Inspectors, just click on one of the icons in the Inspector's toolbar along the top. If you're not sure which button opens which inspector, hover over the button with your mouse, and the name of that inspector appears in *italics* at the top of the Inspector.

Inspector Behaviors

Before diving in to explore what's possible with each inspector, it's worth taking a quick look at a couple (possibly unknown) features that we've built in.

If you have the Inspector window open while you're working in a multicolumn Outline, you'll notice that the inspector automatically switches over to the Column inspector whenever you select a column heading. This makes it easy for you to set or change the column Type and its Summary behavior.

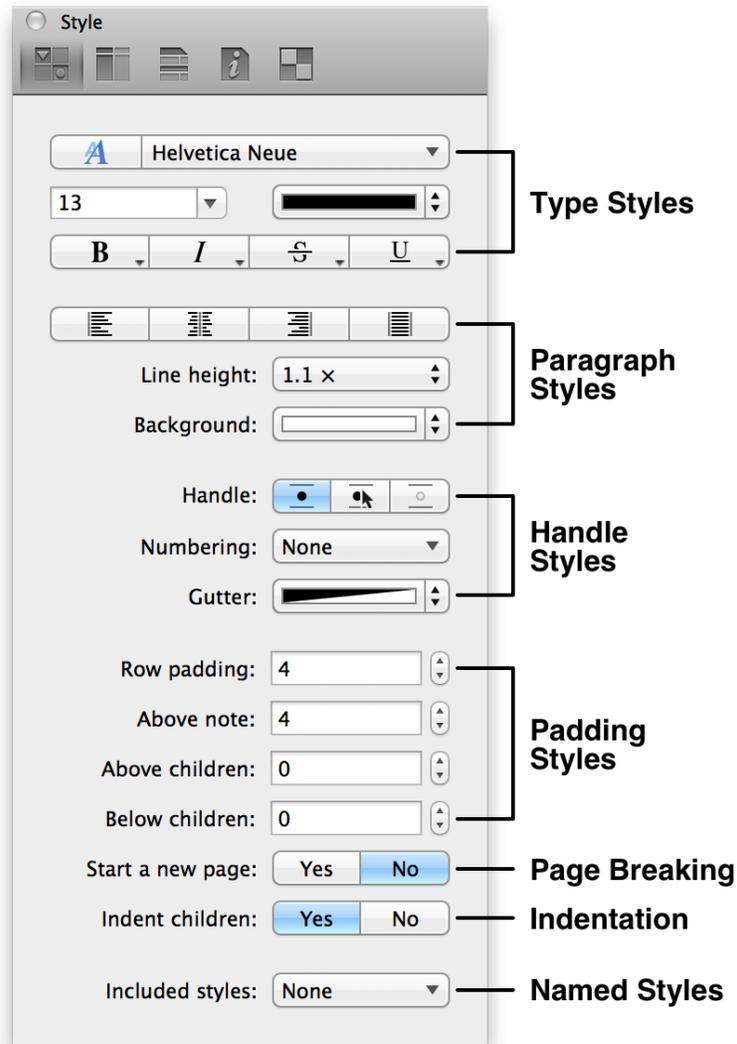
As you're working in OmniOutliner, you'll notice that whenever you are entering text in a row or column cell that the Style inspector is always available in the inspector window. However, if you want a particular inspector to show up as you're moving along, you can double-click on the inspector icon in the Inspector window's toolbar. This places a tiny green lock on the inspector so that it's always available. To unlock the inspector, just double-click it again.



This comes in particularly handy when you want to examine the styles in your outline. Just place the lock on the Style Attributes inspector, and click around in your document to examine and tweak the styles as needed.

Style Inspector

Use the Style inspector when you want to change the appearance of the rows in your document.



Type Styles

This section of the Styles inspector provides you with a variety of controls for changing the appearance of the text in your document:

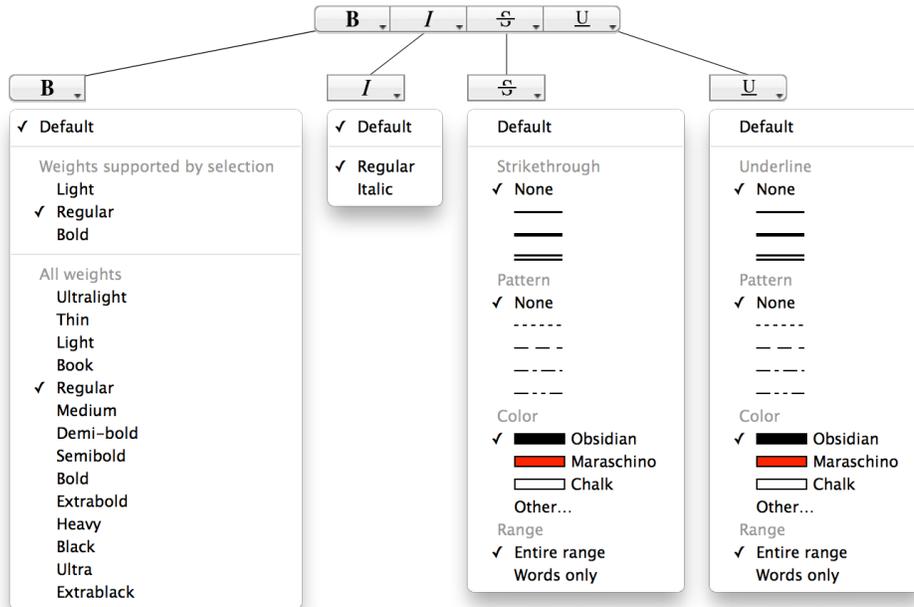
Typeface, Size, and Color

Choose the font, size, and color for the selected text or row.

Bold, Italic, Strikethrough, and Underline

Click to apply the default Bold, Italic, Strikethrough, or Underline styles to the selected text or row. At the lower right of these buttons

you'll see a teeny-tiny triangle that's pointing downward. This lets you know that there are additional options from which you can select. You can either click on the tiny arrows, or just click and hold to reveal the optional attributes menus:



Paragraph Styles

Choose the attributes for the rows within your document:

Text Alignment

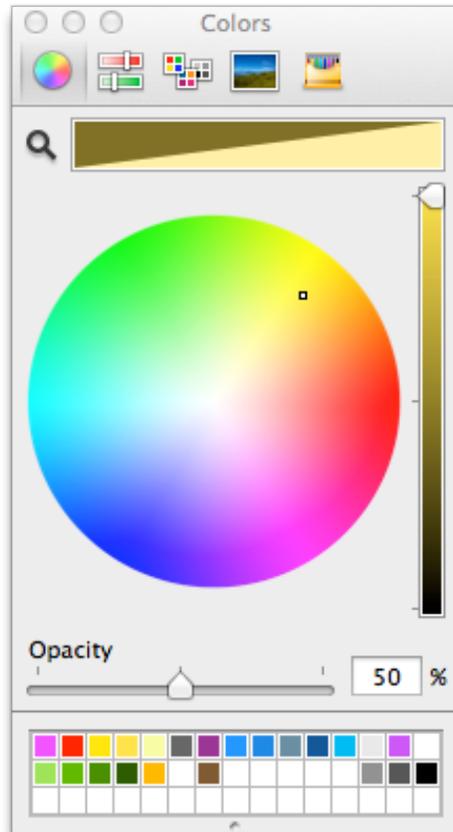
The next row of buttons are used to left-, center-, right-align, or justified text.

Line Height (Pro)

Choose from a range of single to double spacing for your document. Line height adds spacing above the text within a row, where as Padding adds spacing between rows.

Background

Set the Background color for the selected row. Click the arrows on the right edge to choose from one of the presets we've offered, or click the color bar to open the Colors palette. Use the Colors palette to choose a custom color.



Row Features

Use these controls to set row features:

Handle (Pro)

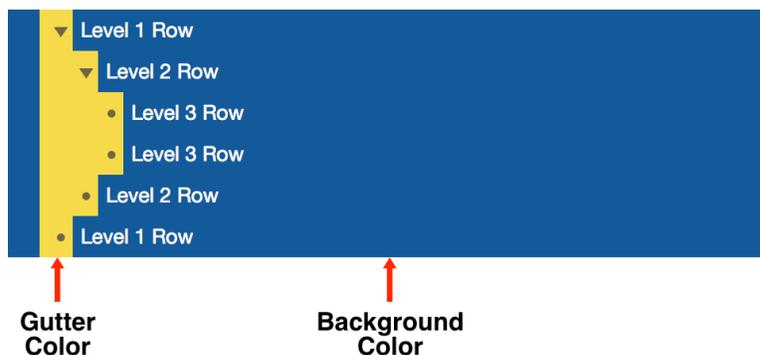
Determines whether the row handle is always visible, only visible when you hover over the row, or never visible. Hiding the row handles makes it a little harder to drag and reorder your content; however, you can use the options in **Organize ▶ Move** to move rows up, down, left, or right.

Numbering

Choose a numbering style to use for the rows in your document. See [Row Numbering](#) for more information about numbering styles.

Gutter

Set a color to use for the gutter (the area where the row handle and status checkbox appear). Click the arrows on the right edge to choose from one of the presets we've offered, or choose **Other** to open the Colors palette.



The main purpose of a Gutter color is to help you see which level a row is on. As you can see in the previous image, the Gutter expands inward as child rows are added. If you set a Background color but do not set a Gutter color, the Gutter adopts the Background color automatically.

Padding Styles (**Pro**)

Padding, unlike Line Height, adds spacing inside of rows, notes, and their children:

Row Padding (**Pro**)

Set the amount of space (in pixels) above and below the text within the row.

Above Note (**Pro**)

Set the amount of space above an inline note.

Above Children (**Pro**)

Set the amount of space between a parent row and its children.

Below Children (**Pro**)

Set the amount of space below a parent row's children.

Page Breaking (**Pro**)

Choose to insert a page break before a row:

Start a New Page (**Pro**)

Determines whether the currently selected row forces the start of a new page. When you select this option, a red dashed line appears above the row, as if you were going to cut the document with a pair of scissors. This is specifically for the purposes of printing or exporting to PDF.

Indentation (Pro)

Choose whether child rows are indented:

Indent Children

Choose whether to indent a row's children. If you choose to not indent children, it might be hard to determine which is the parent and which is the child row. As such, you might want to style child rows differently, perhaps giving them a different background color or shade, reducing the font size, and so on.

Named Styles

Choose a Named style to apply:

Included Styles

This popup menu lets you select and apply one of the Named styles, listed in the lower portion of the Styles section of the Sidebar.

Column Inspector

The Column inspector has two popup menus for setting column attributes:

Type

New columns always start out as Rich Text; however, you can change this to suit the needs of your document to one of the following:

Checkbox

Unlike the Status Checkboxes that live as an integral part of the main Topic column, Checkbox columns can be used for anything from giving you another checkbox to tick off, to monitoring the state of something, and even for ratings. You can add as many Checkbox

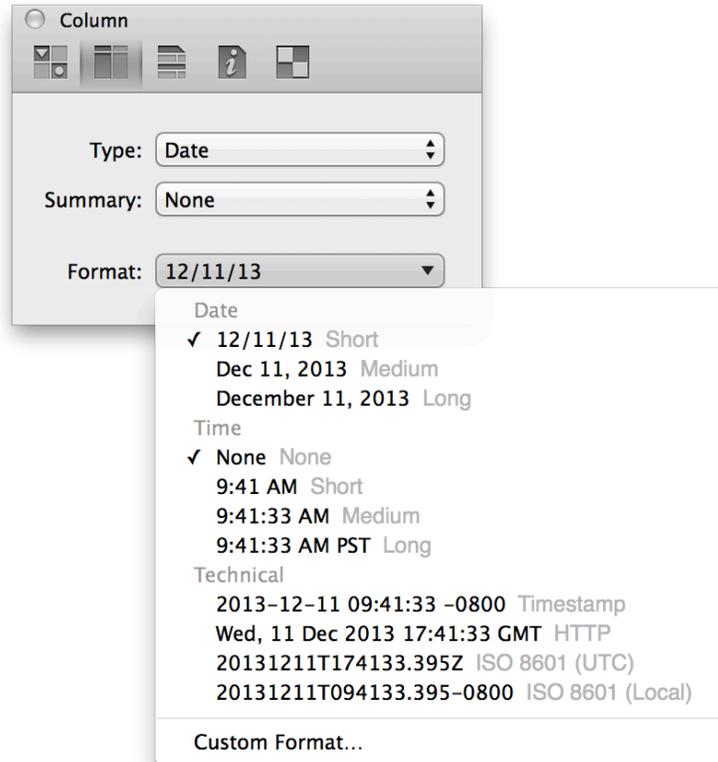
columns as you'd like, and you can show or hide them as needed with the options in **View ▶ Columns**.

When used in combination with OmniOutliner's sorting features (**Organize ▶ Keep Sorted** or **Organize ▶ Sort Outline**), checkboxes can be used to denote a Yes or No (binary) state for almost anything—feature comparisons, things that need to be reviewed, and so on.

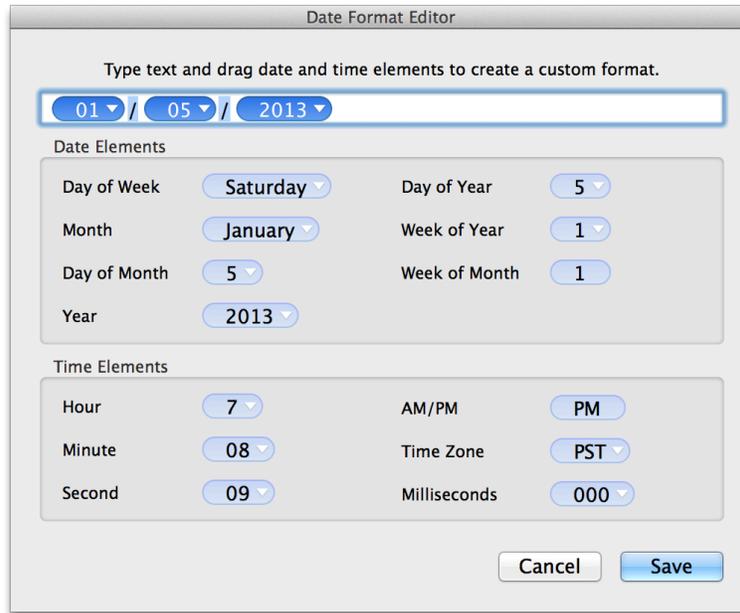
Date

Choose a date and optional time format to use in the column. The default date string is based on your locale, which is configured in **System Preferences ▶ Language & Region**. One of the many additions to OmniOutliner 4 is a new and improved date parsing logic that lets you type stuff like *now*, *yesterday*, *2d*, *september*, *thu*, or *-5w* in a date column and have it know what you mean.

Use the **Format** menu to choose how dates and times are displayed in a date column. You can choose from a Short, Medium, or Long time string, or opt for something a bit more technical such as **ISO 8601 (UTC)** so you can show your friends just how nerdy you are.



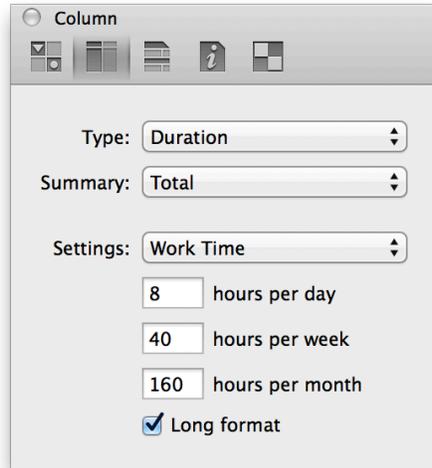
Not satisfied with the options and formats we've provided? Choose **Custom Format** to create your own special date and time string to use for a Date-formatted column.



To use the Date Format Editor, just drag the items you'd like as part of the date/time string up to the field at the top of the dialog window. Items, such as **Day of the Week** or **Month**, have additional formats which you can choose by clicking the downward-pointing arrow. By default, the custom format uses slashes (/) for the delimiter, but you can enter another character (or different characters) or remove them entirely, if you'd like.

Duration

Use a Duration column for estimating or tracking the amount of time a task or project takes. For example, if you're using OmniOutliner to make a list of all the things you want to do this weekend, you might add a Duration column so you can estimate how long it will take you to categorize your comic book collection and whether you should prioritize that over painting the garage.

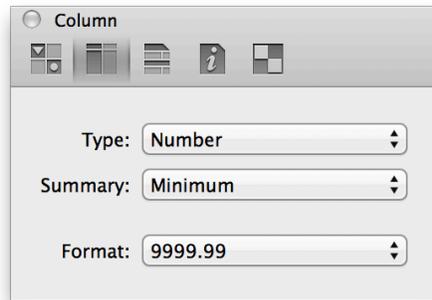


Use the **Settings** popup menu to select from **Work Time**, **Calendar Time**, or to use a **Custom** time of your choosing. OmniOutliner formats the duration time based on the Setting you've chosen; for example, **12h** in Calendar Time is equivalent to **1d 4h** in Work Time (assuming an 8 hour workday). If you turn on **Long format**, OmniOutliner spells out the time durations; for example, **1d 4h** gets expanded to **1 day 4 hours**.

Use the **hours per day**, **hours per week**, and **hours per month** fields to adjust or fine-tune the Duration settings to suit your needs. For example, we prefer to have an 8-hour workday so we can have a great work-life balance, while the folks at a law firm or ad agency might enjoy working 80 hours per week.

Number

Choose Number as the column Type when you have a numbered value that you'd like to monitor.



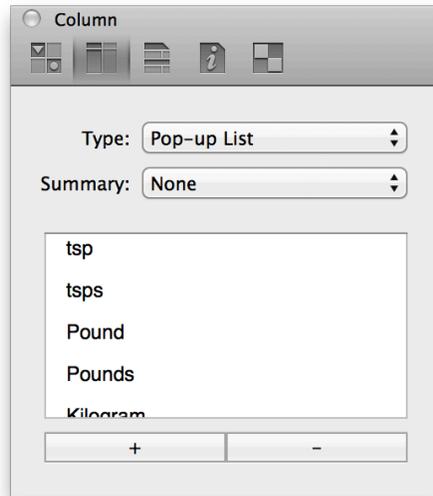
Using the **Format** popup menu, you can choose from:

- **9999.99** — Numbers with a two-digit decimal.
- **10000** — Whole numbers; decimal numbers are rounded up or down to the nearest whole number. For example, 2.67 is rounded up to 3, while 3.14 is rounded down to 3.
- **10000%** — A whole number percentage; a decimal number that gets entered is rounded up or down to the nearest whole number. For example, **2.67%** is rounded up to **3%**, while **3.14%** is rounded down to **3%**.
- **99.99%** — Percentages with a two-digit decimal value, if needed. For example, **99%** appears as that and not **99.00%**, while **3.14159%** is rounded to **3.14%**.
- **\$9999.99** — Use this option for representing currency values based on the localized values you've set in **System Preferences** ▶ **Language & Region** ▶ **Region**. For example, if your Region is set to **Asia** ▶ **Japan**, the currency value would show up with the Yen symbol (¥).

Pop-up List

Choose the Pop-up List type when you have a column of repeating “options” that you need to choose from. For example, if you have a template document for creating recipes, you might want to create a

Measurements column with options such as ounce, ounces, gram, and grams (to name just a few). Now when you go to enter an amount, all you have to do is select the applicable option from the Pop-up List rather than having to enter the text over and over again.



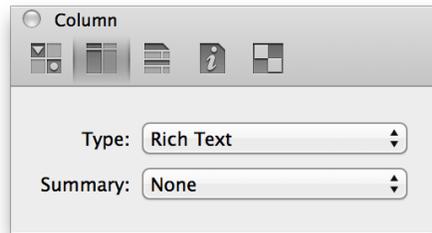
Pop-up cells now use OmniFocus's Smart Match technology. As you type characters, OmniOutliner tries to guess the item you want—and those characters don't have to be at the beginning or contiguous either.



What's more, if you enter a new term that isn't already defined as part of the Pop-up List, you can enter **Command-Return** to add it to the list.

Rich Text

Choose Rich Text for regular text; this is the default column style for new columns.



Summary

The first and most important thing to know about Column Summaries is that they only appear on the parent row for a group. For example, if you have a two column document that lists pricing information for a bunch of parts that you need, and you choose **Summary ▶ Total**, you'll probably wonder "*Where's the total at?*". But if you group those rows together by selecting the rows and choosing **Reorganize ▶ Group (Option-Command-L)**, you'll see all kinds of magic happen.

Component	Price
Bicycle Upgrades for 2014	\$ 4366.91
Drivetrain	\$ 1168.95
• Shimano XTR PD-M985 Pedals	\$ 179.00
• Shimano XTR FC-M985 Cranks	\$ 444.99
• Shimano XTR FD-M985 Top Swing Dual Pull Front Derailleur	\$ 89.99
• Shimano XTR RD-M985 Shadow Plus SGS Rear Derailleur	\$ 199.99
• Shimano XTR 10-speed Chain	\$ 54.99
• Shimano XTR 10-speed MTB Cassette	\$ 199.99
Suspension/Wheels	\$ 1117.99
• Mavic CrossMax SLR 29 Mountain Wheels	\$ 999.99
• WTB Weirwolf AM TCS MTB Tires	\$ 118.00
Front End	\$ 1599.98
• Loaded Precision Napalm Carbon Riser Bar	\$ 229.99
• Loaded Precision Napalm Carbon 120mm/6° Stem	\$ 249.99
• Fox 34 Talas 29 140 Fit Ctd w/trail adjust (Fork)	\$ 1120.00
Other	\$ 479.99
• Brooks C17 Cambium Saddle	\$ 160.00
• Crank Brothers Kronolog Dropper Seatpost	\$ 269.99
• Cables	\$ 50.00

First, you'll notice that all of the rows you selected were indented and placed under a new parent row. And in that parent row, the total appears in the column with all of the pricing information, but with a gray background to the cell. The gray background is a transparent layer of black, which slightly darkens any background color you've assigned to the row style.

The options in the Summary popup menu change depending on what you've selected in the Type popup menu:

Checkbox

Summary options include:

None

There is no summary; the summary cell displays a checkbox that acts completely independent of its children.

State

Displays an empty checkbox if no items have been checked off, a checkbox with a dash inside if some items have been checked, or a filled checkbox if all of the items have been checked.

Hidden

The summary cell is empty, regardless of the state of the other checkboxes in the column.

Date

Summary options include:

None

There is no summary.

Minimum

The summary cell displays the earliest date (or time) in the column from among the child rows.

Maximum

The summary cell displays the latest date (or time) in the column from among the child rows.

Hidden

The summary cell is empty.

Duration

Summary options include:

None

There is no summary.

Total

The summary cell displays the total of all cells in the column.

Minimum

The summary cell displays the lowest duration in the column.

Maximum

The summary cell displays the highest duration in the column.

Average Leaves

The summary cell displays the average duration for the child items under the parent row in that column.

Hidden

The summary cell is empty.

Number

Summary options include:

None

There is no summary.

Total

The summary cell displays the total of all cells in the column.

Minimum

The summary cell displays the lowest number in the column.

Maximum

The summary cell displays the highest number in the column.

Average Leaves

The summary cell displays the average number for the child items under the parent row in that column. This only averages descendant leaves, which means that all contained rows with no children—no matter how many levels away they are—are averaged.

Hidden

The summary cell is empty.

Pop-up List

Summary options include:

Minimum

If the Pop-up List contains numbers, the summary cell displays the lowest number used in that column. If the Pop-up List contains text, the summary cell displays uses the first entry in the Column inspector.

Maximum

If the Pop-up List contains numbers, the summary cell displays the highest number used in that column. If the Pop-up List contains text, the summary cell displays the last entry in the Column inspector.

Hidden

The summary cell is empty.

Rich Text

Summary options include:

None

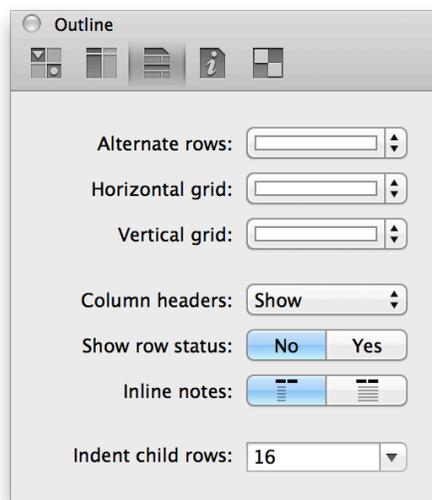
There is no summary.

Hidden

The summary cell is empty.

Outline Inspector

Use the Outline inspector when you want to adjust the styles that affect the outline as a whole, rather than styles that can be applied to a certain part of the outline.



Alternate rows

Use the Alternate rows option to set a background color to alternating rows in your document. You can choose from one of the preset color options (Subtle Gray, Subtle Green, or Subtle Blue), or click the color bar next to it to choose a custom color or background pattern from the Colors palette.

Horizontal grid

Use the Horizontal grid option to add a thin line of color between the rows in your document. You can choose from one of the preset color options (Subtle Gray, Strong Gray, Subtle Green, Strong Green, Subtle Blue, Strong Blue, Subtle Red, Strong Red), or click the color bar next

to it to choose a custom color or background pattern from the Colors palette.

Vertical grid

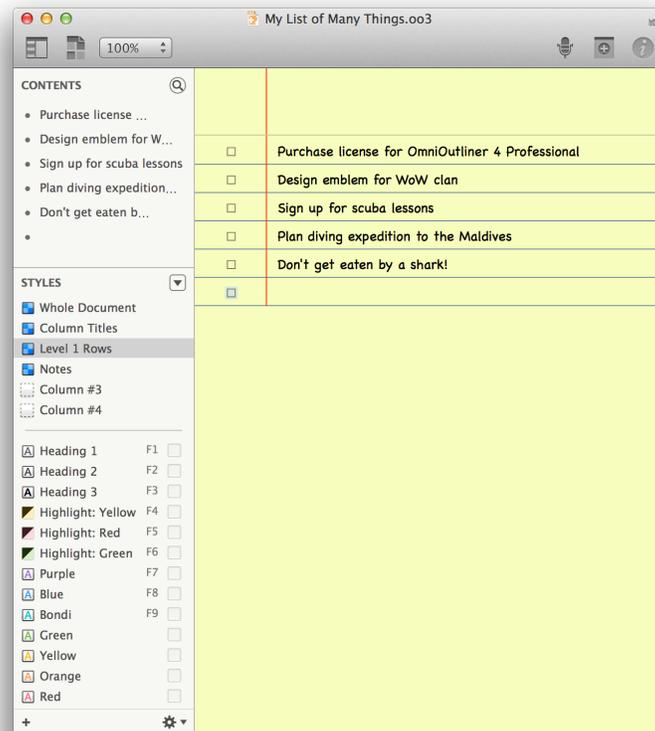
Use the Vertical grid option to add a thin line of color between the columns in your document. You can choose from one of the preset color options (Subtle Gray, Strong Gray, Subtle Green, Strong Green, Subtle Blue, Strong Blue, Subtle Red, Strong Red), or click the color bar next to it to choose a custom color or background pattern from the Colors palette.

Column headers

Choose whether to Show or Hide column headers. The **Automatic** option shows any text you've entered for a header, but hides the generic **Topic** header if you have only one column in your document. You can also do this by choosing **View ▶ Column Headers ▶ Show/Automatic/Hide**.

Using Grid Lines and Columns for Creative Templates

You can combine the Horizontal and Vertical grid to create documents that resemble a ruled sheet of paper. Just add another column and then change the font size for column headers, and you'll get something like this:



Of course, that required a bit more tweaking (and not much, honestly), but you get the general idea, right? OmniOutliner makes it easy for you to customize documents and create templates that suit your every note-taking need.

Show row status

Choose this option if you want to display the Status Checkboxes along the left side of every row. These are different from the Checkbox option you can set on a column, in that Status Checkboxes are always located on the left edge of and follow the indentation level of your rows.

Inline notes

These buttons let you decide whether Inline Notes will wrap based on the first column of the document, or if they'll span the width of all columns. Inline notes, which are styled using the Notes style, appear beneath the text you've entered in a row.

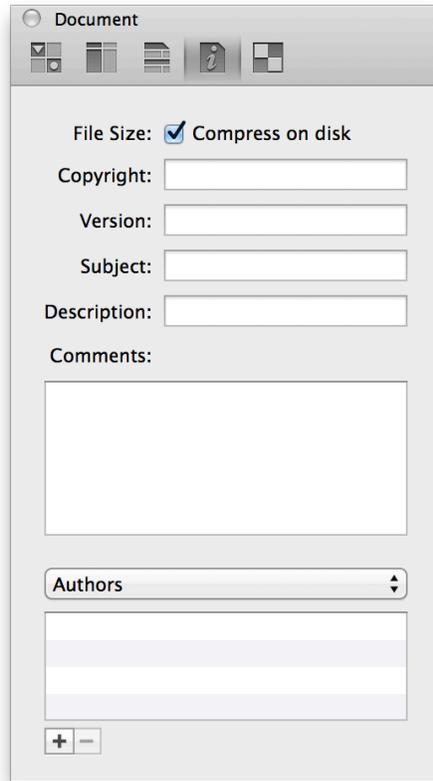
(Pro) If you have OmniOutliner Pro, you can opt to have Inline notes appear in a separate pane at the bottom of the Outline (**View ▶ Notes ▶ Display in Pane**).

Indent child rows **(Pro)**

This pop-up menu lets you choose how far child rows will be indented. You can choose from one of the options we've provided (either 0, 8, 16, or 24 pixels), or enter a value of your liking and press **Return**.

Document Inspector

Use Document inspector to provide additional information (metadata) about the document you're working on. The information you provide here stays with the document and makes it easier to find on your Mac using Spotlight.



The first option in the Document inspector, **Compress on disk**, determines how your Outliner document is saved. This option is document-specific, which means that you can turn this on or off depending on your own needs.

If you check this box, OmniOutliner uses a simple Zip compression to squish your files down to the smallest size possible. Compressed files don't just take up less space on your hard drive; they're also easier to send to your friends and colleagues via email.

Leaving the **Compress on disk** option unchecked means your files won't be compressed, and they'll show up in the Finder as taking up a bit more space. You should consider leaving this unchecked if you are saving your OmniOutliner files in a version control or document management system,

or so you can more easily run scripts (Python, Ruby, and so on) on the XML inside your document.

The metadata fields in the Document inspector include:

Copyright

Copyright statements typically declare who owns the legal rights to something. Since this is your thing, or your company's thing, enter your name or your company's name into this field.

Version

Version numbers are used to indicate a certain "state" of a project. For example, 0.1 might be a beta release while 1.0 might be an initial release. You can even go as far as adding a sub-version number, so you'll end up with something along the lines of 4.0.1 when you correct a typo or something. The choice is yours, really.

Subject

Enter something similar to what you would enter as the subject line for an email; for example, *Staff project assignments for OmniOutliner 5*, or *Fried Chicken Recipe*.

Description

Describe the contents of your OmniOutliner file. For example, *A list of bike parts*, or *Actors who've portrayed Batman*.

Comments

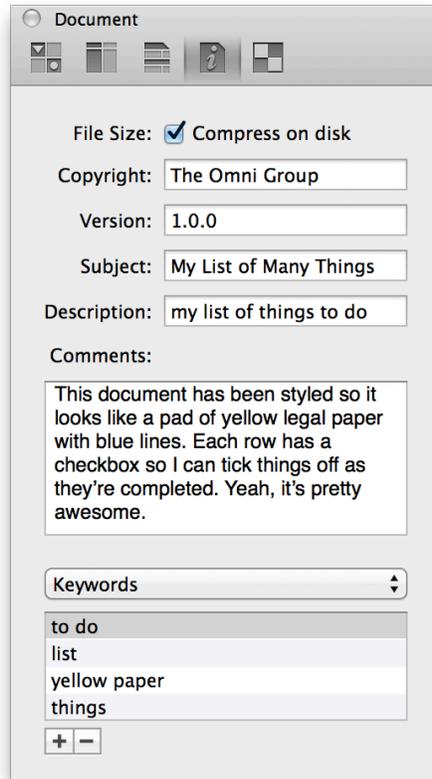
Use the Comments field to enter more information about the file you're working on. For example, you could provide additional detail about a project this file is associated with, or notes to yourself about other things that you'd like to add to the file.

Beneath the Comments field, you'll notice a popup menu that's set to **Authors**. This menu works in conjunction with the combo box below for creating metadata attribute and value pairs. What's that? Too nerdy? Okay, let us explain...

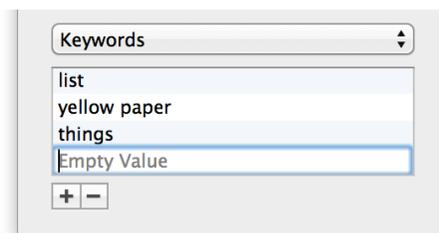
...Metadata, as you may know, is tiny bits of "embedded" information that can be included in files, images, and even audio and video recordings. OS X uses this metadata to fuel the search capabilities on your Mac by indexing this information and making it available to Spotlight. The metadata information you enter here, however, has two parts: an *attribute* and its *value*. In this case, the attributes are the options you'll find in the popup menu: Authors, Organizations, Languages, Keywords, or Projects. Now here's the fun part: You get to enter anything you'd like as the *value* (or *values*) for those attributes! The important thing to note here, though, is that once entered the *attribute* and its *value* are bound to each other, sort of like Arnold Schwarzenegger and Danny DeVito in the movie *Twins*. When combined, the two make for an unbeatable team when it comes to adding unique metadata to your documents.

Here's how to create a metadata attribute and value pair using the popup menu and the combo box:

1. Select one of the options in the popup menu (Authors, Organizations, Languages, Keywords, or Projects, as further described next).
2. Click the **Add** button (the + sign) at the bottom of the Document inspector.



3. When you click **Add**, the focus changes to the box in the middle so you can enter information about the item you've selected in the popup menu.



4. When you've finished entering some text, either press **Tab** or **Return** to save the metadata information to the file.

If you decide later that you want to remove an item, select it with the mouse and then click **Remove** (the – button, next to the Add button). To

edit an existing item, double-click to highlight the text, and then enter your changes and press Tab or Return to save the changes.

Options in the popup menu include; all of these options can have multiple entries:

Authors

Enter the name of the person who created the document. This would be you, or perhaps you and a colleague, or you and the cat that won't get off your lap while you're working at 2 a.m. Of course, your friends at work might question why Sir Snugglepuss III is contributing to a secret project, but that's for the lawyers to sort out.

Organizations

Enter the name of your company or the organization the document has been created for.

Languages

Enter the language, such as **English** or **Japanese**, or use one of the **ISO 639 language codes**, such as **en** or **jp**, to name a few.

Keywords

Ah, this is where you can have the most fun! Keywords increase the find-ability of your files more than anything else. This is because you can add tons of keywords to your file, and they can be as descriptive or outrageous as you'd like. The key (no pun intended) here is that the keywords are what help make each document unique when it comes to finding files with Spotlight.

Projects

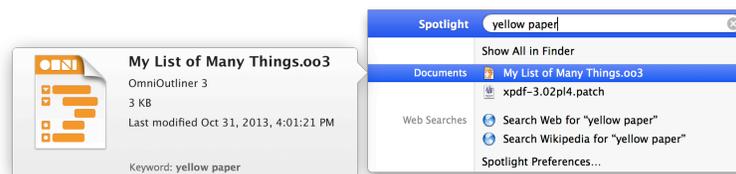
If you've created an Outliner file for a specific project, enter the project name here.

Tip

If you are using other Omni apps, such as OmniGraffle or OmniPlan, you can enter similar metadata in the Document inspectors for those apps. So, let's say that you're tracking a project in OmniPlan, creating charts and diagrams in OmniGraffle, and managing your to-do list in OmniFocus, you could enter similar information for each project. That way, if you do a Spotlight search for a particular project, you could just enter that project name in the Spotlight search field and see all of your related documents in one place (even if they aren't saved in the same place).

As noted earlier, the information you enter in these fields, and through the popup menu, are registered on your Mac as additional metadata for that particular OmniOutliner file. When you do a Spotlight search, by clicking the Spotlight menu in the menu bar (or with **Command-Space**), all of the information you've entered into the Document inspector helps to make your files easier to find.

Now, rather than opening a Finder window and trying to remember where you hid that super secret file, you can press **Command-Space**, enter one of the keywords or something else that helps you identify the file, and Spotlight brings it up in the list of possibilities.



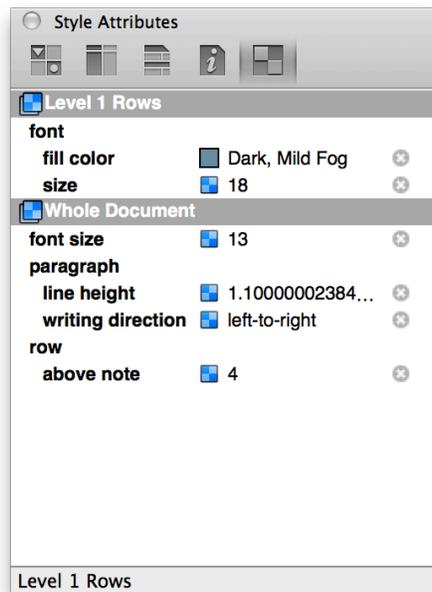
To open the file, highlight it with your mouse and press **Return**.

Tip

Actually, Spotlight works with every file on your Mac, not just the OmniOutliner files that you've assigned metadata to. Spotlight is a system-level service that catalogs all of the files on your Mac automatically to help you find the file (or files) you need quickly.

Style Attributes Inspector

At a quick glance, the Style Attributes inspector is a little deceiving. What appears to be a mild-mannered window that shows you all of the styles in your document, is actually quite powerful.



As you apply styles to the rows and columns in your OmniOutliner file, those styles start to show up here in the Style Attributes inspector. What you see in the Style Attributes inspector depends on where the cursor is currently placed in the document. The previous image shows that the cursor was on a **Level 1 Row**, and that the text in all Level 1 Rows are to be styled as 18pt text with a color of Dark, Mild Fog (a subtle grayish-blue, in case you were wondering).

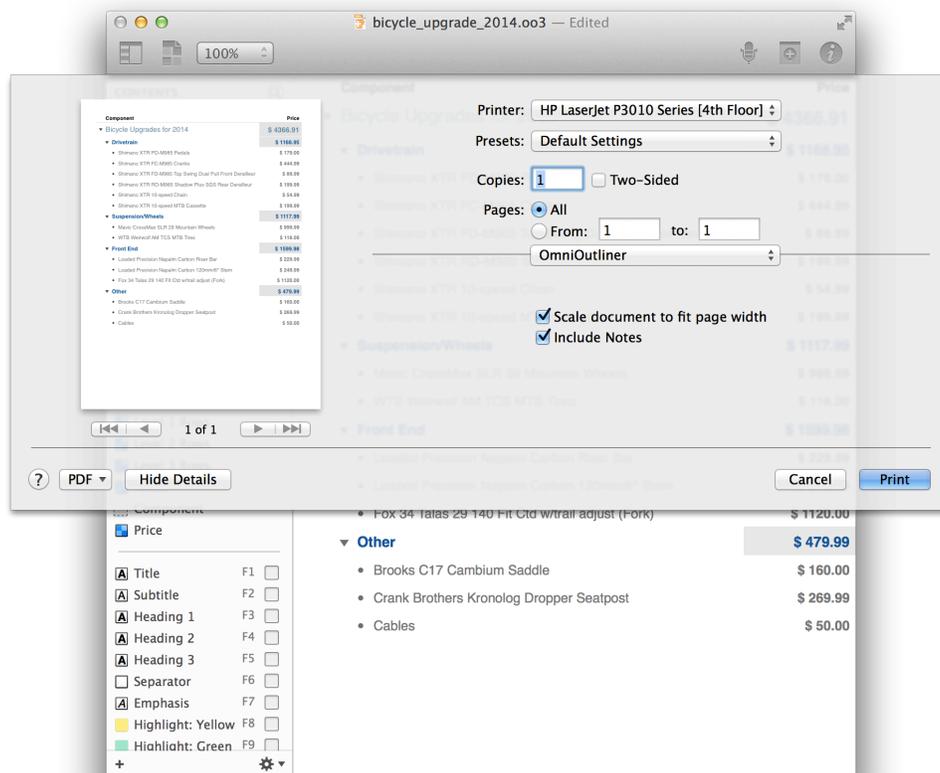
But let's say that you want the text in the Level 2 Rows to have that same grayish blue color. The easy way to apply that style is to click on the colored square in the middle of the inspector and then drag and drop that onto the Level 2 Row style in the Styles pane of the sidebar, and voila! The text for all Level 2 Rows now have that same grayish-blue color. This makes it easy for you to try out different styles. And remember, if you don't like a change you've made, you can always press **Command-Z** to undo your last change and revert everything to normal.

What makes the Style Attributes inspector particularly useful, however, is that the order of the styles shown matches the priority of how the styles are applied to the selection. This allows you to see how the selected item's style is calculated, so you can figure out why it looks the way it does. Additionally, you can click the little  button at right to clear any styles that are causing you trouble without having to find the control you used to set them.

Printing from OmniOutliner

Whether you've finished working on your OmniOutliner document, or if you're in the process of checking styles and formatting prior to submitting an outline, one of the things you'll eventually want to do is print your outline. When it comes to printing, OmniOutliner has a few tricks up its sleeve that can make the printed form even more amazing.

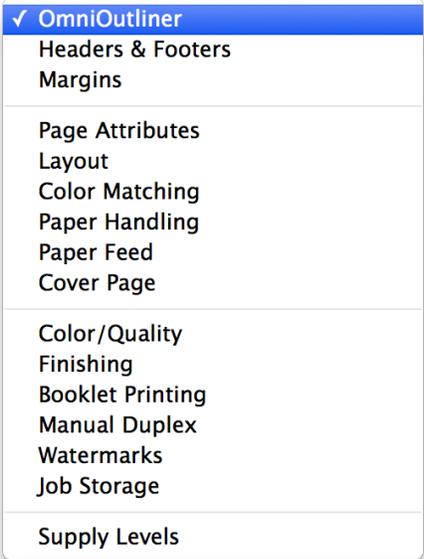
To print, choose **File** ▶ **Print** or use the standard keyboard shortcut, **Command-P**. This opens the standard Mac print dialog box, but as mentioned, we've added a few OmniOutliner-specific things to the print panel.



On the left side of the printing panel, you'll see an exact replica of your OmniOutliner document, showing you how it will look when printed. You can use the arrow buttons beneath the preview to page through your document so you can verify that everything is in order. By default, the **Scale document to fit page width** and **Include Notes** options are checked.

(Pro) Another thing you might want to check, if you have OmniOutliner Pro, is that pages are breaking according to any manual page breaks you've added using the Styles inspector.

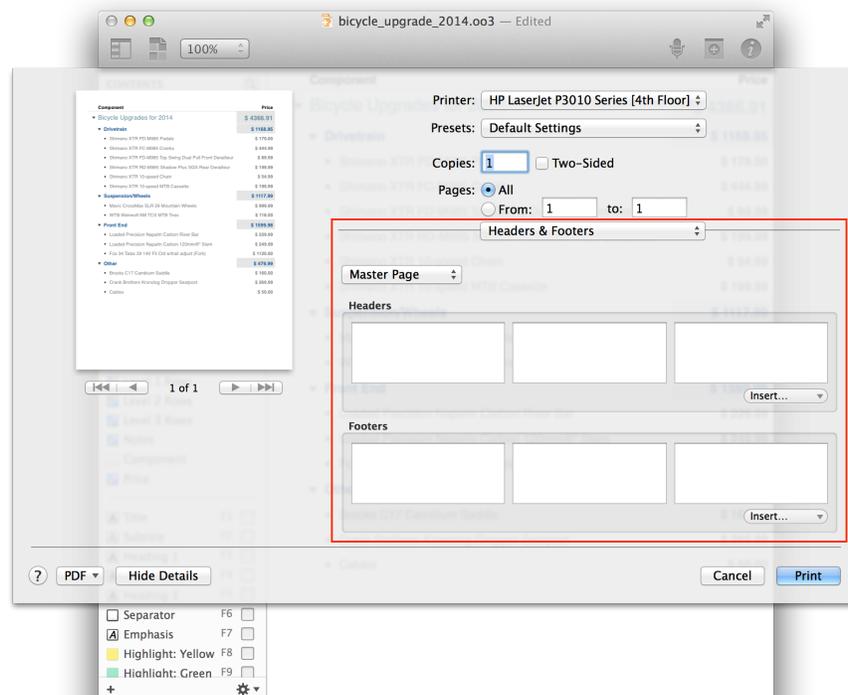
Just above those two options, you'll see a popup menu that says **OmniOutliner** on it. If you click that, you'll see a whole bunch of other printing options, but the ones we want to focus on are **Headers & Footers**, **Margins**, and **Page Attributes**.



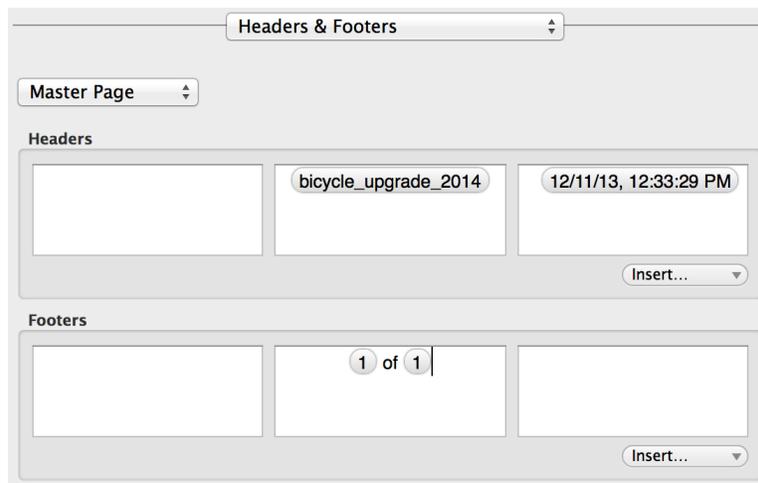
The **Headers & Footers** print settings gives you the ability to add details about your OmniOutliner document to the top and bottom of the printed

page. The six boxes (three each for Headers and Footers) represent the left, center, and right positions on the page. Use the popup just above the Headers section to apply the headers and footers to the **Master Page, First Page, Odd Pages, or Even Pages**. Use the **Insert** popup just below the right-most box to insert one or more of the following:

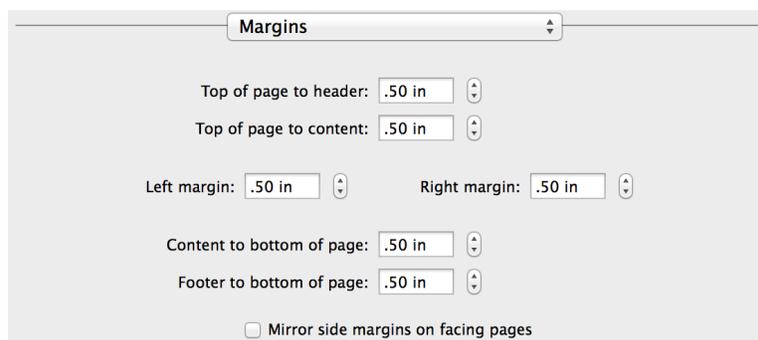
- Page Number
- Section Title
- Last Modification Time
- Page Count
- Document Title
- Document Name
- Print Time



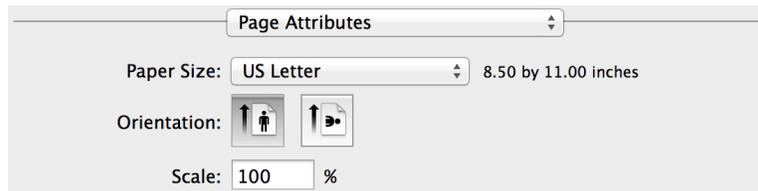
Just click inside one of the six boxes and choose the option from the **Insert** menu. For example, the following image inserts the Document Title and Print Time in the center and right boxes of the Header, respectively. For the Footer, the center box uses a combination of Page Number and Page Count (with the word “of” added in between), which would print as **1 of 10** or **2 of 10**, and is particularly useful for long documents.



Use the **Margins** print options to control how the contents of your document appears within the bounds of a printed page. The Top and Bottom controls let you set the distance from the edge of the page to any Headers or Footers you’ve applied, and from the Headers and Footers to the actual content. To adjust any of the margin values, you can either click in the box and enter something different, or use the little arrows off to the right to increase or decrease the value.



Finally, use the **Page Attributes** print options to choose a Paper Size and set the Orientation to either portrait or landscape. If you have a document with a lot of columns, switch the Orientation to landscape so everything will fit on the page.



(Pro) And speaking of columns, OmniOutliner prints only the visible columns in your document. If you don't want to print a particular column, choose **View ▶ Columns** and then choose from the submenu the column you want to hide. This “unchecks” that column in the menu. You can also **Control-click** on a column heading and then choose **Hide** from the contextual menu. To later make the column reappear in your document, choose **View ▶ Columns ▶ Show All Columns**.

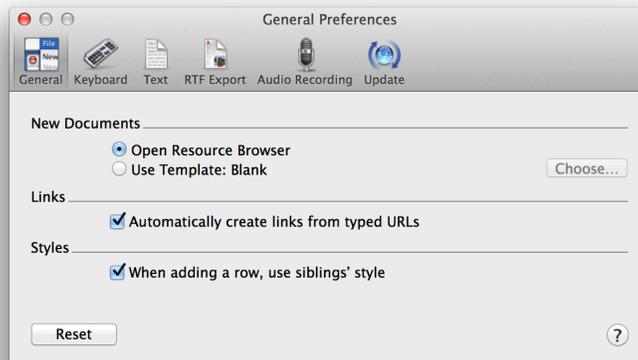
OmniOutliner Preferences

Now that you've had a chance to get cozy with OmniOutliner 4's interface, let's take some time to examine the app's preferences. To open OmniOutliner's preference pane, choose **OmniOutliner ▸ Preferences**, or use the ultra-handly keyboard shortcut, **Command-Comma (⌘-,)**. There are six preference panes that you can use to further customize OmniOutliner 4 to suit your needs, and your work style.

Each preference pane includes a Reset () and Help (

General Preferences

Use the General preferences pane to make changes that apply across the board for everything you do in OmniOutliner.



Options in General preferences include:

New Documents

Choose what happens when you create a new document, by either choosing **File ▶ New** or using the **Command-N** keyboard shortcut. You can choose between opening the new Resource Browser, or creating a new document based on the default template. If you want to change the default template, click **Choose** and then select one of the OmniOutliner template files on your Mac.

Links

Turn on or off the ability to make Internet URLs (such as <http://www.omnigroup.com>) clickable. If you uncheck this option, the URLs you enter are rendered as Rich Text and clicking them will not open the URL in your default web browser.

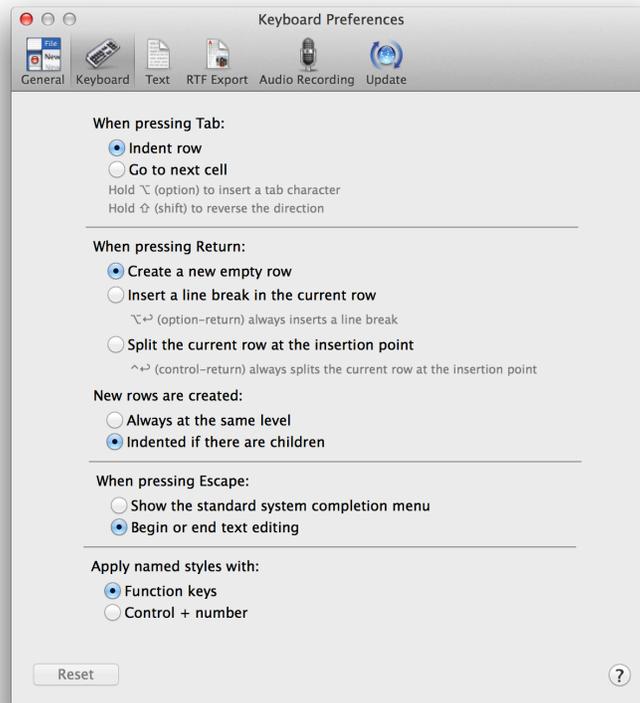
Styles

Turn on or off the setting for a new row to adopt the style from that row's sibling. When this is checked and you add a new row (by pressing **Return** or **Shift-Return**), that new row adopts the styles of the row you were previously in. When unchecked, any new styles you create revert to the default styles from the template you've chosen.

For example, let's assume that you have a new document that uses the Blank template and you've unchecked this option. In your first row, you click the row handle and assign an orange background to the row. You then enter some text and press **Return**. The next row doesn't pick up the orange background color; instead, it has a white background (which is the default for the Blank template). Now, if the **Styles** option were checked, the next row you created from the orange row would pick up the same orange background color.

Keyboard Preferences

Use the Keyboard Preferences to adjust how OmniOutliner reacts when you press certain keys.



These options are as follows:

When pressing Tab

By default, pressing **Tab** will indent a row. You can change this to **Go to next cell** by switching the radio buttons. Holding the **Option** key will insert an actual Tab character, while pressing **Shift-Tab** will outdent the current row.

When pressing Return

By default, pressing **Return** creates a new empty row. You can change this to **Insert a new line in the current row** by switching the radio buttons; however, pressing **Option-Return** always inserts a new line in the current row.

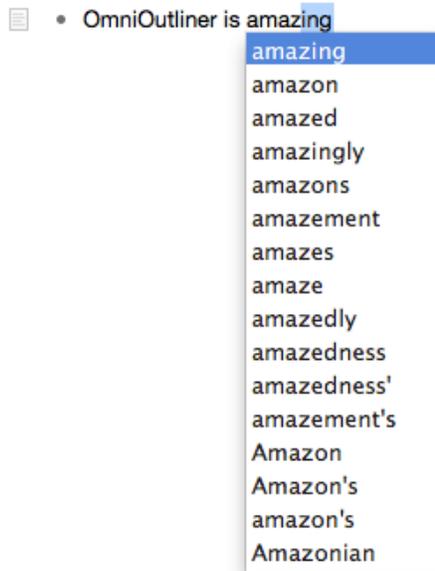
Similarly, with **Split the current row at the insertion point** set, you can split the current row into two rows at the cursor's position by pressing Return. Even when this option is turned off, you can press **Control-Return** to split a row in two.

New rows are created

By default, new rows are **Indented if there are children** when you press **Return**. If you switch the radio button to **Always at the same level**, new rows are created at the same level as the line your cursor is on when you press **Return**.

When pressing Escape

There are two options for what happens when you press the Escape key. By default, pressing the **Escape** key opens the system-wide completion menu. This comes in particularly handy when you aren't quite sure how to spell something. You can just type in the first few characters of the word, press Escape, and a popup menu appears with a list of possible options. To accept one of the options, you can click it with your mouse, or use the **Down Arrow** key to move the highlight to the word you need and then either press **Tab** or **Return** to accept that option.



Use the other option, **Begin or end text editing**, for times when you're doing quick entry and need to move around in your Outline, editing rows and column cells more efficiently. Pressing **Escape** after entering some text in a row will highlight that row. Press **Escape** again places the cursor at the end of the line so you can continue typing.

Apply named styles with

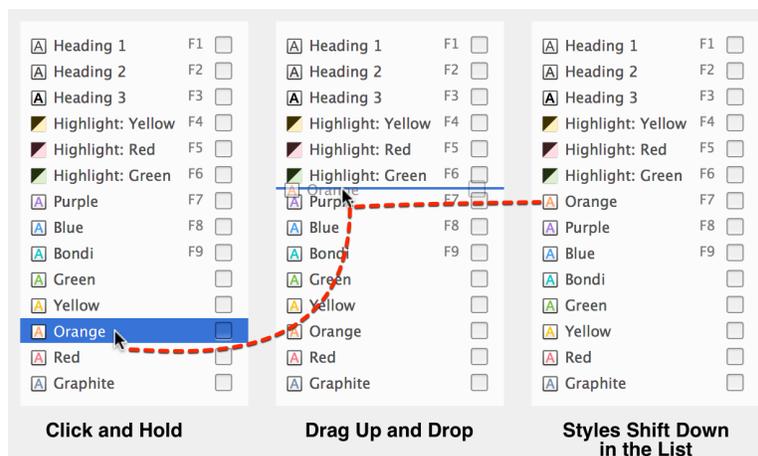
By default, you can use one of the **Function keys** to apply one of the Named styles to the current row. (Named styles are found in the lower portion of the Styles section of the Sidebar.) To use the function keys (F1 through F9), you'll need to press and hold the *fn* key and then press a numbered function key to apply the style. For example, to apply the Heading 1 named style, use **fn-F1**.

You can change this to **Control + number** by switching the radio buttons in the preference pane. This can make it easier for you to apply named styles since using the *fn* key along with the various function keys can be a little awkward.

Rearrange the Named Styles for Different Keyboard Shortcuts

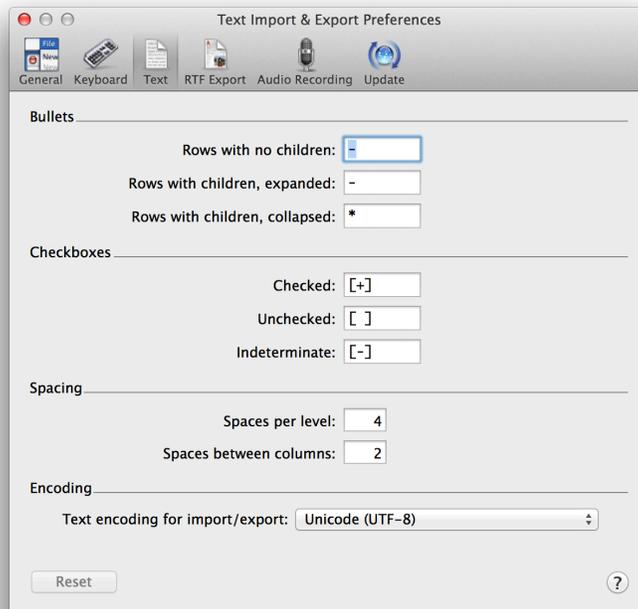
As you may have noticed, not all of the Named styles in the Sidebar have a keyboard shortcut equivalent. Additionally, you cannot directly assign (or reassign) these keyboard shortcuts in **System Preferences > Keyboard > Shortcuts** since these aren't tied to a menu item.

However, you can rearrange the Named styles by dragging and dropping them into different positions in the list. For example, if you find that you're using the Orange text style very often, you can drag that up in the list and drop it into a position where it will have a keyboard shortcut.



Text Import & Export Preferences

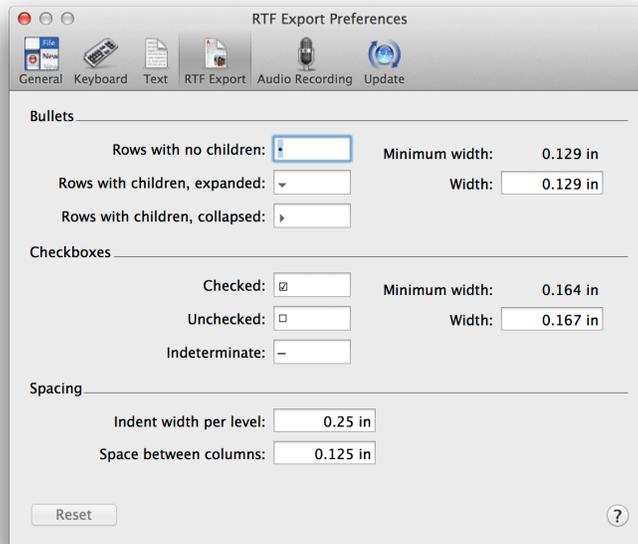
OmniOutliner also offers the ability to import or export raw text files. To assist with this, the Text Import and Export Preferences lets you view (or change) the characters used to represent elements in an OmniOutliner document.



The document elements you have control over include Bullets, Checkboxes, and Spacing, and there's also a popup menu that lets you select the text encoding type for importing and exporting operations.

RTF Export Preferences

Similar to the Text Import and Export Preferences, OmniOutliner can also export documents to Rich Text Format (RTF). As such, we've preset some characters and sizes based on the object types for Bullets and Checkboxes, and have set Spacing for indents and the distance between columns.



You can use the defaults, or change these up however you see fit, and based on your own document needs.

Audio Recording Preferences

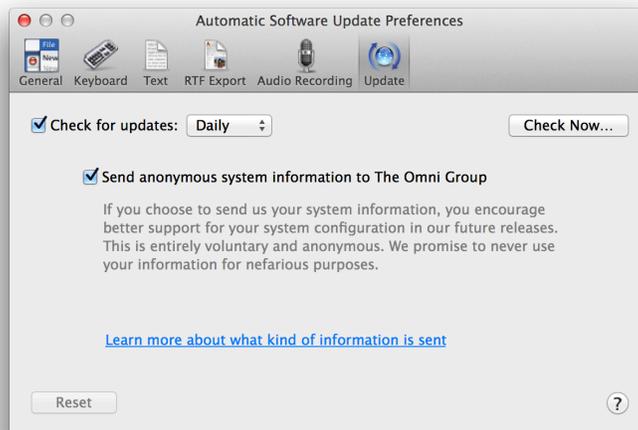
Use the Audio Recording preferences to see which microphone you're using for recording, change the compression level, or to access the temporary recording folder.



As you record audio, OmniOutliner creates a temporary file in which to dump the audio bits you're recording. When you've finished recording, that temporary file goes away and moves into your OmniOutliner document. However, if OmniOutliner quits unexpectedly while you are recording, all hope is not lost. The temporary recording is still there, and the easiest way to get to it is from this Audio Recording preference panel. Just click the **Open Folder** button, and you'll be whisked away to a new Finder window that's open to the where the temporary file is stored. You can then drag that into OmniOutliner, or dump it in the trash if you want to start over from scratch.

Automatic Software Update Preferences

There's nothing worse than out-of-date software, and one way to ensure that you're always using the latest and greatest version of OmniOutliner is with the Automatic Software Update Preferences.



You can choose to check for updates either Daily (the default), Weekly, or Monthly, or if you're really impatient you can click **Check for Updates Now**.

There is also a checkbox to **Send anonymous system information to The Omni Group** when you check for an update. This is totally optional, so feel free to uncheck that box to turn this off. However, if you do choose to send information about your system (no personal information is ever sent), we promise to never ever share that information with anyone. The Omni Group only uses this information so we know which hardware and operating system types we need to target for future software updates.

Note

If you've purchased your copy of OmniOutliner through the Mac App Store, you can disregard this preference pane as you will be notified in the App Store app when a new update is available. However, we still offer Mac App Store customers the option to send us anonymous system information when updating.

Sharing OmniOutliner Files with Other Apps

As we've mentioned, OmniOutliner is the bees knees when it comes to working with text. And for all of your text-hungry needs, we've made it easy for you to import text files and export in a variety of formats.

Exporting from OmniOutliner

You've finished working on your masterpiece, and now it's time to share your OmniOutliner file with everyone else around you. For those times when you need to send an OmniOutliner file to someone who doesn't have OmniOutliner (you *have* told them how awesome OmniOutliner is, right?), we've included a bunch of export file formats that you can choose from. To export an open file, choose **File ▶ Export (Option-Command-E)**, and then choose one of the following options from the **File Format** pop-up menu:

Apple Keynote

Creates a *.key* file that you can open in **Keynote**. This file can be opened on Keynote for Mac.

Note

OmniOutliner 4 exports Keynote files that are *only* compatible with iWork '09 and earlier. These files *are not* compatible with Keynote version 6.0 or higher on the Mac, and Keynote for iOS.

HTML

Creates a like-named folder that contains an *index.html* file along with the necessary images and attachments that make up your OmniOutliner file. All of the styles you've used in OmniOutliner are converted to CSS and included in the *index.html* file.

HTML (Dynamic)

This option gives you everything that comes with the basic HTML export, plus an added *outliner.js* file. This JavaScript file is what makes the file dynamic, in that you can open and close the sections of your document just as you would in OmniOutliner.

Microsoft Word document (**Pro**)

Exports your beautifully-crafted OmniOutliner file into a *.docx* file that you can open in Microsoft Word. This is an OmniOutliner 4 Pro-only option.

MS Word (HTML) (**Pro**)

Exports a *.dohtml* file which you can open in Microsoft Word.

OmniOutliner 3

Exports a *.oo3* file which can be opened in either OmniOutliner 3 or 4 for Mac, and in OmniOutliner 1 and 2 for iPad. These files are not compatible with OmniOutliner 2 for Mac and earlier.

OmniOutliner 3 Template

Exports a *.oo3template* file which can be opened in either OmniOutliner 3 or 4. These files are not compatible with OmniOutliner 2 or earlier.

OPML (Outline Processor Markup Language)

Exports a *.opml* file, which is the industry standard XML format for outlines, and is a great way to share documents with other outlining

apps. Only the contents of your OmniOutliner document is exported as OPML; all of the fancy style stuff you've applied isn't included in the OPML file.

Plain Text (fixed width)

Exports a raw *.txt* file without any styles. Child rows are indented with four spaces, and columns are aligned using spaces. You can adjust the number of spaces used in **OmniOutliner** ▶ **Preferences** ▶ **Text** ▶ **Spacing**.

Plain Text (with tabs)

Exports a raw *.txt* file without any styles. Child rows and columns are aligned using tabs rather than spaces, making this type of export useful for importing into spreadsheet apps such as Numbers or Excel.

RTF (Rich Text Format)

Exports a *.rtf* file, which retains all of the styles you've applied in OmniOutliner. RTF is a standard document format that most word processors, such as Word and OS X's TextEdit app can open. Export to RTF if your Outliner document contains only text and numbers.

RTFD (Rich Text Format with Attachments)

Exports a *.rtfd* file, which retains all of the styles you've applied in OmniOutliner. What sets RTFD apart from RTF is that an RTFD file can contain attachments, such as any images, audio clips, or anything else you attach to your OmniOutliner file. Most word processors, such as Word, Pages, and OS X's TextEdit can open *.rtfd* files.

Importing to OmniOutliner

For those times when OmniOutliner isn't handy, or for when you receive an OmniOutliner-compatible file from a coworker, it's nice to know which

filetypes you can open in OmniOutliner. To import a file, just use **File ▶ Open** and then select one of the following file types in the Open dialog:

- *.opml* — A valid OPML file.
- *.oo3* — Files created with OmniOutliner 3 or 4.
- *.oo3template* — Template files created with OmniOutliner 3 or 4.
- *.txt* — Plain text and tab-delimited files.
- *.rtf* — All text styles and colors are preserved when importing an RTF file.
- *.rtfd* — As with RTF files, all text styles and colors are preserved, and any images are also brought along for the ride. Images are automatically scaled to the column width.

Tip

OmniOutliner cannot open files created or exported as *.csv* (Comma-Separated Values). Instead, use a tab-delimited file and save it with a *.txt* file extension.

Sharing OmniOutliner Files with OmniGraffle

Additionally, you can share OmniOutliner files with OmniGraffle and create awesomely beautiful things from what on the outset might just look like finely-styled text. Now you can take those texty things and make them look even more awesome in OmniGraffle.

1. Open OmniGraffle and choose **File ▶ Open**.
2. In the Open dialog, choose any file whose extension is *.oo3*.
3. Click **Open**.

4. OmniGraffle presents you with the **Import Outline** dialog. At the top, be sure to select one of the themed templates, such as Circles or Lines, and then in the **Outline Columns** combo box, choose how you want column data to be styled (if your OmniOutliner has column data).

You can use OmniGraffle's powerful Outline Editor (in OmniGraffle, choose **View ▶ Show Contents ▶ Outline Editor**) to add depth to the diagram you've created. When you're finished, go ahead and export the OmniGraffle file as an OmniOutliner file and then open that up in OmniOutliner 4. The styles you've used in OmniGraffle should carry over to OmniOutliner. If you want to change those back to something else, choose **Format ▶ Apply Template Theme** and then select a template whose styles you'd like applied to the OmniOutliner file.

Every Single Menu Item and Keyboard Shortcut

Here it is, an exhaustive list of every single menu item, along with any corresponding keyboard shortcut, available in OmniOutliner 4. This section doesn't just provide a once-over of the available commands, you'll also find hidden gems—*tips*—to help you select the right menu option (or combination thereof) so you can unlock your OmniOutliner Power User badge and be the envy of all your friends and coworkers.

Note

There is no real *badge*, per se, that you can unlock for mastering OmniOutliner. That would be an Easter Egg, and we don't do that sort of thing here. (Not sure what an Easter Egg is? [Look here.](#))

If you find a menu option that doesn't have a keyboard shortcut but you really-really want one, you can always define new ones in System Preferences. For details on how to do this, don't miss the sidebar in [Getting to Know OmniOutliner 4](#).

The OmniOutliner Menu

About OmniOutliner

This opens the About box so you can learn more about OmniOutliner, including the current version and build number (in case you need that for technical support). And speaking of technical support, we've also included handy email links so you can inquire about Sales info or to contact our Support Humans with any questions you may have about using OmniOutliner (or any of our other products for that matter). And if you'd rather speak to one of our Support Humans, just dial the phone

number we've included; we're here Monday through Friday from 10 a.m. to 5 p.m. Pacific Time.



Check for Updates

If your Mac is connected to the Internet, selecting this option will connect with our servers to see if an updated version is available for OmniOutliner. If one is available, you'll be asked first if you want to update, and if so, the new build will download and install on your Mac.

Note

You won't see the **Check for Updates** option if you've purchased OmniOutliner 4 from the Mac App Store.

Preferences (Command-,)

This opens the **Preferences** window so you can further configure OmniOutliner to suit your needs and your work style.

Licenses

This opens the Licenses window, in which you can enter or delete a license, or if you are using an evaluation copy of OmniOutliner, you can click **Buy Licenses** to be taken to our online store where you can purchase a license key.

Note

You won't see the **Licenses** option if you've purchased OmniOutliner 4 from the Mac App Store.

Services

Here you'll find a list of applications that OmniOutliner can share information with. Just select something in OmniOutliner, and then choose this menu option to see which apps you can send stuff.

Hide OmniOutliner (Command-H)

Hides OmniOutliner's window, suppressing it to the land of hidden apps. To bring OmniOutliner back into view, either click the app icon in the Dock, or use Command-Tab to use OS X's application switcher to switch back to OmniOutliner.

Hide Others (Option-Command-H)

Banish the windows of other open apps to the land of hidden apps. As with Hide OmniOutliner, to bring a hidden app back into view, either click that app's icon in the Dock, or use Command-Tab to use OS X's application switcher to switch back to the app you need.

Show All

Choose this menu option to quickly bring all of the hidden app windows out of hiding.

Quit OmniOutliner (Command-Q)

This does what it says; it quits OmniOutliner. If you haven't saved the file before, you'll be prompted to save the file (giving it a name and specifying a location to save the file to). If you are working in a file that you've previously saved, you don't have to worry about saving before you quit, thanks to OS X's Auto Save feature. But, if you're really paranoid, you can use Command-S to save the file before using Command-Q.

The File Menu

Options for creating, opening, renaming, exporting, and printing documents and templates:

New (Command-N)

Create a new document using the default template.

Resource Browser (Shift-Command-N)

Opens the Resource Browser.

Open (Command-O)

Open an existing file.

Open Recent

OmniOutliner keeps track of recently opened files and includes the filenames in this menu so you can reopen a file and continue your work.

Close (Command-W)

Close the current window; use Option-Command-W to close all open OmniOutliner windows. You will be prompted to name and new, Untitled, document files before the window is closed.

Save (Command-S)

Save the contents of the current document.

Duplicate (Shift-Command-S)

Create a duplicate copy of the current document. The exact contents of the current window are copied into a new document window, which has the filename in the titlebar highlighted so you can enter a different name for the file. The file will be saved in the same location as its parent.

Rename

Choose this option to highlight the filename in the document's titlebar so you can enter a new name for the file.

Move To

Choose this option to open a sheet and select another location on your Mac's hard drive to store the file.

Export (Option-Command-E)

Export your OmniOutliner document to one of the following formats mentioned in [Exporting From OmniOutliner](#).

Save As Template

Saves the current file as an OmniOutliner template file. Template files are stored on your Mac in `~/Library/Containers/com.omnigroup.OmniOutliner/Data/Library/Application Support/The Omni Group/OmniOutliner/Templates`.

Note

If you've purchased OmniOutliner 4 from the Mac App Store, swap out `com.omnigroup.OmniOutliner` with `com.omnigroup.OmniOutliner.MacAppStore`, or `com.omnigroup.OmniOutlinerPro.MacAppStore` if you have OmniOutliner 4 Pro.

Revert To

Opens Time Machine so you can sift through earlier saves of the current document and restore it from an older save.

Print Setup (Shift-Command-P)

This opens the Print Setup dialog, so you can apply any previously saved Settings, choose which printer to format the document for, select a paper size, orientation, and scale for the document.

Print (Command-P)

Sends the current document to your default printer. You can use Print Setup (Shift-Command-P) to choose a printer other than your default printer; for example, if you have a document that needs to print in Tabloid-Landscape on a color printer.

The Edit Menu

Options for editing your content:

Undo (Command-Z)

Undoes the previous change you've made. OmniOutliner supports unlimited Undo, so go ahead and hit Command-Z a few dozen times and watch all of your hard work disappear.

Redo (Shift-Command-Z)

Just like Undo, Redo puts back something that you've undone but have decided that you really want to be there. For example, let's say that you were testing out the strength of hitting Command-Z repetitively, but then you want to put all of that back. Yep, that's right; you can just hit Shift-Command-Z to put everything back in place.

Cut (Command-X)

Deletes whatever you've selected and places that on the Clipboard so you can paste it back later, or just ignore it.

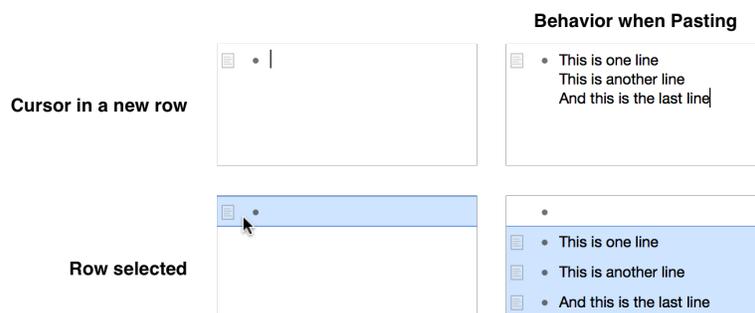
Copy (Command-C)

Copies whatever you've selected and places that on the Clipboard so you can paste it somewhere else, or in another document, later.

Paste (Command-V)

Pastes in whatever is on the Clipboard.

Paste's behavior is slightly different in OmniOutliner than what you find in some other apps. If you cut or copy text that has line breaks from another app and paste that into OmniOutliner, all of the text appears on a single row, but with those line breaks intact.



However, if you wanted each line to appear on its own row in OmniOutliner, first select a row by clicking in the gutter, and then use **Edit ▶ Paste** (or **Command-P**) to paste in the text.

Paste and Match Style (Option-Shift-Command-V)

Unlike Paste, this option pastes in whatever is on the Clipboard, but applies any predetermined style for that row or column in your OmniOutliner to the pasted material.

A Note About the Clipboard, Styles, and Cut-Copy-Paste

Whenever you use Cut or Copy, whether within OmniOutliner or in some other app, all of the attributes of that thing you cut or copied are placed in OS X's Clipboard. The Clipboard is a systemwide feature that only holds one thing at a time; presumably because once you've cut or copied something, chances are you're going to want to paste that in somewhere else real soon.

Additionally, OS X also examines the thing you've cut or copied and carries with it any styles that are applied, such as the font, typeface or size, and color. That's where **Paste and Match Style (Option-Shift-Command-V)** comes in handy. Let's say that you've copied something from a website, and that some of that text is blue, some green, and some of it is bolded. When you copy that text in Safari, OS X copies it exactly as it is on that webpage. But really, all you want is that text, right? You don't need the colors or styling; you just want to insert the text into your OmniOutliner file and have it match the style of the document you're working on. So, rather than using the default **Command-V** to paste in the content, you should use **Shift-Option-Command-V** instead. This clears out any styles that were copied along with the text, and applies the style for the selected row or cell automatically.

This will save you a lot of time from having to reapply your own document styles to the things you've pasted in, whether that info came from a webpage, a Word or Pages document, or from another OmniOutliner file.

Duplicate Selection (Command-D)

Copy and paste the current selection into the current document automatically.

Delete

Deletes the current selection. Unlike Cut, however, Delete just wipes out whatever you've selected without placing it on the Clipboard.

Select All (Command-A)

Select every single thing in your OmniOutliner document.

Deselect All (Shift-Command-A)

Unselect every single thing in your OmniOutliner document. This is sometimes handy for when you're not sure if something is selected and you're about to paste something in.

Set Status

Use one of the following to set the status of a row's checkbox:

- Checked
- Unchecked
- Calculated
- None

Edit Note (Command-')

Edit the Note for the currently selected row or column cell.

Attach File

Attach a file to the document.

Start/Stop Audio Recording

Add an audio clip to your document.

Insert Time Stamp

Inserts one of the following time stamps on the current row:

Short Date (Command-/)

Inserts a localized numerical date string; for example: **10/05/2013**.

Long Date (Option-Command-/)

Inserts a localized numerical date string; for example: **October 5, 2013**.

Time (Command-@)

Inserts a localized numerical time string; for example: **12:34:56 PM**.

Short Date and Time (Command-|)

Inserts a localized numerical date and time string; for example: **10/05/2013 12:34 PM**.

Long Date and Time (Option-Command-|)

Inserts a localized numerical date and time string; for example: **October 5, 2013 12:34:56 PM PDT**.

Find

Use one of the following search options:

Show/Hide Search (Option-Command-F)

Displays the search field in the Sidebar. When the search field is displayed, a **Hide** button appears to its left. Click the Hide button, or use the Hide Search menu option (or the same keyboard shortcut) to make the search field go away.

Find (Command-F)

This opens the Find dialog, in which you can enter something to search for. You can search for a text string, such as **The Omni**

Group, or you can use a regular expression, such as **Omni\s**, to search for the word **Omni** followed by a space (**\s**).

Find Next (Command-G)

Find the next instance.

Find Previous (Shift-Command-G)

Find the previous instance.

Use Selection for Find (Command-E)

Uses the current selection as the search criteria when using Find. You can use this option before or after opening the Find dialog (Command-F).

Spelling

Choose one of the following options for checking the spelling and grammar in your document:

Spelling (Command-:)

Checks the spelling and grammar in the current document.

Check Spelling (Command-;)

Just checks the spelling in the current document. Who cares about grammar, anyway?

Check Spelling as You Type

Turned on by default, this option checks your spelling as you type. If you misspell something, the word will get a red squiggle underneath and OS X offers up similar words from which you can select the correct spelling.



Speech

You can have OS X read aloud the text in the current row or note using the system voice you've set up in the Dictation & Speech preferences (**System Preferences** ▶ **Dictation & Speech** ▶ **Text to Speech**).

Start Speaking

Start speaking the text in the current row.

Stop Speaking

Stop speaking.

LinkBack

LinkBack is a way of embedding content between applications in such a way that you can always go back and edit the content with the software used to create it originally.

Edit LinkBack Item

If you have pasted LinkBack content from another app, select the object and use this command to open the content in the original app.

Remove LinkBack for Item

Selecting this option removes the LinkBack feature from the selected content so that this content can only be edited within OmniOutliner.

See the [LinkBack](#) section of the [Reference](#) for more details.

Start Dictation (fn fn)

When dictation is turned on, OmniOutliner uses OS X's speech recognition capabilities to convert the words you speak into text. When you've finished, just press **fn fn** again to stop dictation.

Special Characters (Control-Command-Space)

This opens the special characters popover, which gives you access to a broader set of characters, including arrows, symbols, and even Emoji.



The Format Menu

Options for formatting the contents of your document, including font and text styles, row numbering, and more:

Copy Style (Option-Command-C)

Copies the style of the current selection and places that on the Clipboard.

Paste Style (Option-Command-V)

Pastes the previously copied style onto the current selection.

Tip

The Copy and Paste Style options are very useful for cleaning up your document. Once you have a row styled just right, you can select **Copy Style** and then select the other rows that you'd like to have the same style, and then select **Paste Style**.

Clear Style (Control-Command-Delete)

Removes any styles that have been applied to an item and reverts the selection to the default style.

Font

Change the typeface and style of your text:

Show Fonts (Command-T)

This opens the Fonts window, from which you can choose another font, its typeface, and size.

Bold (Command-B)

Turns on or applies **bold** to the current selection.

Italic (Command-I)

Turns on or applies *italics* to the current selection.

Underline (Command-U)

Turns on or applies an underline to the current selection.

Outline

Turns on or applies an outline to the current selection.

Bigger (Command-+)

Increase the size of the current row or selected text.

Smaller (Command--)

Decreases the size of the current row or selected text.

Kern

Use these options to change the spacing between characters:

- Use Default
- Use None
- Tighten
- Loosen

Ligature

Use these options to control ligatures in your document:

- Use Default
- Use None
- Use All

Baseline

Use these options to adjust the baseline of the current row or selection:

- Use Default
- Superscript
- Subscript
- Raise
- Lower

Show Colors (Shift-Command-C)

Opens the color palette so you can make all of your text chartreuse (if you'd like).

Text

Alignment options for text, images, and attachments:

Align Left

Aligns text and objects to the left margin of the current row or column.

Center

Aligns text and objects based on the midpoint of the current row or column.

Justify

Evenly space the words in a row or column so that multiline text uses the full width of the column.

Align Right

Aligns text and objects to the right margin of the current row or column.

Writing Direction

Change the writing direction:

Right to Left

Change the writing direction from *Left to Right* to *Right to Left*.

Row Numbering

Assign a row-numbering scheme to your document. Row numbers are based on their indentation level. Assuming that a row with no indent is the Parent, the first indented row would be a Child, and subsequent indented rows are Grand Children and Great Grand Children, unnumbered rows would have the following hierarchy:

- ▼ Parent
 - ▼ Child
 - Grand Child
 - ▼ Grand Child
 - Great Grand Child
 - Great Grand Child
 - Grand Child
 - Child
 - Child
- ▼ Parent
 - Child
 - Child
- Parent

The **Row Numbers** menu is split into two parts. The upper section of the menu lets you determine a numbered style to use as the prefix for the rows in your document. If you have set a numbered style other than **None**, the styles in the lower section—**x.**, **x)**, and **(x)**—can also be applied to the row number; for example **1.1.1.**, **1.1.1)**, or **(1.1.1)**, respectively.

Set the formatting for row numbers:

None

When selected, the rows in your document will not be numbered.

1, 2, 3, 4

When selected, the rows in your document are numbered sequentially, starting with **1**.

A, B, C, D

When selected, the rows in your document are lettered sequentially using uppercase letters, starting with **A**.

a, b, c, d

When selected, the rows in your document are lettered sequentially using lowercase letters, starting with **a**.

I, II, III, IV

When selected, the rows in your document are numbered sequentially using uppercase Roman numerals, starting with **I**.

i, ii, iii, iv

When selected, the rows in your document are numbered sequentially using lowercase Roman numerals, starting with **i**.

1, 1.1, 1.1.1

When selected, the rows in your document are numbered sequentially using section numbering, starting with **1** for the parent row, **1.1** for the next level of indented rows, and so on.

No Prefix or Suffix

Selected by default, this option implies that no characters will appear before or after a row number.

x.

This places a period after the chosen row number style; for example, **1.1.2..**

x)

This places a closing parenthesis) after the chosen row number style; for example, **1.1.2).**

(x)

This places row numbers in parenthesis; for example, (1.1.2).

Apply Template Theme

Opens a sheet that looks similar to the Resource Browser so you can choose and apply a template theme to the current document.

The View Menu

Options for working within your OmniOutliner document:

Expand All (Control-Command-9)

Expand all of the rows in your document.

Collapse All (Control-Command-0)

Collapse all of the rows in your document.

Expand Row (Command-9)

Expand the current row.

Expand Row Completely (Option-Command-9)

Expands the row and all child rows as well.

Collapse Row (Command-0)

Collapses the current row.

Collapse Row Completely (Option-Command-0)

Collapses the row and all child rows as well.

Focus (Shift-Command-F)

Brings the current row (and its children) into focus by hiding everything else in your OmniOutliner document. This is particularly helpful, for example, when you want to focus on the outline for a

chapter of a book or a parts list for an engineering project. You can also assign multiple levels of Focus based on the structure of your document. For example, if you have a row with a few nested children, you could assign focus to the one of the child rows, and again to one of its rows if any were nested.

Unfocus (Option-Shift-Command-F)

Removes the previously assigned Focus.

Unfocus All

Removes the Focus as applied to every object in your OmniOutliner document.

Zoom In (Command->)

Magnify the view of your document. You can scale your document up to 400 percent.

Zoom Out (Command-<)

Demagnify the view of your document. You can scale your document down to 50 percent.

Zoom to Actual Size

Automatically scales your document back to 100 percent (normal size). This is particularly helpful when you've zoomed in to 400 percent and want to quickly return to a normal view.

Tip

If you find that you're zooming in and then back to actual size a lot, consider adding a keyboard shortcut for Zoom to Actual Size. Many great Mac apps, such as **Acorn**, use Command-1 to zoom to actual size.

Column Headers

Choose whether column headers are displayed using one of these options:

Show

Displays all column headings.

Automatic

Turns on column headings if there are two or more columns in your document (the Note column does not count).

Hide

Hides all column headings.

Show/Hide Status Checkboxes

Choose to display or hide the clickable status checkboxes. These are helpful for when you an outline that pertains to a project (such as the outline for writing OmniOutliner's documentation) and you want to tick things off as you go.

Tip

Use the status checkboxes in concert with the **Reorganize ▶ Keep Sorted** or **Reorganize ▶ Sort Outline** options for sorting a document's status by checked or unchecked status boxes.

Hide Column (**Pro**)

Hides the column that presently has the focus.

Columns (**Pro**)

Choose which columns to display:

Show All Columns (**Pro**)

Displays all of the columns in your OmniOutliner document.

Note (**Pro**)

Hide or show the Notes column.

Topic (**Pro**)

The Topic column cannot be hidden; it is always viewable.

Note

Since you can change the default name of the column heading from **Topic** to anything else, the options you see in the Columns submenu will reflect the titles you've assigned to the column headings, including text or any Emoji characters you may have used.

Row Text (**Pro**)

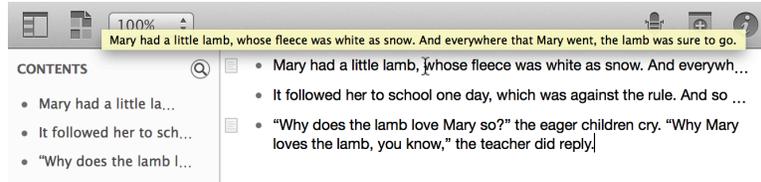
Use these options for displaying text within a row:

Always Show Full Text

The text in a row will always be visible, even when the cursor is in another row.

Collapse When Not Editing

The text in the row will be truncated at the end of the first line (rather than wrapping and continuing) when the row is not being edited. This is particularly helpful when you've imported text from another document (such as a Word document), and you only want to see the text for the row you're working on.



You can still see the text in rows that are collapsed; just move the mouse pointer over another row, and a popup appears with that rows text.

Notes (**Pro**)

While Notes in general are a standard feature of OmniOutliner 4, the ability to control how they are displayed is only available in OmniOutliner 4 Pro. Choose how you want the Notes in your OmniOutliner file to appear; either inline or in a separate pane:

Display Inline

Have your Notes appear inline with the rest of of your content.

Display in Pane

An OmniOutliner Pro feature, you can opt to have the Notes in your OmniOutliner file appear in a separate pane at the bottom of the window.

Show/Hide Note (Option-Command-')

Show/Hide Note Pane (**Pro**) (Option-Command-')

Shows or Hides inline notes or the Note Pane. (Show/Hide Note Pane is an OmniOutliner Pro feature.)

Show/Hide All Notes (Control-Command-')

Toggle the visibility of the Notes in your document.

Hide/Show Sidebar (Option-Command-1)

Choose whether to display the left sidebar that contains Search, Document info, and Styles.

Enter/Exit Full Screen (Control-Command-F)

Make it so OmniOutliner takes over the entire screen. The advantage of going to Full Screen is so you can focus on your work without other distractions. The Inspector sidebar will float on top of your window, and you can still access the buttons in OmniOutliner's toolbar by moving your mouse pointer toward the top of the screen. To exit from Full Screen mode, use either **Control-Command-F** again, or press the **Esc** key.

Show/Hide Toolbar (Option-Command-T)

Choose whether to display the toolbar at the top of the document window.

Create/Remove Document-Specific Toolbar (**Pro**)

This option lets you create a toolbar that's specific to the document you're working on. For example, the tools you need for writing a script might be totally different from the tools you use to create invoices. After creating a document-specific toolbar, you might consider saving that file as an OmniOutliner Template (**File ▶ Save as Template**) so you don't have to recreate that toolbar ever again.

Customize Toolbar

Choose this option if you want to customize the toolbar for **every** OmniOutliner document, except for any templates for which you've created a document-specific toolbar (*see the previous menu option*). See the earlier section, **Customizing the Toolbar** for details on how to customize and create document-specific toolbars (an OmniOutliner Pro feature).

The Organize Menu

Options for adding, removing, and sorting the contents of your document:

Add Row

Insert a row beneath the current row.

Add Inside (Command-})

Inserts and indents a new row beneath the current row.

Add Outside (Command-{})

Inserts and outdents a new row beneath the current row.

Add Column

Inserts a new column after the currently selected column.

Remove Column

Removes the selected column.

Keep Sorted

Choose one of these options to either reset or maintain the type of sorting you'd like for your document:

Clear Sorting

Removes any previously selected sorting choice. This is useful for when you want to resort a document using another method.

Notes, A-Z

Sorts the contents of the document in alphabetical (A-Z) order based on the Notes for each row.

Notes, Z-A

Sorts the contents of the document in reverse alphabetical (Z-A) order based on the Notes for each row.

Status, Unchecked to Checked

Sorts the contents of the document based the state of the Status Checkboxes, from unchecked to checked.

Status, Checked to Unchecked

Sorts the contents of the document based the state of the Status Checkboxes, from checked to unchecked.

Topic, A-Z

Sorts the contents of the document in alphabetical (A-Z) order based on the Topics used in the document.

Topic, Z-A

Sorts the contents of the document in reverse alphabetical (Z-A) order based on the Topics used in the document.

Sort Outline

Sort the items in your document, once, based on the following options:

Notes, A-Z

Sorts the contents of the document in alphabetical (A-Z) order based on the Notes for each row.

Notes, Z-A

Sorts the contents of the document in reverse alphabetical (Z-A) order based on the Notes for each row.

Status, Unchecked to Checked

Sorts the contents of the document based the state of the Status Checkboxes, from unchecked to checked.

Status, Checked to Unchecked

Sorts the contents of the document based the state of the Status Checkboxes, from checked to unchecked.

Topic, A-Z

Sorts the contents of the document in alphabetical (A-Z) order based on the Topics used in the document.

Topic, Z-A

Sorts the contents of the document in reverse alphabetical (Z-A) order based on the Topics used in the document.

Move

Use the following commands to move, indent, or outdent rows in your document:

Move Down (Control-Command-↓)

Moves the selected row down one row.

Move Right (Control-Command-→)

Outdents the selected row.

Move Up (Control-Command-↑)

Moves the selected row up one row.

Move Left (Control-Command-←)

Indents the selected row.

Indent (Command-])

Indents the current row.

Outdent (Command-[)

Outdents the current row.

Group (Option-Command-G)

Indents the selected rows and groups them together under a new parent row.

Ungroup (Option-Command-U)

Ungroups the rows of a selected group. Ungrouping does not remove a parent row; you'll need to delete that separately, if you so choose.

The Window Menu

Options for working with OmniOutliner's windows:

Minimize (Command-M)

Relegates the current window to the right side of the Dock so it's out of your way. To bring the window back into focus, you can either choose **Window** ▶ **[filename]** (look at the bottom of the Window menu for a list of open documents), or just click on the document's icon in the Dock to make it zoom back into view.

Zoom

This resizes the OmniOutliner document window to make it smaller (and sometimes really small), or to snap it back to normal-sized. This performs the same function as clicking the green Zoom button (⊕) in the upper-left corner of the document window.

Show/Hide Inspector (Shift-Command-I)

Open the Inspectors.

Inspectors

Choose to go directly to one of the following **Inspectors**:

- Style
- Column

- Outline
- Document
- Style Attributes

Bring All to Front

Brings all open OmniOutliner windows to the front of any other application windows that are currently open on your Mac.

The Help Menu

Can't figure something out in OmniOutliner? We're here to **Help**:

OmniOutliner Help

Opens the in-app help document that you're currently reading.

Welcome

A little greeting from us to you. (Aw!)

Release Notes

Discover what's new in the latest release of OmniOutliner. Details you'll find here include bug fixes, additions, and changes.

Contact Omni

This queues up an email to omnioutliner@omnigroup.com so you can send us feedback about, or ask for help with, OmniOutliner. We've pre-filled the Subject line of the message with your specific build number and the license key for your version of OmniOutliner so we can better help you.

Reference

LinkBack

LinkBack lets you embed content between applications in such a way that you can always go back and edit the content with the software used to create it originally.

For example, let's say that you've used LinkBack to include some information from OmniGraffle in one of your OmniOutliner documents. To edit the OmniGraffle content that's linked to from your OmniOutliner document:

- Double-click the OmniGraffle content in your OmniOutliner document. This opens an OmniGraffle window containing that content.
- Edit the content in the OmniGraffle window, just as you normally would.
- In OmniGraffle, choose **File** ▶ **Save**; the content in the OmniOutliner window updates automatically.

This makes it easy for you to roundtrip content shared by LinkBack apps without having to update the content in two different places. For more information about LinkBack, and a list of participating applications, check the [LinkBack Project's](#) website.

Licensing

From the menu bar, choose **OmniOutliner** ▶ **Licenses** to see the Licenses dialog. From here you can review and edit your OmniOutliner licenses, which verify that you've actually paid for the software. (Thanks!)

To purchase a license:

- Click **Buy Licenses** and you will find yourself magically transported to the Omni Store, where you can purchase a license for the Mac versions of our software. (Naturally, this only works if you have an Internet connection.)

To add a new license:

1. From the menu bar, choose **OmniOutliner** ▶ **Licenses** to see the Licenses dialog.
2. Click Add License.
3. If you have a license key in an email message, copy and paste both the **Owner** name and the **License Key** into the appropriate fields. If you can't copy and paste the information, you'll have to type it in; make sure you enter everything exactly as it appears in your license message, including the dashes. Also, double-check that the license you're entering really is a license for OmniOutliner 4, and that it is for the correct edition (Pro or Standard); licenses for other Omni products or earlier versions of OmniOutliner won't work.
4. The **Type** drop-down menu is grayed out by default, which limits the license type to **Personal** for the current user account on your Mac. OmniOutliner has two different types of licenses:
 - **Personal:** This license is for your personal use, and will only be available on this computer when you are logged in as the user who installed the license. You can install this license on more than one computer, but only for your personal use. You should not use the software on two different computers at the same time with this kind of license. If a personal license is available, the application will always use it.

- **Computer:** You can use this license on this computer, and so can any other user of this computer. However, you should not install this license on more computers than it has license seats for.

5. If there is more than one user account on your Mac, and you'd like everyone on your Mac to discover the awesomeness that is OmniOutliner, you'll need to jump through a couple of hoops (thanks to Apple's mandated app sandboxing for OS X 10.7 and above). To set up a **Computer** license, follow these steps:
 1. Quit OmniOutliner 4.
 2. Open a new **Finder** window.
 3. Switch the Finder's view settings to Column, by choosing **View ▶ as Columns** (or use **Command-3**). This will make it easier for you to traverse the folder hierarchy on your Mac.
 4. Choose **Go ▶ Computer**.
 5. Choose your Mac's hard drive (if you haven't renamed it, it should be named **Macintosh HD**), and then traverse through the following folders:
 - Library
 - Application Support
 6. In the Application Support folder, create a new folder (choose **File ▶ New Folder**, or use **Shift-Command-N**) and name it **Omni Group**. You will need to enter your admin password to create a new folder at this level.
 7. In the Omni Group folder, create a new folder and name it **Software Licenses**.

8. Open OmniOutliner 4 again, and then choose **OmniOutliner ▶ Licenses**.
9. Click **Add License**.
6. When you click **Add License**, you'll notice that the **Type** drop-down menu is no longer grayed out, and the **Computer** option is available for selection. Now just enter the **Owner** and **License Key** information you received from us, click **Save**, and you should be set.

To remove a license:

1. Select the license you want to remove.
2. Click **Delete License**.

To move a license from one Mac to another:

1. First, find the license file on the old computer. OmniOutliner license files are located in the folder *Library/Application Support/Omni Group/Software Licenses*, where *Library* is either at the top level of your system disk (for computer licenses), or in your Home folder (for personal licenses). The file you are looking for has a name such as *omnioutliner-123456.omnilicense*. Move this file to the new computer.
2. On the new computer, choose **OmniOutliner ▶ Licenses** from the menu bar and then click **Add License**.
3. On the sheet that appears, click **Import License File**.
4. Locate and select the license file that you want to import.
5. Click **Open**. If the license file is compatible—meaning, it is for the same version of OmniOutliner—the license will be added to OmniOutliner on your other system.

Again, the thing to remember here is that license keys are *version-specific*; the license key you have for OmniOutliner 3 is not compatible with OmniOutliner 4 (and vice versa).

Getting Help

When you're in need of help—whether you're trying to figure out how layers work, or if you're having some other issue with OmniOutliner—it's good to know that the Support Humans at The Omni Group are always available to lend you a hand.

The OmniOutliner Website

The **OmniOutliner website** is always a good place to find the latest information about OmniOutliner.

Forums

The Omni Group maintains **online forums** for all of our products, and you're invited! Come share your questions and ideas with other users and Omni staff.

Email Support

If you're stuck, if you have a good idea for the next version of OmniOutliner, or if you just want to let us know how we're doing, go ahead and send us an email. Choose **Help ▶ Contact Omni** from the menu bar to conjure up a message addressed to us, or just **send us an email with your thoughts**. We take support pretty seriously, so you can expect a prompt response actually typed by human hands.

Release Notes

For really meticulously detailed information about what has changed in each minor version of OmniOutliner, check out **Help ▶ Release Notes** from the menu bar.