The Achievevment Planner 3.0
M A N U A L

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

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

Finally... Absolutely fantastic. I've scoured every BBS, local and national, trying to find a complete, powerful, smart and goodl looking Windows PIM. PLUS I have some very expensive store bought PIMs. None that I have tried is as excellent as yours. The Achievement Planner is definitely the very best.
...D.M. Mondell, Ad Image Marketing, Cape Coral, FL

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

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

Just like all he work that HDS does, this program is practical and powerful. It s helped us transform time and effort into success.
...D. Moore, Vice President, AMF Inc., Richmond, VA.,

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

M U S T   R E A D

Our Attorney wants you to know that:

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

DAY PLANNER --- APPOINTMENT CALENDAR

- display, and sort your tasks and goals by priorities
- display, your daily schedule in 1/2 hour increments, automatically updated each day
- work log: diary enables you to keep track of how you spend your time
- print your Day Plan in an attractive format
- schedule and track future events and reminders
- automatically display events on the Day Plan of the appointed day;
- print out your calendar for as many days ahead as you like
- reminders for a particular day displayed on a special billboard on start-up
- drag and drop to move events around, easily access other modules and more
- multiple alarms with onscreen display
- automated data entry to the schedule with auto-recur function
- pop up monthly calendar with week view/edit and print
- auto-load tasks from Project Planner
- drag and drop ease and much more.

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

CONTACT TRACKER
- NOW - multiple address books, create a database of personal, business, and other contacts;
- ASCII export
- at-a-glance information to improve communication, easy to update;
- Contact History briefs you on when, how, and what your previous contacts have been:
- set next contact date/time/purpose for pop-up viewing on that day.
- print out your Contact List, Mailing Labels, Phone Book, as well as Contact Histories.
- AutoDial in the tracker makes you more efficient
- view your listings by name or by company

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

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

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

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

>>Use the ALT key combinations for speed.

As with all Windows applications most commands can be accessed though a combination of ALT and other keys. Wherever you encounter an underlined letter or number holding down the ALT key while you press that character will execute the command. In the drop down menus you need not hold down the ALT key to activate the commands - just the underlined character will do.

You should be able to do 95 % of what you want to do in Achievement Planner without having to reach for the mouse. If you like rodents , on the other hand you can always point and click away.

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

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

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

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

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

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

PROJECT.DAT - project data, ditto.

REM.DAT - Quick notes

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

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

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

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

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

DAY PLANNER--APPOINTMENT CALENDAR

>>> cycle through Day Planner formats"

Click on the Date Bar to cycle through 3 different formats: the split screen format shows both the To Do list and today's schedule, the extended To Do list shows additional To Do slots, and the full-view Appointment Calendar shows you the whole day's scheduled events at a glance for the current or any other day. You will notice that some of the utility buttons on the top button bar also change function when you cycle through the formats. These will be explained in the appropriate sections below.

NOTE: when you are in the full-view Appointment Calendar you can view and edit your schedule for any day -- using the various navigation buttons. When you are in the view with both TO DO list and schedule on the screen you will only see the current day. That is the day shown on the Date Bar.

>>> use the TASK LIST "

The task slots consist of a square box at the left for entering the task's priority and a long box for entering the task itself. Click in the middle of an empty slot and type in the task or goal. To go to the next entry slot just press the DOWN ARROW key. The UP ARROW key takes you to the slot above."

Pressing the TAB key after you've entered the task will take you to its priority box.

The To Do list is designed so that you will first list all of your tasks then go back and prioritize them in relation to each other.

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

In the extended format you can see the tasks in your project planner that you have 'deadlined' for the current day. Click on 'LOAD PROJECTS DUE' and they will be placed in available slots.

>>> use the Schedule (split screen format)"

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

You can also move through the TASK LIST with the up and down arrow buttons on the screen, the up and down arrow keys, or the TAB key.

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

By implementing the Diary function you can use the SCHEDULE as a work record as well as an appointment scheduler. See: '...implement the Diary"

NOTE: At midnight the date and schedule automatically cycle to the next day. This is useful for those who leave their systems on continuously (or who work very late).

>>> set and sort Priorities"

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

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

>>> delete items (all formats)"

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

In the extended TO DO list you will see that one of the control buttons changes to 'Clear--Only'.

Clicking on this button clears only the tasks that you have marked as done, ie. tasks with lines through them.

>>> delete entire sections"

Clicking The 'Clear' button above the TASK LIST will bring up a message asking you if you want to delete your tasks. Clicking 'Yes' or pressing ENTER will do so. The schedule is deleted with the 'Clear' button above it. You will be asked if you wish to clear the schedule. Clicking 'Yes' or pressing ENTER will do so. "

NOTE: the schedule is cleared for the day that is on the screen at the time whether it be current, past, or future.

>>> see the Monthly Calendar"

Click on the grid icon at the extreme left of the top button bar, OR click on Modules in the menu bar, then on Calendar, OR press CTRL + M. This brings up a monthly calendar from which you can navigate to and view other days, weeks or months. Click on the Help button in the calendar itself for instructions.

>>> set/turn off up to three alarms"

Click on the Clock Display in the top button bar and an input screen is displayed. Enter the time you want the alarms to sound using the scroll bars. You can also type in a message you want to appear at that time. Then click on 'SET'. Click on Put Away to exit that screen.

>>> view your Appointment Calendar (full-view format)"

Click on the Date Bar twice to display a full day's schedule. In this full-view format there are a number of ways to bring up a particular day.

1) Click on 'GoTo' on button and enter the date in the input box, using the format mm/dd/yr; for example: 09/07/94.

2) Go to previous/next week/day by clicking on the navigation buttons at the bottom of the screen.

3) Bring up the Monthly Calendar (see above); then click on the day you want to view.

>>> edit your Appointment Calendar (full-view format)"

Go to the day of the appointment you wish to add or edit suing the various navigation features (see 'view your Appointment Calendar') You can enter your new appointment directly into a slot or you can click on the hour box at left to bring up an auto data entry form. Click on the HELP button for instructions on using this form.

You can also edit your appointment calendar from the week view screen. This is accessed from the monthly calendar and instructions are provided in that module.

>>> see/use your Project Planner"

Click 'Modules' on the menu bar then on 'Project Planner, OR press CTL + P. Help on using the Project Planner is available from that screen. You can also click on it's icon button (the 'organization' chart).

>>> see/use your Weekly Planner"

Click 'Modules' on the menu bar then on 'Weekly Plan, OR press CTL + W. Help on using the Planner is available from that screen. You can also click on it's icon button (the linked squares).

>>> see/use your Contact Tracker"

Click 'Modules' on the menu bar then on Contact Tracker OR press CTL + T. Help on using the Tracker is available from that screen. You can also click on it's icon button (the card stack).

>>> make/review/delete quick notes"

Click on the pencil icon at the far right of the screen. Help on using Quick Notes is available from that screen"

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

>>> review calls to be made today"

Click on the telephone icon above the Schedule to view calls planned for today in your Contact Tracker. Help on using the Dialer is available from that screen"

NOTE: This feature is available in most modules. Just click on the same icon. It works differently however in the Contact Tracker -- refer to instructions in that module.

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

When you click 'Tools' on the menu bar and then click on 'Add an application'. An input box appears. This enables you to customize this TOOLS MENU for your individual use.

Enter the name of the EXE, COM, or BAT file you wish to add. If it is not in your Windows

directory also add the PATH.
Remember to use the program file name not its title. For example, Corel Draw would be entered as 'coreldrw.exe'; or 'c:\cor\coreldrw.exe' depending on your directory and PATH set up.
To CHANGE an entry click on 'Edit an application'. You'll be asked for the number of the application. It will then appear in an input box. This is handy for adding the name of a file to open with the application or adding a switch.
To Delete an entry click on 'Delete an application'. You'll be asked for the number of the application to delete.
TIP: Put your most used application in the list first. In this way future
additions and deletions will not alter those items. Thus you can always jump right to, lets say, your spreadsheet program form the Day Planner by hitting ALT + O then 1 (or the number of that program).
>>> launch tools, programs, utilities"
Click 'Tools' on the menu bar then click on the tool you wish to use. Or press Alt + O then the underlined letter or number of the program. "By adding your most used programs and utilities to this list you can
use your Day Plan as a desktop. (See help item: 'add/edit/del. tools list programs and utilities'. At the top of the menu listed some of the 'applets' that come with Windows. These '.exe' files must be in your Windows directory.
>>> use the Decision Aids"
Click 'Think Tank' on the menu bar and the suite of thinking aids will come up. Instructions on using the modules will appear with each one.
>>> use the File Launcher"
Click 'Launch File' on the menu bar and the launcher will come up. This
facilitates quick opening of files. Instructions on using this module will appear with it.
>>> implement the Diary"
Click on 'File' in the menu bar, then on Diary' or press Alt + F, then D. The selections above the line on the drop down menu determine how/if the record of your activities for that day is saved.
'Prompt to save' instructs the program to ask you if you want to save it when you exit Achievement Planner or when you save your Day Plan.
'Always save' instructs the program save your diary whenever you save or exit. The 'View' option' loads MS Windows WRITE with your diary file. The latest entry is at the bottom of the file (press Ctrl + End to jump there.)
NOTE: You'll want to back up, print and/or clear this file from time to time. See your WRITE documentation for instructions on how to do this.
>>> save for security"
If you're concerned about a system lock up or other problem that may crash your computer thus loosing your current Day Plan data click on the 'file' menu then 'Save' or press Alt + F, then S.
>>> exit"
Double click the control box (in the upper left hand corner of the screen), or click on 'File', then 'Exit' or press Alt + F , then X . All data is automatically saved (except for Diary - see above) upon exiting.

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PROJECT PLANNER

>>> enter information"
click on or Tab to the slot you want to fill and type in the data. You can type beyond the visible end of the slot.
Use the cursor or End keys to see the rest of your line if you do. The home key restores the beginning of the line to the visible portion of the slot.
You can move from slot to slot using the up and down arrow keys (vertical movement) as well as TAB and Shift TAB (horizontal movement).
>>> enter and sort deadlines"
To enter a deadline click on the deadline slot for the particular task. An input box comes. Use the

scroll bars to set the deadline date. Click OK. Click on 'Sort' or Alt + S to sort the list from the nearest to the farthest date"
TIP: Once you have set a dealine date you can automatically show that task on your TODO list for that date by clicking on 'LOAD PROJECTS DUE.'
>>> create a sub-project"
First click on 'Drag-Drop' or press Alt + R. This will bring up a drop panel with two colored areas. Drag and dropping an item into the"
yellow area on the right will put that item into the next available slot on your Project Listing. A '#' button will appear next to the"
deadline of that item. Clicking this button will always take you directly to project details for this sub-project.
To drag and drop, put your mouse cursor on the item you wish to use, press and hold the left mouse button while you move the cursor - which becomes a pointing finger - to anywhere inside the yellow area. The drop
panel will stay on the screen until you click 'Done' or press Alt + D.
>>> send a task to today's action list"
First click on 'Drag-Drop' or press Alt + R. This will bring up a drop panel with two colored areas. Drag and dropping an item into the light blue area on the left will put that item into the next available slot on today's action list.
To drag and drop, put your mouse cursor on the item you wish to use, press and hold the left mouse button while you move the cursor - which becomes a pointing finger - to anywhere inside the blue area. The drop
panel will stay on the screen until you click 'Done' or press Alt + D.
>>> go to another project"
Using the buttons in the Project controls frame you can go to the previous project (by clicking the '<=' button or pressing SHIFT Alt+ <)
the next project (by clicking the '=>' button or pressing SHIFT Alt+ >) or clicking on 'List' to return to the Project Listing.
>>> print your projects"
Clicking 'Print' or pressing Alt + P will bring up a print options menu. Click on the appropriate button to print just this project or all projects. Make sure your printer is hooked up and ready before clicking.
>>> delete an item"
Drag and drop the item on the arrow in the lower right corner of the screen to delete it.
>>> delete the project"
click on the 'delete' button in the Project Controls frame or press Alt+ T.
>>> save"
Your data is saved automatically as you exit and move around this module. If you are concerned about a system failure for any reason"
you can click on 'Save' or press Alt + A to save all your project data instantly.
>>> exit"
Click 'Exit' or press Alt + X. This exits from this module back to The Day Plan. You can exit from here in the same manner.

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CONTACT TRACKER

>>> add new contact name and data"
If there is a record on the screen make sure you've SAVEd or ADDed the data, then click on 'Blank' or press Alt + B.
Click on or Tab to the appropriate slot and type in the data. Each field is limited to a certain number of characters.
If you exceed that number a message will pop up and further data entry into that field will not be possible (unless you delete one or more characters).
When you've finished entering the data you have click on 'Add' (or press Alt+A). The name will be added to your index list in alphabetical order.

NOTE: the fields for 'Next Date' and 'Purpose' are saved along with the rest of a contact's data when you click on ADD NEW.

>>> IMPORTANT - please read this"

Make sure you've UPDATEd or ADD NEWed the data on the screen, before BLANKing or clicking on another record name. If you fail to do this any information you've added or changed will be lost.

>>> view/edit contact data"

Scroll through the index list until you find the name you want. Clicking on the name or moving the highlight bar with the arrow keys to it will bring Up that data. If you change any of the fields click on 'Update' (or press Alt + U) to save the new data into the existing record BEFORE MOVING TO ANOTHER NAME.

NOTE: the fields for 'Next Date' and 'Purpose' are saved along with the rest of a contact's data when you click on 'Update'. If you wish to copy the record - to add another name from the same company or family for example - use the 'Add New' button.

>>> view/edit contact history"

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

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

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

NOTE: the fields for 'Next Date' and 'Purpose' are NOT saved when you ADD HIST. They are saved with the rest of a contact's data when you click on Add or Update in the main button cluster.

>>> paste name and address to clipboard"

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

This pastes a name and address block into your document. Remember, with the registered version you can also print mailing labels.

>>> delete a field

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

>>> delete a record"

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

>>> list records in index by Company or Names"

Clicking on 'by Company' (or Alt + M) will list the records in the index by the Company name. Clicking again restores the listing to Names.

>>> print out your contact list"

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

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

>>> print out your Contact Histories"

Click on 'Print' or press Alt + P. Make sure your printer is hooked up and ready before clicking 'OK'

If you have very long entries in your Contact Histories you may loose the ends of some lines when you print. If so you can obtain a complete printout by highlighting the text in the View Box, COPYING it to the clipboard (Ctrl + Insert), then pasting (Shift + Insert) to and printing from Notepad.

>>> use AutoDial functions"

Click on 'Settings' if you have not already set your COM port settings and dialing prefix, if any, in the 'Calls For Today' pop-up form. "

Click on 'Dial' or 'Dial with PREFIX' to auto-dial the office number on the screen.

>>> review calls to be made today"
Click on the telephone button -- 'Calls List'. The index will show only the names of those contacts that you have specified for today. If you haven't specified any the list will be blank. With a name highlighted on the index you can autodial that person just by clicking on 'DIAL'. The OFFICE number on that record will be called.
You'll notice that the caption on the button changes to 'Full List' and the icon changes to the Contact Tracker icon. Clicking on this button now will return your full list to the index.
>>> save data
Your data file is updated when you ADD records to your file (by clicking 'Add'). To save changes made to an existing record click on 'Save' (or Alt +S) after you've made changes or additions to that record. You can click on 'Save' or press Alt + S to save all your Contact Tracker data instantly.
>>> exit
Click 'Day Plan' or press Alt + y. This exits from this module back to The Day Plan. You can exit the program from there.

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The Achievement Seminar

THE ACHIEVEMENT SEMINAR is a unique, interactive, personal development program. We call it a 'virtual seminar' because like our live seminars it provides a stimulating environment and practical guidance for developing skills. In this seminar the suite of skills we address are the primary achievement skills - goal definition and achievement, time and self management and the ability to creatively SHAPE our lives.

Like the in-person seminars that we conduct, The Achievement Seminar is based on a broad range of ideas - borrowing from humanist, behaviorist and cognitive branches of psychology and incorporating the principles of MetaDynamics. These ideas are reflected in the techniques suggested in the seminars and form the Seminar are complementary elements of a program for increasing ones abilities to accomplish goals and realize aspirations.

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

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

Contents

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

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

which need work.

MetaDynamics
This section explains the principles of MetaDynamics and reveals how they are applied in The Achievement Planner. Tips and tactics are provided for optimizing the use of the Planner.

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

Goal Planner
This comprehensive planning module enables you to identify your core values, roles, and goals in life. And it provides you a way to map and track you achievement process.

Interface

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

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

To Order

Use the order form (which you access from the FILE menu in the Day Planner) to place your order when you register for The Achievement Planner. The cost is only $19.95 ($29.95 after March 1, 1993). Please indicate preferred disk size.