

# Index to Ascend

## Introduction

[What is Ascend](#)  
[Performance Considerations](#)  
[Who Can You Call for Help](#)

## Installation

[Registering Ascend](#)

## Basic Operations

[Changing Ascend's "Current" Window](#)  
[Common Ascend Menus](#)  
[Common Keys Used in Ascend](#)  
[Printer Considerations](#)

## Prioritized Daily Task List Icon

[Prioritized Daily Task List](#)  
[Date Status Bar](#)  
[Changing Dates](#)  
[Entering Tasks](#)  
[Adding Notes to a Task](#)  
[Prioritizing Your Task List](#)  
[Inserting a Task](#)  
[Deleting a Task](#)  
[Copying a Task](#)  
[Moving a Task](#)  
[Group Action](#)  
[Forwarding with the Goto Calendar](#)  
[Recurring Task](#)  
[Repeat Tasks](#)  
[Finding a Specific Task](#)  
[Statistics](#)  
[Sort Tasks](#)  
[Start Timer](#)  
[Printing Your Task List](#)  
[Printing Monthly Index](#)

## Appointment Schedule Icon

[Appointment Schedule](#)  
[Changing the Page Date](#)  
[Entering Appointments](#)  
[Adding Notes to an Appointment](#)  
[Setting Alarms](#)  
[Moving Appointments](#)  
[Copying Appointments](#)  
[Recurring Appointments](#)

## Daily Record of Events Icon

[Daily Record of Events](#)  
[Adding Entries for Your Monthly Index](#)  
[Edit Menu](#)  
[Time, Date, Break, and Name](#)

## Address and Phone Icon

[Address and Phone](#)  
[Adding an Entry](#)  
[Phone and Address Data Entry](#)  
[Finding and Editing a Record](#)  
[Index](#)  
[Filter](#)  
[Modem Settings](#)  
[Print](#)  
[Importing Records](#)

### **Values and Goals Icon**

[Values and Goals](#)  
[Values and Goals Pyramid](#)  
[Attaching Intermediate Goals to Your Task List](#)  
[Edit Evaluation](#)  
[Print](#)

### **Red Tabs Icon**

[Red Tabs](#)  
[Red Tabs File Menu](#)  
[Red Tabs Edit Menu](#)  
[Printing Red Tabs](#)  
[Searching for Text in the Red Tabs](#)

### **Master Task List Icon**

[Master Task List](#)

### **Focus Icon**

[Focus](#)

### **Weekly View Icon**

[Weekly View](#)

### **Turbo File Icon**

[Turbo File](#)

### **Special Days Icon**

[Special Days](#)

### **Journal Icon**

[Journal](#)  
[Printing Journal Entries](#)  
[Journal Index Entries](#)

### **Favorite Quotes Icon**

[Favorite Quotes](#)

### **Reports Icon**

[Reports](#)

### **Tools and Utilities Icon**

[Tools and Utilities](#)  
[Registration](#)  
[Edit Categories](#)

**Ascend Tools and Utilities Program**  
Ascend Tools and Utilities Program

## **What is Ascend**

Ascend is a computer software program designed specifically to be used with the Franklin Day Planner. Although anyone can increase their personal productivity with Ascend, its real strength comes from using it in the manner taught by Franklin International Institute, Inc. All reports and forms printed with Ascend are designed to be printed on pages from a Franklin Day Planner.

For more information about Franklin International Institute, Inc. Contact:

**Franklin International Institute, Inc.**  
**2640 Decker Lake Blvd.**  
**Salt Lake City, UT 84119**  
**801-975-1776**  
**1-800-654-1775**

## Performance Considerations

In order for Ascend to work at its optimum, you must have sufficient hardware and your hardware must be configured properly. **Chapter 13 of your Windows User's Guide** discusses how you can optimize the performance of Windows and Ascend. **It is highly recommended that you spend some time and read this chapter.**

Some of the items that can affect the speed of Windows that are:

- \* Amount of memory (RAM) you have on your computer.
- \* Type of computer and speed of its microprocessor.
- \* Disk caching installed for your hard drive.
- \* Type, speed, and condition of your hard drive.

## Who Can You Call for Help

If, after you refer to the on-line help and the User's Guides, you cannot find an answer to a question or problem that you are having, you can call Ascend's Technical Support Help line. If your question is concerning Windows, you should call Microsoft's Help line.

**Microsoft's Technical Support: 206-454-2030**

**Ascend's Technical Support: 801-476-9262**

So that both Microsoft's and Ascend's technicians can answer your questions as quickly as possible, it is a good idea to have some information ready before you call. The very last page of your Windows 3.0 User's Guide is an outline of information that you should know before calling either of these lines. To help us answer your questions as quickly as possible, please review this outline before calling.

## Registering Ascend

It is very important that you register your copy of Ascend! **Once installed, Ascend will only work for 60 days before requiring a special "Key Number."** This Key Number will be mailed to you from SIS after they receive your Ascend Registration Card.

To register your copy of Ascend, perform the following steps:

1. After Ascend has been started, select the Tools and Utilities icon (a hammer) by double clicking on the icon.
2. Select the **Registration** menu option along the top of the screen. This will pull down the Registration Dialog Box.
3. Fill in the information in the Dialog Box. **You will not be able to fill in the KEY NUMBER field at this time.** After you have entered your registration name and serial number, you will see a User ID Number. Take your registration card and fill in the information **EXACTLY** as it appears on the registration dialog box.
4. Mail in your registration card.
5. When you receive your **Key Number**, go back to the registration dialog box and enter in the **Key Number**.

Once you have entered in a valid registration key number, your copy of Ascend will work indefinitely.

## Changing Ascends "Current" Window

You may have several windows and/or icons on your screen at one time, but only one of the windows can be the "current" or "active" window. You can recognize the current window in several ways:

the color of the current window's title bar will be different from the inactive windows.

the control-menu box, maximize box, and minimize box of the inactive windows will not be displayed in the title bar.

the active window will never have another window "in front" of it.

### To change the "current" window:

#### Mouse Users

To activate a particular window simply click your mouse anywhere on the window that you wish to activate. If the window is minimized, double click your mouse on the window's icon and the window will be restored and activated.

#### Keyboard Users

There are three ways to select the current with from the keyboard:

1. Press the [Alt]+[W] and then press a number from 1 to 9 that corresponds with the window that you wish to make the active window. Since Ascend has more than 9 windows, if the window that you need is not listed, press [M] instead of a number from 1 to 9, and a list of all the possible windows within Ascend will be displayed in a scroll list. Use your up and down arrows to find the desired window from the scroll list and then press [Enter].
2. You may press the [Shift]+[F1] key to make the Prioritized Daily Task List the active window, [Shift]+[F2] for Appointment Schedule, etc. through [Shift]+[F9]. The order of the windows represented by [Shift]+[F1] through [Shift]+[F9] is the same as that displayed in the Windows menu described in option #1 above. [Shift]+[F10] will bring up the scroll list of all Ascend Windows.
3. You may "thumb through" all of the windows and icons by pressing [Ctrl]+[F6]. Pressing the [F6] function key while holding down the [Ctrl] key will rotate through all the windows and icons, highlighting each one. When you are at the desired icon or window, simply let go of the [Ctrl] key. (If the window you select is still in its icon form, you will need to expand it into a window by pressing [Alt]+[-] and then [R].)



## **Common Ascend Menus**

Each of Ascend modules has its own unique menu. There are, however, a few menu options that are the same for each of the windows.

Options Menu

Window Menu

## Options Menu

When you select the Options Menu, a pulldown menu will appear with the following options:

Save Window Setup

Printer Setup

Preferences

Speed Dial

Control Panel

File Manager

Print Manager

Calculator

System Editor

Windows Setup

Exit

## **Save Window Setup**

Selecting this menu option will cause Ascend to save your current window positions and colors. This allows you to save any changes you have made to the size, screen position and color of a window.

## Printer Setup

This option allows you to specify what type of printer you will be using, the font style, and point size. When you first run Ascend, you should go into this option and enter the necessary information.

**Select Printer**      Select the printer that you will be using to print out your tasks, appointments, etc. All of the printers that you have installed under windows will be displayed here.

**Font**                      Once you have selected the appropriate printer, a list of fonts supported by that printer will appear. Select the desired font that you want Ascend to use when printing.

**Size**                      Once you have selected the appropriate font that you want to print with, select the point size of the font that you desire. Some fonts will only have one point size, while others will have several point sizes. **IMPORTANT:** If you select too large of a point size, you will not get as much information on the printed page. A point size of 6 to 10 is recommended.

Select the OK button when you have selected the necessary information.

## Preferences

The Preferences sub-menu is where you customize Ascend by telling it your "preferences".

### **Capitalize Task**

Select this option if you like all task and notes to always be in capital letters.

### **Printer Adjustments**

You can "fine tune" the top and left margin of your printer by increasing or decreasing these field, thus making Ascend print as closely as possible within the lines of your Franklin Day Planner.

### **# of Times to Forward A, B, & C Task Priorities**

When Ascend "forwards" a task, it can also forward that task's priority (A,B,C, or D). Ascend keeps track of how many times a task has been forwarded, and this field allows you to tell Ascend not to forward a task's priority after the task has been forwarded X number of times.

### **# of Times to Forward D Task Priorities**

This option is the same as **# of Times to Forward A, B, and C Task Priorities** but this option works on your "D" tasks which are usually tasks that you need to perform at home or in the evening.

### **# of Times Forwarded Before Master Task List Prompt**

Allows you to tell Ascend to "prompt" you to move a task into the Master Task List after you have forwarded a task X number of times.

### **Default Print Task Notes on Notes Page**

Ascend allows you to enter and save notes on each task. When you add a note to a task, Ascend will allow you to specify whether or not you wish to have the note printed on your Daily Record of Events. Every time you add a new task note you will be allowed to include it on the Daily Record of Events if you wish. This preference item allows you to tell Ascend that you usually will or will not want to include a task's notes on your Daily Record of Events.

### **Default Include Notes in Monthly Index**

This option is very similar to the **Default Print task Notes on Notes Page** discussed above, but deals with including appointment and task notes on your monthly index.

### **Default Include Journal on Notes Page**

When you select the menu option to print your Daily Record of Events, you will be given the option of having your Journal entries printed as well. If you usually include your Journal entries on your Daily Record of Events, you should select this option.

### **Planner Size**

Select the size of the Franklin Day Planner you are using.

### **Minutes Between Auto Save**

Ascend saves your files whenever you quit Ascend or switch to another Windows program. As safety precaution to protect you against power failure, computer problems, etc., the program will save changes every X minutes.

### **Break Definition**

Ascend uses a "break line" to separate items printed on your Daily Record of Events. Click your mouse on the down arrow located next to the Break Definition box and select the type of break line you would like to use.

### **Break After Date**

When you insert the System Date into a note, this option specifies whether to insert a break character after the date.

### **Break After Time**

When you insert the System Time into a note, this option specifies whether to insert a break character after the time.

### **Break Between Notes**

Print a break line between each note on your Daily Record of Events.

### **Display Evaluation**

Select this option to display your evaluation in achieving your goals and values.

### **Master Task List**

Enter the names of the five categories you desire to use in your Master Task List.

### **More Options**

To access the second page of preferences, select the More Options box.

## **More Options**

### **Quote of the Day**

If you would like to randomly select one of the quotes from your Favorite Quotes file and display it when you start the program, select this option.

### **Positive Affirmations**

If you would like to randomly select one of your positive affirmations from your productivity pyramid and display it when you start the program, select this option.

### **Default Phone Descriptions**

Enter the descriptions of the five phone numbers for your Address and Phone file.

### **Password**

If desired, you can enter a password in this field. If a password is entered, you will be required to enter the password every time you start the program.

## **Window Color**

This option allows you to change the background color of the current window by mixing different levels of red, green, and blue. As you slide the scroll bar slider, you will see the color change in the rectangle box below. Once you have the desired color in the rectangle box, select OK and this color will be applied to the currently active window.



## **Speed Dial**

Allows you to use a modem to "auto dial" phone numbers from your Address and Phone file.

Each of the names in your phone and address section that have been marked as a "Speed Dial" number will be listed here. Select the speed dial entry that you wish to dial and press the OK button.

## **Control Panel**

This option allows you to run the Microsoft Windows' Control Panel directly from within Ascend. See your Windows User's Guide for Details on the Control Panel.

## **File Manager**

This option allows you to run the Microsoft Windows' File Manager directly from within Ascend. See your Windows User's Guide for Details on the File Manager.

## **Print Manager**

This option allows you to run the Microsoft Windows' Print Manager directly from within Ascend. See your Windows User's Guide for details on the Print Manager.

## **Calculator**

This option allows you to run the Microsoft Windows' Calculator program directly from within Ascend. See your Windows User's Guide for details on the Calculator program.

## **System Editor**

This option allows you to run the Microsoft Windows' System Editor program directly from within Ascend. See your Windows User's Guide for details on the System Editor program.

## **Windows Setup**

This option allows you to run the Microsoft Windows' Setup program directly from within Ascend. See your Windows User's Guide for details on running the Setup program.

## **Exit**

When you select this option, Ascend will close down and remove itself from Windows.



## Windows Menu

The Window menu is the second common menu throughout all Ascend modules. When you select this menu option, you will be given the following options:

Arrange Icons

Options 1 - 9

More Windows

## **Arrange Icons**

Selecting this option will automatically and evenly arrange any icons along the bottom of your screen.

## **Options 1 through 9**

These options allow you to quickly go to any of the first 9 of Ascend's modules with the keyboard. For example, pressing [1] from the Windows menu will make Prioritized Daily Task List the current window. These options can also be selected by pressing the [Shift]+[F1] through [Shift]+[F9] anywhere in Ascend.

## **More Windows**

This option displays a scroll list allowing you to quickly go to any of Ascend's modules. This scroll list can also be accessed by pressing [Shift]+[F10] anywhere in Ascend.

## Common Keys Used in Ascend

|              |   |
|--------------|---|
| F1           | On-line Help                                      |
| F2           | Speed Dial Feature                                |
| F4           | Goto Date Monthly Calendar (certain modules only) |
| Shift + F1   | Prioritized Daily Task List                       |
| Shift + F2   | Appointment Schedule                              |
| Shift + F3   | Daily Record of Events                            |
| Shift + F4   | Address and Phone                                 |
| Shift + F5   | Values and Goals                                  |
| Shift + F6   | Red Tabs  |
| Shift + F7   | Master Task List                                  |
| Shift + F8   | Focus   |
| Shift + F10  | Ascend Module Selection Scroll Bar                |
| Ctrl + Esc   | Windows Program Selection Scroll Bar              |
| Ctrl + F6    | Rotate through Ascend Modules                     |
| Alt + Tab    | Rotate through Windows Programs (fast)            |
| Alt + Esc    | Rotate through Windows Programs (slow)            |
| Ctrl + F4    | Close an Ascend Module Window                     |
| Alt + F4     | Close and Exit Ascend (if in Ascend)              |
| Alt + F4     | Close and Exit Windows (if in Program Manager)    |
| Ctrl+Insert  | Copy highlighted items into Windows clipboard     |
| Shift+Insert | Past items from Windows clipboard                 |

## Printer Considerations

Ascend was designed specifically to be used with the Franklin Day Planner. It is important to understand that printing presses cannot print each page of the planner **exactly** the same. As you begin using Ascend to print on your Franklin forms, you will notice that it may move outside of the preprinted lines slightly on occasion. This is due in part to the variation in lines and margins on the Franklin forms and also in part to how you line your paper up in your printer.

You can use the Printer Adjustments box in the Preferences section of Ascend to fine tune your printouts as much as possible, but the printouts will not always be exact. This is usually not a big problem, but you should be aware of the situation.

## Prioritized Daily Task List

The Prioritized Daily Task List is one of the main functions of Ascend and lets you prioritize your Daily Tasks using a simple "step-through" approach. Tasks can be quickly forwarded to future dates via a pop-up calendar. Notes can be kept on each task. When a task is forwarded, the notes for the task are forwarded as well. Tasks are printed in their prioritized order right on your [Franklin Day Planner](#) pages. If desired, print notes for your tasks on your [Daily Record of Events](#).

You can enter [recurring tasks](#) to help you remember to purchase birthday presents, prepare for recurring meetings, etc. You can also track your time by categorizing how much time you spend on certain tasks and displaying the information on a graph.

### See Also:

- [Date Status Bar](#)
- [Changing Dates](#)
- [Entering Tasks](#)
- [Adding Notes to a Task](#)
- [Prioritizing Your Task List](#)
- [Inserting a Task](#)
- [Deleting a Task](#)
- [Copying a Task](#)
- [Moving a Task](#)
- [Group Action](#)
- [Forwarding with the Goto Calendar](#)
- [Recurring Task](#)
- [Repeat Tasks](#)
- [Finding a Specific Task](#)
- [Statistics](#)
- [Sort Tasks](#)
- [Start Timer](#)
- [Printing Your Task List](#)
- [Printing Monthly Index](#)

## Date Status Bar

The bar directly under the Menu Bar is called the Date Status Bar and **always** displays the **current** date and time. This date and time are the current date and time as set in your computer's clock/calendar. The date in the Date Status Bar is called the **System Date** or **Today's Date**.

You can quickly return the Page Date to the System Date by double clicking the mouse on the Date Status Bar.

The plus or minus number in the middle of the Date Status Bar shows how many days the Page Date is before or after the System Date.



## Changing Dates

The date that is displayed between two big arrows on the Daily Prioritized Task List, Appointments Schedule, Daily Record of Events, and Journal is called the **Page Date**. This date represents the date of a page in your Franklin Day Planner.

When you change the **Page Date**, it is like turning the pages in your Franklin Day Planner to a new day. You need this capability in Ascend in order to forward tasks to new days, plan tasks for future dates, review upcoming meeting notes, etc.

There are several ways to change the **Page Date** to another day:

1. You can go back one day at a time by clicking the big arrow to the left side of the Page Date with the left mouse button.
2. You can go forward one day at a time by clicking the big arrow to the right side of the Page date.
3. You can use the **Goto** menu to go to yesterday, today, tomorrow, forward a day, backward a day, forward a week, or backward a week.
4. You can use the **Goto** menu and then the **Date** sub-menu to pop-up a calendar. From this "goto" calendar you can select the date that you want to go to.
5. You can press the [F4] function key and the Goto Calendar will appear. You may then use this calendar to change the Page Date.
6. You can quickly have the Page Date "jump" to the System Date (Today's Date) by double clicking on the Date Status Bar.

By experimenting with the different methods of changing the Page Date, you will notice that as you change the Page Date, the System Date shown in the Date Status Bar remains unchanged, but in the Date Status Bar, a positive or negative number will tell you how many days your Page Date is "from today."

## Entering Tasks

To enter a task, simply move to the first empty line under the Prioritized Daily Task List column and type in the task. To move between columns you can either use your mouse to click in the desired column and row or you can use the [Tab] key to move between columns and your up and down arrow keys to move between rows.

Each of the columns are explained below:

↓ (Task Code) This column specifies the particular code to assign each task. Valid codes each task are:

A blank code symbolizes that the task has not been acted upon.

- ✓ This code symbolizes that the task has been completed.
- ➡ This code symbolizes that the task has been forwarded to another day. You may see the day in which the task was forwarded by using the View Statistics function.
- ✗ This code symbolizes that the task has been deleted.
- This code symbolizes that the task has been delegated to another person.
- This code symbolizes that the task is currently in process but has not been completed yet.
- ☑ This code symbolizes that the task that was delegated has now been completed.
- 🔄 This code symbolizes that the task that was in process has now been completed.

There are three ways to select the appropriate code for a task:

1. Click in the task code column or press the space bar. This will bring up the Select Task Code dialog box allowing you to choose from a list available codes.
2. Use the right mouse button and click in the column. Each time you click, the next task code will appear. Stop clicking when you reach the code you desire.
3. Use the Group Action feature.

abc This is the prioritization column. When you prioritize your tasks with the Prioritize Tasks menu option, this column will fill in automatically for you. You may, however, fill this information in directly if you desire.

Prioritized Daily Tasks This column is where you enter your task descriptions.

📝 (Notes) This column indicates whether you have entered a note for the task or not. If the box contains the notes icon, you have entered a note. If it is blank, there are no notes for the task. To enter or edit the notes for a task, either click in this column or press the space bar to activate the Task Notes dialog box.

### Columns for Full View Only

Est Estimated number of time blocks that the task will take.

Act Actual number of time blocks that the task used to complete.

Category This column allows you to specify what category you would like to assign a task to. The default category for all tasks is "None". To access the different categories, either click the left mouse button in this column or press the space bar when you are in this column. This will bring you the Task Categories dialog box.



## Add Notes to a Task

Ascend allows you to assign a note for each task and appointment that you enter.

**Include on Index Page** Check this box if you want this note to be included when you print your monthly index.

**Print on Notes Page** Check this box if you want this note to be printed on your Daily Record of Events.

**Index Entry** If you have selected to have this note printed on your monthly index, you can enter the index entry name. This field will default to the name of the task or appointment.

**Find Name** This push button is used to merge information from your Address and Phone file into your task notes. When you press the button, you will be able to select a name from your Address and Phone file.

**Insert Break** If you want to insert a break line that will be used when printing this information, press this button. When you select this button, you will see a "␣" character.

**Insert Date** If you wish to insert the current date anywhere in your note, select this button.

**Insert Time** If you wish to insert the current time anywhere in your note, select this button.

**OK, Cancel, and Delete** Select the OK button when you are ready to save the note and exit. If you wish to exit the note's dialog box and not save your changes, push the Cancel button. If you wish to delete or clear out a note from a task or appointment, press the Delete button.

## Prioritizing Your Task List

One of the nicest things about Ascend is the way it "walks you through" the prioritizing process "step by step." Ascend uses the prioritizing methods taught by Franklin International Institute, Inc., and if you are familiar with how this method works, you will appreciate the easy approach Ascend uses to help you with this process.

You enter the prioritization process by selecting the **Task Options** menu and then select the **Prioritize** menu option.

The Unprioritized Task box lists all of the current Page Date's tasks that have not already been either completed, deleted, forwarded, or prioritized.

As taught by Franklin International Institute, Inc. the first step to prioritizing process is to label each of your tasks, A, B, C, or D. A definition of each priority follows:

- A** Tasks that must **absolutely** be completed today.
- B** These are important tasks that you would like to be able to do today, but you would not suffer significant consequences if you did not get them completed today.
- C** These are tasks that you will complete "if you get some time". These are less important and not very urgent.
- D** These are tasks that you wish to do in the evening and will be printed at the bottom of your planner page.

You will notice that the first task in the **Unprioritized Tasks** box is highlighted. Decide whether it is an A, B, C, or D task and click the corresponding button to prioritize the task.

If you come to a task that should not be prioritized because it is completed or you want to forward it, etc, simply select the appropriate check box to show that task has been completed, forwarded, delegated, etc.

Sometimes you may forget what a task means. You can use the **View Notes** button to see if there are any notes associated with a particular task. If there are no notes associated with the task, you will hear a short beep.

Once you have categorized all your tasks into either A, B, C, or D tasks, you need to press the **Rank** button to put each task in a numerical order.

When you are all through prioritizing and ranking your tasks, press the OK button to return to your task list.

## View Notes

This dialog box shows you the note associated with the task that you have highlighted on the Prioritized Tasks dialog box. **You cannot edit the note here.**

## Rank Tasks

After you have put each of your tasks into one of the 4 categories (A,B,C, or D), you need to rank your tasks. Ranking is the process of determining the numerical order of your tasks. For example, which of your A tasks should be first, second, and third.

When you see this dialog box, you will see all of your A,B,C or D tasks in the **Unranked Tasks** list box. Select the task that you want to be first and then press the **Rank 1** button. This will move the task over to the other side of the dialog box and allow you to select the next task. The **Rank 1** button will now change from **Rank 1** to **Rank 2**. Continue ranking all of your tasks. Once you have ranked all of your tasks, select the **Done** button.

You may also select the next task to be ranked by double clicking on the task.

## Inserting a Task

One of the advantages to using an automated planner system, is the ability to insert a task into your task list and keep the list prioritized. To do so, simply move the cursor to the row of the task you would like to insert a task **before**, select the **Edit** menu and then **Insert**. Ascend will insert a blank line for the new task and keep the prioritized rankings in order.



## Deleting a Task

To delete a task, simply move the cursor to the task to be deleted, select the **Edit** menu and then **Delete**. Ascend will keep your list in a prioritized order.

## Copying a Task

To copy a task to another Page Date and still leave the task on the current Page Date, move the cursor on the task to be copied, select the **Edit** menu and then **Copy**. The same calendar that you see when you are changing Page Dates will appear and you can select the date to copy the task to.

## Moving a Task

Moving a task is identical to copying a task except that you use the **Move** option and the task will be deleted from the Page Date where the task was moved from.

## Group Action

You use the group action to quickly assign task codes to all of the tasks that have not been completed, deleted or forwarded.

To access the group action, pull down the **Task Options** menu and then select **Group Action**.

All tasks that do not already have a task code will appear in the upper box labeled **Tasks that Need Actions**. Select the appropriate action for the highlighted task by pressing the necessary button (Completed, Forwarded, Deleted, etc.).

There are seven smaller buttons for the next seven days of the week. These buttons are used as a quick way to forward tasks to sometime within the next seven days without having to use the Goto calendar. These seven buttons will change depending on the Page Date.

The **Complete & Copy** button can be used to mark a task as completed on the current Date Page but then still copy it to another date via the Goto calendar. This is a handy feature for "ongoing" tasks.

## Forwarding with the Goto Calendar

When you forward a task, you will get the Goto Calendar also known as the Monthly Calendar. You will notice that this is the same calendar used when you select the **Goto/Date** menu options.

Next to some of the dates a small icon might appear (cake, closed sign, briefcase, palm tree, etc.) representing a Special Day. These icons help you to avoid forwarding tasks to days when you will not be available.

You may select the date you wish to forward the task to by double clicking on the desired date or by typing in the desired date that you wish to proceed to.

Sometimes it is useful to know what tasks, appointments, and/or special day items are on a particular day before forwarding a task to it. To view a date's tasks, appointments, and special day items, click the mouse on the desired date **one** time. The date will become marked with a highlighted box. You can now check the **View Detail** box and any tasks, appointments, and/or special day items will be displayed in the scroll boxes at the right of the calendar.

Using the calendar, you also have the option of forwarding tasks to your Master Task List instead of a date. To do this, click your mouse on the down arrow to the right of the Master Task List category box. Your five Master Task List categories will be displayed and you may select the OK button and the task will be moved to the specified category in your Master Task List.

## Recurring Tasks

A recurring task is a task that must be scheduled at consistent intervals.

Ascend allows you to schedule recurring tasks either directly from the Prioritized Daily Task List or via the Values and Goals section.

To Add a recurring task, select the **Task Options** menu and then **Recurring Tasks**.

|                         |   |
|-------------------------|---|
| <b>Task Description</b> | Enter the description of the recurring task that you want to have appear on your Prioritized Daily Task List.   |
| <b>Default Priority</b> | Enter the default priority for the task, A, B, C, or D or leave blank for no default priority.  |
| <b>Starting Date</b>    | Enter the date that you want this task to start appearing on your Daily Task List.  |
| <b>Ending Date</b>      | Enter the date that you want this task to stop appearing on your Daily Task List.   |
| <b>Day</b>              | If you would like the recurring task to only appear on a specific day in the month, enter the day here.   |
| <b>Month</b>            | If you would like the recurring task to only appear on a specific month, enter the month here.  |
| <b>Weekdays</b>         | Check the weekdays that you would like the recurring task to appear on your Daily Task List on.   |
| <b>Week Number</b>      | Check the week number that you want the recurring task to appear on your Daily Task List on. These week numbers correspond to the week number in the month.   |
| <b>Save</b>             | Press this button to save the current recurring task.   |
| <b>Find</b>             | Press the button to <u>find</u> an existing recurring task.   |
| <b>New</b>              | Press this button to allow you to enter a new recurring task.   |
| <b>Delete</b>           | Press this button to delete the current recurring task.   |
| <b>Prev</b>             | Press this button to view the previous recurring task in the recurring task file.   |
| <b>Next</b>             | Press this button to view the next recurring task in the recurring task file.   |
| <b>Exit</b>             | Press this button to exit the recurring tasks dialog box.   |
| <b>Performance</b>      | When you select this check box, you will see a calendar which shows you how you have performed with the current recurring task. Days that you should have completed the recurring task will show a circle. Days that you actually completed the task will show as a check mark. At the bottom of the calendar you |

will see some statistics about the task for the month.

## Repeating Tasks

A "Repeat Task" is a special task that repeats once finished. These are tasks that once you have completed, you want to re-schedule the task again after so many days. Repeats Tasks are different from recurring tasks in that they are only re-scheduled after they are completed, and that the reschedule date is based upon the completion date.

To schedule a repeat task, simply add the task to your Prioritized Daily Task List on the first date you wish to schedule the task. After you have entered the task, pull down the **Task Options** menu and then select **Repeat Task**. A dialog box will appear asking you how many days to wait before re-scheduling this task **once it has been completed**. You can then enter the correct number of days and select OK.



## **View Statistics**

To view the statistics of a particular task, move your cursor to one of your tasks, pull down the **View** menu and select **Statistics**. This option will display a dialog box containing misc. statistics about the task.

## Sort Tasks

In the very rare occasion that you move your tasks and/or priorities around and need to re-sort them by their prioritized order, you can do so by pulling down the Task Options menu and selecting **Sort Tasks**.

## Start Timer

Ascend has a timer function allowing you to time how long you work on a task. To start this timer, pull down the **Task Options** menu and select **Start Timer**. To stop the timer select **Stop Timer** from the **Task Options** menu. When the timer is stopped, you will be given a report on how many hours and minutes elapsed since the timer was started and also how many Time Blocks were used.

## Printing Your Task List

Ascend will print your Prioritized Daily Task List right on the pages on your Franklin Day Planner. To do this, make sure your Date Page is on the correct date and put that day from your Franklin Planner in your printer. Pull down the **Print** menu and select **Print Tasks, Appointments & Notes**.

### Print Prioritized Daily Task List

Check this option if you wish Ascend to print your Prioritized Daily Task list on your Franklin Planner page.

### Print Appointment Schedule

Check this option if you wish Ascend to print your Appointment Schedule on your Franklin Planner page.

**If both Print Prioritized Daily Task List and Print Appointment Schedule have been selected, Ascend will print both your tasks and appointments at one time on the left side of a Franklin Day Planner page.**

### Print Daily Record of Events & Notes

Check this option if you wish Ascend to print your Daily Record of Events, Task Notes, Appointment Notes, etc. on your Franklin Daily Record of Events Page.

### Lines to Skip

If you have already written on your Franklin Day Planner page for the selected date, you may specify how many lines you wish Ascend to skip before printing. This option is only valid for your Prioritized Daily Task List and your Daily Record of Events.

### Pause between Pages

If you have selected to have both tasks/appointments (left page) and notes (right page) printed, check this box if you would like Ascend to pause between these pages to allow you to load them into your printer manually.

### Include Journal with Daily Record of Events

Check this option if you desire any entries for the current Page Date found in your journal to be printed along with the other note items on your Daily Record of Events.

### Print on Blank Page

Occasionally you might ruin a page from your Franklin Planner (printer was not setup properly, put wrong date in printer, paper jam, etc.). Should you ruin one of your pages, you can still print your task list and record of events on a blank sheet of paper by checking this option.

When you are ready to print, press the OK button.



## Printing Monthly Index

To print a monthly index of your notes, pull down the **Print** menu and select **Print Monthly Index**. Select the desired month, insert paper into your printer, and then select **OK**.

## Select Task Codes

Select the task code that you desire to perform on the task and then select the OK button. If you select the Forward task code, you will be presented with the Goto calendar to select the appropriate date to forward the task to.

## **Task Categories**

Select the appropriate task category by using the arrow keys or the mouse. If you would like to add a new category, simply type in the name of the new category and press the OK button.



## Find a Recurring Task

Select the recurring task from the list and press the **OK** button. If you desire to delete one of the recurring tasks in the list, select the task and press the **Delete** button.

## Appointment Schedule

Ascend alllows you to track your appointments and print them right on your [Franklin Day Planner](#) pages. The program will warn you if you try to schedule an appointment that conflicts with another meeting. Just like recurring tasks, you can incorporate recurring appointments. Also, like tasks, appointments can have notes attached which can be printed on your [Daily Record of Events](#). An alarm can be set for any and all appointments and then "snoozed" when it sounds.

### See Also:

[Changing the Page Date](#)

[Entering Appointments](#)

[Adding Notes to an Appointment](#)

[Setting Alarms](#)

[Moving Appointments](#)

[Copying Appointments](#)

[Recurring Appointments](#)

## Entering Appointments


To enter an appointment, simply move to the desired time and enter in a description for the appointment. To move up and down the schedule, you can either:


1. Use the scroll bar to the right of the schedule to move to the time that you desire.
2. Use the up and down arrow keys on the keyboard to move you to the line that you desire.
3. Use the mouse to click on the line that you desire to go to.

The columns for the appointments window will now be discussed.

Appointment Schedule      This is where you type in the appointment.

 (Alarm)      This is the alarm column where you can set alarms for your appointments.

 (Notes)      This column allows you to attach a note to the appointment.

 (Time Blocks)      This column allows you to specify how many time blocks the appointment will take.

## Setting Alarms

To set an alarm for an appointment, click your mouse on the row of the appointment in the Alarm column or move your cursor to the correct row and press the space bar. You can either enter a time directly or you can use the up and down arrow buttons to change the default time.

When the alarm does sound, you will be given the option to snooze the alarm to sound again at a later time.

## Moving Appointments

To move an appointment to another date or time, put the cursor on the appointment you wish to move, pull down the **Edit** menu, and select **Cut Appointment**. The appointment will disappear and has been moved to a temporary location in your computer's memory. Next, move your cursor to the location where you wish to move the appointment to, even on a different page date, pull down the **Edit** menu, and select **Paste Appointment**. The appointment reappears in its new location.

## Copying Appointments

The procedure to copy an appointment is the same as moving an appointment except you use the **Copy Appointment** option from the **Edit** menu instead of **Cut Appointment**. Unlike **Cut Appointment**, **Copy Appointment** will leave the original appointment alone but still allow you to paste the appointment elsewhere.

## **Recurring Appointments**

Recurring appointments work the same as recurring tasks. The major difference is that you can specify the number of time blocks required and the time of the recurring appointment.

## Daily Record of Events

Ascend allows you to enter and save notes into your Daily Record of Events and then print these items in your [Franklin Day Planner](#). A quick search routine allows you to find entries quickly in your Daily Record of Events. Information from your Address and Phone file can be quickly merged into an entry, thus allowing you to include phone numbers, addresses, directions, etc., instantly with an entry.

The Daily Record of Events is basically a mini word processor where you can record phone conversations, thoughts, ideas, anything!

### **See Also:**

[Adding Entries for Your Monthly Index](#)

[Edit Menu](#)

[Time, Date, Break, and Name](#)



## **Adding Entries for Your Monthly Index**

If you would like to create an entry to be included on your Monthly Index for something in your Daily Record of Events, simply select the **Index** menu and a dialog box will appear asking for the name of the index entry.

## **Edit Menu**

Use the Edit Menu to delete, copy, paste, or move information. You can also use this menu to undo your last edit.

## **Time, Date, Break and Name**

The **Time, Date, Break**, and **Name** functions of the Daily Record of Events' module are the same as **Insert Time, Insert Date, Insert Break**, and **Find Name** as described in [Task Notes](#).

## Address and Phone

Ascend maintains a categorized address and phone directory that can be printed for your [Franklin Day Planner](#). Phone numbers can be dialed directly from the computer if you have a [modem](#). When dialing a number for you, the program will automatically send the appropriate prefix and/or suffix codes for in-state, out-of-state, and local calls. A "speed dial" feature makes it extremely easy to dial certain numbers that you call frequently. A "filter" feature allows you to quickly view or print only a select group of entries, such as all golf courses, all hotels in California, all board members, etc. If desired, a "VIP" feature can be used to help secretaries screen incoming calls.

### **See Also:**

[Adding an Entry](#)

[Phone and Address Data Entry](#)

[Finding and Editing a Record](#)

[Index](#)

[Filter](#)

[Modem Settings](#)

[Print](#)

[Importing Records](#)

## Adding an Entry

To add a name to your Address and Phone file, pull down the **Name** menu and then select **Add**. (You can also press the Insert key to add a new entry.) Ascend will then proceed to the Phone and Address Data Entry screen.

## Phone and Address Data Entry

Most of the fields in this dialog box are self-explanatory, with the following added detail:

- Category** Ascend allows you to categorize your Address and Phone entries, if desired. You can then use Ascend's "filter" feature to find all golf courses, restaurants, hotels, business associates, etc.
- To categorize an entry, click your mouse on the down arrow to the right of the category input box. A box will appear showing all of the categories you have entered so far. You may either use your mouse to select an existing category, or you may type in a new category if needed.
- Description** When adding a new record, the five **Description** fields will default to what you have specified in your preferences. You may keep these defaults or enter new ones.
- VIP** Check this box if the entry is a VIP. You could then use the filter feature of Ascend to print a listing of your VIP's for your secretary. Your secretary could then interrupt you in meetings if a VIP calls or visits.
- Speed Dial** If you have a modem and are planning on using Ascend as an auto dialer, check this box if the entry is one that you call often. Entries with the **Speed Dial** box checked can be called quickly from anywhere in Ascend by pressing the F2 function key.
- List by Company**
- List by Name** When Ascend displays your entries on the directory screen (the one that looks like a phone book), it will list them in alphabetical order. If you would like the entry you are adding to be displayed based on the last name, check the **List By Name** box. If, however, you would like the entry to be listed by the company name, check the **List by Company** box. If you would like to have the entry listed by **both** the last name and the company name, check **both** boxes.
- Print** The **Print** button can be selected to quickly print all of the information in the current record you are editing.
- Dial** Select this button to quickly dial (using your modem) the current record you are editing.

## Finding and Editing a Record

To move from page to page on the phone directory screen, you can do one of the following:

1. Click your mouse on the letter tab for the page you desire.
2. Enter the desired letter by typing it in the Finding box.
3. Use the right and left arrow keys on the keyboard to page through your listings.

To select an existing record for editing or viewing, simply move your cursor to the desired record and press [Enter] or double click on the record's name with your mouse.

To quickly search for a particular name, you may type the name in the **Finding** box, and Ascend will search for the name as you type. When you arrive at the desired name, press [Enter] to edit or view the record.

## Index

If you would rather view all of your entries alphabetically in one scroll list instead of one scroll list per letter, select **Index** on the menu bar. To return back to the normal display method, select **Index** again. Selecting this option will toggle you between the two viewing modes.



## Filter

You may set up a "filter" in Ascend's Address and Phone module to exclude individuals from your index listings and printouts who do not meet certain criteria.

To enter your filter criteria, pull down the **Filter** menu and select **Set Filter**. A screen will appear exactly like the Address and Phone dialog box. Enter in any criteria you wish to filter by and then press **OK**.

Once you have set your filter's criteria, you must make sure you have turned the filter on. There are two ways to do this:

1. Select **Use Filter** from the **Filter** menu. (Note: If there is a check mark by the **Use Filter** menu option, then the filter is already on and selecting it again will turn it off.)
2. Check the **Use Filter** box at the bottom of the Address and Phone directory screen.

To turn the filter off, reverse one of the above options.

To reset your filter's criteria, select **Set Filter** from the **Filter** menu and select the **Reset** push button and then **OK**. You can tell that your filter criteria has been reset and is currently empty if the **Use Filter** box under your Address and Phone directory has been shadowed.

## Modem Settings

If you have a modem and desire to use it with Ascend as an auto dialer, select the **Modem** menu option to set Ascend's modem configuration.

Ascend will automatically send a prefix and/or suffix before certain types of calls. These prefixes and suffixes can be set from the **Modem** menu option.

Ascend automatically detects if a call is **Local, In State,** or **Out of State** by how the number is entered in the Address and Phone file:

1. If a phone number is 8 characters or less (including the hyphen), Ascend assumes the number is **Local**.
2. If the phone number is 10 characters or less but begins with the number 1, it assumes the call is **In-State**.
3. If the phone number is 11 characters or more and begins with the number 1, it assumes the call is **Out-of-State**.

## Printing

To print out your directory for use in your Franklin Day Planner, select the **Print** menu option.

**Listing Type**            Select what type of listing you wish to print.

**Use Filter**              Check this box if you desire your printout to only include those records that meet the criteria you have set up in the filter.

### **Page Break Between Letters**

Check this box if you want a form feed after each letter. If you want all of your names to print on as few pages as possible, do not check this box.

**Starting and Ending**      Enter a starting and ending letter for your report.

**Page**                      Ascend will automatically flip between the right and left page, but you can specify which side of the page you wish to begin the report on.

Select the OK button when you are ready to print.

## Importing Records

If you already have a significant amount of data on a computer that you wish to import to Ascend's Address and Phone file, you can use Ascend's import routine. To be able to use Ascend's import routine, you must have a data file that is **Line Delimited** and only contains information pertinent to Ascend's Address and Phone file.

To use this routine, pull down the **Name** menu and select **Import**. Two scroll lists will appear. Double click on the first item in your data file, then double click on the second item, and so on. After you have selected all of the pertinent fields, enter the name, drive, and path of the file you wish to import.

After you have entered the appropriate information, select the **Import** push button, and Ascend will read the data into your file and append it to any records you already have in Ascend's Address and Phone file.

## Values and Goals

The real power of Ascend is seen in the Values and Goals module. This module allows you to enter your Productivity Pyramid, or Personal Constitution, as taught by the Franklin International Institute, into your computer. The program outlines your Governing Values, Long-Range Goals, and Intermediate Goals in a logical pyramid which can then be printed in an attractive format for your Franklin Day Planner. Ascend allows you to evaluate yourself in each area of your Personal Constitution on a rating scale of 1 to 10 and then will automatically introduce specified items from your Intermediate Goals into your Prioritized Daily Task List. The real power here is in automatically including the goals that need work into your Prioritized Daily Task List. You can even view a progress report on how well you are doing. Because of the structured system employed by Ascend, creating your Productivity Pyramid is easy and fun, and if you need to edit it later, doing so is a snap.

### **See Also:**

[Values and Goals Pyramid](#)

[Attaching Intermediate Goals to Your Task List](#)

[Edit Evaluation](#)

[Print](#)

## Values and Goals Pyramid

The goal setting process, as explained by Franklin International Institute, Inc., uses the Productivity Pyramid which consists of four levels:



1. Governing Values.



2. Long Range Goals



3. Intermediate Goals



4. Daily Tasks

Ascend allows you to enter these four levels using a "tree" approach. For example, someone could have 10 Governing Values, 50 Long Range Goals (an average of 5 per value), and 250 Intermediate Goals (an average of 5 per Long Range Goal).

To enter items under each level, select the **Add** button.

## Attaching Intermediate Goals to your Daily Task List

After you have added the first three levels of your pyramid: Values, Long Range Goals, and Intermediate Goals, you can **introduce some of your intermediate goals into your daily task list**. The average person will have between 100 and 300 Intermediate Goals, as you probably will also. It is not realistic for you to work on all of your Intermediate Goals at one time. Therefore, you should evaluate your goals often and select two or three of your intermediate goals at any given time by introducing items from these goals into your Prioritized Daily Task List.

To have items from your Intermediate Goals appear on your task list, select the **Add** key from the dialog box of the Intermediate Goal you wish to "work on". A screen will appear that looks and function exactly like the Recurring Tasks feature. The only difference will be that this recurring task will be attached to your Intermediate Goal.

## Edit Evaluation

Ascend allows you to evaluate yourself by rating each of your Intermediate Goals on a scale of 1 to 10 (1 being poor and 10 being excellent). Ascend will then use your Intermediate Goal ratings to calculate a rating for each of your Long Range Goals. Ascend will then use the calculated rating from your Long Range Goals to calculate a rating for each of your Values, and then it will calculate one overall rating for your entire life based on the ratings of your Values.

This approach is fairly accurate because how well you are doing overall in your life is a factor of how well you are doing in each of your Governing Values, and how well you are doing in each of your Values is based upon how well you are doing with your Long Range Goals which in turn is based upon how well you are doing with your Intermediate Goals.

To evaluate your Intermediate Goals, select the **Edit Evaluation** menu options. This will bring up a list of all of your Intermediate Goals. As you scroll through each of your Intermediate Goals, you will see that goal's evaluation in a box below where you can change it.

Select the OK button when you are all done changing the evaluations.



## Printing Values and Goals

Use the **Print** menu option to print your Values and Goals on the Franklin Day Planner forms. Depending on which section of the values and goals you are on, you will use different forms.

If you are on the first "Personal Constitution" section, selecting the **Print** menu option will print all of your Governing Values on the "Values" sheet in your Planner.

If you are editing an existing Governing Value, selecting the **Print** menu option will print only that one Governing Value on the "Values" sheet in your Planner.

If you are editing an existing Long Range Goal, selecting the **Print** menu option will print that one Long Range Goal with its corresponding Intermediate Goals under it on the "Goal Planning" sheet in your Planner.

## Red Tabs

Red Tabs is an Ascend module that allows you to quickly enter, store, and print misc. information with your computer -- a mini word processor, only faster. This feature is used similarly to the red tabs in the [Franklin Day Planner](#) -- a catch-all for misc. items.

There are an infinite number of ways to use Red Tabs, limited only by your imagination. To get your imagination flowing, here are some examples of what you might use the Red Tabs for:

- \* A wish list of books you would like to read
- \* Gift ideas for your spouse and others
- \* A list of items to take when you travel
- \* A list of items to take when your family goes camping
- \* Business ideas
- \* Shopping lists
- \* Things to ask your boss when he calls from out of town
- \* A back-up log of when you backed up your data files
- \* And on, and on, and on...

### See Also:

[Red Tabs File Menu](#)

[Red Tabs Edit Menu](#)

[Printing Red Tabs](#)

[Searching for Text in the Red Tabs](#)

## Red Tabs File Menu

Each Red Tab item is kept in a separate file. To Add, Edit or Delete files from your Red Tabs, you need to use the **File** menu option.

- |                |  |
|----------------|--|
| <b>New</b>     | This option clears the Red Tab screen and allows you to create a new Red Tab item.   |
| <b>Find</b>    | This option allows you to <u>find</u> an existing Red Tab item and open it up for editing.   |
| <b>Save</b>    | This option saves any changes you may have made to an existing Red Tab item. If the item is a new Red Tab item, you will be prompted to type in the Red Tab's description before saving the file.  |
| <b>Save As</b> | This option allows you to save the current Red Tab item into a new Red Tab. You will be prompted to enter in the Red Tab's new description before saving the file. You will need to use this option when changing a Red Tab's description. |
| <b>Delete</b>  | This option allows you to delete an existing Red Tab.  |

## Red Tabs Edit Menu

Because the Red Tabs module is basically a mini word processor, there are several editing features that you may take advantage of.

- |                  |   |
|------------------|---|
| <b>Undo</b>      | This option undoes your last editing operation.   |
| <b>Cut</b>       | This cuts the selected text and copies it to the clipboard.   |
| <b>Copy</b>      | This option copies the selected text to the clipboard but leaves the selected text where it is.   |
| <b>Paste</b>     | This option pastes any text that is in the clipboard to the location where your cursor is currently positioned.   |
| <b>Delete</b>    | This option deletes any text that is currently selected <b>but does not copy it to the clipboard.</b>   |
| <b>Word Wrap</b> | This turns on the Word Wrapping mode. If the Word Wrapping mode is OFF, you will need to press the [Enter] key to terminate lines. When it is ON, Ascend will <i>wrap</i> to the next line automatically. |
| <b>Font</b>      | This option allows you to select the font that you want to display the text in. <b>This does not affect your printing of the Red Tab.</b>   |

## Printing Red Tabs

You may print out your red tabs by selecting the **Print** menu option. The red tab will be printed on plain white paper and will print according to the planner size that you are using.

## Searching for Text in the Red Tabs

You may use the **Search** menu option and the **Find** sub-option to find text in your red tab file.

**Search For**            Enter the text that you desire to search for.

**Case Sensitive**      If you desire your search to be case sensitive, check this button.

### **From Beginning of File**

If you desire the search to start at the beginning of the file, check this button. Otherwise the search will begin from the current position in the file.

Select the OK button to begin the search.

You may use the **Search** menu option and the **Find Next** sub-option to repeat the last find operation.

## Finding Red Tabs

Select the Red Tab file that you desire to edit and press the OK button or double click on the desired file.

If you desire to delete one of the Red Tab files that you see in the list, simply highlight the Red Tab item and press the **Delete** button.

## Master Task List

Ascend allows you to have up to five different Master Task List categories where you can temporarily "store" tasks that you would like to do someday but that you don't want to schedule on a particular day yet -- kind of a "someday when" list. The Master Task List is like a "back burner" and is a handy feature for storing those tasks that you don't want to forget about, but you know you don't have time to complete in the near future.

You can easily and quickly move tasks from your Prioritized Daily Task List to the Master Task List and vice versa. In fact, Ascend will even prompt you to move a task to the Master Task List after you have forwarded it a specified number of times.

There are five different categories in your Master Task List. To switch between categories, click on one of the big arrows to either side of the category name box.

|                 |  |
|-----------------|--|
| <b>Search</b>   | This menu option will allow you to <u>search</u> through all of your data for a particular task, phrase, note, appointments, etc.  |
| <b>Delete</b>   | This menu option will allow you to delete the current task that you are on from the Master Task List.  |
| <b>Move</b>     | This menu option will allow you to move the current task that you are on to your Daily Prioritized Task List. When you select this option, you may use the <u>Goto</u> calendar to find the day that you want to move the task to. |
| <b>Print</b>    | This option allows you to print your Master Task List on planner sized blank paper.  |
| <b>Category</b> | This option allows you to select the Master Task List category that you would like to view or modify.  |



## Focus

If you use a computer during the day, the Focus feature allows you to view and concentrate only on the highest prioritized task that has not yet been completed from your Prioritized Daily Task List. Focus does this by "blocking out" everything else on your computer's monitor except for a "worksheet" containing all of the information on the current task you are working on, thus making it possible to really focus in on the most important task at hand. You may change any of the information on this work sheet and Ascend will automatically update your Master Task List with the new information.

- |                      |   |
|----------------------|---|
| <b>Next Task</b>     | This option will allow you to skip the task you are working on and "peek ahead" to the next task. This is most useful if the task that you are currently working on cannot be completed at this point for some reason.  |
| <b>Previous Task</b> | This option will allow you to backup to the previous task that has not been completed.  |
| <b>Completed</b>     | By selecting this menu option, the current task that you are working on is given a check to show that it is completed and then the next task that needs to be completed will be brought up. (The map will be displayed after each task is marked as completed.) |
| <b>Map</b>           | This menu option will bring up a quick chart showing you how many tasks you have to do and how many have been completed.  |
| <b>Insert</b>        | This menu option will allow you to insert the Time, Date, Break Character, and Name into the notes for the task you are working on.   |

## Weekly View

Weekly view will quickly and graphically show you one week with all appointments, special days, and tasks listed for each day.

A summary of each day will appear under the week day heading (Sunday, Monday, Tuesday, etc.). For each of the seven days this summary will show:

- \* Appointments
- \* Number of Tasks
- \* Any special day items

In addition to the summary information for each of the seven days, Weekly View displays detailed information about one of the seven days. This detailed information is displayed along the bottom of the Weekly View window. The day for which the detail is being displayed is designated by its name box being highlighted. To change the day for which the detail is being displayed, simply select a different day by clicking on its name box. (Keyboard users: Use the **Goto** menu option to change the detailed day.)

**Goto** This menu option allows you to select which day of the week you want to "zoom" in on. Also this menu option allows you to select a different week range to view.

**Print** This menu option will allow you to print your weekly view to the Franklin **Weekly Schedule** form.

## Turbo File

Turbo File is a new concept introduced by Ascend that allows you to quickly find "things". A "thing" could be a magazine article you once read and found interesting, a statement you heard and wanted to remember, a report your boss gave you, a piece of mail you might someday want to find, etc. Simply think of Ascend's Turbo File as a very sophisticated in/out box where you can locate items in seconds.

Turbo File is the cure for the "I wish I could only remember where I read that..." blues. And the "If I would only have saved that letter..." groans. And the "I wish I would have kept that information, I know I would need it someday..." gloomies.

Turbo File is basically a dialog box that allows you to fill in information, save it, and then retrieve that information at a later date. The fields for the dialog box are explained below:

|                     |   |
|---------------------|---|
| <b>Description</b>  | Enter the description of the item that you are filing. You may search by this description at a later date so use a unique description if possible. For example, if you had read an article about stocks, your description might be <b>Stocks for the 90's</b> . |
| <b>Key Words</b>    | Enter up to five <b>Key Words</b> that you might want to use when trying to find this item in the future. For example, if you were filing an article about stocks, some of your key words may be <b>Stocks, Wall Street</b> , etc.                              |
| <b>Location</b>     | Enter the location where you will be able to find this article in the future. You may enter a magazine issue, a location in your office, a filing cabinet number, a folder number, etc.   |
| <b>Category</b>     | You may either select from an existing category by clicking your mouse on the down arrow next to the <b>Category</b> box, or you can enter a new category by typing it in the box.  |
| <b>Type</b>         | The <b>Type</b> field is similar to the <b>Category</b> field in that you can either select an existing <b>Type</b> or enter a new one.   |
| <b>Date Entered</b> | This field will default to Today's Date and you can leave it alone, or you may enter a date of when you entered this file.  |
| <b>Notes</b>        | You can enter a more detailed description of the filed item, or type anything about the item that you want to remember in this section.   |
| <b>Save</b>         | After you have entered all of the necessary information, select the <b>Save</b> push button and Ascend will save the record and clear the screen for a new entry.   |
| <b>Find</b>         | To find records that you have entered into Turbo File, select the <b><u>Find push button</u></b> . You may then perform a search to find one of your filed items.   |
| <b>New</b>          | If you want to start on a new item <b>without</b> saving the current item that you are working on, you may press the <b>New</b> push button.  |

**Delete**

If you want to delete the current Turbo File item that is displayed, press this button.

**Prev**

If you want to view the previous item the Turbo File, press this button.

**Next**

If you want to view the next item in the Turbo File, press this button.

## Finding Turbo File Records

To find an existing Turbo File record, you have several options:

1. You can type in the first few letters of the **Description** and then select the **Search** push button.
2. You can type in one or more of the **Key Words** and then select the **Search** push button.
3. You can do a combination of the above two items.

If you want Ascend to display **all** of your Turbo File record, simply select the **Search** button without entering anything in the **Description** or **Key Words** boxes.

When searching for a record based on **Key Words**, you can select to either have Ascend require that only one of the **Key Words** specified be found in a record to list it or that all of the **Key Words** specified must be found in a record to list it.

When you have found the record that you were looking for and you want to view and/or edit it, you can either highlight the item and select **OK** or double click on the item.

## Special Days

Ascend allows you to flag "special days" such as recurring holidays, birthdays, anniversaries, etc., and nonrecurring days such as vacations and business trips. Once specified, these days will be designated with a special icon on your goto calendar and weekly view windows, thus helping you to avoid these days if necessary when scheduling meetings and tasks.

**Special days do not print on your task list.** The main purpose of designating a Special Day is to warn you when scheduling tasks and appointments to possibly avoid these days. For example, you would probably not want to schedule a meeting on Christmas or while you will be out of town on a business trip or vacation. Therefore, if you want to remember to purchase a birthday present for your spouse, you should enter a recurring task about 5 days before your spouses birthday: **Buy Birthday present for...**, since recurring tasks **Do** appear on your task list.

**Description** Enter the description of the special day. For example Christmas.

### Starting & Ending Dates

Enter the starting and ending dates for the special day.

**Day** Enter the day of the month (if applicable) of the special day. For example, Christmas is the 25th of the month.

**Month** Enter the month number (if applicable) of the special day. For example, Christmas is the 12th month.

**Category** Select the appropriate category for the special day. The valid categories are:



The closed sign symbolizes a holiday.



The palm tree symbolizes a vacation.



The cake symbolizes a birthday.



The ring symbolizes an anniversary.



The brief case symbolizes a business trip.



The exclamation point is for misc. special days.

**Week Days** Check the weekdays (if applicable) that this special day will take effect on. If you have specified **day**, you need not check these fields since Ascend knows which day the special day is on.

**Week Number** Check the week numbers (if applicable) that this special day will take effect on.

**Save** Press the Save button when you want to save changes to the Special Day record that you are working on.

**Find** Press the Find button to find an existing Special Day record for viewing or editing.

**New** Press the New button when you want to **lose** the changes that you have made the current Special Day and allow you to enter a New Special Day.

**Delete**

Press this button when you want to delete the current Special Day record.

**Prev**

Press this button when you want to save the current Special Day record and bring up the previous Special Day record.

**Next**

Press this button when you want to save the current Special Day record and bring up the next Special Day record.

## **Finding Special Day Records**

Select a Special Day from the list of all your Special Days and press the OK button or double click on the desired item. If you desire to delete one of the displayed Special Days, select the day and press the Delete button.



# Journal

Ascend's Journal is very similar to the Daily Record of Events, but is kept separate should you wish to print just your Journal entries. Also, special "red letter" days can be marked, such as "our son left for college today." Just like the Daily Record of Events, entries can be indexed and/or found using the [search](#) features of Ascend.

- Edit** The **Edit** menu option will allow you to **Cut, Copy, Paste, Undo, and Delete** text in your Journal.
- Print** The **Print** menu option allows you to [print](#) different entries in your Journal.
- Goto** The **Goto** menu option allows you to jump to different days and view/edit journal entries for those days.
- Index - Add Entry** The Index/Add Entry menu option allows you to add a new special [Index entry](#) for your journal entry.
- Index - Show Entries** This option displays a box showing you all of the index entries for the date you are working on.
- Search** This option proceeds to the Ascend [search](#) routines.
- Time** This option will insert the current time into your journal entry.
- Date** This option will insert the current date into your journal entry.
- Break** This option will insert a break character into your journal entry. When your entry is printed out, the break character will be expanded into a solid line dividing the text before and after the break character.
- Name** This option will allow you to find a name in your phone and address files and merge the information into the journal entry.

## See Also

[Printing Journal Entries](#)  
[Journal Index Entries](#)

## Printing Journal Entries

You have several options when it comes to printing your journal.

- Journal Index** Check this box if you desire to only print a journal index to special events.
- Journal** Check this box if you desire to print your actual journal entries.
- Starting Date** Enter the starting date for the printing.
- Ending Date** Enter the ending date for the printing.
- Print only 1 Date per Page**  
Check this box if you desire each journal entry to be on its own page.
- Pause Between Pages**  
Check this box if you desire Ascend to pause between pages to let you insert a new sheet of paper if you are using manual feed on your printer.
- Print Out Size** Select the appropriate size of your journal print out.

When you are ready to begin printing, press the **OK** button.

## Journal Index Entries

Journal index entries are a way to mark a day in your journal with special entries, such as "Bill went off to college today", or "Preston was born". These entries can be printed out separately from the rest of the journal and made into a "table of contents" for your journal.

**Index Entry**            Enter the index entry you want specified for the event.

**Special Entry**        Check this box if you want this index entry printed in **BOLD** lettering when you print out the index.

**Current Index Entries**    This box displays the currently defined index entries.

Press OK to save the new index entry or press Cancel to abort.

## Favorite Quotes

The Favorite Quotes feature of Ascend allows you to store and retrieve your favorite quotes. Ascend comes with a few quotes as examples. If you like, you can configure Ascend to "pop up" one of the quotes each morning when you start the program. Ascend also provides a search feature so that you can quickly find specific quotes, all quotes associated with "time management" for example.

The format for entering and finding quotes is very similar to the Turbo File features.

## Reports

Ascend uses the Reports module to print or display certain time management reports. As of this version of Ascend, the only report in this module is the **Task Statistics Report**.

The **Task Statistics Report** gives a breakdown of how you are spending your time. This report is only valid if you are using Ascend's advanced time management features.

## Tools and Utilities

The Tools and Utilities module is used to enter your registration information and change the name of a category.

Do not confuse the **Tools and Utilities** *module* (designated by a hammer) with the **Ascend Tools & Utilities** *program* (designated by three tools) located on the Windows Program Manager. These items are different and perform different functions.

### See Also

Registration

Edit Categories

## Edit Categories

This option is used to change the name of an existing category in one of the following areas of Ascend.

- \* Task Categories
- \* Phone Categories
- \* Turbo File Categories
- \* Turbo File Types
- \* Quote Categories

For example, if you had entered a Task Category of **Phone** and you wanted to change it to **Telephone**, you would pull down the **Edit Categories** menu and then select **Task Categories**.

To change the **Phone** category to **Telephone** you would highlight **phone** in the list of categories by clicking on it one time with your mouse or by moving down to it with the down arrow on the keyboard. The word **Phone** would now appear in the **Edit Category** box also. Next, you would press the [Tab] key to move the cursor to the **Edit Category** box. Type **Telephone** in the **Edit Category** box and press the [Tab] key. Notice that the category **Phone** is now changed to **Telephone**. Select the **OK** when you are finished making changes.

## Ascend Tools & Utilities Program

The Ascend Tools & Utilities program is not a module run from within Ascend, but is a program run from the Windows Program Manager. This program allows you to:

- \* Make back-up copies of your Ascend data files.
- \* Restore back-up copies to your hard drive.
- \* Reindex your Ascend files

**Backup** This menu option allows you to back up your Ascend data files from your Ascend sub-directory to a floppy diskette. If your data will not fit on only one floppy diskette, Ascend will ask you for additional diskettes. **Ascend will erase any data on the floppy diskette used for backing up, but it will not format the diskette. Diskettes used for backing up must already be formatted.**

**Restore** This option allows you to restore data from your floppy diskette to your Ascend sub-directory on your hard drive.

**Fix Header** This option will reconstruct critical data that may have been corrupted in the data files. **Do not run this routine unless specifically instructed by an Ascend Support Technician.**

**Reindex File** This option is used to "clean up" any potential problems your data files might have due to power failures, poor backups, etc. Contact Ascend's Technical Support department for more instructions on this function or refer to your users manual.



**Ascend**

A computer software program designed specifically to be used with the Franklin Day Planner.

**Backup**

A routine that allows you to back up your Ascend data files from your Ascend sub-directory to a floppy diskette.

**Click**

Quickly press and release a mouse button, usually the left one.

**DOS**  
Disk Operating System

**Double Click**

Quickly click the left mouse button twice.

**Drag**

Press the left mouse button and hold it down while moving the mouse. This will allow you to move items, make selections from pulldown menus, etc.

**Focus**

A feature that allows you to view and concentrate only on the highest prioritized task that has not been completed from your prioritized Daily Task List.

**Franklin Day Planner**

A date-book-organizer to aid you in controlling daily events and schedules. The Franklin Day Planner is designed to improve your personal productivity as well as help those around you. For additional information about the Franklin Day Planner call 1-800-654-1775.



**Goto Calendar**

The Goto Calendar has several uses. The primary purpose is to forward or move Tasks to days in the future. The Goto Calendar can also be used to view Special Days, Daily Tasks, and Appointment Schedules.

**Icons**

Small pictures representing one of Ascend's modules or other Windows programs.

**Importing Records**

A routine used to put address and phone information into Ascend from another computer file.

**Master Task List**

A file to temporarily store tasks that you would like to do someday but don't want to schedule on a particular day yet.

**Modem**

A device that connects your computer with a phone line. If you have a modem you will be able to use the auto dialer.

**Page Date**

The date that represents the date of a page in your Franklin Planner. This is the date that is displayed between the two arrows on many of Ascends windows such as the Daily Prioritized Task List, Daily , etc.

**Point**

Move the mouse until the pointer rests on the item you want.

**Prioritize**

A process to put your Daily Tasks in the sequence in which you want to complete them.



**Rank**

Part of the process to prioritize your Daily Task List. After your tasks are put into either A, B, C, or D priority, they are then given a numerical ranking.

**Recurring Appointments**

An appointment that can be scheduled at consistent intervals.

**Recurring Task**

A task that must be scheduled at consistent intervals.

**Registration**

Each Ascend program must be registered to the person or company who purchased the program. Fill out your Ascend registration card and mail it to SIS. After SIS receives your registration card, they will mail you a **KEY NUMBER**. Your Ascend program will only work for 60 days before requiring your Key Number.

**Repeat Task**

A task that you want to re-schedule a certain number of days after the completion of the same task. Repeat Task are different from Recurring Task because they are re-scheduled based upon the completion date.

**Restore**

A routine that allows you to restore data from a floppy diskette to your Ascend sub-directory on your hard drive.

**Search**

Ascend's Search routine can be accessed from several of Ascend's modules(Appointment Schedule, Daily Record of Events,Journal, etc.) and is used to search through various parts of your planner's data for a specific word or words.

**Speed Dial**

A method to quickly dial a phone number from your address and phone module. You must have a modem to Speed Dial.



## **Statistics**

A routine accessed from the Daily Task List. Move the cursor to one of your tasks, pull down the **View Menu and select Statistics**. This will display a dialog box containing misc. statistics about tasks.

**Systems Date**

This is the date that your computer keeps as the "current" date. This is also the date displayed in the Date Status Bar.

**Task Code**

A Task Code designates what action was taken on a task (completed, forwarded, delegated, etc.). The Task Code column is the furthest to the left on the Prioritized Daily Task List and designated by a down arrow.

**Technical Support**

Refer to on-line help and the User's Guide to find an answer to your questions or problems.

If you are unable to solve your problem, you can call Ascend's Technical Support Help Line.

Ascend's Technical Support: 801-476-9262

If your question is concerning Windows, you should call Microsoft's help line.

Microsoft's Technical Support: 206-454-2030

**Time Blocks**

A Time Block is a 15 minute block of time. Time blocks are used in the Time Management routine as well as in the appointment schedule routine.

**Window**

A "window" is an area on your computer's screen where a program (or part of a program) is running. For example, you could have one window running your Ascend, another window running your word processor, and still another window running your spreadsheet. Windows allows you to quickly "jump" between these applications by pressing one key.

**Font**

**Daily Record of Events**

The right side of your planner usually used for notes, ideas and journal entries.





## Change Between Days

There are several ways to change between Days.

- \* You can go back one day at a time by pressing the big arrow to the left side of the Page Date.
- \* You can go forward one day at a time by pressing the big arrow to the right side of the Page Date.
- \* You can use the Goto menu to go to yesterday, today, tomorrow, forward a day, back a day, forward a week, or back a week,
- \* You can use the Goto menu and the Date sub-menu to pop-up a calendar. From the calendar you can double click on the date you desire to go to or you can enter the date in the entry box.
- \* You can press the F4 function key and the Goto Calendar will appear. Use this calendar to change the page date as explained in the previous step.
- \* You can quickly have the Page Date "jump" to Today's Date by double clicking on the **Date Status Bar** (Located directly under the Menu Bar).

## Method 1 - Dialog Box

You have the following task codes to select the progress of a particular task.

- |                        |   |
|------------------------|---|
| <b>Not Completed</b>   | This code is a blank and symbolizes that the task still needs to be done.   |
| <b>Task Completed</b>  | This code is a check mark and symbolizes that the task has been completed.  |
| <b>Planned Forward</b> | This code is a arrow pointing to the right. This code symbolizes that the task has been forwarded to a future date. |
| <b>Task Deleted</b>    | This code is a large "X" and symbolizes that the task has been deleted.   |
| <b>Delegated Task</b>  | This code is a square and symbolizes that the task has been delegated to another person.                            |
| <b>In Process</b>      | This code is a circle and symbolizes that the task is currently in progress but cannot be finished at this time.    |

### **Delegated and Completed**

This code is a square with a check in it. It symbolizes that the task was first delegated and then it was completed.

**Process Completed** This code is a circle with a check in it. It symbolizes that a task that was in process has been completed.

You can select from these codes by Clicking your mouse in the task code box next to the task you wish to mark.

Select the desired action by double clicking on one of the options.

If you select Planned Forward the monthly calendar will appear for you to select the date that you would like to forward the task to.

The Delegated & Completed option and the Process Completed options do not work unless a task was first given the Delegated or In Process designation.

## Method 2 - Right Mouse Button

Pressing the right mouse button will "thumb through" the different task codes. This is a very handy method to quickly mark tasks as having been completed.

Since the Planned Forward requires the Goto calendar to be displayed, you cannot select this option using this method.

## **Method 3 - Group Action**

Group action allows you to quickly mark all of the tasks on a Page Date that have not been marked with a code with their appropriate code.

Most users will use this method each morning to "clear out" the previous day before planning the current day.

To access the Group Action method, pull down the Task Options Menu and then select Group Action.

From here you can select any one of the following options for each task:

**Completed**

**Deleted**

**Forwarded**

**Completed and Copy**

**The next seven days of the week**

After you are finished with Group Action, press the OK button.

## Search For

Ascend's Search routine can be accessed from several of Ascend's modules (Daily Task List, Journal, Appointment Schedule, etc.), and is used to search through various parts of your planner's data for a specific word or words.

To access the Search dialog box, select the Search Menu option.

A dialog box will appear with the following options:

- |                               |  |
|-------------------------------|--|
| <b>Search For</b>             | Enter the text that you want to search for.                                |
| <b>Task</b>                   | Check this box if you want to search through your tasks.                   |
| <b>Task Notes</b>             | Check this box if you want to search through your task notes.              |
| <b>Appointments</b>           | Check this box if you want to search through your appointments.            |
| <b>Appointments Notes</b>     | Check this box if you want to search through your appointment notes.       |
| <b>Daily Record of Events</b> | Check this box if you want to search through your daily record of events.  |
| <b>Journal</b>                | Check this box if you want to search through your journal entries.         |
| <b>Phone &amp; Address</b>    | Check this box if you want to search through your Phone and Address notes. |
| <b>Master Task List</b>       | Check this box if you want to search through your Master Task List.        |
| <b>Master Task List Notes</b> | Check this box if you want to search through your Master Task List notes.  |
| <b>Starting Date</b>          | Enter the starting date for the search.                                    |
| <b>Ending Date</b>            | Enter the ending date for the search.                                      |

Press the **Search For** button to begin search. Each match found will be displayed in the scroll list at the bottom. You may then select the proper match and Ascend will jump to that day's entries.

## Finding Names

To find a name in your Phone and Address list, simply start typing in the **Last Name** or **Company Name** of the record you are looking for. You may also use the mouse to search through the scroll list to find the correct name.

Once you have found the correct name, press the **OK** button.