Welcome to ASCEND 97 for Windows 95 from Franklin Quest Co. You have purchased the award-winning software that combines the power and convenience of your personal computer with the proven principles of the Franklin Day Planner system.   ASCEND 97 Personal Information Management (PIM) software helps you increase your productivity and achieve greater personal and professional success. ASCEND 97 software is an easy and effective tool to help you identify your priorities, reach your goals, and focus on *what matters most*.

As with any important data, you should backup your ASCEND 97 data regularly. Creating a backup saves data even in the event of data loss. Remember, hard drives can fail and you don't want to lose all of the information you've entered in your data files. A good practice for backing up is:

Back up to a diskette once or twice a week. Additionally, we strongly suggest that you back up your files before attempting the following procedures:

- ◆ Importing data into your Address and Phone book
- ◆ Rebuilding index data
- ◆ Purging data from your data files

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See Also:

Creating a Backup

The Restore feature restores data from a backup file to the ASCEND 97 data subdirectory on your hard drive. This is a useful command for transferring data between computers. For example, you can transfer data between the computer you use at work and the computer you use at home. You can run a Backup routine when you leave one computer and do a Restore command when you arrive at the other.

See Also:

Restoring data from a backup file

The Tools and Utilities program is a module that runs outside of ASCEND 97 and will not run unless ASCEND 97 is closed. Tools and Utilities allow you to:

- **Backup your ASCEND 97 data files.**
- **Restore backups to your hard drive.**
- **Purge old data and compress current data**.
- Operate ASCEND 97 on more than one machine.
- Rebuild (resynchronizes index files with data files).

ASCEND 97 Address and Phone is a powerful personal contact management tool that allows you to keep track of addresses, phone numbers, and notes for business contacts, relatives and friends. Using the Address and Address and Phone book, you can:

- ◆ Keep categorized lists of addresses and phone numbers.
- ◆ Create filters and categories.
- ◆ Dial (using a modem) any selected number from within ASCEND 97. ASCEND 97's Speed Dial function is Microsoft TAPI compliant.
- ◆ Print a hard copy of your phone and address book.

- ◆ **Address and Phone Book Tool Bar**
- ◆ **Adding an Address and Phone Entry**
- ◆ **Personal Window**
- ◆ **Address Window**
- ◆ **Notes Window**
- ◆ **Important Dates Window**
- ◆ **Contact Management**
- ◆ **Creating Phone Categories**
- ◆ **Assigning Phone Categories**
- ◆ **Editing/Deleting Phone Categories**
- ◆ **Sorting Phone Entries With Filters**
- ◆ **Creating a New Filter**
- ◆ **Loading a Filter**
- ◆ **About Importing**
- ◆ **Importing Address and Phone Data**
- ◆ **About Exporting**
- ◆ **Exporting Address and Phone Data**
- ◆ **Setting Dialing Preferences**
- ◆ **Using the ASCEND 97 Dialing Function**
- ◆ **Printing Address and Phone Entries**
- ◆ **Printing on Labels**
- ◆ **Printing on Envelopes**

The Appointment Schedule is a powerful organizing tool that helps you manage your time efficiently. When you set an alarm you can leave ASCEND 97 running in the background and go into other programs. ASCEND 97 will find you in the program you are working in and remind you of your appointment.

Besides just scheduling appointments, the ASCEND 97 Appointment Schedule lets you attach unlimited notes, set alarms, make appointments private and create repeat appointments.

To open the Appointment Schedule
- ◆   Click the **Appointment Schedule** button on the Main Tool Bar. The Appointment Schedule daily view appears.

The default view is the Daily View starting at 8 a.m., but you can click the scroll buttons to view a 24-hour day. You can also change the Daily View to Weekly View or Monthly View.

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- ◆   **Appointment Schedule Tool Bar**
- ◆   **Navigating with Date Buttons**
- ◆   **Creating a New Appointment**
- ◆   **Creating a Repeat Appointment**
- ◆   **Entering Appointment Notes**
- ◆   **Moving an Appointment**
- ◆   **Changing Appointment Times**
- ◆   **Adding Alarms**
- ◆   **Linking Appointments to Contacts**
- ◆   **Attaching a File to a Appointment**
- ◆   **Attaching an Object to an Appointment**
- ◆   **Weekly View**
- ◆   **Monthly View**
- ◆   **Yearly View**
- ◆   **Changing Appointment Schedule Preferences**
- ◆   **Printing Appointment Schedule**

If your files become too large to manage, you can archive important information that you don't want to delete. For example, you don't want each of your backup disks to store three years worth of data. Archive your old files and view them in a text only format whenever you need to refer to old information.

See Also:

Archiving your ASCEND 97 Data

You can use the Export command to export ASCEND 97 Address and Phone data. For example, you might want to export your Address and Phone entries to a word-processing program. ASCEND 97 will either export Address and Phone entries in its own format or as an ASCII text file. When exporting, ASCEND 97 uses a filter so you can customize the export file to include only the data you choose.

When you create an export file, you need to choose the file format   and whether to overwrite or append to the existing file. If you choose to export to a file which already exists, ASCEND 97 asks if you wish to overwrite (replace) the existing file or if you wish to append (add to) it.

See Also:

Exporting Phone Book data

Global Search is a powerful tool that allows you to search for a word or a line of text within your data files. Global Search can search for data in many areas of ASCEND 97, including:

- The Prioritized Daily Task List
- The Appointment Schedule
- Daily Record of Events
- Favorite Quotes
- Journal
- Address and Phone Book
- Red Tabs
- Turbo File
- Values and Goals

- **Locating Information in Global Search**
- **Additional Searching Capabilities**

In order to import information into the ASCEND 97 Address and Phone book from a text file, or export to a text file from the ASCEND 97 Address and Phone book, you must understand how to format your text.

You can import and export ASCEND 97 Address and Phone book information to other applications as long as the text is saved in one of the following file formats.

File format	Definition
Comma Delimited	This is the most common of the two styles and allows more flexibility in preparing the file. ASCEND 97 interprets comma delimited files as different fields separated by a comma for each field. (Some spreadsheet export programs use TABS to separate each field.)
Line Delimited	This style assumes that each field is on a separate line. ASCEND 97 separates one entry from the next simply by the number of fields (in this case, the number of lines) associated with each entry. If an entry doesn't have information in one of its fields, it is important to leave a blank line when importing.

See Also:

Importing Address and Phone Data

The Pilot is an electronic organizer that complements the ASCEND 97 for Windows 95 software. It is a revolutionary way for you to manage your personal and business data in the office or home, and on the road.

The HotSync software and the organizer's docking cradle let you share information like tasks, addresses and phone numbers, appointments and notes between your Pilot and ASCEND 97.

When you use the Pilot with ASCEND 97 software, you can:

◆ **Enter Data Once**.
   Choose either the writing stylus, the computer keyboard, or the onscreen keypad.
◆ **Access Information Instantly**.
   Find tasks, appointments, address and phone entries, or any notes in your Pilot.
◆ **Accomplish *What Matters Mo*st**.
   Use the power of the Franklin Quest Time Management system with your Pilot.
◆ **Eliminate Double Entry**.
   Press the HotSync button to synchronize information between your Pilot and the ASCEND 97 software.
◆ **View Your Daily Plan**.
   Display your appointment schedule, task list, and notes at the touch of a button.
◆ **Store Thousands of Contacts**.
   Organize your contact phone numbers and addresses.

◆ **Connecting Pilot to your computer**
◆ **Using HotSync at your computer**
◆ **Changing HotSync Options**
◆ **Using HotSync via Modem**
◆ **Configuring Your Pilot**
◆ **Configuring Your Computer**
◆ **Conducting a HotSync via Modem**

ASCEND 97's printing feature ensures that you'll never be without your valuable personal information. You can print your task list, appointments, address and phone lists and more, directly to Franklin Day Planner pages or regular printer paper. You can select your Franklin size and filler for a perfect fit.

You can print information from any of ASCEND 97's modules. You can print on any of the following Franklin Day Planner   binder sizes and filler types:

◆ **Monarch   8 ½" x 11"**

Traditional Green, Computer Edition and plain paper

◆ **Classic   5 ½" x 8 ½"**

Traditional Green, Computer Edition, Seasons, Monticello, Championship Edition and plain paper

◆ **Compact   4 ¼" x 6 ¾"**

Traditional Green, Computer Edition, Seasons, Monticello, Championship Edition and plain paper

◆ **Pocket   3 ½" x 6"**

Traditional Green, plain paper

Choosing a Printer

Choosing a paper source

Selecting a binder size and filler type

Printing Address and Phone entries

Printing Appointment Schedule

Printing Daily Record of Events

Printing Journal Entries

Printing Quotes

Printing Red Tabs

Printing Your Prioritized Daily Task List

Printing Turbo Files

Printing Values and Goals

Printing Calendars

Printing on Envelopes

Printing on Labels

The Prioritized Daily Task List helps you manage all your daily activities. Because it incorporates the Franklin Time Management principles to help you focus your energy on *what matters most*. The Task List works hand-in-hand with the Values and Goals module, reminding you of the values-based tasks you need to accomplish each day to achieve the goals you have set for yourself.

With the Prioritized Daily Task List, you can:

- Write and prioritize a list of tasks every day
- Forward tasks to a date in the future
- Create redo and repeat tasks for tasks you do often
- Wrap up your task list at the end of the day with the **Group Action** button
- Link a task to a contact in the Address and Phone book

Prioritizing is the process of organizing your tasks based on what is most important to you. You can assign A, B, C or D priorities to each of your tasks, depending on their level of importance.

A priority tasks are tasks that must be completed today.
B priority tasks are tasks that should be completed today.
C priority tasks are tasks that could be completed today.
D priority tasks are personal tasks that should be completed after work hours.

After you have assigned a priority to each of your tasks, the next step is to rank your tasks. Ranking helps you organize your prioritized tasks by assigning a number to each task (A1, A2, B1, etc.)

For example, if you are in the process of completing your A1 task when you are interrupted by a coworker who would like to discuss a project that you consider a B3 task, you may want to schedule some time with your coworker later in the day to work on the B3 project so you can focus your time on more important projects right now.

- **Prioritized Daily Task Tool Bar**
- **Creating a Task**
- **Creating Redo Tasks**
- **Creating Repeat Tasks**
- **Linking a Task to a Contact**
- **Entering Task Notes**
- **Moving a Task to a New Date**
- **Editing a Task**
- **Attaching a File to a Task**
- **Attaching an Object to a Task**
- **Prioritizing Your Task List**
- **The Prioritize Tasks Window**
- **Quick Prioritize**
- **Assigning Action Codes to a Task**
- **Assigning Action Codes to a Group of Tasks**
- **Get Incomplete Tasks**

- **Creating a Task Category**
- **Editing or Deleting a Task Category**
- **Viewing Task Statistics**
- **Prioritized Daily Task List Preferences**
- **Printing**

The ASCEND 97 Quotes module is a place for you to store your favorite quotes for speeches, reports, personal inspiration and more. You can quickly reference quotes and even have ASCEND 97 display a different motivational quote each day upon startup.

- **Quotes Tool Bar**
- **Adding a New Quote**
- **Editing/Deleting a Quote**
- **Creating Quote Categories**
- **Editing Quote Categories**
- **Locating a Quote**
- **Displaying a Quote at Start-up**
- **Printing Quotes**

The ASCEND 97 Red Tabs window is named after the Red Tab page dividers in the Franklin Day Planner system. Like the Day Planner, ASCEND 97 Red Tabs enable you to organize your information under your own categories. You can store miscellaneous documents such as gift ideas, books you'd like to read, movies you want to see, and so forth.

- **Red Tabs Tool Bar**
- **Creating a Red Tab**
- **Editing a Red Tab**
- **Opening a Red Tab Document**
- **Finding Text in a Red Tab File**
- **Creating Red Tab Categories**
- **Editing Red Tab Categories**
- **Inserting the Date and Time**
- **Inserting a Name**
- **Inserting an Object**
- **Changing Red Tab Preferences**
- **Saving Red Tabs**
- **Printing Red Tabs**

While daily tasks, appointments and notes take up most of your day, don't forget those special events that happen in your life. The ASCEND 97 Special Days dialog box helps you remember events such as anniversaries, birthdays, holidays or even business trips. Once a special day is programmed in the Special Days dialog box, ASCEND 97 does all the work of reminding you of these days.

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◆ **Creating a Special Day**

In the Daily Record of Events module, you can record the details of daily commitments, transactions and conversations. For example, if you receive an unexpected call from a business associate who asks you to give a presentation on Monday, use the Daily Record of Events page to take down the details of the discussion. You can later create an appointment on Monday's Appointment Schedule and use the important information you entered on the Daily Record of Events to create tasks to help you prepare for the presentation.

In the Daily Record of Events you can:
- Record details of your meetings, conversations and transactions
- Format your text entries
- Insert names and phone numbers from the Address and Phone Book

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- **Daily Record of Events Tool Bar**
- **Creating a Daily Record of Events Entry**
- **Formatting Text in the DRE**
- **Inserting the Date and Time**
- **Printing your Daily Record of Events**

Tasks that are not important right now but may become a priority in the future should be entered on the Master Task List. For example, you would like to organize a big family party for your parents 50th anniversary next year. While this task is not a priority right now, it will probably become a priority in a few months. You can enter the task Organize Family Party on your Master Task List and then transfer the task to your Prioritized Daily Task List when it becomes a priority.

◆ **Entering a Task on the Master Task List**
◆ **Moving Tasks to the Master Task List**
◆ **Moving Master Tasks to the Prioritized Daily Task List**
◆ **Master Task List Categories**
◆ **Printing Your Master Task List**

Turbo File is a fast, computerized index that enables you to keep track of all your miscellaneous information such as the date and title of an interesting magazine article, or the location of an important piece of mail. Think of Turbo File as a sophisticated card file where you can locate items in seconds.

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- **Turbo File Tool Bar**
- **Creating a Turbo File**
- **Opening and Editing Turbo File Entries**
- **Creating Turbo File Categories**
- **Creating Turbo File Types**
- **Tracking Turbo Files**
- **Printing Turbo Files**

Values and Goals are the heart of the Franklin Time Management System. By building a Personal Productivity Pyramid based on your inherent values and goals, you can bring your daily activities in line with your governing values. The ASCEND 97 Values and Goals module assists you in this process by helping you decide *what matters most* to you. No other personal management software application has anything like it.

What's so important about Values and Goals?

All of us have things that we value—whether it's family, financial security, health, or so on. Unfortunately, for many of us, there is a gap between the things we value and our daily actions. We may have a personal goal to spend more time with our family or get in shape, but we become so distracted by day-to-day urgencies that our goals are often neglected.

The ASCEND 97 Values and Goals window is a planning tool that helps you define what you want out of life and how you will achieve it. The Values and Goals window is based on the time-management principles of the Franklin Quest system. The Franklin Quest system is a method of identifying the things that matter most to you and then setting goals to bring your daily actions in line with your values.

- ◆ **Building a Productivity Pyramid**
- ◆ **Identifying Governing Values**
- ◆ **Setting Long-Range Goals**
- ◆ **Creating Intermediate Steps**
- ◆ **Creating Daily or Repeating Tasks**
- ◆ **Entering a Governing Value**
- ◆ **Entering Long-Range Goals**
- ◆ **Entering Intermediate Steps**
- ◆ **Entering a One-Time Task**
- ◆ **Entering a Repeat Task in Values and Goals**
- ◆ **Editing Values and Goals**
- ◆ **Deleting Values and Goals**
- ◆ **Focusing on a Value**
- ◆ **Calculating Your Values and Goals Performance**
- ◆ **Viewing your Completed Personal Productivity Pyramid**
- ◆ **The Values and Goals Wizard**
- ◆ **Using the Wizard**
- ◆ **Prioritizing Values and Goals**
- ◆ **Using the Prioritize Window**
- ◆ **Prioritizing in the Values and Goals window**
- ◆ **Printing Values and Goals**

The Journal is a great place for recording personal thoughts, important events and special occasions. The Journal is a constant daily file—you never need to "open" or "close" any files. ASCEND 97 automatically saves your Journal Entry when you exit the Journal. Everyday you have a new journal window at your disposal.

Use the Journal to:

- Keep a daily record of your accomplishments.
- Remember those special days (birthdays, anniversaries, holidays).
- Keep track of the events in the lives of those important to you. For example, academic or extracurricular accomplishments of your children, "Katy won her first swim meet today."

To open the Journal

1   Click the **Journal** icon on the Main tool bar
     or
     Select **Journal** from the **Window** menu. The Journal window opens.

- **The Journal Tool Bar**
- **Adding a Journal Entry**
- **Indexing Journal Entries**
- **Adding Journal Index Entries**
- **Editing Journal Index Entries**
- **Finding past journal Entries**
- **Inserting the Date and Time**
- **Printing Journal Entries**
- **Printing your Journal Index Entries List**

Purging erases old data to conserve space which, in return, allows ASCEND 97 to run faster. You may specify whether you want to Archive (store) the old data or purge it.

In essence, purging your data is the process of permanently removing all of the old data you no longer need from your ASCEND 97 directory. How often you use the Purge Data command is dependent on how extensive your notes and journal entries are. Some users may find that they need to purge their data once a month, while others may find they need only purge data once a year. Purging your data depends, of course, on your system resources and how much hard disk space you can spare.

When you purge data from ASCEND 97, you cannot use the data in ASCEND 97 again. If you create an archive, the data is saved as a text file and can only be opened by using a word processor or other text-editing programs.

See Also:
Purging data

To add an alarm to an appointment

    1   Select an appointment.

    2   Click the **Alarm** button.   The Appointment Alarm dialog box appears.

3   In the **Sound Alarm** field, check the box.

4   In the **Early Warning** box, enter the number of minutes before the appointment that you would like this alarm to ring.

              Note: If no early warning time is entered (0), the alarm will sound at the start time of the appointment.

    5   Click **OK**. When an alarm has been set for a task, the **Alarm** button appears as a ringing bell.

To add Journal Index entries

1   Open the Journal window and click on the **Index** button
     or
     Select **Index Entries** from the **Options** menu. The Index Entries dialog box appears.
2   Click **Add Index**. The Add/Edit Index Entries dialog box appears.
3   In the **Description** field, enter a name for your Journal entry.
4   In the **Index Date** field, select the date the Journal entry was created.
5   Click **OK**. The Index Entries window appears.
     Repeat this process to add more Index Entries.
6   When you are finished, click **Close**.

See Also

Editing Journal Index Entries

To add a call log

    1   Click on the Address and Phone record to which you want to add a contact.

    2   Click the **Edit** button.

3   Click the **Contact History** tab in the Address and Phone Detail window. The Contact History window appears.

4   Click the **Add** button and select **Add a New Call Log**. The Call Log window appears.

5   Select **Incoming** or **Outgoing** from the **Call Type** pull-down menu.

6   Click the **Timer** button and select **Start** to time the duration of the call. Click the **Timer** button and select **Stop** to stop the timer when you hang up.

    7   Enter any notes for the call.

    8   Click **Follow-Up** to add a new task or a new appointment to the contact.

    9   Click **Save**.

See Also:

Adding a task to a contact

Scheduling an appointment with a contact

Attaching a file or object to a contact

To add a Journal entry

    1   Click the **Journal** icon on the Main Tool Bar
           or
           Select **Journal** from the **Window** menu.

    2   Type the Journal entry.

    3   Apply the text formatting tools to your entry.

    4   Click **Close**.
           Journal entries are automatically saved when the Journal window is closed.

To add a new quote

1   Click on the **Favorite Quotes** button in the Main Tool Bar

      or
      Select **Favorite Quotes** from the **Window** menu. The Favorite Quotes window appears.

2   Click the Add Quote button

      or
      Select **Add Quote** from the **Edit** menu. The Edit Quote dialog box appears.

3   In the **Author** field, enter the author or source of the quote

4   In the **Category** field, enter a category. Categories let you distinguish between different types of quotes (humor, inspirational, motivational and so on). See Entering Categories

5   In the **Keywords** field, enter any words you associate with the quote.

6   In the **Quote** field, enter the quote.

7   Click **OK** to save the quote.

To add a task to a contact

1   Click on the Address and Phone record to which you want to add a contact.

2   Click the **Edit** button.

3   Click the **Contact History** tab in the Address and Phone Detail window. The Contact History window appears.

4   Click the **Add** button and select **Add a New Task**. The Task window appears.

5   Enter a date for the task in the **Date** field.

6   Enter the task's priority.

7   Enter the Task Code assigned to this task.

8   Enter Notes for this task.

9   Click **OK**.

See Also:

Scheduling an appointment with a contact

Adding a call log

Attaching a file or object to a contact

To create a new Address and Phone book entry

1   Click the **Address and Phone** icon to open the Address and Phone book.

2   Click the **Add Entry** button.   The New Phone Entry window appears.

3   There are five tabs in the New Phone Entry window to help you create a complete Address and Phone record:

Personal
Address
Notes
Important Dates

4   Begin creating your Address and Phone entry in the Personal window.

Although Global Search is an excellent tool for locating data, ASCEND 97 provides other searching features which are specific to the modules:

Filters

Filters can sort information by categories, types and key information to locate important information quickly. You can use filters to search for information in Favorite Quotes, Turbo File, and the Address and Phone Book.

Search Features

You can use search features to locate specific information in the Journal and the Address and Phone Book.

Red Tab Find

The Red Tab Find feature helps you locate a specific Red Tab file quickly.

Defining the Tool Bar

 [Add a new entry.](#)

 [Edit an entry](#)

 Delete an entry

 View phone numbers

 [Load a filter](#)

As you become familiar with the Appointment Schedule, you may want to customize the window to meet your specific needs.

To open the Appointment Preferences window
1   Open the Appointment Schedule.
2   Select **Preferences** from the **Options** menu.
3   Select **Appointment Preferences** from the **Preferences** menu.

Appointment Colors

Appointment Colors make it easy to separate your various appointments. You can create your own color in the Appointment Preferences window or use the ASCEND 97 default colors. You can set colors for:

◆   Normal Appointments
◆   Repeat Appointments
◆   Work Time
◆   Off-hours Time

Appointment Grid Preferences

You can customize the appearance of your appointment grid.

◆   Identify your work hours with a color
◆   View an entire workday in your Appointment Schedule grid

Add a new appointment

Delete the selected appointment

Cut the currently selected text

Copy selected text to clipboard

Paste the text from the clipboard

Create or edit a Repeat appointment

Daily view

Weekly view

Monthly view

Yearly view

To archive your ASCEND 97 data

1   Open the Tools and Utilities program.

      Note: You must close ASCEND 97 before you can open the Tools and Utilities program.

2   Click the **Purge/Archive** button.   The Purge/Archive window appears.

3   Select the ASCEND 97 information you want to archive in the **Elements to purge** box.

4   Enter the start and end date of the information you want to archive.

5   Click the **Archive** box.

6   Type the destination path in the **File Name:** field. For example, a:\backup.001, then go to step 8.

      or

      Click the **Browse** button to select a backup path, then go to step 7.

7   If you clicked the **Browse** button, type in the file name, then click the drop-down list arrow from **Save File as Type**. Determine a destination path (drive and directory), then click **OK** to close the current window and return to the Purge/Archive window.

8   Click **OK**. A window appears with the message "Database is purged/archived."

9   Click **OK**. The archive process is complete.

You can place your icon bar anywhere within the ASCEND 97 window to make it convenient to access.

To rearrange your icon bar
1   Click in the box surrounding the icon bar.
2   Drag the icon bar anywhere in the ASCEND 97 window.

To return your icon bar to normal position
1   Double click on the drag bar.

You may find that at the end of a very busy day you have many tasks without action codes. You can quickly wrap-up your day by using the Group Action window to assign action codes to all of your remaining tasks.

To assign action codes to a group of tasks

1   Click the **Group Action** button. The Group Action window appears.

2   All incomplete tasks appear in the **Incomplete Tasks** box.

3   Click on all tasks that have been completed and click the **Complete** button. The completed tasks appear in the **Completed Tasks** box.

4   Assign an action to all remaining tasks by selecting the task and clicking on the appropriate action code button   (**Uncomplete**, **Complete and Forward**, **Forward**, **Complete**, **Delete**, and **Move**).

   Note: When forwarding a task click the **Forward** button and select the date you would like the task forwarded to in the Copy/Forward Date calendar.

5   When you are finished click **OK**.

As your day progresses, keep track of the status of your   tasks with Action Codes. You can select from the following action codes to indicate the status of a task:

☐   Not Complete

✓   Task Complete

➡   Planned Forward...

✗   Task Deleted

▢   Delegated Task

✔   Planned Forward complete

●   In Process

To assign an action code to a task

1   Click   and hold the mouse in the Action Code column next to the task. The Action Codes drop-down menu appears.

2   Drag the mouse to the action code you want to assign to this task. The selected action appears in the Action Code column next to the appropriate task.

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See Also:

Assigning action codes to a group of tasks

Once you have created a phone category, you need to assign the category to the appropriate Address and Phone book Entries.

To assign a category to an address and phone entry

1   Open the Address and Phone book

2   Double-click on the listing that you would like to assign a category. The Address and Phone book Detail view appears.

3   Click the down arrow in the **Category** field.

4   Select the category you want to assign to this record and click the **Save** button.

5   Click **Close**.

      Note: To help you locate Address and Phone records easily assign a category to each new Address and Phone entry.

To Assign a Color to a Task Category

1 Open the Prioritized Daily Task List Preferences window.

2 Click on the **Task Category** button in the Prioritized Daily Task List Preferences window. The Color window opens.

3 Click on the color you would like to assign this group of tasks.

   Note: You can also create a custom color for your task category. For more information on creating custom color see your Windows 95 Online Help.

4 Click **OK**. The new task color appears next to the selected Task Category in the Prioritized Daily Task List Preferences window.

To attach a file or object to a contact

    1   Click on the Address and Phone record to which you want to add a contact.

    2   Click the **Edit** button.

3   Click the **Contact History** tab in the Address and Phone Detail window. The Contact History window appears.

4   Click the **Add** button and select **Add a New Appointment** or **Add a New Task**.

5   In the Task or Appointment window, click the **Attachments** button to link a file or an object to the entry. The File Attachments window appears.

    6   Click the **Add File** or **Add Object** button.

    7   Select the file or object you want to link and click **OK**. You return to the File Attachments window.

    8   Click **Close** to return to the Contact History window.

    9   Click **Save**.

See Also:

Adding a task to a contact

Scheduling an appointment with a contact

Adding a call log

To attach a file to a task

   1   Select a task.

   2   Click on the **File** icon. The File Attachments window opens.

3   Click the **Add File** button.
4   Navigate to the file you would like to attach and click **Open**.
5   The file now appears in the File Attachments window.
6   A small file icon appears in the Task box.

To attach a file to an appointment

1   Select   an appointment.

2   Click on the **File** button. The Appointment Properties window opens to the Appointment
     Information tab.

3   Click the **Attachments** button. The File Attachments window opens.
4   Click the **Add File** button.
5   Navigate to the file you would like to attach and click **Open**.
6   The file now appears in the File Attachments window.
7   A small file icon appears in the Appointment box.

To attach an object to a task

1 Select   an task.

2 Click on the **File** icon.   [icon]   The File Attachments window opens.

3 Click the **Add Object** button.

4 Select whether you would like to **Create New** or **Create from File** by clicking   the preceding radio button.

5 If you select **Create New**, then select the type of object you will be inserting.
or
If you select **Create from File**, then click **Browse** and select the object you would like to insert. Click Insert.

6 Click **OK**.

7 Click **Done** in the File Attachments window.

8 A small file icon should appear in the Task box.

To attach an object to an appointment

    1   Select   an appointment.

    2   Click on the **File** icon.   The Appointment Properties window opens to the Appointment Information tab.

3   Click the **Attachments** button. The File Attachments window opens.

4   Click the **Add Object** button.

5   Select whether you would like to **Create New** or **Create from File** by clicking   the preceding radio button.

6   If you select **Create New**, then select the type of object you will be inserting.

            or

            If you select **Create from File**, then click **Browse** and select the object you would like to insert.

    7   A small file icon appears in the Appointment box.

The Franklin Time Management system is designed to bridge the gap between your values and your daily activities. This section will help you determine your values and create a Productivity Pyramid to help you bring your daily activities in line with your values.

The Productivity Pyramid is composed of four steps, Governing Values, Long-Range Goals, Intermediate Steps, and Daily Tasks.

_____

See Also:

Step 1: Identifying your Governing Values

Step 2: Setting Long-Range Goals

Step 3: Identifying Intermediate Steps

Step 4: Translating Intermediate Steps into Daily Tasks

You can easily keep track of how well you are living by your values and goals with ASCEND 97's Display Goals Evaluation feature. This feature allows you to enter a grade for each Governing Value, Long-Range Goal, and Intermediate Step (on a scale of 1-10) based on how you're doing toward accomplishing that step. If you've finished, give yourself a 10; if you're halfway there, give yourself a 5, and so on. ASCEND 97 takes these grades and does three things:

◆ Assigns a grade to each goal, based on the average grade of the intermediate steps attached to that goal. This grade is displayed in the **Grade** field in that goal's dialog box and cannot be edited.
◆ Assigns a grade to each value, based on the cumulative score of the Long-Range Goals under that value.
◆ Calculates an overall grade which reflects your total performance. This is your Goals Evaluation Grade. This grade is displayed next to the pyramid buttons on the Values and Goals display.

To enter a grade for an Intermediate Step
1   Double-click on the Intermediate Step to open its dialog box.
2   In the **Grade** field, type in a grade, on a scale of 1-10, which reflects how well you've done toward accomplishing that step.
3   Click **OK**.

To change the HotSync options

1   Click the **HotSync** button on the ASCEND 97 desktop. The HotSync Setup window appears.

2   Click **Change** if you want to synchronize specific files between ASCEND 97 and the Pilot, like Red Tabs or Task List. Otherwise, leave your setting on "synchronize all files."

3   Choose how far back in time you want to synchronize your events.

4   Select whether you want HotSync to always be available, available when ASCEND 97 is running or run manually.

5   Click **Apply**.

To change an appointment time

1   Select an appointment.
2   Place the cursor on bar at the start or end of the appointment. Drag it to the new time.
    or
    Select **Edit Appointment** in the **Edit** menu. The Appointment Properties dialog box appears.
3   Click and drag the time bar to the new time period.
4   Click **OK**.

Red Tab Preferences give you the option to view an existing Red Tab file after opening the module and/or set a default font for your text format.

To access Red Tab preferences select **Preferences** from the **Options** menu. Select **Red Tab Preferences** from the **Options** menu. The Red Tab Preferences window appears.

To select an existing file each time you open Red Tabs
1   Select **Red Tabs Preferences** from the **Options** menu.
2   Check the **Retrieve a file when entering Red Tabs** box.

To change the default font in the Red Tabs window
1   Click the **Default Font** button. The Font window appears.
2   Select the new Font and formatting options you want and click **OK**.
3   The Red Tab Preferences window appears. The new default font appears next to the **Default Font** button.

You can move to any date quickly with the Floating Calendar.

To change date using the Floating Calendar
1   Select **Calendar** from the **View** menu to open the Floating Calendar.

2   Navigate to a month by clicking the date-control buttons.

3   Click any day on the calendar. All ASCEND 97 windows change to this date.

To select a paper source
1   Select **Print** from the **File** menu, the Print window opens.
2   Click the **Setup** button.
3   In the Print Setup window, click the **Source** drop-down list to select a paper source.
4   Click **OK**.

By default ASCEND 97 prints to your default printer in Windows. If you'd like to print to a different printer, change the printer selection in the Print Setup box.

To select a different printer
1   Select **Print** from the **File** menu, the Print window opens.
2   Click the **Setup** button.
3   Select your printer from the **Name** drop-down menu in the **Printer** box.
4   Click the **Properties** button to change your default printer settings.
5   Click **OK**.
6   Click **OK**.

As your ASCEND 97 files grow you may find that you want to purge, archive or compress some of your ASCEND 97 information to create more space. If you have deleted old tasks, appointments, Red Tab files, etc., compress your database to free this space on your hard drive.

To compress your database

    1   Open the ASCEND 97 Tools and Utilities program.

          Note: You must close ASCEND 97 before you can open the Tools and Utilities program.

    2   Click the **Compact Database** button.   The Compact Database window appears.

3   Click **Yes** to compact your database. A confirmation window appears stating "Database is compacted."

4   Click **OK**. Your ASCEND 97 files are now compressed.

To conduct the HotSync via modem

1   In the HotSync manager window confirm that the modem is connected and turned on.
2   Make sure the HotSync Manager is running with the **Modem** selected from the **Options** menu.
3   Connect the special modem cable from the Pilot's serial connector to the modem.
4   Turn on the Pilot.
5   Tap the **Applications** button on the Pilot screen.
6   Tap the HotSync application. The HotSync window appears.
7   Tap the **Modem Sync** button. The HotSync process begins.

See Also:

Configuring Your Pilot
Configuring Your Computer

To configure your computer

1   Open the HotSync Manager.
2   Select **Setup** from the **Options** menu.
3   Click the **Modem** tab.
4   Choose the Serial Port for the modem.
5   Choose a Speed. Try **As Fast As Possible**.
6   Choose the Modem type.
7   Click **OK**.

See Also:

Configuring Your Pilot
Conducting a HotSync via Modem

To configure your pilot

1. Turn on the Pilot and tap the **Applications** button.
2. Tap the **HotSync** button. The HotSync window appears.
3. Tap the **Modem Setup** button. The Modem Setup window appears on the Pilot screen.
4. Enter the telephone number to access your computer's modem.
5. Click **TouchTone**[a] or **Rotary** to match the telephone system you are using.
6. Select the Modem type that best describes the modem connected to your Pilot. If you are not sure what modem you are using, choose Hayes Basic.
7. Select the modem speed that the modem uses to communicate.
8. Tap **OK** to close the Modem Setup window.

   Note: You must perform your first HotSync at your computer before you can HotSync via modem.

See Also:

[**Configuring Your Computer**](#)
[**Conducting a HotSync via Modem**](#)

To connect pilot to your computer

1   Insert the Pilot into the Pilot docking cradle.

2   Plug the cable from the Pilot cradle into the communications port you selected during ASCEND 97 installation.

3   Open HotSync Manager from the Franklin Day Planner program folder. The HotSync Manager window appears.

4   Select **Setup** from the **Options** menu. The Setup window appears.

5   Click the **Local** tab.

6   Make sure the selected Serial Port corresponds to the port number that you connected the Pilot to.

7   Choose a Speed for data transfer. Try **As Fast As Possible** first and adjust downward if you experience problems.

8   Click **OK**.

See Also:

With the ASCEND 97 Contact History window, you can track phone calls, task and appointments for all your important business and personal contacts. The **Contact History** tab will become available only after the contact has be entered.

The Contact History window allows you to

- Keep track of outgoing and incoming calls
- Add tasks to a contact
- Schedule appointments with a contact
- Time your phone calls with contacts
- Link   a file or object to a task

See Also:

Adding a task to a contact

Scheduling an appointment with a contact

Adding a call log

Attaching a file or object to a contact

Context Sensitive Help allows you to find help on specific areas of ASCEND 97 software. Some dialog boxes have a **Help** button.

To access context sensitive help

- ◆   Click on a **Help** button to open ASCEND 97 Online Help to the specific topic you are looking for.

          or
- ◆   Click **F1** from anywhere within ASCEND 97 program to open a ASCEND 97 Online Help topic in the area you are working.

Converting ASCEND 5.0 files to ASCEND 97 after installation

1   Double-click **My Computer** on your Windows Desktop.

2   Locate your ASCEND 97 program file and double-click on the **Conversion** icon. The Conversion window opens.

3   If the correct path for the ASCEND 5.0 Data Files does not appear in the Path for ASCEND 5.0 Data File field, click **Browse** to find the correct path.

4   When you have identified the correct path for the ASCEND 5.0 Data Files, click **Convert**.

5   Click **Yes** to begin the conversion process.

6   Click **OK**. The ASCEND data conversion process is now complete.

Review the following changes if you are upgrading from ASCEND 5.0:

◆   ASCEND 5.0 Recurring Tasks and Recurring Appointments are now called Repeat Tasks and Repeat Appointments.

◆   ASCEND 5.0 Repeat Tasks are now called Redo Tasks.

To help you locate Address and Phone records easily, assign a category to each new Address and Phone entry. Categories allow you to fine-tune any Address and Phone book listing for quick reference. For example, suppose you need a list of all contacts who work at the Franklin corporation. You would simply create a category called "Franklin." A category can be any subject. It can be general (personal, business) or specific (Franklin).

To create a category

1   Open the Address and Phone book.
2   Select **Edit   Phone Categories** from the **Options** menu. The Phone Categories dialog box appears.
3   Click **Add**. The Category Properties dialog box appears.
4   Enter a new category name and click **OK**.

See Also:

Assigning Phone Categories
Editing or Deleting Phone Categories

After you've broken your goals into steps, the final step is to create Daily Tasks based on your Intermediate Steps. The Daily Task is a single event which helps you reach a Long-Range Goal. For example, a daily task for the Intermediate Step "Read the new book entitled *Building Better Teams*" might be "Read 10 pages a day."   With each step you take your daily behavior moves closer to the things you value most.

There are two types of Daily Tasks that you can create in the Values and Goals window:

◆   Recurring Daily Tasks
◆   One-time Daily Tasks

ASCEND 97's Values and Goals Module makes the process of creating your Productivity Pyramid simpler than you've ever imagined.

See Also:

Entering a repeat task
Entering a one-time task

Once you have created your Long-Range Goals, you need to determine the steps you will need to complete them. These are called Intermediate Steps. Intermediate Steps can be one-time tasks or smaller goals. For each goal make a list of the steps required to reach it.

For example, some Intermediate Steps for the Long-Range Goal "I will successfully accomplish my part of my team's three main objectives by January 1, 1997" might include:

- "Be on time for every team meeting this year."
- "Volunteer to make the team presentation to management."
- "Read the new book entitled *Building Better Teams*."

See Also:

Entering Intermediate Steps
Creating daily or repeat tasks

To create a quote category

1   Open the Favorite Quotes window.
2   Select **Quotes Categories** from the **Options** menu. The Quotes Categories dialog box appears.
3   Click **Add**. The Edit Quotes Category dialog box appears.
4   Enter a description.
5   Click **OK** or press Enter to return to the Quotes Categories dialog box.
6   Click **Done**.

Red Tab Categories is the organizing tool for all your Red Tab files. You may create as many Red Tab Categories as you need.

Some guidelines you might want to keep in mind when creating Red Tab Categories:

◆ Create categories that are specific to a project or activity. For example, if you create a category entitled Book Club, you may store all your related Red Tab files (Books to read, Review of *Building Better Teams*, names and addresses of Book Club members).

◆ Make sure to identify a category when creating your Red Tab files. If you don't find a category that fits the new file, create a new category.

To create a Red Tab Category

1   Open Red Tabs.
2   Select **Red Tabs Categories** from the **Options** menu. The Categories dialog box appears.
3   Click **Add**. The Edit Category dialog box appears.
4   Enter a category description in the **Description** field.
5   Click **OK** to return to the Categories dialog box.
6   Click **Done** to return to the Red Tabs window.

A Redo task is rescheduled each time you complete it. For example, you could enter the task, "Get haircut" and set it to reoccur every 30 days. ASCEND 97 will not schedule it again until you mark the task as complete.

To create a Redo Task
1   Click on a task in the Prioritized Daily Task List.
2   Select **Redo Tasks** from the **Options** menu. The Redo Task dialog box appears.
3   The task that you selected in the Prioritized Daily Task List   appears in   the **Task** field.
4   In the **Days to Redo** field, enter the number of days after completion that you want the task to reappear.
5   Click **OK**.

You can program a task to appear on your task list on a consistent basis. For example, you could set the task "Read 10 pages in my book" to appear every day for the next month. Each day this task would automatically appear on your Prioritized Daily Task List.

To create a Repeat Task

1   Click the Repeat Task button in the Prioritized Daily Task List   Toolbar. The Repeat Task dialog box appears.

2   Enter a task description in the **Description** field.

3   Enter a priority (A, B or C) in the **Priority** field.

4   Enter any notes related to the task in the **Notes** field.

5   Enter the date you would like the Repeat task to start appearing on your Prioritized Daily Task list in the **Start** field.

6   Enter the date you would like the Repeat Task to stop appearing on your Prioritized Daily Task List in the **End** field.

- [To Create a Weekly Repeating Task](#)
- [To Create a Monthly Repeating Task](#)
- [To Create a Yearly Repeating Task](#)

To help you organize your Turbo File entries, you can separate them into categories.

To organize your Turbo Files with Categories

1   Click on the **Turbo File** button on the Main Tool Bar
     or
     Select **Turbo File** from the **Window** menu. The Turbo File window appears.
2   Select **Turbo File Categories** from the **Options** menu. The Turbo File Categories dialog box appears.
3   Click **Add**. The Edit Turbo File Category dialog box appears.
4   Enter a description.
5   Click **OK** or press Enter to return to the Turbo File Categories dialog box.
6   Click **Done**.

To edit an existing Turbo File Category

1   Select a category from the Turbo File Categories dialog box and click **Edit**.
2   Edit the description and click **OK**.

To delete a Turbo File Category

◆   Select the Category and click **Delete**.

Turbo File Types make it easier for you to locate a file. For example, under the category "Computers" you might have the types "Hardware" and "Software."

To create a Turbo File Type

1   Click on the **Turbo File** button on the Main Tool Bar
     or
     Select **Turbo File** from the **Window** menu. The Turbo File window appears.
2   Select **Turbo File Types** from the **Options** menu. The Turbo File Types dialog box appears.
3   Click **Add**. The Edit Turbo File Types dialog box appears.
4   Enter a description.
5   Click **OK** or press Enter to return to the Turbo File Types dialog box.
6   Click **Close**.

To edit an existing Turbo File Type

1   Select a type from the Turbo File Types dialog box and click **Edit**.
2   Edit the description and click **OK**.

To delete a Turbo File Type

◆   Select a type from the Turbo File Types dialog box and click **Delete**.

When using the backup option, specify a disk drive and directory in which to place the backup file. If your data will not fit on one diskette, ASCEND 97 asks for additional diskettes. ASCEND 97 does not erase any data on the diskette used for a backup, nor will it format the diskette. Diskettes used for a backup must already be formatted.

To make a Backup of your ASCEND 97 data

    1   Open the Tools and Utilities program.

        Note: You must close ASCEND 97 before you can open the Tools and Utilities program.

    2   Click the **Backup** button.   The Backup window opens.

3   Click **OK** to create a backup.

4   When the backup is complete, a confirmation window appears that says "Database backup was successful."

5   Click **OK.** Your backup is now complete.

To make a Daily Record of Events entry

1   Click the **Daily Record of Events** button on the Main Tool Bar.
      or
      Select **Daily Record of Events** from the **Window** menu.
2   Enter your data in the text window.
3   You can format your data using the Daily Record of Events Tool Bar.

To create a new appointment

1   Click on the line next to the start time of your appointment.

    or

    Click on the **New Appointment** button.

    or

    Select **New Appointment** from the **Edit** menu. The Appointment Properties window appears.   Move the appointment time block to the starting time with the keyboard arrows.   To adjust the length of the appointment, hold down the **Shift** key and use the keyboard arrows.

2   Enter a appointment description. You can enter up to 255 characters in the Appointment **Description** field.

Tip:

You can assign categories to each appointment and distinguish you categories with different colors.

To assign a category to an appointment

1   Select the appointment   by clicking it.

2   Select **Edit Appointment** from the **Edit** menu.

3   Choose a category from the drop-down menu.

4   Click **OK.**

Note: Create appointment categories by selecting **Appointment Categories** from the **Options** menu.   You can assign category colors in the Appointment preferences.

See Also:

Creating a Repeat Appointment

Editing an Appointment

Entering Appointment Notes

If you want to view certain Address and Phone entries use a filter. For example, create a filter entitled Franklin Quest Co. to view all your Address and Phone entries for Franklin Quest Co.

To create a Filter

1   Open the Address and Phone book.

2   Click the **Filter** button. The Phone Filter window opens.

3   Click the **Add** button to create a new Phone Filter. The Phone Filter detail view appears.

4   Enter the name of your filter in the **Filter Name** field.

5   Decide what information you want to appear with this filter. For example, if you want all Address and Phone records related to Franklin Quest Co. to appear, enter Franklin Quest Co. in the **Company** field. You can assign Key Codes, Categories, etc. to your filter.

6   Enter the filter criteria in the assigned fields: **Last Name, First Name, Hailing, E-Mail, Title**, etc.

7   In the **Word Match** box, you can select the type of filter you wish to create.

8   Select from:

Anywhere   Search for the correct order of letters anywhere in the directory. This includes the correct order of letters within another word. For example, if you are looking for "out," ASCEND 97 searches for any entry in the directory containing the letters o-u-t, such as the word "clout."

Exact   Search for words exactly as they are typed. For example, if you have the word "out" typed as OUT, ASCEND 97 will not find the match. It must be typed exactly as "out."

Beginning   Search for the correct order of letters at the beginning of any word. For example, if you are looking for "out," ASCEND 97 searches for any entry in the directory with the letters o-u-t in the beginning, such as in the word "outer."

9   Click the **Case Sensitive** box   if you want ASCEND 97 to search for words in upper and/or lower case exactly as entered. For example, if you are searching for "Out," ASCEND 97 would not find "out".

10   When you have defined all the fields you want to assign to this filter click **OK**. The new filter appears in the Phone Filters window.

See Also

[Loading a Filter](#)

Password protection is set up for your security. By creating a password, only you can access your ASCEND 97 program.

To create a Tools and Utilities Password

1   Open the ASCEND 97 Tools and Utilities program.

Note: You must close ASCEND 97 before you can open the Tools and Utilities program.

2   Click the **Change Password** button   in the Tools and Utilities window. The Change Password window appears.

3   Add a security password in the **New Password** field.
4   Retype the password in the **Verify New Password** field.
5   Click **OK.** A window appears displaying the message "Password is set."
6   Click **OK**. Your ASCEND 97 files are now secured by your password.

To remove your password

1   Open the ASCEND 97 Tools and Utilities program.

Note: You must close ASCEND 97 before you can open the Tools and Utilities program.

2   Click the **Change Password** button   in the Tools and Utilities window. The Change Password window appears.

3   Type your password in the **Old Password** field.
4   Click the **Remove** button.

Keep tabs on all of the information in your life. Whether it's ideas for the meeting with the Creative Department next week, or keeping track of your son's Little League schedule, you can organize it all with Red Tabs. You can create as many Red Tab files as you want. The Red Tab Categories feature makes retrieval easier than any manual filing system. Red Tab files are easy-to-use because you can create, edit and delete Red Tab files with the click of a button.

To create a Red Tab File

1   Click the Red Tab button

     or
     select **Red Tabs** from the **Window** menu.
     An Untitled Red Tab document appears.
2   Enter text.
3   Format text.

4   Click **Save** button.
5   Choose a Red Tab Category from the drop-down menu.
6   Enter a description of the Red Tab in the **Description** field.
7   Click **Save**.

Repeat appointments automatically appear on the days you select. For example, you can create a repeat appointment for a staff meeting every Thursday from 9:00 a.m. to 10:30 a.m. Every Thursday, the appointment appears on your ASCEND 97 Appointment Schedule.

To create a Repeat Appointment

    1   Open the Appointment Schedule

    2   Click the **Repeat Appointment** button.

        or

        Select **Repeat Appointments** from the **Options** menu.

        The Repeat Appointment window appears.

2   Click the **Add** button. The Add/Edit Repeat Appointment window appears

3   Enter a description of the appointment in the **Description** field.

4   Enter any notes in the **Notes** field.

5   Enter the date you would like the Repeat Appointment to start appearing on your Appointment Schedule in the **Starting date** field.

    6   Enter the date you would like the Repeat Appointment to stop appearing on your Appointment Schedule in the **Ending Date** field.

    7   Enter the Starting Time.

    8   Enter the Duration of the appointment.

    9   To set an alarm, check the **Alarm** box. In the **Early Warning** field, enter the number of minutes before the appointment that you would like to be warned.

Yearly Appointment

◆   If you want the appointment to appear once a year on a certain date, enter the date in the **Day** and **Month** fields.

Monthly Appointment

◆   To create a monthly appointment, enter the number of months before the appointment repeats in the **Every** field, then click the **Months** button.

◆   To repeat the appointment on a certain day of the month (for example, the second Friday of the month), in the Weekdays field click the **Friday** box and click the **2nd** box in the **Weeks** field.

    Tip: If you select the **1st**, **Last** or **5th** boxes in the **Weeks** field, make sure the day you have selected occurs in that week. For example, if you select the **Thursday** and **Last** boxes, there must be a Thursday in the last week of the month or the appointment will not appear.

Weekly Appointment

◆   To create a weekly appointment, enter the number of weeks before the appointment repeats in the **Every** box and click the **Weeks** button. For example, "Every 2 Weeks" means the appointment will repeat every other week after the Starting Date until the Ending Date is reached.

    10   Click **Save**.

    Note: To view or edit an existing Repeat appointment, click **Find**. Click the **Delete** button to remove a Repeat appointment.

To enter a Special Day in your ASCEND 97 program

1   Select **Special Days** from the **File** menu

    or

    Open the Floating Calendar and click on the **Special Days** icon.

2   The Special Days dialog box appears.
3   Click **New**. The Special Days Detail dialog box appears.
4   Enter the name of the Special Day in the **Description** field.
5   If the event occurs on one specific day (such as a birthday) complete the **Month and Day** fields. (You must complete either the **Month** and **Day** fields **or** the **Start Date** and **End Date** fields.)
6   If the event occurs on more than one day (such as a vacation) enter the beginning and ending dates of the event in the **Start Date** and **End Date** fields. (You must complete either the **Month** and **Day** fields, **or** the **Start   Date** and **End Date** fields.)

    Tip: You can either enter the date in the **Start Date** and **End Date** fields, or you can click on the calendar and select the date. If you select a date in the calendar, click on the calendar again to close it.

7   Click **Early Notification** to have ASCEND 97 remind you when a Special Day is approaching. Enter the number of days before the event that you would like to be reminded. A reminder will appear on your ASCEND 97 desktop.
8   Select a category from the drop-down menu.
9   Enter the days on which you would like the Special Day to appear.
10 Click **OK**.

Take some time each day to make a list of all the goals that you plan to complete today.

To create a new task

1   Click on a blank task line
    or
    Select **Insert Task** from the **Edit** menu.
2   Enter a task description.
3   Enter any note for this task in the **Note** field.
4   Click the **Date/Time Stamp** in the **Note** field when a task has been completed. This helps you keep an accurate record of when tasks have been completed.
5   You can also attach a file to a task or link this task to a contact.

   Note: A task description can have a maximum of   255 characters. To view the remaining characters in the slot, click on the far right end of the text. The text will scroll to the left.

See Also:

Creating Redo tasks
Creating Repeat tasks
Prioritizing your task list
Assigning action codes to a task
Linking a task to a contact
Moving a task

Creating Task Categories will help you organize your tasks into specific areas such as work, home and other projects.

To create a task category

1   Open the Prioritized Daily Task List.
2   Select **Task Categories** from the **Options** menu. The Task Categories dialog box opens.
3   Click **Add**.
4   Enter a category description in the **Description** field.
5   Click **OK**.

See Also:

Editing or Deleting a Task Category

To create a new Turbo File

1   Click on the **Turbo File** button on the Main tool bar
    or
    Select **Turbo File** from the **Window** menu. The Turbo File window appears.

2   Click the **Add Turbo File** button.
3   In the **Description** field, enter the name of the article or title of the document you are filing.
4   In the **Keywords** field, enter any words that will help you find items in the future.
5   In the **Location** field, enter the location of the physical file or document. For example, drawer two, file three, family room, or safety deposit box.
6   In the **Category** field, specify the type of item being indexed or filed. Examples of categories include Computers, Parenting, Speech Material.
7   In the **Date Entered** field, enter the date the turbo file was created or edited.
8   In the **Type** field, enter the Turbo File Type. You can subcategorize items within each category by defining a Turbo File Type.
9   Enter notes about the file item in the Turbo File **Notes** field.
10 Click **OK**.

You can personalize your ASCEND 97 desktop by sizing each ASCEND 97 window to fit your needs and by setting your preferences. Options in Global, Prioritized Daily Task List, and Appointment Schedule Preferences allow you to change the way your desktop looks.

ASCEND 97 Global Preferences allow you to customize your desktop. In the Global Preferences window you can:

- Synchronize dates between modules
- Show a Quote of the Day on startup
- Show a Governing Value on startup
- Set your dialing preferences

You can personalize your task list by changing your Prioritized Daily Task List Preferences. Within the Prioritized Daily Task List Preferences window you can:

- Auto Forward/Sort tasks
- Assign colors to tasks
- Delete priorities from incomplete tasks
- Forward tasks to the Master Task List

The Appointment Schedule Preferences allow you to:

- Select colors for your different appointment types
- Designate work and personal time for appointments
- Select a Start and End time for your workday
- Set the view for the appointment grid (15 minutes, 30 minutes, one hour)
- Show or hide any tasks that are related to an appointment

You can format your Daily Record of Events with the Daily Record of Events Tool Bar.

Cut selected text

Copy text to clipboard

Paste text from clipboard

Bold text

Italicize text

Underline text

Change font style

Align text left (default)

Center text

Align text right

Insert bullet

Date and Time stamp

You may find that you need to decrypt your database at some point in the future. For example, if you want to be able to import and export Address and Phone information you will need to decrypt your ASCEND 97 database because this information is transferred directly from the ASCEND 97 database.

To decrypt your ASCEND 97 database

1   Open the ASCEND 97 Tools and Utilities program.

2   Click the **Decrypt Database** button.   The Decrypt Database window appears.

3   Click **Yes** to decrypt your database. A confirmation window appears that says "Database is decrypted."

4   Click **OK**. Your ASCEND 97 database is now readable by other programs.

At times you may want to remove a value, goal, step or task. If, for example, you have reached a goal or you discover that a certain value is no longer significant, you may want to delete it.

To delete a Values and Goals entry
1   Open the Values and Goals window.
2   Click the pyramids to expand the list to the appropriate level.
3   Click on the value, goal, step, or task that you want to delete.
4   Click **Delete**.
     A message warns you that everything beneath the value, goal, or step will also be deleted.

     Warning!   When you delete a value, goal, or step, everything beneath it is also deleted. For example, if you delete a Governing Value, ASCEND 97 deletes all the goals, steps and tasks attached to the value.
5   Click **OK** to delete; click **Cancel** if you do not want to delete your selection.

To start each day with an inspirational quote

1   Open the favorite Quotes window.

2   Select **Global Preferences** from the **Option** menu. The Global Preferences dialog box appears.

3   Select **Show Quote of the Day on Startup**.

4   Click **OK**. ASCEND 97 will display a different quote each time you start up.

To edit Journal Index entries

1   Open the Journal window and click on the **Index** button

or

Select **Index Entries** form the **Options** menu. The Index Entries dialog box appears.

2   Click **Edit Index**. The Add/Edit Index Entries dialog box appears.
3   Make any changes to the entry and click **OK**. The Index Entries window appears.
4   Repeat this process to edit more Index Entries.
6   When you are finished, click **Close**.

To edit an existing Quotes Category

1   Select a category from the Quotes Categories dialog box
2   Click **Edit**.
3   Edit the description and click **OK**.

To delete a Quotes Category

1   Select a category from the Quotes Categories dialog box
2   Click **Delete**.

To rename a category

1	Select **Red Tab Categories** from the **Options** menu.
2	Click to highlight the category you wish to rename.
3	Click **Edit**. The Edit Category dialog box appears.
4	Highlight the text, type in the new name, then click **OK**.
5	The new name appears in the Categories window.
6	Click **Close** to exit the dialog box.

To delete a Red Tab category

1	Open the Red Tabs window.
2	Select **Red Tab Categories** from the **Options** menu. The Categories window appears.
3	Click to highlight the category you wish to delete.
4	Click **Delete**.

To make changes to any Value, Goal, Intermediate Step, or Daily Task

     1   Open the Values and Goals window.

     2   Click the **View All** button to view all levels of your pyramid.

3   Click on the Governing Value, Long-Range Goal, Intermediate Step or Daily Task you want to change. The dialog box appears for the value, goal, step or task you selected.

4   Make the changes in the appropriate fields.

5   When you are finished editing, click **OK**.

To edit a Journal entry

◆ Locate it with the date bar, or in the Index Entries dialog box. Make changes to the entry, they will automatically be saved upon closing the Journal window.

See Also:

Finding Past Journal Entries

You can make changes to Red Tab documents at any time.

To edit a Red Tab document

1   Open the file you want to change.

2   Make the desired changes, then click the **Save** button.

ASCEND 97's editing features allow you to change, cut, copy or delete a task description or note.

To edit an existing task

◆ Double-click on a task description and enter new text.

To edit the note for a task

1 Click on the task you wish to edit. The note for the selected task appears in the **Note** field.
2 Make any changes to the note. The changes are automatically saved when you exit the note field.

Using the tool bar, menu bar, or right mouse button, you have access to the Cut, Copy and Paste commands. However, if you don't want to cut a task completely from the task list, you can assign it a "Deleted" action code— keeping a record of it, with all links, notes and assigned data.

Once you have located the Address and Phone entry you want to edit, you may make changes to any field in the New Phone Entry window. Use this option if someone changes location (moves, joins a new company, etc.) or changes their business or home phone number.

To edit an address and phone entry

1   Select the entry that you would like to edit in the Address and Phone book.

2   Click the **Edit** button. The New Phone Entry window opens with all the Address and Phone information for this record.

3   Make changes to the appropriate fields and click **Save**.

See Also:

Locating existing Phone entries

Appointments are often dependent on other people's schedule. Consequently, your appointment schedule can change often during the day. You can make changes to any appointment description, start time, notes or attachments.

To edit an appointment
1   Select **Edit Appointment** from the **Edit** menu. This opens the Appointment Properties window.
2   Under the **Appointment Information** tab you can make changes to the date, duration or description of the Appointment. You can also add or delete any attachments to the Appointment. (If you change the date field, this appointment will no longer appear on the appointment schedule for this day)
3   Under the **Notes** tab you can add or edit your appointment notes.
4   Under the **Alarms** tab you can set how many minutes before the appointment you would like an alarm to go off.

See Also:

Moving an appointment
Adding notes to an appointment

You can change your Task Categories to fit your current situation. For example, if you complete a project and begin another, you may want to delete or edit the category for the old project.

To edit a task category

1 Select **Task Categories** from the **Options** menu.
2 Select the category you would like to change in the Category window.
3 Click the **Edit** button. The Edit Task Category dialog box appears.
4 Make any changes to this category and click **OK**.

To delete a task category

1 Select **Task Categories** from the **Options** menu.
2 Select the category you would like to delete in the Category window.
3 Click **Delete**. A dialog box will appear asking you "Delete the selected category?"
4 Click **Yes**.

You may find that you need to change or delete an Address and Phone book category. For example, you create an Address and Phone category "Franklin Quest Co." for all your contacts at Franklin Quest Co. However, you soon find yourself with a number of contacts at Franklin Quest Co. It's time to create more specific categories. You can create new categories for each division of Franklin Quest Co. (Franklin Quest Sales, Franklin Quest Technology, Franklin Quest Product Support, etc.). You can change or delete any existing category in the Address and Phone Categories window.

To edit a category
1   Select **Edit Address and Phone Categories** from the **Options** menu. The Edit Categories dialog box appears.
2   Select the category that you would like to edit and click **Edit**.
3   The Category dialog box appears. Make any changes and click **OK**.

To delete a category
1   Select **Edit Address and Phone Categories** from the **Options** menu. The Edit Categories dialog box appears.
2   Select the category that you would like to delete and click **Delete**.

To edit an existing quote
  1   Locate and open the quote you want to edit. See <u>Locating a Quote</u>.

  2   Select the quote you would like to change and click the **Edit** button
       or
       Select **Edit Quote** from the **Edit** menu.
3   Make any changes to the quote and click **OK**.

To delete a quote
  1   In the Favorite Quotes window, click on the quote you want to delete.

  2   Click the **Delete** button.

By encrypting your database and creating a password for your ASCEND 97 program you can feel secure that your information is safe. Encrypting the database makes ASCEND 97 files unreadable outside of the ASCEND 97 program. While ASCEND 97 can decipher the encrypted text, other users that may have access to your computer cannot read these files.

To encrypt your ASCEND 97 database

    1   Open the ASCEND 97 Tools and Utilities program.
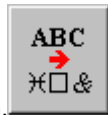
    2   Click the **Encrypt Database** button.   The Encrypt Database window appears.

3   Click **Yes** to encrypt your ASCEND 97 database. A window appears confirming the encryption that says "Database is encrypted."

4   Click **OK**. Your database is now secure.

See Also:

Decrypting your database

Setting a password

If you're already familiar with ASCEND, 97 you'll appreciate the program's enhanced features, including:

- Enhanced Global Search
- Refined Prioritized Daily Task List: weekly, monthly and yearly views
- Enhanced Appointment Schedule: daily, weekly, monthly and yearly views
- Improved printing features for the Franklin Day Planner pages, or labels and envelopes

To enter an appointment note

1. Click on an existing appointment and click in the **Notes** field below the Appointment Schedule daily view.
    or
    Select **Edit Appointment** from the **Edit** menu and click the **Notes** tab. Enter any notes for this appointment.

2. When you've finished entering your note, click back on the **Appointment** field. A pencil icon appears indicating there is a note attached to this appointment.

3. To review an appointment note, click on the pencil icon in the appointment slot. The appointment notes appear in the notes window.

To enter an Intermediate Step

1   Click the **View All** pyramid button.

2   Select a Long-Range Goal and click the **Add Item** button
     or
     Select **Add Value, Goal or Task** from the **Edit** menu. The Add Item dialog box appears.
3   Select Intermediate Step and click **OK**. The Intermediate Step dialog box appears.
4   In the **Description** field, enter a step toward your Long-Range Goal.
5   In the **Clarifying Statement** field, describe exactly what you will do to complete this step.
6   In the **Priority** field, enter a priority (A1, A2, A3). You don't have to prioritize your Intermediate Steps now; you can enter steps, then prioritize them in the Values and Goals window. In the meantime, ASCEND 97 lists your steps in the order that you entered them.
7   If you want, you can enter dates in the **Start Date** and **End Date** fields.
8   Click **Save**. The Intermediate Step now appears under the Long-Range Goal associated with it.

See Also:

Creating repeat or daily tasks
Entering a repeat task
Entering a one-time task

To enter a Long-Range Goal

1   Click the **View all** pyramid button.

2   In the Values and Goals window, click on a Governing Value to which you want to add a goal.

3   Click the **Add Item** button
    or
    Select **Add Value, Goal or Task** from the **Edit** menu. The Add Item dialog box appears.

4   Select Long-Range Goal and click **OK**. The Long-Range goal window appears.
    Note: If you are not able to select Long-Range Goal in the Add Item dialog box, make sure you have associated this goal with   a Governing Value in the Values and Goals window.

5   In the **Description** field, enter your goal.

6   In the **Clarifying Statement** field describe in a few sentences:
    Why do you want to achieve this goal?
    What do you hope to accomplish or change about yourself?
    How will this goal help you live a Governing Value?

7   Complete the **Priority**, **Start Date**, and **End Date** fields.

8   Click **OK**.
    In the Values and Goals window, the Long-Range Goal now appears under the Governing Value it is associated with.

See Also:

Creating Intermediate Steps
Entering Intermediate Steps

To add a note to a task

1   Select   a task.

2   Click in the **Notes** field.

3   Enter   text.

        You can also attach a file or object to the task.

See Also:

Attaching a file to a task

Attaching an object to a task

Linking a contact to a task

To enter a Governing Value

1   Open the Values and Goals window by clicking the **Values and Goals** button on the Main Tool Bar.
    or
    Select **Values and Goals** from the **Window** menu. The Values and Goals window appears.

2   Click the **View All** pyramid button. This displays any existing Governing Values, Long-Range Goals, Intermediate Steps, and Daily Tasks.

3   Click the **Add Item** button
    or
    Select **Add Value, Goal or Task** from the **Edit** menu. The Add Item dialog box appears.

    4   Select **Governing Value** and click **OK**. The Governing Value dialog box appears.

    5   In the **Description** field, enter a value description.

    6   Write the value as a positive affirmation such as "I am successful in my work."

    7   In the **Clarifying Statement** field, enter a brief statement describing why this value is important to you.

    8   In the **Priority** field, enter a priority.

    9   Click **Save**. The new value appears in the Values and Goals window.

See Also:

You can create a value-related task in the Values and Goals window that appears in the Prioritized Daily Task List as well as your Productivity Pyramid.

To enter a one-time task in Values and Goals

1   Click in the **View all** pyramid button.

2   Select an Intermediate Step and click the **Add Item** button
     or
     Select **Add Value, Goal or Task** from the **Edit** menu. The Add Item dialog box appears.

3   Select Daily Task and click **OK**. The Repeat Task dialog box appears.

4   Enter the name of the task in the **Description** field.

5   Enter a Priority (A, B, C, D) in the **Priority** field. Remember, the goal is to bring your daily actions in line with your Governing Values. Value-related tasks should be A priority values.

6   Enter   any notes associated with this task..

7   In the **Starting Date** and **Ending Date** fields enter the date you would like the task to occur, including the year.

8   Enter the Day you would like the task to occur in the **Day** field.

9   In the **Month** field, enter the Month you would like the task to occur.

10   Click **Save**. The task now appears in the Values and Goals window and in the Prioritized Daily Task List.

You can create tasks that will occur within a specified time frame. For example, you can create a repeat task "Take physical fitness exam" that appears once every 30 days.

To enter a repeat task in Values and Goals

1   Click in the **View All** pyramid button.

2   Select an Intermediate Step and click the **Add Item** button
     or
     Select **Add Value, Goal or Task** from the **Edit** menu. The Add Item dialog box appears.
3   Click the **Daily Task** radio button and click **OK**. The Repeat Task dialog box appears.
4   Enter the name of the task in the **Description** field.
5   Enter a Priority (A,B, C, D) in the **Priority** field. Remember, the goal is to bring your daily actions in line with your Governing Values.
6   Enter any notes associated with this task.
7   In the **Starting Date**   field enter the date you would like the task to first occur, including the year. In **Ending Date** enter the date you would like the task to end.
8   For a task that occurs only once a year, complete the **Day** and **Month** fields.
9   Complete the **Every** field to have the task reappear after a certain number of days, weeks, or months. For example, to create a task that repeats every 30 days, enter 30 in the **Every** field and click **Days** radio button.
     or
     Complete the **Weekdays** and **Weeks** boxes to determine what days of the week and how many weeks a month the task needs to occur.

To enter a master task

1   Open the Master Task List module.

2   Select the category where you wish to enter the task.   You can create Master Task List Categories if desired.

3   Enter the task in the first available line. You can use your mouse or the TAB key to move between columns. If you wish, click the **Notes** field to add a note to the task.

To export names, address and numbers

1. Open the Address and Phone Listing View.
2. Select **Import/Export Wizard** from the **File** menu. The Import/Export Phone Wizard window appears.
3. Click the **Export to another program** radio button.
4. Click **Start**. The **Address and Phone Export** window appears.
5. Choose the fields you want to export.
6. Use the **Move Up** and **Move Down** buttons to arrange the fields in the order you want them exported.
7. Click **Next**.
8. Choose the records you want to export.
9. Click **Next**.
10. Choose the format you would like to export, from the **Format** pull-down menu.
11. Click **Next**.
12. Click **Export**. A window appears noting how many records were exported.
13. Click **OK**.

The Index Entries dialog box automatically lists all index entries by date.

You can narrow your search for a specific index entry by:

◆ **Searching a specific date range.**

In the **Display Options** box, select a beginning search date and an ending search date.   The list of index entries is now limited to dates that fall within the range you specified.

◆ **Searching by name.**

In the **Sort By** box, check the **Name** field. Index entries are now listed by name.

◆ **Searching by date.**

In the **Sort By** box, check the **Date** field. Index entries are now listed by date.

To find specific information within a Red Tab file

1 Open the Red Tab you want to search
2 Select **Find** from the **Edit** menu. The Find dialog box appears.
3 Enter the text you want to find.
4 Specify if you want to search for a whole word only, such as "in" instead of "inside".
5 Specify if you only want to search for text that is in the same case.
6 Click **Find Next**.

To make it easier to concentrate on building your Personal Productivity Pyramid, you can focus all of your attention

on one value by clicking the **Focus** button. When you focus on a value, all other values are "collapsed" (their goals, steps and tasks are removed from the display.)

To focus on a value

1   Click to highlight the value on which you want to focus.

2   Select **Focus on a Value** from the **View** menu.

      or

      Click the **Focus** button on the toolbar.

3   Notice that all other values are collapsed.

4   To focus on another value, simply click on that value.

5   To turn focus off, repeat step two or click any pyramid button.

To format text in the Daily Record of Events

♦   Select the text that you would like to format and click on the formatting buttons in the Daily Record of Events Tool Bar.

See Also:

The Daily Record of Events Tool Bar

In the Task Forwarding box you can:

- Delete the task priority after a task has been forwarded a certain number of times
- Forward incomplete tasks to the Master Task List

To set your forwarding options in the preferences window

1   To delete an A,B or C task priority after the task has been forwarded a certain number of times enter a number in the **Times to forward A, B, & C Tasks** field.

2   To delete a D task priority after the task has been forwarded a certain number of times, enter a number in the **Times to forward D Tasks** field.

3   To forward incomplete tasks to the Master Task List after they have been forwarded a certain number of times, enter a number in the **Forward to Master Task List** field.

4   When you are finished setting your Prioritized Daily Task List Preferences, click **OK**.

When you can see all of your incomplete tasks on the current date, it is easier to determine which tasks need to be completed, which tasks need to be deleted, which tasks need to be forwarded to another date in the future, and which tasks need to be transferred to the Master Task List.

To get incomplete tasks

1   Click the **Get Incomplete Tasks** button to bring all incomplete tasks to the current date.

2   A dialog box appears asking "Move all incomplete tasks to current list?"

3   Click **Yes**. All of your incomplete tasks will appear on your task list for the current day.

4   You can now determine if they should be completed, forwarded or deleted.

To set your Global Preferences

1   Select **Preferences** from the **Options** menu.

2   Select **Global Preferences** from the **Preferences** menu. The Global Preferences window opens.

3   Click **Synchronize Dates Between Modules** to enter data on the same date within different modules.

   For example, you have scheduled an appointment three weeks in the future and you want to set related tasks and Daily Record of Events notes for the same date. Rather that move each module to the selected date with the Date Control bar you can click **Synchronize Dates Between Modules** and all modules automatically open to the date that appears in the Appointment Schedule.

4   Click **Show Quote of the Day on Startup** to display a positive reinforcement each morning when you open the ASCEND 97 program.

5   Click **Show Governing Value on Startup** to display the goals you created in the Values and Goals module.

6   Enter your area code in the **Area Code** field. (This way ASCEND 97 will not dial an area code when the number you are calling has this same area code.)

7   If you must dial a prefix to place a call then enter it in the **Dialing Prefix** field.

8   If you must dial a suffix or a calling ID number after you place a call, then enter this number in the **Dialing Suffix** field.

9   Enter the dialing format you will be using in the **Phone Format** field.

10   Click **OK**.

To learn to use ASCEND 97 software quickly, we suggest that you do the following:

- ◆ Read The Day Planner Quick-Reference Card
- ◆ Start using ASCEND 97 software and experiment as you go
- ◆ Refer to ASCEND 97 Online Help and the *ASCEND 97 User's Guide*
- ◆ If you can't find the answer to your question in the *User's Guide* or ASCEND 97 Online Help, call the ASCEND 97 Product Support team at   1-801-975-9999.

Where to learn more

If you would like to learn more about increasing your personal productivity through effective time management, you can attend TimeQuest: Increasing Productivity through Value-Based Time Management seminar. In addition to live seminars, Franklin Quest Co. also offers motivational books, tapes and videos. Call 1-800-654-1776 for more information.

To register your copy of ASCEND 97

1   Fill out the postage-paid registration card in the ASCEND 97 package.

2   Mail it to Franklin Quest Co.

Note: If you are upgrading from ASCEND 5.0, you are already registered with your previous version. However, we welcome your comments and you may register again if you would like.

3   If you have any questions about registering ASCEND 97, you may call the Franklin Technical Support Team at   1-801-975-9999 or send E-mail to **support_win@franklinquest.com**.

Governing Values are the first step to building your Productivity Pyramid. Governing Values are the principles and ideals that define who you are, or who you want to be. They can be traits or beliefs, like honesty or a belief in a higher power, or represent life-long ambitions, like physical fitness or financial security. Some samples of governing values include:

- I am successful in my work
- I am physically fit.
- I am financially secure

To identify your values, ask yourself two questions:
1   What are the highest priorities in my life?
2   Of these priorities, which do I value most?
    Keep a list of your values, adding to it with each new value you discover.

See Also:

[Entering a Governing Value](#)
[Setting Long-Range Goals](#)

When you import a text into the Address and Phone module, you can specify the fields you want to include.

To import names, addresses, and numbers
1   Open the Address and Phone book.
2   From the **File** menu, choose **Import/Export Wizard**. The Import/Export Wizard window appears.
3   Click the **Import from another program** radio button.
4   Click the **Start** button, the Address and Phone Import window appears.
5   Click **Browse**. The Open window appears.
6   Select the file you wish to import, then click **Open** and return to the Address and Phone window.
     ASCEND 97 returns to the Address and Phone Import window. This window allows you to select the available fields that reflect the names, addresses, and numbers you have selected for Importing.
7   Click **Next**.
8   Choose each field you wish to import, then choose the related ASCEND 97 field.
9   Click **Next**. The Address and Phone Import window appears.
10   Click **Import** to import and add the data to your Address and Phone listings.
11   A dialog box will appear stating the number of Entries Imported, click **OK**.

You can organize your Journal information for quick reference by using the Index feature.

To open the Journal index

Open the Journal window and click the **Index** button
or
Select **Index Entries** from the **Options** menu. The Index Entries dialog box appears. The Index window appears.

Within the Index Entries dialog box you can:
- List all index entries
- View entries for a specific time frame
- Sort entries by name and date
- Mark special entries
- Add new index entries
- Edit or delete existing entries

See Also:
Adding a Journal Index entry
Editing Journal Index entries

To insert a name in a ASCEND 97 text field

1   Click in the text field in which you would like to insert a name.
2   Select **Insert Name** from the **Insert** menu. The Insert Name dialog box opens.
3   Enter a name in the **Find** field or select a name from the contact list.
4   Select the information you would like to include by checking the **Paste Options** boxes.
5   Click **Insert**. The contact appears in your notes field with the Information you selected.

For instant access to contacts related to a note, you can insert the Phone and Address information directly into your Daily Record of Events. For example, you need some additional information from the business associate you spoke to earlier today. Fortunately, you imported his name and phone number into your Daily Record of Events so all the information you need is in one place.

To insert a name in the Daily Record of Events
1   Open the Daily Record of Events.
2   Select **Insert Name** from the **Insert** menu. The Insert Name dialog box opens with your contacts listed in the window. (You can list contacts by name or company by selecting one in the **Sort By** box.)
3   Select the contact who's information you would like to insert.
4   Select at least one of the options in the **Page Options** box.
5   Click **Insert**.
     The contact information that you have selected will be inserted into your Daily Record of Events notes.

You can insert Address and Phone Book information for an individual into your Journal entry by using the Insert Name function.

To insert a name in a journal entry

1   Select **Insert Name** from the **Insert** menu. The Insert Name window appears.

2   Select the name that you would like to insert.

3   Select which information you would like to paste in this Journal entry in the **Paste Options** box.

4   Click **Insert**. The information should appear in the Journal entry.

To insert an object in ASCEND 97

1   Click in the text field you would like to insert the object.

2   Select **Insert New Object** from the **Insert** menu. The Insert Object dialog box opens.

3   Select **Create New** or **Create from file** by clicking in the appropriate radio button.

4   If you select **Create New**, then select the type of object from the Object Type window.

     If you select **Create from file** then click the **Browse** button and find the object you would like to insert.

5   Click **OK** to insert the selected object into your notes field.

You can use the Daily Record of Events as a place to store important information. For example, rather than search all your programs for the pie chart you created for Monday's meeting, simply import the object into your Daily Record of Events.

To insert an object into the Daily Record of Events

1   Open the Daily Record of Events
2   Select **Insert New Object** from the **Insert** menu. The Insert Object window opens.
3   Select whether you would like to create a new object or insert an object that has already been created by selecting **Create New** or **Create from File**.
4   If you select **Create from File** then browse to the object you would like to insert and click **Insert**

     or

     If you select **Create New**, then select the type of object you are going to insert and click **Insert**.

     An icon or object document will appear in the DRE window.

Since the Journal uses ASCEND 97's Text Editor feature you can insert an object directly into your Journal entry.

To insert an object in a Journal entry

1   Select **Insert New Object** from the **Insert** menu. The Insert Object window appears.
2   Select whether you would like to **Create New** or **Create from File** by clicking   the preceding radio button.
3   If you select **Create New**, then select the type of object you will be inserting
      or
      If you select **Create from File**, then click **Browse** and select the object you would like to insert. Click **Insert**.
4   Click **OK**.
5   Click **Done** in the File Attachments window.
6   An object should appear in the Journal entry box.

To insert the Date and Time into an ASCEND 97 text field

1   Click in the field you would like to enter the Date and Time.
2   Select Insert **Date and Time** from the **Insert** menu. The Date and Time dialog box appears.
3   Select the format that you would like the date and time to be inserted.
4   Click **OK**.

To link a contact to an appointment

1   Select an appointment.

2   Click on the **Link** icon.

3   The Contact Link Selection List dialog box appears. The Contact Link Selection List dialog box   displays all names and companies listed in the Address and Phone directory.

4   In the **Sort By** box, select   whether   you would like to view the listing by name or   company.

5   Click **Add** to add contacts to this appointment. If you would like to attach all contacts to this appointment task, click **Select   All**.

6   When you are finished adding contacts, click **OK**. A small link appears on the right side of the

    appointment. The **Link** icon also changes to interlocked links.

To link a task to a contact

1   Select a task.

2   Click on the **Link** icon.

3   The Contact Link Selection List dialog box appears.

     The Contact Link Selection List dialog box displays all names and companies listed in the Address and Phone directory.

4   In the **Sort By** box, select whether you would like to view the listing by name or company.

5   Select a contact and click **Add** to add this contact to this task. If you would like to attach all contacts to this task, click **Select All**.

6   When you are finished adding contacts, click **OK**. A small link appears on the right side of the task column the contact is linked to and the **Link** button appears with interlocked links.

You must apply the filter criteria to each of the Address and Phone records where you want to apply the filter. For example, if the Franklin Quest filter includes Franklin Quest Co. in the **Company** field make sure all Address and Phone records you want to include in this filter contain Franklin Quest Co. in the **Company** field.

To Set a Filter

1   Click the **Filter** button.

      or

      Select **Set Filter** from the **Options** menu. The Phone Filters window appears.

2   Click on the filter you want to apply to the Address and Phone book.

3   Click the **Set Filter** button.

4   Click **Close**. All Address and Phone listings that meet the selected filter criteria appear in the Address and Phone window.

After you have entered all your contacts into your Address and Phone book, you can easily locate them with the Address and Phone book's searching capabilities. There are two ways to search for an existing Address and Phone entry, the Search feature and filters.

- If you are searching for an individual or company, use the Find field.
- If you are searching for a list of entries (such as a list of contacts for a company), use the Phone Filters option.

To locate information using Global Search

    1   Select **Global Search** from the **File** menu.

        or

        Click the **Global Search** button on the Floating Calendar. The Global Search window appears.

2   In the **Search for** field enter the word or group of words you wish to locate.

3   In the **Search where** box, select the ASCEND 97 modules you would like to search.

4   In the **From** field enter the date you would like to begin your search.

5   In the **To** field enter the date you would like to end your search.

    6   Click **Search**. ASCEND 97 displays the search results in the module and **Description** field.

    7   Click on the entry you would like to view in the **Module** and Description field. The **Additional Information** field displays task status, task priority, description, category, date entered, address and phone number, etc.

    8   To find out more information about a Global Search selection click the **Go To** button.

    9   Global Search locates where the information was found and opens the related ASCEND 97 window.

    10   Select **Reset** to begin another search.

See Also:

[Additional Searching Capabilities](#)

The Filter option lets you locate a quote or types of quotes using the author's name, key words or categories as search criteria.

To locate a quote using a filter

1   To find a quote, open the Favorite Quotes window.

2   Click the **Filter** button

      or

3   Select **Filter** from the **Option** menu. The Filter Quotes dialog box appears.
4   Enter the search criteria.
5   Click **OK**. The search results appear in the Favorite Quotes window.

Use ASCEND 97 software in a way that is most productive for your work environment and lifestyle. Here are a few suggestions of how to adapt ASCEND 97 software to fit your style:

ASCEND 97 at work

If you use a desktop computer regularly, you can use ASCEND 97 software to plan your day, schedule your appointments, make phone calls and so on. While traveling, or in meetings, you can keep a printed copy of your weekly or monthly schedule with you.

ASCEND 97 at home

If you use a computer and printer at home, you can plan your daily activities in the ASCEND 97 program in the morning, print out your day's tasks and appointments and work from the printed pages until you get back to your computer.

ASCEND 97 between work and home

To use ASCEND 97 both at home and work, install ASCEND 97 on both computers and use a disk or modem to transfer your ASCEND 97 data between the two computers.

ASCEND 97 on the go

If you use ASCEND 97 on a laptop or notebook computer, you have the advantages of portability—you'll be able to take your personal information wherever you go.

What if you don't use your computer every day?

Many of the ASCEND 97 windows are useful even if you are only at your computer a few times a month. For example, you can enter information in the Address and Phone book once, print attractive listings and simply update as needed.

Categories allow you to store tasks under different classifications. Five categories (Home, Work, Misc. A, Misc. B, and Personal)   are provided for you. You can create as many as you want.

To create Master Task List categories
1   Select **Edit Categories** from the **Options** menu.
2   Type the name for your Master Task List category in the Category box. Your categories can be anything: Business, Family and so on.
3   Click **Add**.

To delete a category
1   Select **Edit Categories** from the **Options** menu.
2   Highlight the category you wish to delete.
3   Click **Delete**.

To rename a category
1   Select **Edit Categories** from the **Options** menu.
2   Click to highlight the category you want to rename.
3   Inside the text box, type in the new name, then click **Rename**.

The Monthly View is a five-week calendar that displays all your appointments for the current month. You can edit appointments and view notes, files and contact links for appointments in the monthly view.   The Monthly View can be opened from any view within the Appointment Schedule.

To open the Monthly View

    1   Open the Appointment Schedule

    2   Click the **Monthly View** icon in the Appointment Schedule Toolbar.

        or

        Select **Monthly View** from the **View** menu of the Main Menu bar.

Within the Monthly View you can view all of your appointments for each day. When you click on a specific appointment you can view the notes, alarms, attached files and contact links for an appointment.

To add an appointment in the Monthly View

    1   Click on the day that you would like to add an appointment.

    2   Click the **Add Appointment** Button.   The Add Appointment dialog box appears.

3   Enter the name of the appointment in the **Appointment** field.

4   Move the appointment time block to the starting time with the keyboard arrows.   To adjust the length of the appointment, hold down the **Shift** key and use the keyboard arrows.

5   Click **OK**. The appointment now appears on the Monthly View.

    6   When you click on the appointment in the Monthly View you can add notes, set an alarm and link files and contact to the appointment.

To move an appointment in the Monthly View

    1   Place the cursor on the appointment you wish to move.

    2   Click and hold the left mouse button to grab the appointment. If you have successfully grabbed the appointment a small box will appear at the base of the mouse arrow.

    3   Drag the appointment to its new location and release the left mouse button.

When you're ready to schedule a task you've been storing, you can easily move it back to the Prioritized Daily Task List using the Move Task to Date window. In this window, you tell ASCEND 97 what day you want the task moved back on your Prioritized Daily Task List.

Using Move Task to date

1   Click the task on the Master Task List.

2   Do one of the following:

   ◆   Click on the **Move Task** button, located on the tool bar.

◆   Select **Move Task** from the **Edit** menu.

3   Select the date you want the task to appear on the Prioritized Daily Task List.

4   Click **OK**.

   The task is moved to the Prioritized Daily Task List on the date indicated.

When it becomes clear that you won't be able to get to a daily task for a while, you can move it from the Prioritized Daily Task List to the Master Task List and store it until you are ready to work it back into your daily schedule.

There are two ways to move a task to the Master Task List:

- **Automatic Forwarding**
- **Manual Forwarding**

To set automatic forwarding

1   Open the Prioritized Daily Task List module.
2   Select **Preferences** from the **Options** menu.
3   Select **Prioritized Daily Task List Preferences** from the **Preferences** menu. The Prioritized Daily Task List Preferences   window appears.
4   In the **Times to forward before Master Task List** field, enter the number of times you would like ASCEND 97 to forward a daily task until it is moved. When the task has been forwarded the selected number of times, ASCEND 97 will ask you if you want to move it to the Master Task List. If you choose **Yes**, make sure you select a category for the task.

Moving Tasks to the Master Task List with Drag and Drop

1   Open the Master Task List and select the category where you want to store the task.
2   Open the Prioritized Daily Task List.
3   Place the cursor on the task in the Prioritized Daily Task List. Click and hold the left mouse button.
4   Drag the task to the first open slot on the Master Task List, then release the LEFT mouse button.

You can move a task to a future date with the **Move To** button.

To move a task to a new date

1   Select the task that you want to move.

2   Click the **Move To** button. The Move Task To window appears.

3   Select the new date in the **Move To** field.

4   Click **OK**.

To move an appointment

1   Click on the appointment you would like to move.

2   In the **Notes** field, click the **Move To** button.

3   The Appointment Properties window appears.
4   In the **Date** field, enter the date you want the appointment   to appear.
5   Click **OK**.

You can navigate to an appointment in the past or the future simply by clicking on the Date Navigator bar.

◀◀◀ ◀◀ ◀ Mon., Jul. 15, 1996 ▶ ▶▶ ▶▶▶

Q One month back

◀◀ One week back

◀ One day back

Tue., Aug. 13, 1996 (+11)   Page date (+ or - the number of days from the current date)
Double click on the Page Date area to instantly return to the current date.

▶ One day forward

▶▶ One week forward

Q One month forward

▦   Go To Date calendar

To navigate to a specific date in the future you can use the Go To Date calendar. Click the Go To Date Calendar

button ▦ and click the date you want to go to on the calendar. Click **OK**. Your ASCEND 97 window will change to that date.

You can navigate to an appointment in the past or the future simply by clicking on the Date Navigator bar.
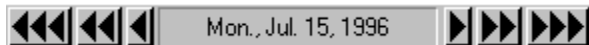
 One month back

One week back
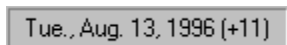
 One day back

Tue., Aug. 13, 1996 (+11)   Page date (+ or - the number of days from the current date)
Double click on the Page Date area to instantly return to the current date,

One day forward
One week forward
 One month forward

    Go To Date calendar
To navigate to a specific date in the future you can use the Go To Date calendar.

Click the **Go To Date Calendar** button and type in or click on the date you want to go to on the calendar.
Click **OK**. Your ASCEND 97 window will change to that date.

New   personal information management software for Windows combines the power of the Franklin Quest Time Management system with the convenience of your computer. This new version includes many new features such as:

- New Quick Prioritize feature. Prioritize your task list with the new Quick Prioritize feature. Simply click on the priority you want to assign your tasks and click on the tasks in the order you want to rank them.
- Store as many phone numbers and addresses as you want
- Attach files and objects to tasks and appointments
- Pilot ready software. The new Pilot is a pocket-size electronic organizer that connects to your computer and the power of ASCEND 97 software.

ASCEND 5.0 users can upgrade all their ASCEND information to ASCEND 97 during installation or at a later time.

Converting ASCEND 5.0 files during Installation

During installation of ASCEND 97, the ASCEND conversion program will ask for the path to any previous versions of the ASCEND program. If you have a previous version of the ASCEND program, it will ask you if you want to convert the information into ASCEND 97.

Converting ASCEND 5.0 files after Installation

If you choose to convert your ASCEND 5.0 data at a later time simply run the Conversion program found in the Planner directory.

See Also:

Converting ASCEND 5.0 Information

To open ASCEND 97 Online Help, select **ASCEND 97 Help** from the **Help** menu in any ASCEND 97 window. There are three windows in the ASCEND 97 Online Help file to assist you in locating the information you are looking for. The three windows are:

Contents The Contents window provides a hierarchical table of contents with information organized under each main area of the ASCEND 97 program. Click on a book to view the help topics related to that subject. Click on a topic to move to the specific help window.

Index The Index window provides an extensive list of all the subjects found in ASCEND 97 Online Help. Enter the subject you are looking for to narrow the search. Click on the topic where you need help.

Find Search for help by entering a word in the Find window. ASCEND 97 Help lists all topics that contain this word.

Note: When you look for hyphenated words, be sure to type the hyphen.

If you can't find information in the ASCEND 97 Online Help file, it may be available in the Windows 95 User Guide: *Introducing Microsoft Window 95*. For example, "Adding a printer" and "Turning off your sound effects" are Windows functions, so they are available in the Windows 95 Online Help. You can access Windows 95 Online Help by clicking the **Start** button on your task bar and selecting **Help**.

See Also:

Printing a Help Topic
Context Sensitive Help

To open a Red Tab document

    1   Click **Open** button. The Open dialog box appears.

2   Choose a Category from the drop-down list.

3   Select a Red Tab title from the Red Tab Description box.

4   Click **Open**. (or double-click the selected Red Tab title). The selected Red Tab file opens.

To open and edit a Turbo File

1   Click on the **Turbo File** button on the Main Tool Bar

or

Select **Turbo File** from the **Window** menu. The Turbo File window appears.

2   In the Turbo File window, double-click on the entry you would like to open

or

Click on the entry you would like to open and click the **Edit** button.

3   Enter or change information and click **OK**.

To print your Address and Phone book

1   Open the Address and Phone window.

2   Select **Print Address and Phone** from the **File** menu. The Address and Phone Reports window appears.

3   Select the **Report Style** you want to print, **Address and Phone Detail** or **Phone Index**.

4   Select the range of addresses you want to print.

5   Select **Pause After Each Page** if you would like to print your Address and Phone book to your Franklin Day Planner pages. This gives you time to feed the Franklin Day Planner pages into your printer.

6   Select **Page Break After Each Letter** if you would like to organize your printed Address and Phone book by letter.

7   Click **Select Size** to choose your paper size.

8   Click **Preview** to view the page(s) you are going to print. This gives you a chance to ensure your margins are set correctly for the Franklin Day Planner page you are printing.

9   Click **Close**. The Address and Phone Reports window appears.

10 Click **Print**.

To print your Weekly Calendar

1   Select **Print Calendars** from the **File** menu. The Print Calendars window appears.
2   Select the items you would like to appear on this calendar by checking them in the **Items to Print** box.
3   Select the **Weekly Calendar** radio button in the **Calendar Type** box.
4   Select the dates to print in the **From** field.
5   Enter the **# of weeks** to print.
6   Select whether you would like your calendar printed on **One Page** or **Two Pages** in the **Pages** box.
7   Select how you would like the calendar to appear in the **Calendar Layout** box.
8   Click **Paper Size** to select the page type you want to print.
9   Click **Preview** to view your printing selection.
10 Click **Print**.

To print your Monthly Calendar

1   Select **Print Calendars** from the **File** menu. The Print Calendars window appears.
2   Select the items you would like to appear on this calendar by checking them in the **Items to Print** box.
3   Select the **Monthly Calendar** radio button in the **Calendar Type**.
4   Select the Month you would like to print in the **From** field.
5   Select whether you would like your calendar printed on **One Page** or **Two Pages** in the **Pages** box.
6   Click **Paper Size** to select the page type you want to print.
7   Click **Preview** to view your printing selection.
8   Click **Print**.

To print your Yearly calendar

1   Select **Print Calendars** from the **File** menu. The **Print Calendars** window appears.
2   Select the items you would like to appear on this calendar by checking them in the **Items to Print** box.
3   Select the **Yearly Calendar** radio button in the **Calendar Type**.
4   Click **Paper Size** to select the page type you want to print.
5   Click **Preview** to view your printing selection.
6   Click **Print**.

You can print the information you have entered on your Daily Record of Events page.

To print the Daily Record of Events

1   Open the Daily Record of Events.
2   Select **Print Tasks, Appointments and Notes** from the **File** menu. The Tasks, Appointments and Notes print window appears.
3   Select the date range to print.
4   Check **Daily Record of Events** in the Items to Print   box. Remove the check from any items that you do not wish to print.
5   Click **Preview** to view the page(s) you are going to print. This gives you a chance to ensure your margins are set correctly for the Franklin Day Planner page you are printing.
6   Click **Setup**. The Print Setup window appears.
7   Select your printer and click **OK**.
8   Click **Print**.

You can print your Journal entries and the Journal Index to easily remember those important times in your life.

To print a Journal entry
1   Open the Journal Window
2   Select **Print Journal** from the **File** menu.
3   Select the page you are printing from the **Filler Size** drop-down menu.
4   Set the margins for the paper size you are printing.
5   Click **Settings**. The Print Setup window appears.
6   Select your printer and click **OK**.
7   Click **Preview** to view your printing selection.
8   Click **Print**.

See Also:

Printing your Journal Index entries list

To print a listing of your favorite quotes

1   Open the Quotes window
2   Select **Print Quotes** from the **File** menu. The Print Quotes window appears.
3   If you would like to print a certain category of quotes, select it in the **Category** drop-down menu.
4   Select the page you are printing in the **Filler Size** drop-down menu.
5   Set the margins for the paper you are printing in the **Margins in inches** box.
6   Click **Setup**. The Print Setup window appears.
7   Select your printer and click **OK**.
8   Click **Preview** to view your printing selection.
9   Click **Print**.

To print a Red Tab

1   Open the Red Tabs window.
2   Select **Print Red Tabs** from the **File** menu.
3   Select the page size you are printing from the **Filler Size** pull-down menu.
4   Set the margins for the paper size you would like to print.
6   Click **Settings**. The Print Setup window appears. Select a printer and click **OK**.
7   Click **Preview** to view your printing selection.
8   Click **Print**.

To print your Turbo Files

1   Open the Turbo Files window.
2   Select **Print Turbo Files** from the **File** menu. The Print Turbo Files window appears.
3   Select a range of Turbo File entries to print in the **Date Range** box.
4   To print specific Turbo Files within a date range, select a **Category** and **Type** from the pull-down menus.
5   Select the page you are printing from the **Filler Size** drop-down menu.
6   Set the margins for the paper you are printing to in the **Margins in inches** box.
7   Enter a range of entries to print in the **Starting Date** and **Ending Date** fields.
8   Click **Setup**. The Print Setup window appears.
9   Choose your printer and click **OK**.
10 Click **Preview** to view your printing selection.
11 Click **Print**.

To print your Personal Productivity Pyramid
1 Open the Values and Goals window.
2 Select **Print Values and Goals** from the **File** Menu. The Print Values and Goals window appears.
3 Select the elements of your Productivity Pyramid that you would like to print in the **Print Options** box by clicking them.
4 Select **All Values** or **Current Value** in the **Scope** box.
5 Click **Select Size**. The Select Paper Size window opens.
6 Select the page size you are printing from the **Page Size** pull-down menu.
7 Click **OK**.
3 Click **Preview** to view the page(s) you are going to print. This gives you a chance to ensure your margins are set correctly for the Franklin Day Planner page you are printing.
6 Click **Print**.

To print your Appointment Schedule

1. Open the Appointment Schedule
2. Select **Print Tasks, Appointments and Notes** from the **File** menu. The Tasks, Appointments and Notes window appears.
3. To select your binder and filler size, click the **Select Binder and/or Filler** button**,** the Binder and Filler Options dialog box appears.
4. Select your binder and filler sizes from the **Binder** and **Filler** drop-down menus. Click **OK**.
5. Select the date range to print in the **From** and **To** fields (automatically defaults to today's date).
6. Check **Appointments** in the **Items to Print** box. Remove the check from any items that you do not want to print.
7. To print a specific range of appointments, click **Edit Appointment Range** in the **Appointments** box.
8. Select the range you would like to print from the **Range Time** drop-down menu.
9. Click **Preview** to view the page(s) you are going to print. This will give you a chance to ensure your margins are set correctly for the Franklin Day Planner page you are printing.
10. Click **Setup**. The Print Setup window appears.
11. Select the printer you want to print to and click **OK**.
12. Click **Print**.

To print a listing of Journal Index entries

1   Select **Print Journal Index** from the **File** menu. The Print Index window appears.
2   You can print Index entries by name or date, by selecting from the **Sort By** pull-down menu.
3   Select the page you are printing from the **Filler Size** drop-down menu.
4   Set the margins for the paper you are printing to in the **Margins in inches** box.
5   Enter a range of entries to print in the **Starting Date** and **Ending Date** fields.
6   Click **Settings**. The Print Setup window appears.
7   Select your printer and click **OK**.
8   Click **Preview** to view your printing selection.
9   Click **Print**.

To Print your Master Task List

1   Open the Master Task List.
2   Select **Print Master Task List** from the **File** Menu. The Print Master Task List   window opens.
3   Select the page you are printing from the **Filler Size** drop-down menu.
4   If you would like to print a specific category of tasks, select from the **Category** drop-down menu.
4   Set the margins for the paper you are printing to in the **Margins in inches** box.
5   Enter a range of entries to print in the **Date From** and **Date To** fields.
6   Click **Settings**. Select your printer and click **OK**.
7   Click **Preview** to view the page(s) you are going to print. This gives you a chance to make sure your margins are set correctly for the Franklin Day Planner page you are printing.
8   Click **Print**.

   Note: If your printed page does not line up with your Franklin Day Planner page adjust the margins in the Margin Offset box.

To print your Prioritized Daily Task List

1   Open the Prioritized Daily Task List
2   Select **Print Tasks, Appointments and Notes** from the **File** menu. The Tasks, Appointments and Notes print window appears.
3   To select your binder and filler size, click the **Select Binder and/or Filler** button**,** the Binder and Filler Options dialog box appears.
4   Select your binder and filler sizes from the **Binder** and **Filler** drop-down menus. Click **OK**.
5   Enter the dates you would like to print in the **From** and **To** fields in the Date Range box.
6   Check **Tasks** and **Task and Appointment Notes** in the **Items to Print** box. Uncheck the items that you do not want to print.
7   Click **Preview** to view the page(s) you are going to print. This gives you a chance to ensure your margins are set correctly for the Franklin Day Planner page you are printing on.
8   Click **Setup**. The Print Setup window appears.
9   Select the printer you want to print to and click **OK**.
10 Click **Print**.

To Print a Help Topic

1   Navigate to the Help topic you want to print.

2   Select **Print Topic** from the **File** menu

     or

     Click the **Print** button.

     This prints only the Help topic you are currently working in.

If you are printing an envelope for an individual Address and Phone entry, have it open in the Address and Phone module.

To print address and phone entries to envelopes

1   Open the Address and Phone book.
2   Select **Print Labels and Envelopes** from the **File** menu. The Print window appears.
3   Click the **Settings** button to choose your envelope type.
4   Select **#10 Envelopes** (91/2 x 41/8) or **Personal Envelopes** (61/2 x 35/8) from the **Print to** pull-down menu.
5   To print only one envevelope for the entry you have selected, click the **Use Selected Record** checkbox.
6   Click **Printer Setup** to select a printer.
7   Click **OK.**
8   Select a sorting method under the **Sort By** pull-down menu.
9   Select the line you would like to appear first, in the **1st line** pull-down menu.
10   Click the **Preview** button to view your page.
11   When you are ready to send the job to the printer, click **Print**.

To create a label for an individual entry

1. Open the Address and Phone book.
2. Select **Print Labels and Envelopes** from the **File** menu. The Print window appears.
3. Click the **Settings** button to choose your label size.
4. Select **Custom Labels** under the **Print To** pull-down menu.
5. Enter your label dimensions in the **Label Setup** box..
6. Enter the label you would like to start printing on in the **Start Row** and **Start Column** fields in the **Start Position** box.
7. Click **Printer Setup** to select a printer.
8. Click **OK.**
9. Select a sorting method under the **Sort By** pull-down menu.
10. Select the line you would like to appear first, in the **1st line** pull-down menu.
11. Click the **Preview** button to view your page.
12. When you are ready to send the job to the printer, click **Print**.

You can personalize your task list by changing your Prioritized Daily Task List Preferences. Within the Prioritized Daily Task List Preferences window you can:

◆ Auto Forward/Sort tasks
◆ Assign colors to tasks
◆ Delete priorities from incomplete tasks
◆ Forward tasks to the Master Task List

Auto Forwarding your tasks in the Prioritized Daily Task List Preferences window

In the Task Auto Forward/Sort box you can :

◆ Auto Forward all incomplete tasks to the current date by clicking the **Auto Forward Tasks** option in the **Task Auto Forward/Sort** box.
◆ Auto Forward only your incomplete Repeat tasks to the current date by clicking the **Auto Forward Repeat Tasks** option in the **Task Auto Forward/ Sort** box.
◆ Auto Sort your task list each time you select the **Quick Prioritize** button in the Prioritized Daily Task List by clicking **Auto Sort During Quick Prioritize** in the **Auto Forward/Sort** box.

Organizing your tasks by color in the Prioritized Daily Task List Preferences window

In the Task Colors box you can assign a color to each of the following task categories.

◆ Normal Tasks
◆ Repeat Tasks
◆ Redo Tasks
◆ Delegated Tasks

See Also:

Assigning a Color to a Task Category

Forwarding tasks in the Prioritized Daily Task List Preferences

The following icons appear at the top of your Prioritized Daily Task List.

[Add a new task](#)

Delete a task

Cut a task

Copy task

Paste task

[Prioritize your entire Task List](#)

[Assign action codes to task list](#)

[Create Repeat Task](#)

[Get uncompleted tasks](#)

[Quick Prioritize](#)

You can prioritize each task as you enter it in the Prioritized Daily Task List **ABC** column.

To prioritize your tasks in the Prioritized Daily Task List Window

1   Enter your tasks for the day in the Prioritized Daily Task List so you can easily determine which tasks will be A, B, C and D priorities.

2   Assign an A, B, C and D priority to each task in the **ABC** column of your Prioritized Daily Task List window.

3   Review your A priority tasks to determine the rank of each task. Enter the rank (A1, A2, A3, etc.) next to the priority in the **ABC** column. Repeat this process for your B, C and D priority tasks.

4   Select **Sort Tasks** from the **Edit** menu. ASCEND 97 sorts your tasks so that your A1 task appears first, followed by your A2 task, etc.

Prioritizing is important because sometimes you will have to make a choice between two of your values. Ask yourself, "Which of these values matters most?" By having a prioritized list, you will always know which value is more important during a conflict.

How do I prioritize my values?

Prioritizing your values is the process of placing them in sequence of importance. Rate your Governing Values as A, B, C or D. The tasks that fall under these Governing Values are then prioritized to show their importance in relationship to the value:

- Tasks with an **A** value are vital. Things that you must do today.
- Tasks with a **B** value are important. Things that you should do today.
- Tasks with a **C** value are less important. Things that you could do today.
- Tasks with a **D** value are personal tasks. Things that you need to do at home or after hours.

After a task is given the A, B, C or D category, the next step is to rank each task in order of priority. A1, A2, B1, C1, etc. based on the importance of each task within a priority group.

There are two different ways to prioritize your values in the Values and Goals window:

- The Prioritize field of the Values and Goals dialog boxes.
- The Prioritize button in the Values and Goals main toolbar.

The ASCEND 97 program has three features to help you with the prioritizing process.

- ◆ The Prioritize Tasks window
- ◆ The Quick Prioritize window
- ◆ The Prioritized Daily Task List window.

You can prioritize your values and goals as you create them by entering a priority and rank in the **Priority** Field.

Note: You don't have to prioritize your values at this point. You can prioritize your values in the Values and Goals window at a later date. If you don't prioritize your values at this time, ASCEND 97 prioritizes your values in the order that you enter them.

Call Product Support at 1-801-975-9999, Monday through Friday, 7:00 a.m. to 6:00 p.m. Mountain Standard Time.

Before calling, please be prepared with the following:

1   Please have ASCEND 97 running on your computer. The support technician can troubleshoot best if you're ready to step through the sequence that led to the problem.
2   Have a pencil and paper in hand.
3   Know exactly what you did before the problem occurred and the exact wording of any error message that appeared on the screen.
4   If you have several questions, write them down.

Additionally, please have the following information handy when you call, or provide it in a letter or fax:

◆   ASCEND version number
◆   Amount of memory (RAM)
◆   Operating system version
◆   Printer manufacturer, type and model

To reach Product Support by fax dial 1-801-978-1133. You can also reach Product Support by E-mail at: support_win@franklinquest.com   or http://www.franklinquest.com.

To purge data

    1   Open the Tools and Utilities program.

            Note: You must close ASCEND 97 before you can open the Tools and Utilities program.

    2   Click the **Purge/Archive** button. The Purge/Archive window appears.

3   Select the ASCEND 97 information you want to purge in the **Elements to purge** box.

4   Enter the start and end date of the information you want to purge.

5   Click **OK.** A window appears with the message "Database is purged/archived."

6   Click **OK**. You have finished the Purge process.

See Also:

Archiving your ASCEND 97 Data

Compressing your ASCEND 97 data

If your daily task list is not very long you can use the Quick Prioritize feature to assign priority and rank to a task.

To prioritize your task list with Quick Prioritize

1　Enter all of your tasks in the Prioritized Daily Task List

2　Click on the **Quick Prioritize** button.

3　The Quick Prioritize dialog box appears next to your daily task list.

4　Review your task list to see if there are any tasks that need to be completed, forwarded, deleted or delegated.

5　If there are tasks that need action before you begin prioritizing your daily task list, click on the appropriate action (**Delete Task**, **Complete Task**, **Forward Task**, **Copy Complete Task**) in the Quick Prioritize dialog box.

6　Move the mouse to your Daily Task List and click on the task you would like to assign an action.

7　In the Quick Prioritize dialog box, click on **A priority**.

8　Move the mouse to your daily task list and click on the task you would like to assign priority A1. Notice that A1 appears in the **ABC** column next to the selected task.

9　Assign priority and rank to the rest of your A tasks.
　　Note: You must click on tasks in order of rank.

10　Repeat this process for all B, C and D priority tasks.

11　Click **Close.**

When you quit ASCEND 97 all of your information will be saved. If you leave a Red Tab document open when you quit, then a dialog box will appear asking "Do you want to save changes?"   Click **Yes** to save.

To quit the ASCEND 97 program
- Select **Exit** from the **File** menu.

 Add quote - click to add a new quote.

 Edit quote - click to edit an existing quote.

 Delete quotes - click to delete a quote.

 Filter quotes - click to filter quotes by categories and keywords.

The Red Tabs window incorporates a Text Tool Bar, making it easy to modify text with text editing features such as Font, Size, Color, Underline, Italic, etc.

Red Tabs Tool Bar

[Create a new Red Tab document](#)

    [Open an existing Red Tab File](#)

    Save a Red Tab file

Cut selected text

Copy text to clipboard

Paste text from clipboard

Bold text

Italicize text

Underline text

Change font style

Align text left (default)

Center text

Align text right

Insert bullet

Date and Time stamp

Registering your copy of ASCEND 97

Why should you register?
Registering you copy of ASCEND 97 entitles you to receive full customer service and technical support. In addition, you will be notified of product enhancements, upgrades, and special pricing on future versions of ASCEND 97 software.

See Also:
How to register

Repair Database resynchronizes ASCEND 97's data files with the index files. In other words, it "cleans up" any potential problems your index files may have developed due to power failures, poor backups, etc.

To run Repair Database

    1   Close your ASCEND 97 program and open Tools and Utilities.

        Note: You must close ASCEND 97 before you can open the Tools and Utilities program.

    2   Click the **Repair Database** button. The Repair Database window appears.

3   Click **Yes** to repair the database. A confirmation window appears which states, "Database is repaired."

4   Click **OK**. The Repair process is complete.

To restore data from a backup

    1   Open the Tools and Utilities module.

        Note: You must close ASCEND 97 before you can open the Tools and Utilities program.

    2   Click the **Restore** button

        or

        Select **Restore** from the **File** menu. The Restore window appears.

    3   Enter the name of the backup file you want to restore

        or

        Click the **Browse** button to search for the backup file.

    4   Click **OK**. A window appears with the message "Database is Restored."

    5   Click **OK**. The Restore process is complete.

To save a Red Tab

1   Click the **Save** button
       or
       Select **Save** from the **File** menu.

To add an appointment to a contact

1   Click on the Address and Phone record to which you want to add a contact.

2   Click the **Edit** button.

3   Click the **Contact History** tab in the Address and Phone Detail window. The Contact History window appears.

4   Click the **Add** button and select **Add a New Appointment**. The Appointment window appears.

5   Enter an appointment **Description** .

6   Enter a date for the appointment in the **Date** field.

7   Use the Time Bar to adjust the **Start Time** and **Duration** of the appointment.

8   Check the **Early Warning** box to have ASCEND 97 remind you of your appointment.

9   Enter any notes for the appointment.

10   Click **OK**.

See Also:

Adding a task to a contact

Adding a call log

Attaching a file or object to a contact

Do not worry about other users reading private information, ASCEND 97 provides tools to ensure that your information remains secure. ASCEND 97 provides two methods of security that can be used individually or together.

To secure your ASCEND 97 files

- **Create a password**
- **Encrypt your Database**

You can print your task list, appointments, phone lists, etc. directly to Franklin Day Planner pages or regular printer paper. You can select your Franklin Day Planner size and filler for a perfect fit and preview your pages to ensure they print correctly. Choosing the binder settings differs depending on what you are trying to print.

To set your binder and filler type in the Values and Goals or Address and Phone print windows

1   Click the **Select Size** button in the Values and Goals or Address and Phone print window. The Select Paper Size window appears.
2   Select the paper size you want to print to from the **Paper Size** drop-down list.
3   Click **OK**.

To set your binder and filler type in the Daily Record of Events, Journal or Red Tabs Print windows

1   Click the **Settings** button in the Daily Record of Events, Journal or Red Tabs Print window. The Print Setup window appears.
2   Select the paper size you want to print to from the **Size** drop-down list.

To set your binder and filler type in the Favorite Quotes, Turbo File or Tasks, Appointments and Notes Print windows

1   Click the **Setup** button in the Favorite Quotes, Turbo File or Tasks, Appointments and Notes   Print windows. The Print Setup window appears.
2   Select the paper size you want to print from the **Size** drop-down list.

You can change the view of the Contact Detail window to include dialing preferences for Autodial features and international preferences for address records.

To change your dialing preferences

1 In the Address and Phone window, select **Preferences** from the **Options** menu. Then select **Global Preferences** from the **Preferences** menu. The Global Preferences window appears.
2 Set an area code, dialing prefix and dialing suffix.
3 Click **OK**. Now, these settings appear each time you use ASCEND 97's Speed Dial feature.

To add international preferences to your address record

1 In the Address and Phone window, select **Preferences** from the **Options** menu, then select **International Preferences** from the **Preferences** menu. The International Preferences window appears.
2 Select the address specifications you would like in the Address and Phone Personal window: United States, Canada or International.
3 Click **OK**. The Contact Detail Address window reflects the preferences you selected.

Long-Range Goals are concrete expressions of your values. They give you clear vision of how you will bring your daily behavior in line with your Governing Values. You may have one Long-Range Goal for a Governing Value or you may have many.

To create a Long-Range Goal for a value, determine what you need to do to make your value a reality in your life. A Long-Range Goal is something that takes a significant amount of time, perhaps a year or more, and may involve many smaller steps. Goals for the value "I am successful in my work" could include: "I will successfully accomplish my part of my team's three main objectives by January 1, 1997."
For each value, list the goals which will help you live by that value.

_____

See Also:
Entering Long-Range Goals
Creating Intermediate Steps

Filters narrow the list of entries to those that meet specific criteria. For example, you can limit the listing of phone entries to only view those contacts who work for a certain company.

See Also:

[Creating a New Filter](#)
[Loading a Filter](#)

The ASCEND 97 Desktop

The Daily Record of Events incorporates the ASCEND 97 Text Editor tool bar. Features such as Font, Size, Color, Underline, Italic, etc. allow you to create attractive readable documents. The ASCEND 97 Text Editor allows you to:

◆ Include graphs, pictures, etc. with the power of Object Linking and Embedding (OLE). (An OLE object is an object that is created from one program and used by another.)

◆ Format your notes

The ASCEND 97 Text Editor is available in the:

◆ Daily Record of Events

◆ Red Tabs

◆ Journal

The ASCEND 97 Text Editor includes the following tool bar

Cut selected text

Copy text to clipboard

Paste text from clipboard

Bold text

Italicize text

Underline text

Change font style

Align text left (default)

Center text

Align text right

Insert bullet

        Date and Time stamp

How can ASCEND 97 help you organize your life? The *ASCEND 97 User's Guide* provides an overview of each ASCEND 97 window and explains special features that help you bring your daily activities in line with your governing, values so you can concentrate your time on *what matters most* to you. For example, did you know you can display your working time and personal time by color?

Note: While the User's Guide will help you navigate through the ASCEND 97 program and explain where to find special features and how they can help you, you'll find many of the detailed steps to perform each ASCEND 97 function in these ASCEND 97 Online Help files.

Keep an current record of an individual's work and home addresses in the Address window.

To enter an address for an individual

1   Select a description from the **Description** field drop-down list. You can choose any of the following descriptions: Home, Mailing, Shipping and Work.

2   Enter the street address in the **Address Line #1** field.

3   Enter the P.O. Box, Suite number, etc. in the **Address Line #2** field.

4   Complete the **City, State, Zip Code** and **Country** fields.

5   Click the Notes tab to add notes to this record.

To search for an existing Address and Phone book entry using the **Find** field, enter the name of the contact in the **Find** field. The entry should appear highlighted in the Address and Phone book window.

Note: When using the Find field, as you type Address and Phone entries sort alphabetically.

The first step to organizing your life is organizing your day. ASCEND 97 software incorporates the Franklin Time Management principles to help you focus your daily activities so you spend more time doing the things that are most important to you.

The Daily Planning Procedure

As taught in the *TimeQuest®* seminar.

1	Select an environment free from distractions.
2	Review values and goals.
3	Review prior day's Prioritized Daily Task List for any incomplete activities.
4	Review prior day's Daily Record of Events page.
5	Review today's prescheduled events/appointments.
6	Review Master Task List for specific activities for today's Prioritized Daily Task List.
7	Write appropriate activities in the Prioritized Daily Task List.
8	Update daily schedule from Monthly Calendar.
9	Review the next few days' schedules for preparation purposes.
10	Prioritize the day's activities according to what is Vital (A), Important (B), and Optional (C). Remember the difference between vital and urgent. Analyze your vital tasks and assign A1, A2, A3, etc. accordingly. Assign numbers to Bs and Cs as well.

The Floating Calendar is   a one-month calendar containing a toolbar and date control (month) buttons. To open the Floating Calendar select **Calendar** from the **View** menu.   You can use the Floating Calendar to:

- ◆ Change the page date quickly
- ◆ Open the ASCEND 97 Global Text Search dialog box
- ◆ View Special Days
- ◆ Access the speed dialing command
- ◆ View Timers

The Speed Dial Button

The Speed Dial button can be used if you have a modem. If you have a modem connected, you can click on this button to bring up the ASCEND Speed Dial dialog box.

The Global Search Button

The Global Search button is a powerful text-searching tool that searches your ASCEND files for key word(s).

The Special Days Button

The Special Days button allows you to designate recurring special days such as holidays, birthdays, anniversaries, etc., and one-time special days such as vacations and business trips.

The View Timers Button

The View Timers button allows you to track how long a task actually takes to complete.

See Also:

Changing the Date with the Floating Calendar

Keep track of important dates related to this Address and Phone record in the Important Dates window.

To enter important dates for this contact

1   Enter the name of the individual related to the occasion in the **Name** field.

2   Enter the Date of the occasion in the **Date** field.

3   Complete the **Gender** field to assist you in purchasing a gift or selecting a card for an individual. For example, It's Kelly Green's birthday. The gift you select for Kelly may be different depending on whether Kelly is a male or a female.

4   Select a category from the drop-down list in the **Category** field.

5   Click the **Save** button.

The Journal incorporates a Text Tool Bar to assist you in modifying text with text editing features such as Font, Size, Color, Underline, Italic, etc.

Cut selected text

Copy text to clipboard

Paste text from clipboard

Bold text

Italicize text

Underline text

Change font style

Align text left (default)

Center text

Align text right

Insert bullet

 Date and Time stamp

 View the index entries

The Main Tool Bar contains ten icons, each representing an ASCEND 97 module. You can click and drag the tool bar to anywhere within the ASCEND 97 window. Clicking on an icon opens a module. You can also open ASCEND 97 modules from the Window menu or by using the key command shortcuts below.

Tip:
You can turn the tool bar on or off by selecting **Main Toolbar** from the **View** menu.

Appointment Schedule   Control+Shift+F5

 Turbo File   Control+Shift+F10

 Quotes   Control+Shift+F3

Prioritized Daily Task List   Control+Shift+F2

Master Task List   Control+Shift+F4

Values and Goals   Control+Shift+F9

Daily Record of Events   Control+Shift+F1

 Red Tabs   Control+Shift+F8

Address and Phone Book   Control+Shift+F6

Journal   Control+Shift+F7

Use the Notes window to keep a record of important details for this phone record, such as "Tom Green was promoted to VP of Marketing."

To create notes for an Address and Phone record

1   Enter text in the text window.
2   Click the Important Dates tab to add important date records to this Address and Phone record.

The Personal tab opens when you open the New Phone Entry window.

Enter the following information in this window:

1   Select a salutation from the **Salutation** drop-down list.
2   Enter the Last name of the individual in the **Last** field.
3   Enter the first name of the individual in the **First** field.
4   Enter the name of the contact's spouse in the **Spouse** field.
5   Click the **Private** box if you do not want this record to appear in your Address and Phone List view.
6   Enter the name of the contact's company in the **Company** field.
7   Enter a title in the **Title** field.
8   Enter the name of the contact's assistant in the **Assistant** field.
9   Enter the name of the Department in the **Department** field.
10 Select a category from the drop-down list in the **Category** field.
11 Enter an E-mail address in the **E-Mail** field.
12 Check the **Speed Dial** box to add this record to your Speed Dial window.
13 Check the **VIP** box if you consider this a very important record. VIP records are labeled in the Address and Phone window.
14 Enter the Phone numbers for this record in the **Phone Numbers** box.
15 Select a description from the **Description** field. You can choose from the following categories: Home, Car, Fax, Mobile and Work.
16 Click the Address tab to add addresses to this record.

If your Daily Task List is long you may want to use the Prioritize Tasks Window to assist you in the prioritizing process. The Prioritize Tasks window allows you to group tasks into A, B, C or D priorities. This option can make the ranking process easier by allowing you to view all of your important tasks in one location.

In the Prioritize Task window, all unprioritized tasks appear in the Unprioritized Tasks box. Any tasks that have been assigned a priority appear in the A,B,C and D box.

To prioritize your task list in the Prioritize Task window

1   Enter all of your tasks in the Prioritized Daily Task List.

2   Click on the **Prioritize Tasks** button. The Prioritize Tasks window appears.

3   Review your task list to see if there are any tasks that need to be completed, forwarded, deleted or delegated. These tasks do not belong on your Prioritized Daily Task List for today and should be taken care of before you begin the process of prioritizing your day.

4   If you find a task that needs to be taken care of before prioritizing, click on the task and click on the appropriate button (**Complete**, **Forward**, **Delete**, **Delegate**, or **Complete and Forward**). Use the calendar to forward any tasks that should be completed at a future date.

5   Click on all the tasks that you consider "A" priority.

6   Click the **A Tasks** button.

7   Follow steps 5 and 6 to assign B, C and D priorities to the remaining tasks.

8   To change a priority, select the task and click on the appropriate **Priority** button.

Ranking Tasks in the Prioritize Task window

1   When all tasks have a priority, you can rank them by clicking the **Rank** button. The Rank Tasks window appears. All unranked "A" tasks appear in the **Unranked** box.

2   To assign a Rank to a task, click on the task you would like to assign A1 priority and click the **Rank #1** button.

3   Click on the task you would like to rank A2 and click on the **Rank #2** button.

4   Assign a rank to each unranked task and click **OK**. Your B priority tasks automatically appear in the Unranked Tasks box.

5   Assign a rank to each B priority task and complete the same process for your C and D priority tasks. When you are finished ranking your tasks the Prioritize Tasks window appears.

6   Click **OK**.

   Note: If you rank your task list a second time during the day, all completed, deleted or forwarded tasks lose their priority and rank and get moved to the bottom of the list.

Identifying your Governing Values and learning to bring your daily actions in line with what matters most to you is a very rewarding process.   However, it can also be very difficult. Many people find that the toughest part is getting started. The Values and Goals Wizard was created to assist you in this process.

The Wizard is a unique tool that takes you step-by-step through the process of identifying your Governing Values and setting value-based goals. You can select from the Wizards list of sample values, or use the sample values to help you create your own. For each value you select, the Wizard guides you toward goals to bring your daily behavior in line with that value.

The power of the Wizard is that it's structured enough to be easy, yet flexible enough to ensure that the values and goals you identify truly reflect your personality. You will leave the Wizard with the foundation of your Personal Productivity Pyramid firmly in place.

See Also:
Using the Values and Goals Wizard

Follow steps 1-6 for creating a Repeat task.

5   Enter the date you want the Monthly task to start appearing on your Prioritized Daily Task List in the **Start** field.

6   Enter the date you want to stop viewing the Monthly task in the **End** field.

7   Click **Month** in   the **Every** field. Enter **1** to view the task every month. Enter **2** to view the task every other month and so on.

    Note: The Monthly task appears on the day you enter in the **Start** field. For example, if you set 9/04/96 as your start date the task will reappear on the fourth day of each month.

8   Click **Save**.

See Also:

Creating a Weekly Repeat Task
Creating a Yearly Repeat Task

Follow steps 1-6 for creating a Repeat task.

7   Do one of the following:

-   Complete the **Every** field. Enter 1 to have the task reappear each week. Enter 2 to have the task reappear every other week.
-   If you only want the task to appear on certain weeks of the month, click in the **Weeks** box. For example, you want to pay your bills on the first and third Friday of the month. Click **Friday** in the **Weekdays** box and **1st** and **3rd** in the **Weeks** box.

8   Click the weekdays you want the task to appear in the **Weekdays** box.

9   Click **Save**.

See Also

Follow steps 1-6 for creating a Repeat task.

5   Enter the date you want the Yearly task to start appearing on the Prioritized Daily Task List in the **Start** field.

6   Enter the date you want the Yearly task to stop appearing on your Prioritized Daily Task List in the **End** field. For example, you may not want to keep a Repeat task for more than five years. If the start date of your Yearly task is 9/04/96, you can enter 9/04/01 in the **End** field and the Repeat task will stop appearing after five years.

7   Enter the day you want the task to appear in the **Day** field.

8   Enter the month you want the task to appear in the **Month** field.

9   Click **Save**.

See Also:

Creating a Weekly Repeat Task

Creating a Monthly Repeat Task

The Turbo Files extensive search feature helps you locate any existing Turbo Files. There are two ways to find a Turbo File, you can search for a name in the Turbo File Listing box, or you can apply a Filter to your list and narrow your search.

Applying a filter

If you have a long list of Turbo File entries to search through, you can create a filter to narrow your search. You can create filter criteria based on description, keywords, location, category, and type.

To create a Turbo File filter

1   Click the Filter button

    or

    Select **Filter** from the **Options** menu.

2   Enter Filter criteria for the entry you are trying to find.

3   Click **OK** to apply the filter to your Turbo File list.

[Create a new turbo file.](#)

[Edit an existing turbo file.](#)

Delete a turbo file.

[Assign a filter to a turbo file](#).

ASCEND 97 software is a perfect complement to the Franklin Day Planner system. The ASCEND 97 program has many of the features of the Franklin Day Planner, including the following:

- Prioritized Daily Task List
- Appointment Schedule
- Daily Record of Events
- Monthly and Weekly calendars
- Address and Phone Book
- Values and Goals
- Special Days

In addition, ASCEND 97 includes many unique tools:

- Use the Turbo File to create and organize documents
- Record your personal thoughts in the Journal
- Store motivational quotes in Favorite Quotes
- Schedule several different activities simultaneously with Timers

With the ASCEND 97 program, you can control personal information on your computer, print ASCEND 97 information on Franklin Day Planner pages, then add the pages to your binder so that your vital information is with you at all times.

How do the Day Planner and ASCEND 97 work together?

If you work at a computer during the day, you can enter most of your information directly into the ASCEND 97 program, and only use the Day Planner when you are away from your computer. On the other hand, if you use your Day Planner often, you only need a few minutes a day to enter key items, such as future tasks and appointments from your Day Planner into the ASCEND 97 program. For example, you could spend 10 minutes planning your day with the ASCEND 97 program, print your daily tasks and appointments, and then work from the printed pages until you return to your computer.

Do you need a planner to use ASCEND 97?

No. ASCEND 97 software is a very useful organization tool by itself. If you like, you can print on letter size (8 ½" x 11") paper.

If you would like to order a Day Planner

If you would like more information about Franklin Day Planner Binders, forms and accessories that work hand-in-hand with the ASCEND 97 program, call 1-800-654-1776 to request a *Franklin Quest Catalog*.

You can synchronize the Pilot when you are away from your PC by using a modem. In order to perform a HotSync via modem, you need:

- A modem connected to your computer
- A modem connected to your Pilot
- A special modem cable to connect the modem to the Pilot. This special cable may be ordered by calling Franklin Quest Product Services at 1-800-877-1814 in the United States and Canada. In all other areas, call 1-801-975-1776.

  Note: You must first HotSync at your computer before you can HotSync via modem.

To be able to conduct a HotSync via modem you must first configure your Pilot and your Computer

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See Also:

Configuring Your Pilot
Configuring Your Computer
Conducting a HotSync via Modem

The first time you use HotSync to synchronize your Pilot with your ASCEND 97 software, you must be at your computer.

1. If the HotSync Manager is not already running, double-click the **HotSync Manager** icon in the Franklin Day Planner program menu. The HotSync Manager window appears.
2. Make sure that **Local** is selected in the **Options** menu.
3. Press the **HotSync** button on the front of the Pilot cradle. The HotSync progress window appears on your computer.
4. When HotSync is complete, ASCEND 97 displays a final message: "You must now reset your Pilot."
5. Click the **Reset** button on the Pilot screen.

See Also:
Using HotSync via Modem

Use Timers to help track how long a task actually takes to complete, or how long you want to spend on a task. Timers can also be an effective way of keeping track of time spent with clients for billing purposes.

To set a Timer

1   Click the **Timers** button in the Floating Calendar and Tools window
    or
    Select **Timers** from the **File** menu. The Timers window appears.
2   In the Timers window, click **New**. The New Timer window appears.
3   Enter a description.
4   By default the timer will count up. If you would like this timer to count down then check the box preceding **Count-Down Timer**. The **Duration** fields become available. Enter how much time you would like this timer to count down.
5   If you would like ASCEND 97 to play a sound when this timer is up then click the **Sound** button to browse for .WAV files.
6   Click **OK**.
7   Click **Start**

To start a Timer

1   Click the **Timers** button on the Floating Calendar
    or
    Select **Timers** from the **File** menu. The Timers window opens.
2   Select a timer in the Timers window and click **Start**.
3   To stop the timer click **Stop**.

Let ASCEND 97 help you save time and effort with the Speed Dial feature. If you have a modem, you can use the Address and Phone window to dial phone numbers automatically.

ASCEND 97's dialing function works with a program called telephony. These tools work together to make dialing your phone as simple as clicking a mouse. For more information about telephony, see your *Windows 95 User's Guide*.

To add an Address and Phone entry to your Speed Dial directory
1   In the Address and Phone window, select the Address and Phone entry you want to add to your Speed Dial directory.
2   Click the **Edit Entry** button.
3   Check the **Speed Dial** box in the lower left-hand corner of the Personal window. This entry now appears in the Speed Dial directory.

To Dial a Number
1   Select **Speed Dial** from the **File** menu. The Speed Dial window appears.
2   Click on the individual you want to call.
3   Click on the number you want to dial in the **Numbers** box.
4   If you would like to include an Area Code, Dialing Prefix and Dialing Suffix select these options in the **Include** box.
5   Click **Dial**.

When you have created your list of Governing Values and associated steps, you can prioritize and rank in the Prioritize window.

To prioritize values in the Prioritize window

1   Click the **Prioritize** button. The Prioritize window appears.

2   The Prioritize window gives you two Governing Values to choose from. It asks you "Which of these Items do you feel is MORE important?"   Click the item you feel is more important.

   ASCEND 97 will continue to ask you until all of the items are ranked in a sequential order.

To use the Values and Goals Wizard

1   Open the Values and Goals window.

2   Select **Wizard** from the **Option** menu

   or

   Click the **Wizard** button in the Values and Goals Toolbar.

   The Values and Goals Wizard dialog box appears.

3   Select your age group and click **Next**. By selecting your age group, you may find the sample Values and Goals geared more towards your lifestyle.

   The Wizard Summary dialog box opens, listing any values you've already identified.

4   To add a new value to this list, click **Next.** The Wizard Value dialog box opens.

5   Click on one of the values listed to select it

   or

   If you don't identify with any of the values listed, type a new value in the **Enter one of your Values here** field. The Wizard's list of values may offer some ideas to help you create your own value.

6   Click **Next**. The Wizard Clarifying Statement dialog box opens, asking you to state the value as a positive affirmation. A positive affirmation is a statement that presents the value as if it were already a reality. A positive affirmation for the value "Financial Security" is "I am financially secure."

7   Type your value in the form of a positive affirmation.

8   Click **Next**. The Wizard Clarifying Statement dialog box opens. A clarifying statement is a sentence or two that defines what the value means to you. It is your opportunity to personalize the value. A list of sample statements is provided.

9   Click on each statement that clarifies what the value means to you. You may select as many statements as you want.

   or

   Type in your own clarifying statement

   or

   Combine the two methods, clicking the statements you like and then personalizing them with your own statements.

10 Click **Next**. The Wizard   Long-Range dialog box opens.

   This dialog suggests some Long-Range Goals for your value. If you see a goal you like, you can select it from the list. You may select as many goals as you like. If you don't see any goals with which you can identify, skip this step. You can always formulate your own goals later.

   Note: Notice how a clarifying statement appears for a goal when it is selected. You may edit this statement to suit your needs.

11 Click **Next**. The Wizard-Summary dialog box appears displaying the new value you have just created.

12 Repeat this process to create more Governing Values and Long-Range Goals.

13 When you are finished, click **Done**. ASCEND 97 gives you the option to prioritize your values.

   Prioritizing is the process of organizing your values in order of importance. This is necessary because at times one value may conflict with another. Prioritizing helps ensure you know which value is more important when you are forced to choose.

14 If most of your values are in place and you feel ready to prioritize them, click **Prioritize**.

15 If you only have a few values in place, or would like some time to think before prioritizing, click **Done** to exit the Wizard. You can always prioritize later using the **Prioritize** button in the Values and Goals window.

16 If you click **Prioritize** the Prioritize dialog box opens.

17 Here, ASCEND 97 randomly displays two values or goals at a time. Click the "1" or "2" button for the value which is more important to you. ASCEND 97 will continue to display your values two at a time. Continue to select the one which is more important.

18 When ASCEND 97 has cycled through the possible combinations, you are returned to the Values and Goals dialog box, with your values in order of priority.

To view task statistics

1.   Open the Prioritized Daily Task List
2.   Click in the task field.
3.   Select **Task Statistics** from the **Options** menu.
4.   The Task Statistics dialog box will open. In this dialog box you can view information about the task and enter the Estimated and Actual Time.
5.   Enter how long you think this task will take in the **Estimated Time** field.
6.   Select a category for this task from the **Category** drop-down list.
7.   After you have completed this task enter how long it took you to complete in the **Actual Time** field.

By clicking on the pyramids in the Values and Goals Tool Bar, you can see different levels of your Personal Productivity Pyramid.

Click This Icon   **To View This Level**

View your Governing Values

View your Governing Values and Long-Range Goals

View your Governing Values, Long-Range Goals and Intermediate Steps

View your complete Personal Productivity Pyramid (Governing Values, Long-Range Goals, Intermediate Steps and Daily Tasks)

To open the Appointment Schedule Weekly View

◆ Click the **Weekly View** button,

    or

    Select **Weekly View** from the **View** menu. The Weekly View window appears.

Adding an appointment in Weekly View

1   Click the **Add Appointment** button

    or

    Select **New appointment** from the **Edit** menu.

2   The Add Appointment dialog box appears. Enter an Appointment description.

3   Move the appointment time block to the starting time with the keyboard arrows.   To adjust the length of the appointment, hold down the **Shift** key and use the keyboard arrows.

4   Click **OK**.

The ASCEND 97 Franklin Day Planner software program is a personal information manager (PIM) for the Windows 95 operating system. With the ASCEND 97 program you'll always have your essential information at your fingertips. You can use ASCEND 97 to perform many tasks, including the following:

- Enter and prioritize daily tasks
- Schedule appointments and set alarms
- Take notes on commitments, conversations and ideas
- Store and print addresses and phone numbers
- Print your information on Franklin Day Planner pages or plain paper

ASCEND 97 Franklin Day Planner software is created by Franklin Quest Co., makers of the popular Franklin Day Planner[a] system. Franklin Quest Co. has taken the proven time-management tools of the Franklin Day Planner and combined them with the power of a computer to create ASCEND 97 personal management software. Like the day planner, ASCEND 97 is an organizational tool that helps you gain control over your time and become more productive.

How can ASCEND 97 increase your productivity?

With the Franklin Day Planner software program, you can perform many time-saving functions on your computer that are not possible with a paper-based planner, such as the following:

- Create repeat tasks and appointments
- Set appointment alarms
- Store a virtually unlimited amount of information
- Search and retrieve information in ASCEND 97
- Print attractive forms for your binder
- Dial phone numbers automatically (requires a modem)

You can view appointments for any date within the Yearly view. Simply click on the date you want to view and the appointments and tasks for this date appear in the Yearly view detail window.

To open the yearly view:

◆   Click the **Yearly View** icon in the Appointment Schedule Toolbar.
       or
       Select **Yearly** from the **View** menu.