The Achievement Planner Manual

CONTENTS...............................

THE ACHIEVEMENT PLANNER is a significant advance on the Personal Information Manager (PIM) concept. In addition to helping you get organized, it contains a suite of thinking tools - intelligence enhancers. Together with the organizational tools this makes a   base camp for success   . It's where you start and end your work day and where you check in from time to time to make sure that you stay on track to the achievement of your goals.

 FINALLY... Absolutely fantastic! ...a complete, powerful, smart and good-looking PIM. I have some very expensive store bought PIM's. None that I have tried is as excellent as yours. Achieve is definitely the very best.
...D. Mondell, Ad Image & Marketing, FA

Enclosed is my check to register me as a fortunate user of your wonderful program.
...R. Engstrom, Half Moon Bay, CA

   It not only helps me keep my goals in focus but also helps me track appointments and time . A real help!
 ...C. Ellis, RPP, Therapist, NJ

   This is great --- a Personal Information Manager for real people who do real things and need an easy-to-learn, easy-to-use way to organize and achieve goals.
  ...I. Francis, President, Benchmark Inc, NY

Just like all the work that HDS does, this program is practical and powerful. It has helped us transform time and effort into success.

...D. Moore, Vice President, AMF Inc., Richmond, VA.,

  What I especially like about this is that it recognizes that achieving success means getting organized AND making decisions, AND coming up with ideas AND creating strategies. This program helps us do all of that. Brilliant!
...L.. Puran, Director, SW LTD, Alton, UK.

M U S T   R E A D

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P R O G R A M   F E A T U R E S

DAY PLANNER
 - display, and sort your tasks and goals by priorities;.
 - display, your daily schedule in 1/2 hour increments, automatically updated each day;
 - work log: diary enables you to keep track of how you spend your time.
 - print your Day Plan; alarm function, quick calendar; drag and drop ease and much more.

APPOINTMENT CALENDAR
 - schedule and track future events and reminders;
 - automatically display events on the Day Plan of the appointed day;
 - print out your calendar for as many days ahead as you like.
 - reminders for a particular day displayed on a special   billboard   on start-up;

- drag and drop to move events around, easily access other modules and more.

PROJECT PLANNER
- define, display your projects in terms of tasks, goals and deadlines;
- individual project plans sortable according to due date, capable of recording long notes on each item;
items can be dragged and dropped into your daily to do list for immediate attention;
sub-project capability, printouts, quick calendar, easily access other modules and more.

CONTACT TRACKER
- create a database of personal and business contacts;
- at-a-glance information to improve communication, easy to update;
- Contact History briefs you on when, how, and what your previous contacts have been:
- set next contact date/time/purpose for pop-up viewing on that day.
- print out your Contact List, Mailing Labels, as well as Contact Histories.

INTELLIGENCE ENHANCERS:
- IDEAS & SOLUTIONS: generate and evaluate ideas and solutions for specific problems/opportunities in a systematic way;
- printouts let you SEE your best ideas and incorporate them into The Project Planner.
- CONTACT STRATEGIES: develop optimum strategies for overcoming resistance and gaining receptivity to your presentations;
- print out battle plans that help you execute your tactics, achieve your goals.
- DECISION AIDS: left brain logical prioritizer teaches you how to establish priorities by helping you to assess urgency vs importance of your Day Planner tasks
- right brain device allows you to access your subconscious with a seriously fun crystal ball.

ORGANIZERS
- make quick notes on a post-it screen; a few words or as long as several pages - always close at hand, easy to review;
- pop up a view of contacts to be made for a particular day - gives you contact name and number as well as the purpose.
- organizers always quickly accessible from wherever you are in the program.

A NEW DESKTOP
-The Day Planner can function as the only place you need to be in Windows: launch your most-used applications without resorting to Program Manager;
-add your own tools and utilities to the Tool Menu containing the most used Windows tools.

G E N E R A L   R E F E R E N C E

>>Use the ALT key combinations for speed.

As with all Windows applications most commands can be accessed though a combination of ALT and other keys. Wherever you encounter an underlined letter or number holding down the ALT key while you press that character will execute the command. In the drop down menus you need not hold down the ALT key to activate the commands - just the underlined character will do.
You should be able to do 95 % of what you want to do in Achievement Planner without having to reach for the mouse. If you like rodents , on the other hand you can always point and click away.

>>Backing up data files, as with all programs, is important.

In this version of Achievement Planner you'll have to attend to backing up your data. We plan to automate this as much as possible in the next upgrade. For now, remember that the files created by the program are your only files of that particular data so you may want to back them up from time to time as you would with any important files to guard against inadvertent erasure, disk crashes, etc. These files are:

TODO.DAT - your daily todo list, no great problem if it's lost since you remake this daily.

CONTACT.DAT - your contact database; depending on the extent of it this could be a headache to replace - backup advised

APCAL.DAT - your appointment calendar data also could be difficult to replace so frequent backup is good insurance.

HISTORY.DAT - the histories of your contacts with people in your contact tracker; again the extent of the information in this file should determine the importance of backing it up.

PROJECT.DAT - project data, ditto.

REM.DAT   - Quick notes

DPDIARY.TXT - diary of your daily activities. If you use this function then it's a good idea to backup and/or rename this file on a monthly basis - (rename it DPDIARY.FEB at the end of February, for example.)

>>Fast switching between modules can expedite tasks, but watch your memory.

The Day Planner is the only module that stays in memory when you switch to another. You can, however speed up the switching between modules by minimizing the current module and clicking on the Day Plan to get back to it. Next time you call the module you just left it will be almost instantly on the screen. However, be aware that it is holding onto memory all the while so, depending on how much RAM you have you may get an   OUT OF MEMORY   message when you try to load something else.

With the calendar, quick notes and contact reminder you can just click on any part of the Day Planner screen to jump back to it. With all other modules you'll first have to minimize or shrink the window (with the arrow buttons in the upper right) then click on the Planner.

O P E R A T I N G   I N S T R U C T I O N S

DAY PLANNER

>> use the TASK LIST

 Click on or Tab to an empty slot and type in the task or goal. To make the next entry just press the down arrow key, enter the item, etc.

  Pressing the TAB key after you've entered the task will take you to its priority box. Alternatively you can first enter all of your days tasks and then go back and assign priorities.

 When you've accomplished a task click on the '---' button to its left and a line will be drawn through it. Click again to delete.

>> use the schedule

 Clicking The 'Bot' button or pressing Alt+ B will jump the list to the end of the day. (This also happens automatically at 1 PM.) The 'Top' button or Alt + P will show you the start. As with the TASK LIST, click on or Tab to the slot you want to make an entry in.

You can also move the TASK LIST with the up and down arrow buttons and the up and down arrow keys.

You can drag-drop items from your TASK LIST into your SCHEDULE as well as drag and drop within the SCHEDULE. You do this by pointing to an item and holding the left button down (the cursor will become a pointing finger), then you 'drag' it to the slot where you want to 'drop it' and release the mouse button.

By implementing the Diary function you can use the SCHEDULE as a work record as well as an appointment scheduler.

>> set and sort Priorities

The small square entry box to the left of each task item will accept the numbers 1, 2 or 3 as the priority indicator for that task. Any other entry will give you an error message.

IF YOU DO NOT ENTER A PRIORITY THAT TASK WILL BE LOST IF YOU SORT. To sort just click the 'Sort' button above the list or press Alt + S.

>> delete items

Drag and drop SCHEDULE items over the arrow icon in the lower right corner of the screen to delete them. Clicking twice on the '---'button to the left of the task deletes it (the first click just draws a line through it).

>> deleting sections

Clicking The 'Clear' button above the TASK LIST or pressing Alt + L will bring up a message asking you if you want to delete your tasks. Clicking 'Yes' or pressing ENTER will do so. The schedule is deleted with the 'Clear' button above it or Alt + E.

If you wish to clear all the data on the screen click the 'File' menu and 'Clear all entries', or Alt + F, then C.

>> see the Quick Calendar

Click on the Date Bar above the TASK LIST. The command buttons on the calendar are self-explanatory,

>> set/turn off the alarm

Click on the Clock Display and an input box is displayed, Enter the time you want the alarm to sound using the format: 'hh:mm ap' (two digits each for hour and minutes, then a space, then 'am' or 'pm' - there must be a space between the minutes and 'am' or 'pm'), then press Enter.

To turn off the alarm, click the watch icon that appears above the Schedule. Even if you don't turn it off the alarm will no longer sound after the appointed minute.

>> see/use your Appointment Calendar

Click 'Appointments' on the menu bar or press Alt + A. Help on using it is available from that screen. You can also click on it's icon button (the open diary page).

>> see/use your Project Planner

Click 'Projects' on the menu bar or press Alt + P. Help on using it is available from that screen. You can also click on it's icon button (the 'org' chart).

>> see/use your Contact Tracker

Click 'Contacts' on the menu bar or press Alt + C. Help on using it is available from that screen.You can also click on it's icon button (the card stack).

>> make/review/delete quick notes

Click on the pencil icon at the far right of the screen. To add a note click on 'Add Note'; to view a note click on its number; to delete, click on it's 'D' button. Click 'Put Away' to hide the note box

NOTE: This feature is available in all modules. Just click on the same icon.

>> review calls to be made today

Click on the telephone icon above the Schedule to view calls planned for today in your Contact Tracker.

NOTE: This feature is available in all modules. Just click on the same icon.

>> launch tools, programs, utilities

Click 'Tools' on the menu bar then click on the tool you wish to use. Or press Alt + O then the underlined letter or number of the program. These are often-used 'applets' that come with Windows.

These '.exe' files must be in your Windows directory. By adding your most used programs and utilities to this list you can use your Day Plan as a desktop. (See help item: 'add/edit/del. tools list programs and utilities'.

>> add/edit/del. tools list programs and utilities

When you click 'Tools' on the menu bar and then click on 'Add an Application'. An input box appears. Enter the name of the EXE, COM, or BAT file you wish to add. If it is not in your Windows directory also add the PATH.

Remember to use the program file name not its title. For example, Corel Draw would be entered as 'coreldrw'.

To CHANGE an entry click on 'Edit an Application'. You'll be asked for the number of the application. It will then appear in an input box. This is handy for adding the name of a file to open with the application or adding a switch.

To Delete an entry click on 'Delete an Application'. You'll be asked for the number of the

application to delete.

>> use the Decision Aids

 Click 'Tools' on the menu bar and then the aid you wish to use. Or press Alt + T, then C or P. Instructions on using the module will appear with it.

>> implement the Diary
 Click on 'Diary' in the menu bar or press Alt + D. The selections above the line on the drop down menu determine how/if the record of your activities for that day is saved. 'Prompt to save' instructs the program to ask you if you want to save it when you exit Achievement Planner or when you save your Day Plan.

 'Always save' instructs the program save your diary whenever you save or exit. The 'View' option' loads MS Windows WRITE with your diary file. The latest entry is at the bottom of the file (press Ctrl + End to jump there.) You'll want to back up, print and/or clear this file from time to time. See your WRITE documentation for instructions on how to do this.

>> save for security

 If you're concerned about a system lock up or other problem that may crash your computer thus losing your current Day Plan data click on the 'file' menu then 'Save' or press Alt + F, then S.

>> exit

 Double click the control box (in the upper left hand corner of the screen), or click on 'File', then 'Exit' or press Alt + F , then X . All data is automatically saved (except for Diary - see above) upon exiting.

PROJECT PLANNER

>> enter information

Click on or Tab to the slot you want to fill and type in the data. You can type beyond the visible end of the slot.

 Use the cursor or End keys to see the rest of your line if you do. The home key restores the beginning of the line to the visible portion of the slot.

 You can move from slot to slot using the up and down arrow keys (vertical movement) as well as TAB and Shift TAB (horizontal movement).

>> enter and sort deadlines

 Deadline entries must have 4 or 5 character the first one or two are the month and the last two are the date. The middle character can be any.

 The following would be 'legal' entries: 9/09; 9,24; 9-24. Click on 'Sort' or Alt + S to sort the list from the nearest to the farthest date

>> create a sub-project

 First click on 'Drag-Drop' or press Alt + R. This will bring up a drop panel with two colored areas. Drag and dropping an item into the yellow area on the right will put that item into the next available slot on your Project Listing. A '#' button will appear next to the deadline of that item. Clicking this button will always take you directly to project details for this sub-project.

 To drag and drop, put your mouse cursor on the item you wish to use, press and hold the left mouse button while you move the cursor - which becomes a pointing finger - to anywhere inside the yellow area. The drop panel will stay on the screen until you click 'Done' or press Alt + D.

>> send a task to today's action list

 First click on 'Drag-Drop' or press Alt + R. This will bring up a drop panel with two colored areas. Drag and dropping an item into the light blue area on the left will put that item into the next available slot on today's action list.

 To drag and drop, put your mouse cursor on the item you wish to use, press and hold the left mouse button while you move the cursor - which becomes a pointing finger - to anywhere inside the blue area. The drop panel will stay on the screen until you click 'Done' or press Alt + D.

>> go to another project

 Using the buttons in the Project controls frame you can go to the previous project (by clicking the '<=' button or pressing SHIFT Alt+ <) the next project (by clicking the '=>' button or pressing SHIFT Alt+ >) or clicking on 'List' to return to the Project Listing.

>> print your projects

 Clicking 'Print' or pressing Alt + P will bring up a print options menu. Click on the appropriate button to print just this project or all projects. Make sure your printer is hooked up and ready before clicking.

>> delete an item

 Drag and drop the item on the arrow in the lower right corner of the screen to delete it.

>> delete the project

 Click on the 'delete' button in the Project Controls frame or press Alt+ T.

>> save

 Your data is saved automatically as you exit and move around this module. If you are concerned about a system failure for any reason you can click on 'Save' or press Alt + A to save all your project data instantly.

>> exit

Click 'Exit' or press Alt + X. This exits from this module back to The Day Plan. You can exit from here in the same manner.

APPOINTMENT CALENDAR

>> enter appointments, events, reminders

Click on or Tab to the slot you want to fill and type in the data. You can type beyond the visible end of the slot. You can also use the up and down arrow keys to move to another slot.

Use the cursor or End keys to see the rest of your line if you do. The home key restores the beginning of the line to the visible portion of the slot.

You can also drag and drop items from one slot to another.

>> set recurring appointments/events

Drag and drop the appointment onto the 'Recurring' frame below the control cluster. A dialog box will ask you for the particulars of recurrence.

NOTE: this feature is available only in the registered version.

>> set 'wake-up' reminders

Go to the day you wish to set a reminder for. Type in the reminder in an available slot. This note will greet you upon program start-up on that day.

>> view/edit another date

The double arrow keys(>>) take you forward or backward one year; the single arrow keys(>) provide monthly increments.

You can click directly on the day box of the month shown to select a particular day.

You can also go to a day directly by using the 'Go To' button which prompts you for the date you want.

You can use 1 or 2 digits for the month but you MUST use 2 digits each for day and year; any separator will do. Thus the following would be valid entries: 9/09/93; 9,24,92; 09-04-94.

>> speed up program operation

Clicking on Purge (Alt +P) will streamline your appointment file by deleting all appointments BEFORE the present day. All past data relative to the current system date will be erased.

Remember it's the ACTUAL date that your system (computer) clock is set to, not the date shown in the Appointment Calendar that is used as the marker.

Click on 'Print' or press Alt + P. This will bring up an input panel that asks for the number of days you want to print. These are counted forward from the date currently on screen.

Make sure your printer is hooked up and ready before clicking 'OK'

You can also print out weekly or monthly calendars (available in registered versions only.)

>> delete items

Drag and drop the item onto the arrow in the lower right corner of the screen to delete it.

>> save

Your data is saved automatically as you exit and move around this module. If you are concerned about a system failure for any reason   you can click on 'Save' or press Alt + A to save all your project data instantly.

>> exit

Click 'Day Plan' or press Alt + y. This exits from this module back to The Day Plan. You can exit the program from there.

CONTACT TRACKER

>> add a new contact name

If there is a record on the screen make sure you've Saved or Added the data, then click on 'Blank' or press Alt + B.

Click on or Tab to the appropriate slot and type in the data. Each field is limited to a certain number of characters.

If you exceed that number a message will pop up and further data entry into that field will not be possible (unless you delete one or more characters).

When you've finished entering the data you have to click on 'Add' (or press Alt+A). The name will be added to your index list in alphabetical order.

>> view/edit contact data

Scroll through the index list until you find the name you want. Clicking on the name or moving the highlight bar with the arrow keys to it will bring up that data.

If you change any of the fields click on 'Save' (or press Alt +S) to save the new data into the existing record BEFORE MOVING TO ANOTHER NAME.

If you wish to copy the record - to add another name from the same company or family for example - use the 'Add' button.

>> view/edit contact history

To Add information to your history of contacts with an individual first bring up that person's data by clicking on his/her name in the index list. Then click 'Add' (or Alt + D) to bring up an input panel. The date and time shown will automatically be 'stamped' into the record as will any of the standard words/phrases you click on. You can type in details as well in the text box.

Clicking on 'View' (or Alt + V) will show you the entries in the contact record for the person currently on the screen.

'New' deletes ALL the records in the HISTORY for the individual on the screen. All other data about that person remains

>> delete a field

Highlight the field (by holding down the left mouse button and dragging the cursor, or by holding down the SHIFT key and pressing END) - then press the 'Delete' key on your keyboard.

Highlight the record you wish to delete and click on 'Del' or press Alt+L. The record data remains on the screen so that if you've deleted by mistake you can restore the data by clicking 'Add'. Click 'blank' to remove completely.

>> list records in index by Company or Names

Clicking on 'by Company' (or Alt + M) will list the records in the index by the Company name.

>> print out your contact list

Make sure your printer is hooked up and ready. Then click on 'Print' or press Alt + P. This will bring up an options menu. The buttons on this menu are self explanatory.

Make sure your printer is hooked up and ready before clicking any of these.'

>> paste name and address to clipboard

If you're going to write a letter to a contact click on 'To Clipboard (alt + O). This pastes the name, company and address into the clipboard. Then load your word processor and click on 'Paste ' in the Edit menu or press SHIFT + INSERT.

>> print out your Contact Histories

Click on 'Print' or press Alt + P. This will bring up an input panel that asks for the number of days you want to print. These are counted forward from the date currently on screen.

 Make sure your printer is hooked up and ready before clicking 'OK'

>> save data

Your data file is updated when you ADD records to your file (by clicking 'Add'). To save changes made to an existing record click on 'Save' (or Alt +S) after you've made changes or additions to that record you can click on 'Save' or press Alt + S to save all your Contact Tracker data instantly.

>> exit

 Click 'Day Plan' or press Alt + y. This exits from this module back to The Day Plan. You can exit the program from there.

The Achievement Seminar

THE ACHIEVEMENT SEMINAR is a unique, interactive, personal development program. We call it a 'virtual seminar' because like our live seminars it provides a stimulating environment and practical guidance for developing skills. In this seminar the suite of skills we address are the primary achievement skills :

>>> time and self management
>>> goal definition and achievement
>>> the ability to creatively SHAPE our lives.

Like the in-person seminars that we conduct, The Achievement Seminar is based on a broad range of ideas. The program integrates information from humanist, behaviorist and cognitive branches of psychology and incorporates the principles of MetaDynamics.

Also, as in the seminar experience, there is interaction and reflection on the your real circumstances. The Self Assessment, the Timewaster Inventory and the Goal Planner make this material relevant to you. So you'll find this seminar helpful whether you work primarily alone or as part of a team, whether you have relatively few areas of action and responsibilities or whether you feel spread over a wide spectrum of duties, whether you run your own business or at almost any level of a typical organizational hierarchy.

Both this "virtual seminar" and The Achievement Planer are based on seminars and workshops we've conducted over the last 10 years around the world. These seminars have helped thousands of business and organizational leaders become more productive - accomplishing goals and reaching performance levels that might otherwise have eluded them.

Contents

Introduction
General overview of the program with suggestions on how to optimize its use and how to go further in developing achievement skills.

Self-Assessment
This questionnaire gives you a view of the time/self management areas that you personally can improve and provides you strategy suggestions for targeting those aspects of your work habits which need work.

MetaDynamics
This section explains the principles of MetaDynamics and reveals how they are applied in The Achievement Planner. These principles help to create the cognitive framework and psychological transitions to higher achievement.

Achievement
Higher achievement has its practical components as well. Largely these have to do with more effective time management. This section shows you how to use the Achievement Planner (or any other planner) to get more done in less time, with less hassle.

Timewaster Solutions
This self-survey helps you define your chief timewasters and coaches you in developing workable tactics that will help you reclaim days, if not weeks of valuable time a year.

Life/Goal Planner
This comprehensive planning module enables you to identify your core values, drive, directions and goals for you life. It helps you to create a road map to higher achievement and fulfillment in all areas of your life. And it provides you a way to map and track you achievement process.

Interface

This program is very easy to use. Laid out in attractive, animated, screens and forms, it is designed so that you can interact with it in a way that suits your needs. If your primary concern is resolving timewasters then you might do that section first, If you need help with daily organization the Achievement Planner section is the place to start. If you're ready to set goals you can begin there.

With a "virtual seminar" you are not constrained to a particular time and place so you can "attend" in any sequence, at your own pace, as often as you wish and for as long as you wish. You can approach the developmental process in a more thorough way. You can chart your progress over time and be more conscious and deliberate about applying techniques.

To Order

Use the order form (which you access from the FILE menu in the Day Planner) to place your order when you register for The Achievement Planner. The cost is only $19.95 when purchased with The Achievement Planner ($39.95 by itself). Please indicate preferred disk size.