

Introducing Opal



Opal, at heart, is a remarkably simple program — indeed, part of the point of Opal is that it provides the powerful functionality of an outliner in a form that is easy to learn and easy to use. Still, perhaps you don't want to dive right in and start using a new program you've never met before. You want to get the most out of Opal, right from the start, so you'd like to take a moment, at the outset, to get your bearings. What is Opal all about? What can it do? How do you use it?

That's why this document is here. It introduces you to Opal by means of a hands-on tutorial. The idea is that by actually creating and editing an Opal outline, your mind and your hands will quickly become acquainted with and accustomed to the basic concepts and moves that you'll use when you work with Opal. Not every aspect of Opal will be discussed here (Opal has complete online documentation), but all the most important features will be encountered.

It will take you less than half an hour to work your way through this document, performing the tutorial on your computer. Afterwards, you'll be completely ready to use Opal on your own.

So it's well worth taking the time to go through this tutorial. Let's get started!

NOTE	This document assumes that you have used an outliner before, or that you at least have a basic understanding of outlines and outlining. If you've never used any outliner before, please be sure to read <i>All About Outliners</i> before starting on this tutorial.
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ENTERING TOPICS

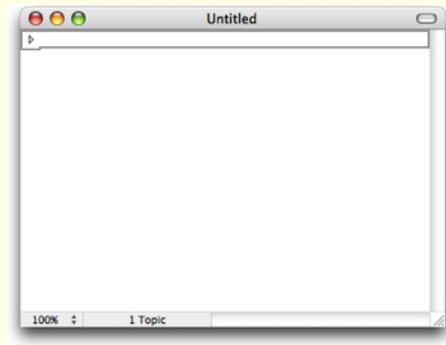
We're going to use Opal to create and use an outline consisting of culinary recipes. (Warning: don't actually try cooking any of these recipes; this is an example of an outline, not a real discussion of how to cook! All recipes are adapted from material freely available on the Internet.)

Get Ready

- 1 Start up Opal. (If the registration dialog appears, click Try Now.)
- 2 Just to be on the safe side, close any open Opal windows and then choose File > New.

You are now looking at a new empty “Untitled” Opal outline.

FIGURE 1-1



A new window. In this screen shot, the toolbar at the top of the window has been closed, for simplicity.

TIP

Have you changed Opal's preferences? If so, let's get our preference settings in synch.

Choose Opal > Preferences.

Make sure that the option "Return key creates New Sister topic" is chosen.

Make sure that "Single ancestress" is *not* checked.

Make sure that "Outline current topic" *is* checked.

Close the Preferences window.

Basic Topic Entry

Let's enter the ingredients for our first recipe. It's easy: just start typing.

- 1 Type (without the quotes) "1 package beef ramen" and press Return.
- 2 Type "1 tsp mayonnaise" and press Return.
- 3 Type "1 tsp horseradish" and press Return.
- 4 Type "2 dashes hot sauce" and press Return.
- 5 Type "1 tbsp nacho cheese" (and don't press Return).

The Return key here is actually the keyboard shortcut for the menu command Topic > New Sister. In Opal, a topic's *sister* is a topic at the same level (and with no higher-level topics between them).

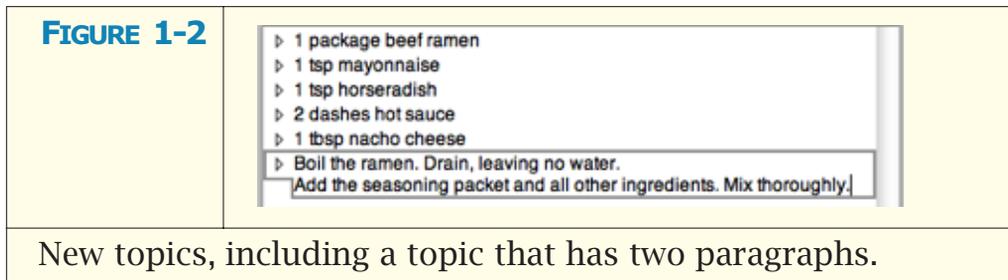
Every time you press Return, a new sister topic is created following the current topic. This is the simplest way to create topics rapidly.

Return Character in a Topic

But what if you wanted to enter a Return character within a topic? One easy way is to hold the Shift key while pressing Return. Let's try it. We'll enter the instructions for cooking

this recipe, as a series of paragraphs contained within a single topic.

- 1 Press Return to start a new topic.
- 2 Type “Boil the ramen. Drain, leaving no water.”
- 3 Press Shift-Return.
- 4 Type “Add the seasoning packet and all other ingredients. Mix thoroughly.”



An alternative approach arises if, in the Opal > Preferences window, you choose the option “Return key starts new paragraph.” Under that setting, Return always does what we just did with Shift-Return: it enters a Return character within the current topic.

In that case, to create a new next sister topic quickly, you would then press Enter instead of Return. (Enter is a separate key from Return on a Macintosh keyboard; it often has the same effect as Return, but some applications distinguish between them.)

Entering Topics Hierarchically

We now have the ingredients and instructions for a recipe, but we have not made a very satisfactory outline. What we really ought to have here is a topic naming the recipe, subtopics called “Ingredients” and “Instructions”, and then subtopics of those, listing the ingredients and providing the instructions.

Still, let's leave things as they are for now; we'll rearrange them later. Instead, we'll enter a second recipe, and this time we'll plan ahead so that the hierarchical structure of the outline is created as we enter topics.

- 1 Press Return to start new topic, and type "Cornbread broccoli pie."
- 2 Instead of pressing Return, choose Topic > New Daughter. (Alternatively, press its keyboard shortcut, ⌘-D.) This creates a new topic as a daughter of the current topic.
- 3 Type "Ingredients" and again choose Topic > New Daughter (⌘-D).

Now we can enter the ingredients in succession as before.

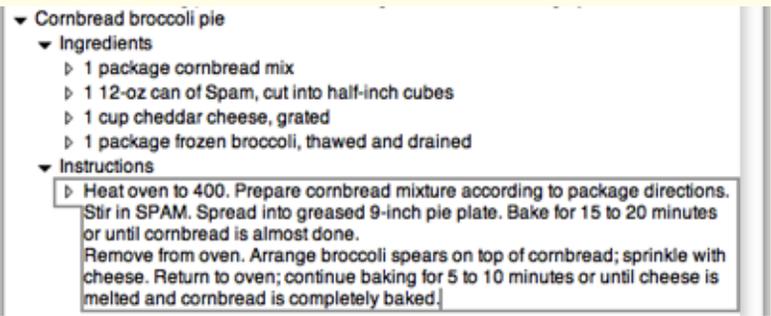
- 4 Type "1 package cornbread mix" and press Return.
- 5 Type "1 12-oz can of Spam, cut into half-inch cubes" and press Return.
- 6 Type "1 cup cheddar cheese, grated" and press Return.
- 7 Type "1 package frozen broccoli, thawed and drained" — and now, instead of pressing Return, choose Topic > New Aunt (Shift-⌘-A).

This creates a new topic one level higher than the current topic: it isn't the "next sister" of the current topic, but rather it's the "next sister" of the current topic's *mother* (and for this reason is referred to by Opal as an aunt).

- 8 Type "Instructions" and choose Topic > New Daughter (⌘-D).
- 9 Type "Heat oven to 400. Prepare cornbread mixture according to package directions. Stir in Spam. Spread into greased 9-inch pie plate. Bake for 15 to 20 minutes or until cornbread is almost done."

- 10 Press Shift-Return and continue typing: “Remove from oven. Arrange broccoli spears on top of cornbread; sprinkle with cheese. Return to oven; continue baking for 5 to 10 minutes or until cheese is melted and cornbread is completely baked.”

FIGURE 1-3



▼ Cornbread broccoli pie

- ▼ Ingredients
 - ▷ 1 package cornbread mix
 - ▷ 1 12-oz can of Spam, cut into half-inch cubes
 - ▷ 1 cup cheddar cheese, grated
 - ▷ 1 package frozen broccoli, thawed and drained
- ▼ Instructions
 - ▷ Heat oven to 400. Prepare cornbread mixture according to package directions. Stir in SPAM. Spread into greased 9-inch pie plate. Bake for 15 to 20 minutes or until cornbread is almost done.
Remove from oven. Arrange broccoli spears on top of cornbread; sprinkle with cheese. Return to oven; continue baking for 5 to 10 minutes or until cheese is melted and cornbread is completely baked.

Topics entered hierarchically.

REARRANGING TOPICS

An important thing about an outliner is that your outline is mutable. It's easy to rearrange topics, changing the order and structure of the outline. Let's practice doing just that.

Rearranging Topics With the Mouse

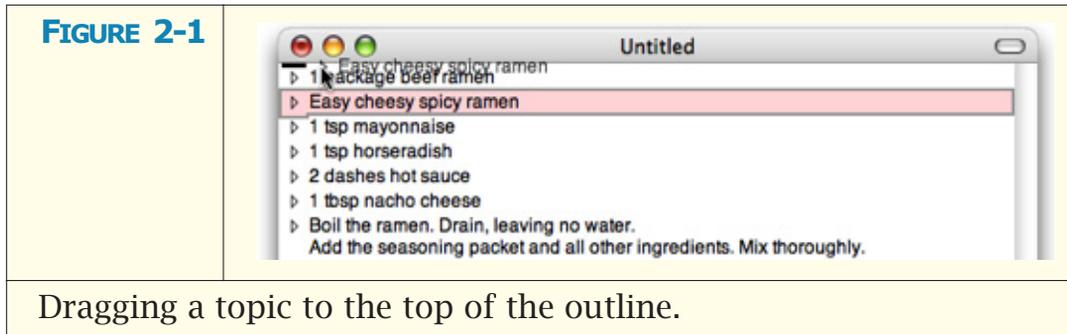
Let's return to our first recipe and adjust the layout of the topics to look like that of our second recipe. We'll do this using the mouse; later, we'll do the same sort of thing using the keyboard.

- 1 Start by clicking in the first topic in our outline; it says "1 package beef ramen."

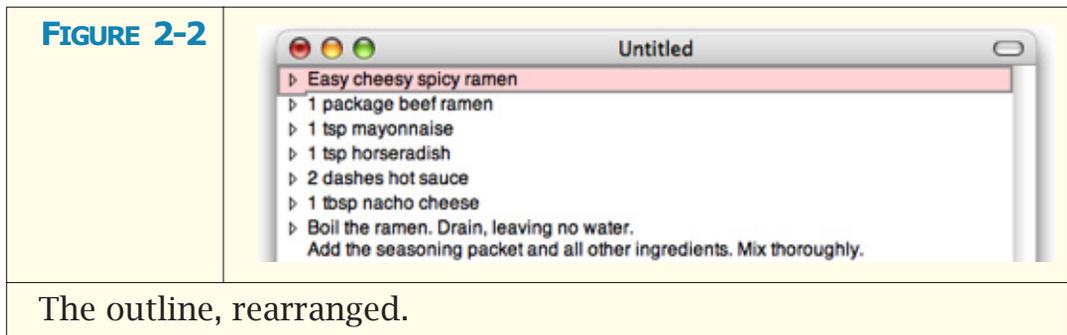
We'd like to create a topic above this, giving the title of the recipe (which happens to be "Easy cheesy spicy ramen"). But there's no way to create a new preceding sister, so we'll create a new next sister and then move it into place.

- 2 Press Return to create a new next sister, and type "Easy cheesy spicy ramen."
- 3 We're going to use the mouse to move this topic above "1 package beef ramen." To do so, click and hold the mouse on the triangle at the left of "Easy cheesy spicy ramen." Now drag upwards. As you do, a black bar indicates where the topic will be placed if you release

the mouse. Keep dragging upwards until the black bar is above “1 package beef ramen.”



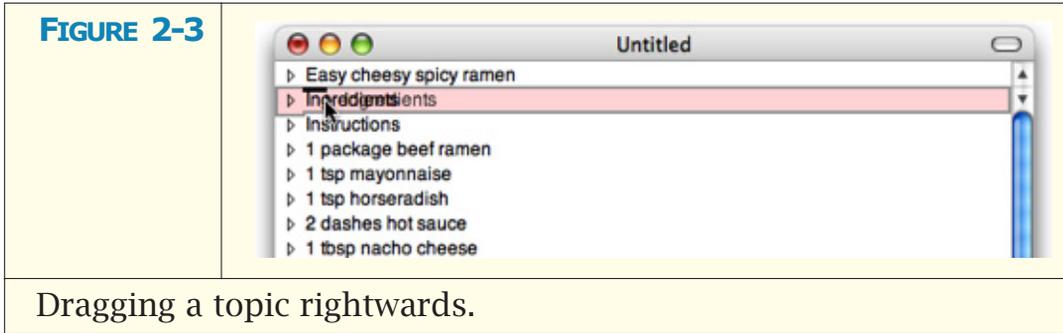
- 4 When the black bar is in the right place, release the mouse.



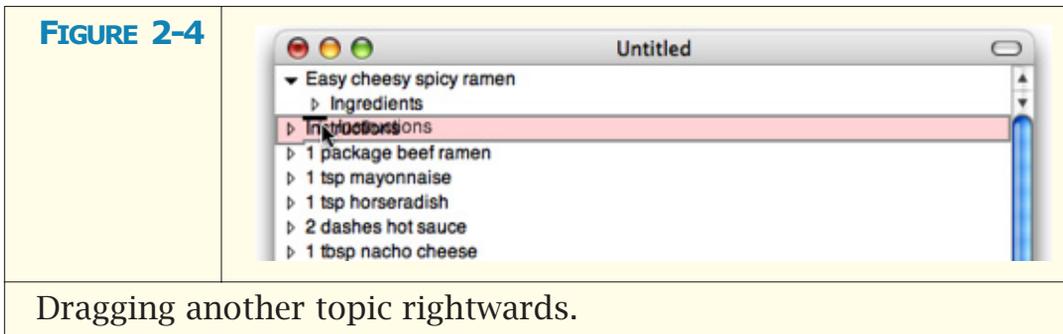
Now let’s create the “Ingredients” and “Instructions” topics for this recipe, and move the existing topics into place as subtopics of those.

- 5 Select the “East cheesy spicy ramen” topic, and press Return.
- 6 Type “Ingredients” and press Return.
- 7 Type “Instructions.”
- 8 Now we need to move both “Ingredients” and “Instructions” so that they are daughters of “Easy cheesy spicy ramen.” Start with “Ingredients.” Click and hold the mouse on the triangle at the left of “Ingredients” and start dragging to the right. You’ll see the black bar move

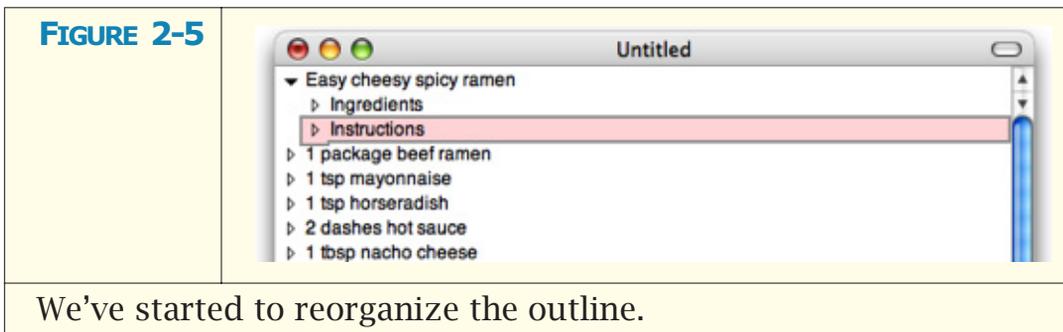
rightwards one level of indentation. At that point, release the mouse.



- 9 Now do the same thing for “Instructions”: click and hold the mouse on the triangle at the left of “Instructions” and start dragging to the right. Watch the black bar. You want “Instructions” to be a sister of “Ingredients”, not a daughter of it, so don’t drag too far to the right. If you do drag too far, just drag back a bit to the left until the black bar is in the correct place. Then release the mouse.



The outline should now look like this.



(If your outline doesn't look like the illustration, use the mouse to drag topics around until it does. It will be good practice for you!)

Rearranging Topics With the Keyboard

We now want to move the ingredients into place as daughters of the “Ingredients” topic. Instead of using the mouse, we're going to do this with the keyboard.

You have four “Move” keyboard commands to work with, and you can see them in the Topic menu: Move Left (Shift-⌘-L), Move Right (Shift-⌘-R), Move Up (Shift-⌘-U), and Move Down (Shift-⌘-D).

We'll use the keyboard shortcuts. The shortcuts are easy to remember, and once you get the hang of them you'll find yourself using them fluidly and easily all the time.

- 1 Select the “1 package beef ramen” topic by clicking the mouse on its triangle.

(Take a peek at the Topics menu. Move Left is presently disabled because there is no “left” from here; the “1 package beef ramen” topic is already as far to the left as it can go.)

- 2 Press Shift-⌘-R (to Move Right).

We're getting there! “1 package beef ramen” is now a daughter of “Easy cheesy spicy ramen.” But we want to go even further; we want it to be a daughter of a daughter of “Easy cheesy spicy ramen.” However, we don't want it to be a daughter of “Instructions”; we want it to be a daughter of “Ingredients.”

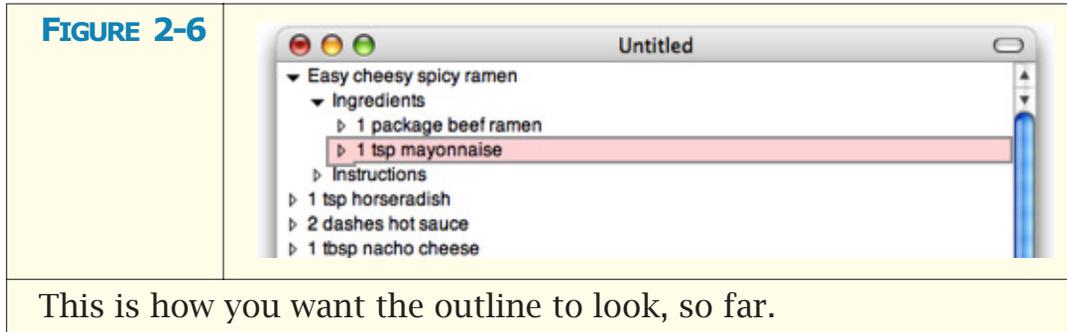
- 3 Press Shift-⌘-U (Move Up).

“1 package beef ramen” is now almost in place. It's below “Ingredients,” ready to become its daughter.

- 4 Press Shift-⌘-R. We're there!

Now let's do the same thing for "1 tsp mayonnaise." You're going to be on your own on this one; it's good practice for you. Here we go!

- 5 Select "1 tsp mayonnaise."
- 6 Use an appropriate combination of Move keyboard shortcuts to move "1 tsp mayonnaise" into place as the next sister of "Easy cheesy spicy ramen."



This is how you want the outline to look, so far.

Multiple Selection

We need to move three more ingredients into place (the horseradish, the hot sauce, and the nacho cheese). But this business of moving one ingredient at a time is becoming tedious. Instead, we can move all three ingredients into place together. This is because Opal permits us to select multiple topics and operate on them all at once.

Let's select all three remaining ingredients. There are actually various ways to do this. Let's use the mouse.

- 1 Select "1 tsp horseradish" by clicking its triangle.
- 2 Now hold down the Shift key, and select "1 tbsp nacho cheese" by clicking its triangle.

Because you held the Shift key, Opal selects *both* topics and everything in between.

- 3 Drag the multiple selection into place using the mouse.



There are other ways to select multiple topics. Select a topic by clicking its triangle, then ⌘ -click another topic's triangle; both topics are selected. Then there is the Edit > Select menu, with its submenus. You can also build a multiple selection with the keyboard. And you can even select multiple topics by dragging with the mouse. These are discussed in detailed in Opal's online help.

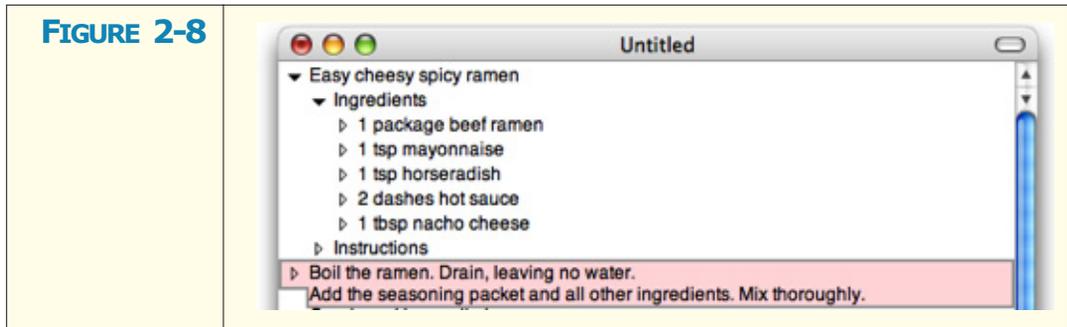
Cut and Paste

Another way to move material around is to copy or cut it, then paste it into place. Let's try it with the instructions for cooking the ramen.

- 1 Select the topic that starts, "Boil the ramen..."

Now, this is important: we want to cut the topic — not merely some text within it. So if there is a blinking insertion point or partial selection within the text of the topic, press Tab to select the entire topic. The Tab key

toggles between selecting the whole topic and selecting within its text.

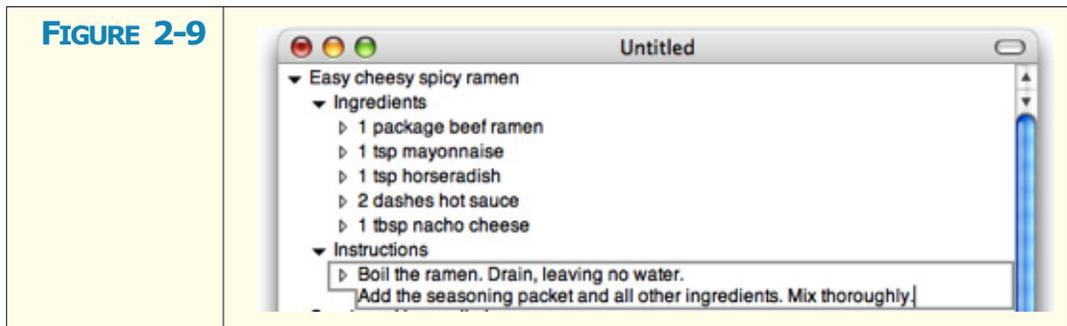


Selecting a whole topic (not just its text), preparatory to cutting the topic.

- 2 Choose Edit > Cut Topic (⌘-X) to cut the topic.
- 3 The rule is that when you paste a topic or multiple topics, you paste as a sister below the current topic. So, select the “Instructions” topic.
- 4 Choose Edit > Paste Topics (⌘-V).

As predicted, the pasted material appears as a sister below “Instructions.” However, we want it to be a daughter of “Instructions.” The pasted material is still selected, so it’s easy to relocate it.

- 5 Press Shift-⌘-R (Move Right) to move the pasted material into the correct position.



Our beautifully rearranged outline.

In this particular case, as it happens, cut and paste was a very silly way to move the topic from its original position to its new position (because we could have done it just by using the Move Right command). However, we wanted to investigate how cut and paste works, so it was worth it. Most important, we learned that pasting a topic will paste as a “next sister” after the currently selected topic. Knowing this, you’ll be able to cut and paste effectively as a way of rearranging your outline.

NAVIGATING AND SEEING

The best thing about an outliner is that it lets you see what you want to see. No matter how many topics your outline has, you can move around it and edit it easily. Most interesting, you can hide topics that you're not interested in right now, so that you easily move to and concentrate on the topics that do interest you. This chapter surveys Opal's various ways of surveying your outline!

Opal provides three ways of hiding topics: collapsing, shrinking, and focusing. We'll start by examining each of them in turn.

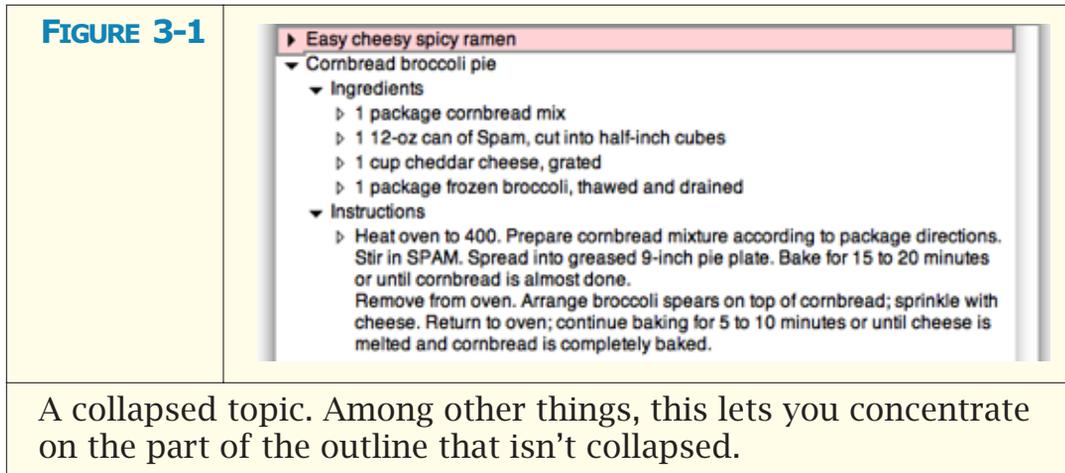
Collapsing and Expanding

We're going to collapse a topic. Ready?

- 1 Double-click the triangle at the left of the first topic, "Easy cheesy spicy ramen."

All of the topic's daughters vanish from sight. This topic is now *collapsed*. A collapsed topic's daughters are still present, behind the scenes; for example, if you move a collapsed topic, or copy it, or cut it, all its (hidden) daughters accompany it, in accordance with the basic

rules of outliners. But they are no longer “in your way” as you view and navigate the outline.



TIP How can you tell that a collapsed topic has daughters, rather than being a simple topic with no daughters? Look at the triangle at the left of the topic, and compare it with other triangles to the left of all the other topics.

- A right-facing empty triangle means that the topic has no daughters (as in “1 package cornbread mix”).
- A down-facing filled triangle means that the topic has daughters and is expanded (as in “Ingredients”).
- A right-facing filled triangle means that the topic has daughters and is collapsed.

We've collapsed a topic; so how do we expand it? Can you guess?

- 2 Double-click once again the triangle at the left of the first topic, “Easy cheesy spicy ramen.” All of its daughters (and all of their daughters) reappear.

Opal has a rule that, when a topic is collapsed, it remembers the expanded or collapsed state of all of its daughters (and all of their daughters, and so on); when the topic is expanded again, that state is restored just as it was.

Let's experiment, to see what this means.

3 Double-click the “Ingredients” triangle to collapse it.

Now “Ingredients” is collapsed, but “Instructions” is expanded.

4 Collapse “Easy cheesy spicy ramen” and expand it again.

As before, “Ingredients” is collapsed, but “Instructions” is expanded. So you can see that Opal remembers the collapsed state of daughters when they are hidden.

Sometimes, though, it is convenient to expand just one level at a time, so that you see a topic's daughters but no deeper into the hierarchy. Let's see how to do it.

5 Select “Easy cheesy spicy ramen” and make sure it is expanded.

6 Hold down the Option key and double-click the triangle next to “Easy cheesy spicy ramen” to collapse it.

7 Now, *without* the Option key, double-click the same triangle to expand the same topic again.

The topic doesn't expand all the way; its daughters appear (“Ingredients” and “Instructions”), but they themselves are both collapsed.

When you Option-double-clicked “Easy cheesy spicy ramen,” you collapsed it, but you also collapsed its daughters (“Ingredients” and “Instructions”). Then, when you double-clicked the “Easy cheesy spicy ramen” topic, it expanded, and, as usual, Opal remembered the expanded or collapsed state of the topic's daughters — and so, its daughters both appeared as collapsed.

Shrinking and Growing

Shrinking is a way of reducing the display of a long topic to a single line. Let's try it.

- 1 Select the last topic ("Heat oven to 400..."). Make sure you select the topic as a whole, not just text inside it. (If you selected text inside the topic, press the Tab key to select the topic as a whole.)
- 2 Choose Topic > Shrink Topic. Or alternatively, Control-click on the topic's triangle to see the contextual menu, and choose Shrink Topic.

Three dots (an ellipsis) appear next to the topic's triangle, and the topic is displayed as a single line. This topic is now shrunk.

- 3 Click *inside the text* of the shrunk topic.

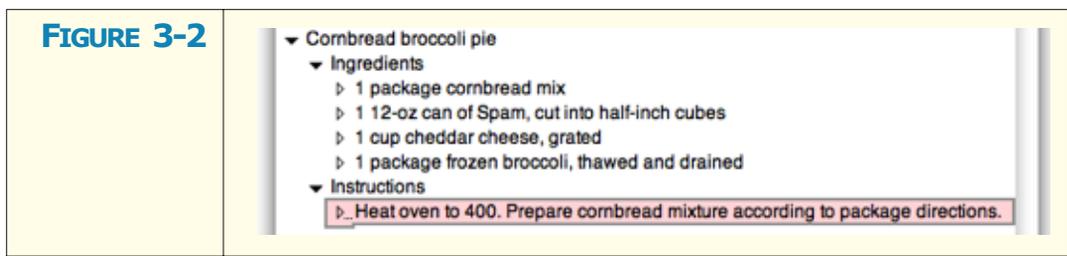
The shrunk topic temporarily grows again so that you can see and edit the entire topic.

- 4 Click the shrunk topic's triangle, or select a different topic. The shrunk topic's display shrinks again.

To cancel completely the shrinking of a topic, you grow the topic.

- 5 Select the shrunk topic and choose Topic > Grow Topic, and the ellipsis will vanish.

You can readily see how the ability to shrink a topic can be useful when a topic consists of many lines or even many paragraphs, like this one.



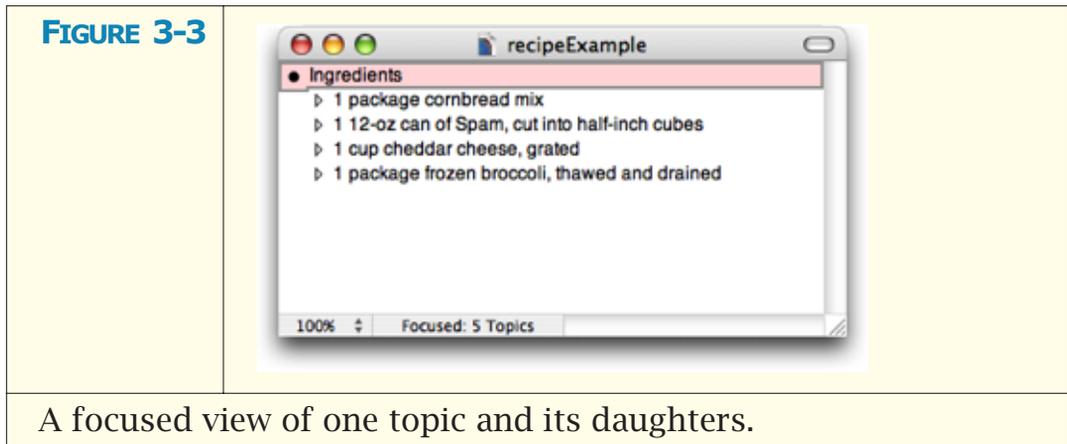
A shrunk topic. In reality, this topic is many lines in length.

Focus and Unfocus

Suppose we want to work on the Ingredients list of a recipe, with no distractions from any other part of the outline. Opal lets us view just one topic and its daughters, to the exclusion of everything else in the outline.

- 1 Select an Ingredients topic and choose View > Focus.

All other topics vanish; only this topic and its daughters remain (and they, of course, can be shown or hidden by expanding or collapsing).



Opal reminds you that you're looking at a focused view of the outline (and not the entire outline) in two ways. The word "Focused" appears at the bottom of the window, and the focused topic has a bullet next to it instead of a triangle. (A filled bullet means that the focused topic has daughters; an empty bullet means that the focused topic has no daughters.)

In a focused state, you can only edit the text of the focused topic or work on its descendants; you cannot, for example, create a new sister for the focused topic (try it!). That's because such a sister would be outside the current focus; it would not be clear how it fits into the "real" outline.

Within a focused view, you can focus more deeply. For example, select a daughter of the currently focused topic

and choose View > Focus once again. Now a single topic is showing in the window. You can edit its text, and you can give it daughters and edit them.

Now let's get back to the "real" outline:

2 Choose View > Unfocus All.

When you want to withdraw from a focused view, you can do so one level of focus at a time, by choosing View > Unfocus, or you can just cancel all focusing completely and return to looking at the whole outline, by choosing View > Unfocus All.

Finding and Searching

Opal gives you two ways to find text in your outline. One is the Edit > Find > Find commands. These commands, along with the Find dialog, should be familiar to you from other applications. You can move forwards or backwards through the document, selecting instances of the text that's in the Find field (and, if you like, replacing it with something else). Collapsed topics will automatically expand as necessary in order to reveal the found text.

Let's try it.

- 1** Choose Edit > Find > Find (⌘-F). The Find dialog appears.
- 2** Type "ramen" into the Find field.
- 3** Press the Next button.

Look at the outline (you may have to move the Find dialog out of the way, or dismiss it). You'll see that "ramen" in the outline is selected.

Searching is different. The best way to see the difference is to try it.

- 4** In your outline window, make sure the Search field (in the toolbar) is visible. If the toolbar is closed, you'll need

to open it (click on the “lozenge” button at the upper right of the title bar).

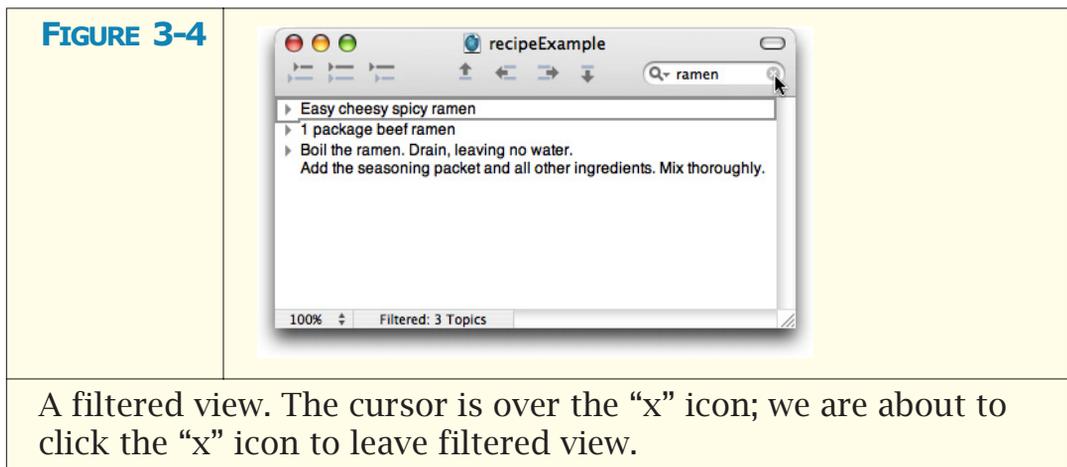
- 5 Click in the search field in the toolbar (or choose Edit > Find > Search).
- 6 Now just start typing a search term. In this case, type “ramen” (without the quotes).

What happens? As you type, the outline is displayed *filtered*: topics containing your search term are shown in a flattened state — they are in order but there is no hierarchy, and no other topics are shown.

Opal lets you know that you are seeing a filtered outline in two ways: the word “Filtered” appears at the bottom of the window, and the triangles next to the topics are grey. In this state, an outline’s visible topics can be edited, but you can’t create or delete any topics.

When you’re done with this filtered view, how do you get out of it? It’s easy:

- 7 Click the “x” icon at the right end of the search field.



Dressing Up Your Topics

Your outline’s topics can be “dressed up” with a few useful symbols besides the ever-present triangles.

For example, you can give your topics checkboxes.

- 1 Choose View > Show Checkboxes. The checkboxes appear.
- 2 Experiment with checking or unchecking a checkbox: Click on the checkbox (or choose Topic > Check Topic or Topic > Uncheck Topic).

Checkboxes automatically maintain a hierarchical relationship: if you check a topic, its daughters will all be checked as well, and conversely the checked state of sisters determines the checked state of their mother (the mother will be checked only if all its daughters are checked, and will be unchecked only if all its daughters are unchecked — otherwise, the mother will have a “mixed” state, signified by a horizontal line).

How you use this feature is entirely up to you. Use your imagination! It might help you use an outline as a to-do list or to keep track of a task in progress. In our example Recipes outline, you might use checkboxes to record what recipes you’ve actually tried.

You can also add labels to your topics. Let’s try it:

- 3 Choose View > Labels and pick a labeling option. In this case, choose Decimal (and click OK).

Label values are maintained automatically. Experiment by showing different label styles. To hide labels again:

- 4 Choose View > Labels and pick None (and click OK).

Keyboard Navigation

Some people are mouse people. Other people are keyboard people. For keyboard people, a very important feature of Opal is that it lets you navigate your outline using the keyboard alone. Let’s practice doing that. (You can skip this section if you don’t find keyboard navigation interesting.)

- 1 Choose Topic > Expand All just to make sure all topics are showing.
- 2 Select the first topic, “Easy cheesy spicy ramen.”
- 3 Repeatedly press ⌘-Down Arrow.
- 4 When you get to the bottom of the outline, repeatedly press ⌘-Up Arrow.

What happened? In this kind of navigation, the selection passes through every topic, regardless of its level of indentation. This is called “flat down” and “flat up” movement (because it treats the outline as flat and just moves down or up through the outline).

Now let’s try a different kind of navigation.

- 5 Again, select the first topic, “Easy cheesy spicy ramen.”
- 6 This time, repeatedly press Option-⌘-Down Arrow.
You don’t get very far, do you? The selection jumps to “Cornbread broccoli pie” and stops.
- 7 Try pressing Option-⌘-Up Arrow.

The selection jumps back to “Easy cheesy spicy ramen.”

Do you see the difference? The addition of the Option key causes navigation to pay attention to the outline structure, so that the notions of “down” and “up” now move the selection from sister to sister.

Finally, let’s experiment with the Right and Left Arrow keys.

- 8 Select the first topic, “Easy cheesy spicy ramen.”
- 9 Press ⌘-Right Arrow twice.

This causes us to move to the first daughter, as long as there is one.

- 10 Now select “1 tbps nacho cheese.”
- 11 Press ⌘-Left Arrow twice.

Each keypress causes us to move to the current topic's mother.

So the Right and Left Arrow keys cause us to move up and down the *hierarchy*, as opposed to the Up and Down Arrow keys, which cause us to move up and down the *page*.