To display the complete text on the monitor, you must set the printer for Portrait. (Menu: FIle, Printer Setup...)
Before printing the handbook, you should also delete these lines, including the dotted line.

# A Planner

## Version 2.3

October 1993

# Handbook

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# 1. General Information

## 1.1 Handbook Design

If you have already installed A Planner, you may skip this section (Chapter 1).

**Chapter 2** describes the program and it's database.  It should be used to gain a complete understanding of A Planner.

**Chapter 3** gves an overview of the use and help functions of A Planner.  Since A Planner has context-sensitive help displayed in the lower left corner, you should be able to begin testing the program thoroughly after reading this information.

**Chapter 4 through 9** were written for users that wish to gain a exact knowledge of the functions and use of A Planner.

Everybody!! should read **Chapter 10,** and everybody with a complaint should read **Chapter 11**.  **Chapter 12** is for those with a suggestion, or who wish to know how A Planner is being developed.

Please take a look at the on-line Help system, which is almost an exact reproduction of this document.

## 1.2 Installation Instructions

**Systemrequirements:**
- Windows 3.1 in Enhanced Mode
- ca. 2 MB free Hard Disk space

**Installation**:

Select the menu point "File:Run" in the Program Manager. Type in "A:setup" and press "Enter". The rest of the installation runs automatically and asks you only for the destination directory to install the program.

If you possess an earlier version of A Planner, you may also install to the old directory, and all of the no longer needed files will be automatically deleted.  Your entries and information remain intact, of course.  Your registration data from Version 2.00 and 2.01 are also valid for 2.2.

You also have the possibility during installion to copy only the shareware version onto the hard disk and register later.  We ask you to please not use a program registered in anyone else's name.  (See **Chap. 10**).

All needed files, including the Visual Basic runtime DLL, will be copied to your windows

directory, as these files are often used by other programs, and having multiple copies on the hard drive is an unneccessary waste of space.  If you have an updated version of the file already on your drive, the newest one will be used.

The first session with A-Planner will automatically load the EXAMPLE database, which should give you a idea how A Planner works.

**Distribution Files:**

**Installed in Program Directory:**

A_PLAN2.EXE          executable Program
A_PLAN2E.HLP         Help File
EXAMPLE.ISD          Example Database
EXAMPLE.ISF          Example Database
EXAMPLE.ISM          Example Database
HANDBOOK.WRI         Handbook
INIT.DAT             Serial number and registration information.
README.TXT           Installation directions and short description
REGIST_E.WRI         Registration Form, Questionaire

**Installed in Windows Directory:**

A_PLAN2.INI          Ini-File (created at first program start.)

**Installed in Windows System Directory** (not installed if already existing files are of later version.):

APLAN22.DLL      Dynamic Link Library (A-Plan)
CMDIALOG.VBX         Visual-Basic Module
COMMDLG.DLL          Windows Module
MHAD200.VBX          Visual-Basic Module
MHEN200.VBX          Visual-Basic Module
MHGR200.VBX          Visual-Basic Module
MHTI200.VBX          Visual-Basic Module
THREED.VBX           Visual-Basic Module
TOOLHELP.DLL         Windows Module
VBRUN300.DLL         Visual-Basic Runtime-Module
VER.DLL              Windows Module
VBIS23MX.DLL         VB/ISAM-Database-Module

## 1.3 Network Installation

It is still impossible to have true multi-user access to A Planner at the same time, however, it is possible to access the database from another station in a network with the following

restrictions:

It is really no problem to access the database twice, as A Planner works with temporary files. There is, however no actualisation process to show the changes that are being made. Therefor, only those changes will be saved that were saved last. All other changes will be lost. At the close of a session, the temporary files are deleted, and the data is therefor destroyed.

If you can control access so that the program will be only used by a single user at any given time, then it is of course problemlessly possible to use A Planner in a network environment. This is a realistic setting when a central station enters and edits the database, and the individual workstations only view the data. You must still use caution when viewing the data, as said, there is no process to show the changes made during the session.

Tests under "Windows for Workgroups" ran well under the restrictions above.

# 2. Program Concept

## 2.1 Areas of Usefulness

A Plan came into existence as a result of a search for a Program that was easy to understand, and yet didn't lose the overview for large projects.

Most PIMs (Personal Information Managers) are good for reminding the user of upcoming events, but are inadequate for organizing the tasks to be accomplished.

The alternative is to buy a Project Management Package, which could cost as much as $1500.00 or more. Such Packages are very complex, and require a considerable "lead time" to understand the basic functions, and sometimes lost the "big picture" -- becoming bogged down in the details of running the program. After a while it feels like shooting flies with a cannon.

**A Plan** is the package that now fills the gap between overblown Project Management packages and simple Task lists.

## 2.2 Short Description

Projects are organized by A Plan in a hierarchical database with the following levels:

 1st.Level: **Folders** (max. 999 Folders per Database),
 2nd.Level: **Projects** (max. 999 Projects per Folder) and
 3rd.Level: **Tasks** (max. 999 Tasks per Project).

Theoretically you can have 1 million Projects with almost 1 billion corresponding Tasks in a single data file, and if that doesn't get ya, just start another file.

A **Folder** could have the name "EXHIBITIONS," for example, and contain the Project "COMDEX."  As Tasks under the project COMDEX you may have the entries "Reserve Stand," "Make Signs," and "Assign Personnel."

Should the Project Prove very complex, you may wish to give it a complete folder, or even a complete file. With such a complex project you may then have the further entries under "COMDEX" and "Make Signs" of "Design", "Layout", "Presentation for Approval", etc.

Through varying display options, you may now achieve a fast overview of all running, past, and future entries.

The Entries will also be displayed on a calendar commonly called a Gantt Diagram, which can be zoomed up to 18 times to achieve an overview.  1x Magnification (1 pixel per day) displays about a year, and 18x Magnification displays about 3 weeks.

Beside the normal options (Sort Order, Auto-Save) there are also various filtering possibilities for the database.  They are designed to facilitate the use of larger projects.

Printing of data is an analog function of the display.  That means you have WYSIWYG (what you see is what you get) printouts.  The Gantt-Diagram can be configured to your personal needs, including columns, type size, page borders and orientation, resolution of the calendar, color, etc.  The Gantt diagram may also be printed on multiple pages to display longer time periods.


## 2.3 Database

On the MS-DOS level, there is a Database consisting of 3 related files with the endings .ISD, .ISM, and .ISF.  This is an ISAM database (Indexed Sequential Access Method) which is characterized by fast data access and "gapless" data saving routines with variable record lengths.  The file with the ending .ISD is dynamically increased by 2K at need.

During the work session with A Plan a temporary file is created with the ending .ISL.

You should not change the names or the endings of the files, nor try to open them with a text editor -- they will be destroyed for use by A Plan.  The database is also rendered useless if any of the original 3 files is missing.

If the database should be rendered non-functional for any reason, the data may possibly be retrieved using the backup files automatically stored as bak.*.  Even in the case of Hardware failure the original files are left unchanged, as A Plan does it's work entirely in the temporary file, and saves the information permanently to the originals with the Save option.


## 2.4 Program Structure

A Folder is characterized by the following data fields:

> - Sort Index (0 to 99)
> - Description (max. 50 Characters)

**Projects** and **Tasks** are identically structured.  A project can serve as a collection of

Tasks, or as a Task in itself comprised of many smaller detailed Tasks.

Projects and Tasks consist of the following data fields, where all of the fields are optional:

- Priority (1 to 5)
- Description (max. 50 Characters)
- Contractor (max. 30 Characters)
- Worker (max. 30 Characters)
- <u>Entry date</u>
- <u>Starting Date</u>
- <u>Reminder Date</u>
- <u>Deadline</u>
- Finishing Note incl. Ending Date
- Note (max. 32.000 Characters)

# 3. Main Window

## 3.1 Overview

Basically the **Functions of A Plan** can be accessed either with the **Pull-down-Menus** or for the most part with the underlying **<u>Button bar</u>**(Toolbar).

The easiest and fastest way is usually the mouse, although almost all functions are accessible with the keyboard.  When using the keyboard, you can move between fields with the Tab key.

The upper Buttons call System Functions, such as File Functions, Printer Functions, and Program Options.  To the right of the buttons is the current date and the time.  The lower Buttons relate to the table and the displayed Tasks.

In the **Table**  are all of the Entries that were read in from the database using the filter function. We could, of course, display all of the data that is contained in the database, however, that is usually too much data to retain an overview.  For example, completed tasks could be filtered out or certain Folders.(s. Chap. 5.1).

At the bottom left of the Table are a set of number representing how many pieces of data were read in from the database (left of the slash "/") and how many exist in the complete database (right of the slash "/").

If an entry in the Table is marked using the right mouse button, the dates corresponding to it can be seen at the lower right highlighted as follows: Rminder (purple) Beginning (green) duration (blue) and deadline (red).  The grey field shows the current position of the mouse pointer on the Gannt Diagram.

The **Footnote** shows context-sensitive help for the use of A Planner.

## 3.2 Upper Toolbar (System and Program Functions)

(Details s. Chap. 4 and 5)

**File Functions:**

To open an existing File, use the icon or *Open* in the menu bar under File:.  The usual Windows dialog will appear to allow for your selection.

The ending .ISD is set as a default for the standard ISAM database.(File structure). The corresponding .ISM and .ISF files will be opened automatically.

By selecting the icon or *Save* in Menu *File* the permanent File will be updated on disk from the temporary file that is being worked on.
Depending on the settings in Program-Options, the File May be automatically updated at given intervals.

Also when a file is saved for the first Time(File: New), or when it will be saved under a New Name, the normal Windows "Save As..." Dialog appears to allow a Manual entry of various options.

If you choose to Save an old Database under a New Name, the old Information will be duplicated in a New File and the old File remains unchanged.  You may also use the File Manager from Windows to delete any Files that are no longer needed.  Remember that the Database is actually comprised of 3 files. (Database-Structure).

**Print:**

The Same Filter and sorting options will be used for printing that were used to display items on the screen.  Selecting the printer icon or *Print* in Menu *File* under *Print Options...* accomplishes the Same Task.

## 3.3 Lower Toolbar (Data and Table Functions)

**Setting the Display Options**

Meaning of the Buttons (when pressed in):

Exclamation:      shows all of the entries that have reached or overrun thier

| | reminder dates, and therefor need attention. |
|---|---|
| Frame: | shows all entries that have not yet reached their reminder date, or have no reminder date set. |
| Checked: | shows all entries that are already completed. |

**Remarks:** Naturally you can not display an entry at all that was not read in from the database because of the filter settings.  If you have set, for example, "do not read completed" you may press the button on the right until you go blue, but you will still see only the entries that were marked after you opened the database.

## Entering, Editing, and Deleting Data

Click on the left icon or *New Entry...* in Menu *Entries* to add an entry to the Database.

**Folder:**
To insert a New folder, no other entry or item may be selected. (de selection is accomplished by clicking on the Word "Description".) In the entry window appear two edit fields: Folder (give the New folder a Name) and Sorting Index (a value between 0 and 99).

**Project/Task:**
By marking  a folder, the Same icon will call an edit window to enter a New Project, and with a Project marked it will allow entry of a Task.  In both cases, the entry of the Data is as follows:

If you enter a worker's Name for the first Time, it will be recorded in the List of human resources, and will thereafter be available as a Selection from the List. (s.Changing Worker's Names).

All dates may be entered directly into the colored blocks or by clicking on the calendar with the mouse.  The required key/mouse combination for any given field is displayed in the Help Text as a Footnote on screen.  (for example, the reminder date is Set by Holding the shift key and clicking on the calendar with the left mouse button.)

The current date is shown in the calendar with a red frame.  The beginning of an entry is marked in green, the deadline in red, the reminder in purple, and the duration in light Blue.  (when dates are entered from the keyboard, the display can be updated by clicking on the area to the left of the calendar.)

**Task:**
When entering or changing a Task, an extra Status line appears to remind you of the beginning and ending dates of the corresponding Project.

Also the calendar dates of the Project will be shown in Black.  Those dates falling outside of the Project are shown in dark Gray.

Any marked entry can be edited by clicking the middle icon or *Edit...* in Menu *Entries*, or

even faster by clicking on it's Description with the Right mouse button. (<u>Entry Window</u>, <u>Program-Options</u>).

When an entry is changed, it is possible that it must change positions. (Depending on the <u>Sort Order</u>).  This may be accomplished immediately, or be left to the user for Manual update.

Any marked entry may be deleted by clicking the right icon or through *Delete* in Menu *Entries*, or by pressing Del on the keyboard.

**Important!:**
**When deleting a folder, all corresponding Projects and Tasks will be deleted. When deleting a Project, all Tasks underneath will be removed.  If the Option: Confirm Delete is active, you will be asked if you are certain.  (_Program-Options..._)**


## Sorting and Filtering

The Selection of the left button or *Sort Order...* in Menu *View* allows many adjustments to be made to the order of the displayed items.

The **Sort Order** of the Main chart can be dynamically changed.

**Sorting the Folders:**
**Folders** can be sorted by a sorting Index, or in alphabetical Order.  The display of the Index can be hidden or turned off also.

**Sorting of Projects and Tasks:**
Projects and Tasks can be sorted by priority, description, reminder dates, or deadlines. Combinations are also possible, except for reminder dates and deadlines.
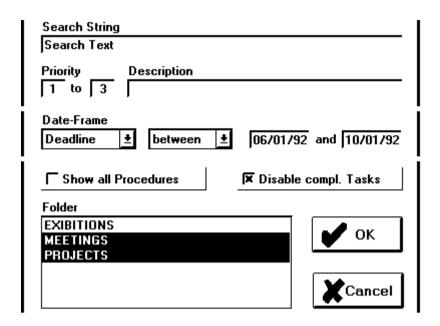
Tasks without dates (no reminder or deadline) appear After sorting at the bottom of the chart.
**Rem.:** Should these tasks for some reason appear at the top of the newly sorted chart, you might want to edit the section of a_plan20.ini to read "Options" "WithoutDateLast=0". If the Option **"new sort on change"** is enabled, the Order of the Data entries will be automatically sorted as any changes occur. (s. also <u>Re-Read Data</u>). You should disable this Option if the sorting bothers you when you are changing dates in the Gannt Diagram.

By selecting the middle button or. *Filter...* in Menu *View,* you may adjust the settings of the display Filter and problemlessly display large amounts of Data.

After entering the Filter criterion, only those entries matching the Filter will be read from the File on Disk.

**Example:**

**Search String**
| Search Text |

**Priority**     **Description**
| 1 | to | 3 |     | |

**Date-Frame**
| Deadline ± | | between ± | | 06/01/92 | and | 10/01/92 |

☐ Show all Procedures     ☒ Disable compl. Tasks

**Folder**
| EXIBITIONS |
| **MEETINGS** |
| **PROJECTS** |

✔ OK

✘ Cancel

In the displayed example above, a;; Data entries will be read and displayed that:

- contain the "search Text" in any field, including notes.
- have a priority between 1 and 3,
- have a deadline between 1.6.92 and 1.10.92,
- are not yet completed
- belong to the folders "PROJECTS" and "SPEECHES".

**time frame:**
By **Date** (Entry, Begin, reminder, deadline, and completed) are two simultaneous entries. The following entry possibilities exist:

- *before*
- *after*
- *on*
- *between* (incl. Lower and upper limits)
- *relative*

Using  ***-relative*** -you can determine a Time frame that. for example, Begins ten days before the current date, and ends 20 days after it.(Entry *-10* and *+20*).

**Show all Tasks:**
With the Selection **Show all Tasks**, the Filter will apply only to Projects already displayed. Tasks for any Project not displayed will remain hidden.

**Folder:**
In the **Folder** list are all folders that exist in the Database in alphabetical Order. By selecting or de selecting an Time in this List, a folder will (or will not) be displayed.

Rem.: The Selection or de selection of a folder is saved to the temporary File on Disk.  For this reason, it is possible that the auto save or Save occurs at exit even if no other changes have been made.

The display can be further influenced by the selections criteria mentioned in <u>Reminder</u>, <u>Incomplete Tasks</u> and <u>Completed Tasks</u>.  Naturally, no Data can be displayed that was not read from the File as a result of the File Filter.

## Setting The Gannt Diagram

by selecting the left button the Gannt diagram will automatically be set to display the week containing the **current date** on the far left of the Gannt Diagram.
The **Resolution** can be set with the other.

With the left button,

## 3.4 Table and Gannt Diagram

The data entries that have been chosen for display (see <u>Reminder</u>, <u>Incomplete Entries</u>, <u>Completed Entries</u>, <u>Filter</u>) will also be shown in a Diagram.  **FOLDERS** are shown in blue caps, **Projects** in Boldface and Tasks in normal Font Size.

**Contents of the columns:**
1        Priority (Sort Index for Folders)
2        Description
3        Contractor
4        Worker
5        Note Icon (if a note for that task exists)
6        Number of days until deadline. (if less than 20, also with a small graphical image)
7        Gannt Diagram

The <u>Column Width</u> can be steplessly adjusted.

**Meaning of the Icons for the Time Remaining** (Column 6)**:**

Color and Size of Icons for Time remaining depend on the Priority and number of days that remain until deadline date is approached.

**Color:**    red          = Priority 1
                    yellow     = Priority 2
                    green       = Priority 3
                    gray        = Priority 4 or 5

The colors of the Timeline in the Gantt Diagram are ordered by the Priority of the task(1=red, 2=yellow, 3=green, 4 and 5 = dark gray).  Completed Entries are "colorless" (shown only with a frame).  The violet diamonds mark the corresponding **Reminder Date**.

**Setting the desired display area:**
The date fields to the left and right of the Horizontal scrollbar show the range of dates that will be displayed on the Gannt Diagram after letting go of the scrollbar button.  Use them to set the Diagram to your needs.

When the scroll button reaches the left or right margin, it will spring back to the middle of the bar, so that despite the relatively fine resolution you may steplessly scroll as far as needed.

The columns can be changed in the headnote of the table or by "pulling" on the margins with the mouse.  The timebar in column 6 will not be shown at all if the column is too thin.

If the Option "Help as a footnote" is active, the title of the column will be shown as a footnote.  This is a great help when measuring columns that are too thin to see the title at the top.

The following functions can be called directly with the mouse buttons.

| Column | Mouse button | Function |
| --- | --- | --- |
| 1 (Priority) | left | Mark with Arrow  (Toggle) |
| 2 (Description) | left | Mark Entry |
| | right | Show/Change/Edit Entry |
| 5 (Notes) | left (hold) | Show notes |
| | right | Enter/Change/Delete Note |
| 6 (Time Remainder) | left | Mark as completed (Toggle) |
| 7 (Gantt-Diagram) | shift + left | Set/Change Reminder |
| | ctrl + left | Set/Change Beginning Date |
| | ctrl + right | Set/Change Deadline |

# 4. File

*(The Boldface type of Chapters 4 through 9 are the menu titles of the main window.)*

## 4.1 New

Should you need to create a new file, it is possible only by using the menu selection File:New on the menu bar.  This will create a new file, and clear the screen to begin entry of the new Tasks. (New Task)

Because an ISAM-Database is capable of storing almost a billion Data entries, and every file can be further separated into Folders, this should not be necessary very often.

## 4.2 Open...

To open an existing File, you can select the "open" icon, and will recieve the normal Windows dialog.

The default extension for ISAM database files is .ISD.  The other two files (.ISM and .ISF) will be automatically opened.

## 4.3 Save



This causes the original file to be updated with any changes made in the working copy.  If the Auto-save feature is enabled, this will largely be uneccessary.

## 4.4 Save As...

When a new file is created, or the open file is to be saved under a new name, the normal Windows Save As... dialog appears.

By saving under a new name, the old file is retained.  If it is no longer needed, you must delete it manually with the File Manager.  Please remember that an ISAM database has three files. .ISM .ISF .ISD.

## 4.5 Print



Printing is an analog function of the display in tabular Form with an integrated Gannt Diagram.  All Sizes are drawn relative to the font size selected on screen.  This insures that the complete Diagram is proportional and the columns are optically correct.

## 4.6 Print  Setup...

If several printer drivers are installed for Windows, this Option will allow you to install and setup the printer of your choice.

This function is also available under *Print Options...*.

In this Dialog you may also Set the Page orientation (Portrait or Landscape)


## 5. Options


## 5.1 Print Options...

Printing is an analog function of the display in tabular Form with an integrated Gannt Diagram.  All Sizes are drawn relative to the font size selected on screen.  This insures that the complete Diagram is proportional and the columns are optically correct.

By selecting the icon or *Print Options...* in Menu *Options,* you Can determine the contents of the printed chart to your personal need.

**Selection of Printable Columns:**
The Printable columns can be selected or de selected, and the width of the columns "Description", "Contractor", and "Worker" Can also be steplessly changed.  The value displayed in the field "free" is an indicator of How Much space remains before reaching the right margin of the printed Page.  As Long As this number remains positive, no Data will be truncated by printing to fit on the page.

**Gantt Diagram:**
When printing the Gannt-Diagram, the value in the field "free" is always "0" because the Diagram will fill all remaining space on the printed Page even if no Task remain with deadlines further than the display allows.  Normally the margin is also a little larger than the margin setting, As only complete weeks or months will be printed.

If you are one of the few with a color printer, the timebar of the Gannt Diagram Can also be printed in color.  If not, the lines are distinguishable by varying fill patterns of stripes.  If the Option "color" is active, But you possess only a Black and White printer, you will receive a printout in grayscales.

If the given calendar dates can't be printed on a Single sheet of paper, A Plan will print as many pages As needed with non-overlapping borders.  Of course you may Set the display for a smaller pixel/day ratio and print a larger time frame on a Single sheet of paper.

The values that are used for the columns representing days are constant pixels and the Rest of the Table will be drawn relative to the fonts chosen in Their respective fields. (Screen Display),

**Notes:**
Notes can be printed under the chart, or as a separate document.  As it is possible for several charts to be concatenated vertically, having the notes printed As footnotes is possibly More a hindrance than a Help.

(If a Note is to be printed, but no longer fits on the printed Page, Then a form feed occurs, and the Note is printed together with it's corresponding chart Data on a New Page.  In this case, it is possible that a printed Page Not be completely filled.

**Margin Settings:**
The margins can be Set in Millimeters hat the upper Right of the Dialog.  In the middle you See the Page orientation.(Portrait or Landscape)

**Fonts:**
The printer fonts serve to distinguish between headnotes, Tables, and notes.

By selecting the change icon the normal window font Dialog appears to allow changing the type style.

The settings in the column *Type style* have no effect, As A Plan Sets These automatically.

**Printer:**
The **Printer** can also be Set with the printer setup icon. (i.e.  Selection of Portrait or Landscape)

## 5.2 Program Options... (Autosave etc.)

**Program Settings:**



By clicking on this button with the mouse, you may adjust the following settings.

**Auto-Save:**
If a value greater Than 0 is Put into the **Interval** field, an automatic backup will occur that many minutes After any detected changes.  ( That means the original File will be overwritten with the New Information in the temporary working File.)  If confirmation is required, it will be requested even if another application is active at that time.

**Backup Files:**
If the field ***Backup Copy*** is crossed, a backup copy of the database will be made before the original is overwritten with the updated data. This backup is named BAK.ISD and can be opened normally As any A Plan Database.

**Confirm Deletion:**
If confirmation is required before deletion of Files, it will be requested.

**Help Displayed in Footnote:**
The meaning of the icons and buttons or descriptions of A Plan functions can be displayed As a Footnote.  The Help relates to the position of the mouse pointer at the Time.

**Fast Call of Entry Screen:**
To reserve Resources, that are limited in Windows to 2 x 64k regardless of available Memory, the normal practice is to remove all Menus and Input fields that are Not in use from Memory As they are closed.  This causes a small delay when the menu must be loaded again before any Input can take place.  If the Memory requirements are Not a bother, or you must change or enter Data frequently, Then you may choose to leave the Data entry menu in Memory until further notice.

## 6. Display

## 6.1 Reminder

By selecting this icon or *Reminder* in Menu *View,* all entries that have reached or overrun Their reminder dates will be displayed.  Also shown are any entries marked with an **Arrow**

## 6.2 Incompleted Entries

By Selection of  this icon or *incomplete* in Menu *View,* all entries that are Not yet completed will be shown regardless of Their **Reminder date**.

## 6.3 Completed Entries

Use this button or the *completed* in Menu *View* to display those items which have been marked As completed.

## 6.4 Sorting ...

**Sorting the Folders:**
**Folders** can be sorted by a sorting Index, or in alphabetical Order.  The display of the Index can be hidden or turned off also.

**Sorting of Projects and Tasks:**
Projects and Tasks can be sorted by priority, description, reminder dates, or deadlines. Combinations are also possible, except for reminder dates and deadlines.

Tasks without dates (no reminder or deadline) appear After sorting at the bottom of the chart.
**Rem.:** Should these tasks for some reason appear at the top of the newly sorted chart, you might want to edit the section of a_plan20.ini to read "Options" "WithoutDateLast=0". If the Option **"new sort on change"** is enabled, the Order of the Data entries will be automatically sorted as any changes occur. (s. also Re-Read Data). You should disable this Option if the sorting bothers you when you are changing dates in the Gannt Diagram.
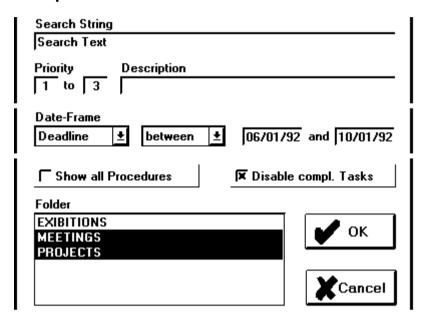
## 6.5 Filter ...

By selecting the displayed icon or. *Filter...* in Menu *View,* you may adjust the settings of the display Filter and problemlessly display large amounts of Data.

After entering the Filter criterion, only those entries matching the Filter will be read from the File on Disk.

**Example:**



In the displayed example above, all data entries will be read and displayed that:

- contain the "search Text" in any field, including notes.
- have a priority between 1 and 3,
- have a deadline between 1.6.92 and 1.10.92,
- are not yet completed
- belong to the folders "PROJECTS" and "SPEECHES".

**time frame:**
By **Date** (Entry, Begin, reminder, deadline, and completed) are two simultaneous entries. The following entry possibilities exist:

- *before*
- *after*
- *on*
- *between* (incl. Lower and upper limits)
- *relative*

Using  *-relative* -you can determine a Time frame that. for example, Begins ten days before the current date, and ends 20 days after it.(Entry *-10* and *+20*).

**Show all Tasks:**
With the Selection **Show all Tasks**, the Filter will apply only to Projects already displayed. Tasks for any Project not displayed will remain hidden.

**Folder:**

In the **Folder** list are all folders that exist in the Database in alphabetical Order. By selecting or de selecting an Time in this List, a folder will (or will not) be displayed.

Rem.: The Selection or de selection of a folder is saved to the temporary File on Disk. For this reason, it is possible that the auto save or Save occurs at exit even if no other changes have been made.

The display can be further influenced by the selections criteria mentioned in <u>Reminder</u>, <u>Incomplete Tasks</u> and <u>Completed Tasks</u>. Naturally, no Data can be displayed that was not read from the File as a result of the File Filter.

### 6.6 Re-Read Data



Updates of the Data displayed on screen are carried out by selecting this icon.

**Rem.:** Through changes made in the entries (i.e. dates changed or items marked as completed) the display becomes cluttered with entries no longer matching the Filter settings. The screen is not immediately updated because sudden disappearance of an entry may be more of a nuisance than a Help. The Data will only be sorted automatically if that Option is manually Set. Option <u>"new Sort on Change"</u>

### 6.7 Show Current Date



If you have Set the Gannt Diagram so that the current date is no longer visible or easily manipulated, you may click on the icon, or select *View current date* in Menu *View.* The Diagram will then display the week containing the current date at the far left.

## 7. Task Menu

### 7.1 New Task...



By clicking on the icon or selecting "New Task" from the Task menu, you can add your entries to the database.

**Folders:**

To enter a new Folder, there may be no marked entries in the table. Click on the word "Description" in the Title line to clear any selections. In the entry window you may enter the description you wish and the sorting index. (0 to 99) of the Folder

## Project/Task:

When a folder is marked, a Project will be inserted in the database, and when a Project is marked, a Task will be created for that Project.

The first time a name is entered in the worker's field,. it will be added to the list of available names, so that it will be accessible in the combo box for the next entry.

Every Date can be manually entered in the field provided, or set using the Mouse in the calendar. The required key combinations and mouse buttons can be found in the context-sensitive help in the footnotes.

The current date is displayed in a red frame. The beginning of an entry is marked in green, the deadline is red, the reminder is purple, and the duration is light blue. When entering dates with the keyboard, the open fields will be calculated when you click on the empty space next to the calendar.

**Task:**

When entering or editing a task, an extra title line will appear showing the beginning and deadline dates of the respective Project.

Also the calendar will display the beginning and deadline dates of the task in gray, and the dates between in black.

## 7.2 Edit... (Change)



Any marked entry can be edited using the menu "File: Edit", or by clicking on the icon. Even faster is to click on the description with the right mouse button. The edit dialog will be immediately opened.

If a data record must be moved in the diagram because a change is made, it will be moved immediately after closing the edit window. If it no longer fits the filter criteria, it will no longer be displayed. If you do not wish these immediate changes, this feature can be turned off. (See Chap. 6.4 Sorting.)

## 7.3 Delete



A marked record can be deleted with the delete icon or with the delete "del" key on the keyboard.

**Important:**
When deleting a Folder, all of the corresponding projects and tasks will be deleted.  This is also true for a deletion of a project, where all corresponding tasks are deleted.  It is advisable to turn on the feature in *Program Options...* (*Confirm Deletion*, s. Chap. 5.3) to confirm exactly what will be deleted if any doubt exists.

## 7.4 Notes...

Every Project and Task may include a Note of up to 32,000 characters.

The notes window is opened by clicking on the icon with the Right mouse button.  At that point it may also be deleted.

If a Note exists for an entry, the notes symbol will appear in the Notes column next to that entry.  By clicking on this with the left mouse button and Holding it down, the first 6 lines may be viewed.

The notes are capable of all clipboard commands using the normal key combinations.


 - Copy:   ctrl + ins
 - Cut:     shift + del
 - Insert:  shift + ins
 - Undo:   alt + Bksp
 - Page break:        Enter
The notes window can be resized by "pulling" on the frame.  The Position and size will be maintained relative to the main window.

## 7.5 Arrow

Entries that must be immediately accomplished can be marked with a special Arrow.

This is done by clicking on the priority column with the left mouse button, or Data arrow in the menu bar.  It may also be removed the Same way.

Anything marked with this arrow will be displayed regardless of Filter settings.(Options: *Reminder*).

## 7.6 Completed

Entries are marked as completed by the following:

> - Selecting ***Completed*** in Menu ***Entries,***
> - **Clicking** on the **Time Column** with the left mouse button.
> - Clicking on Completed in the Data Entry window.

The current date is used as a completion date, which can be changed from the edit window.

The Marker is a toggle, which means it may also be removed in the Same manner it was created.

# 8. Human Resources

### 8.1 Edit...

This function allows entry or deletion of names for available workers.

**Rem.:** The Button *Cancel* in the Edit Window is only active until a change is made.  It is not intended to be an "undo" function.

**Change:**
The effected name must be selected from the List, changed to the desired entry in the editing line, and saved by clicking on the *change* button.
**New:** Simply enter the Name in the editing line and Confirm the Addition with *New.*
**Delete:** Select the Name in the List to be deleted, and Confirm by clicking the button.
**Rem.:** If the Name of a Worker is still associated with a Task, A Plan will refuse to delete it until theTask is changed or completed.

# 9. Info

### 9.1 Help

The Help function is almost identical in content with this handbook, and can be called with the F1 key on the keyboard or with the menu.

### 9.2 Handbook

Calls Write and displays this User Handbook. (HANDBOOK.WRI)

### 9.3 About A Planner...

Next to the Program Version number is a Serial number that is needed by us to Register the Program.

# 10. Registration

A Plan is a **Shareware program** in compliance with the requirements of **Association of Shareware Professionals** (ASP). It is therefor a complete program without crippling of any kind.

There are no "Time-Loops" or any other registration "gimmicks" built into the Program, and the shareware Version has complete functionality.

Please Test A Plan for 30 days completely.  You may also make copies of the complete, unchanged, and unregistered Program to give away. (If you have a registered copy of A Plan, simply do NOT copy init.dat when you distribute the Program.)

If you should decide within that time frame that A Plan has a value of $50 and you wish to use the Software further, we ask you to Please Register your copy.

When you Register, you will receive an individual **Registrations number**, which will remove the "Please Register" screen at the Start of the Program.  (Also you will no longer wake up in a cold sweat in the middle of the night from your bad conscience.)  You will also receive (pending availability) news of new program versions, and the possibility to buy inexpensive updates. (Planned Additions)

If necessary, we are naturally overjoyed to hear from you (also as an Unregistered user) Our address and Telephone number are at Address Further details on registration can be found by selecting "Registration Info" at the start of A Plan.


## 11. Liability

Now that we've discussed registration, it's time to get rid of the "small print."  It's the same as you've read in the last hundred ASP shareware programs, but you can get it - like everything else - here, too.

With A-Plan you recieve no guarantee, expressed or implied, including, but not limited to, merchantability or fitness for any express purpose.

We also accept no responsibility for the usefulness of this program or it's sale price.

We accept under absolutely no set of circumstances the liability for lost time and wages or lost profit that result from use or uselessness of this program or it's documentation.  This is also true if the author and distributor are informed of possible damages.


## 12. Planned Additions

In the next version all of your wishes should be included, provided that you tell us what they are.  So Please fill out the questionnaire in "register.wri" and send it back to us.  We are interested in your opinion even if you don't decide to register.

**The following is likely to occur in the near future:**

- Drag and Drop of entries into other Folders or Projects.
- Moving complete Folders or Projects on the timeline.
- **True Network capability**
- **recurring Entries** (i.e. weekly, monthly)
- association of entries to one another.
- **Export** (i.e. to Excel, WinWord, other A Plan format....)
- task duration modifications.  (Like a holiday planner)

The order in which this occurs depends largely on your input.  Whatever we hear the most from our users (preferably registered, of course) will get built in first.

Naturally it is also important for us to receive news of Bugs.  A Plan has been tested thoroughly, but it is impossible to test a program for everything.  Please contact us if any problem arises from use.

Viel Erfolg beim Testen von A-Plan wünscht Ihnen

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## Appendixes

## A. Known Problems and possible Solutions

### 1. Error message:"too little memory" or "out of  memory" or incomplete picture
**Explanation:**
A-Plan requires comparatively much memory for it's graphics functions, which can be a problem especially for computers with less than 4MB RAM.
**Solutions:**
- Start Windows in enhanced mode.
- Close other programs.
- Buy some RAM.  (Not only A-Plan will benefit from that.)

### 2. long wait for screen repaint
**Explanation:**
The graphically demanding 3D effects of A Plan require much memory, despite special graphic routines, to open the main window or to page through the entries.

All graphic routines were created with turbo Pascal. As far as possible, routines were used from the Windows API. (i.e. BitBlt.)

**Solutions:**
- Resize the A Plan window a little smaller.
- Set the filter to display fewer entries.

- Start Windows in enhanced mode.
- create a permanent windows swapfile (where possible with 32 bit access.)
- defragment the hard disk
(Advice to these topics can be found in the Windows-Handbook)

- buy a faster Graphics card, more memory, or a faster computer. (to do this just for A Plan would be a great compliment. Give us a call.)


## 3. False Registration number

**Explanation:**
When A Plan is first installed, a serial number is created and the file "init.dat" is saved in the A Plan directory. If you re-install for any reason, A Plan will create a new serial number, which your registration number no longer matches.

**Help:**
- copy "init.dat" to the original diskette after entering the registration number. It will then be automatically used for a new installation.
- Ask us for a new serial number. Of course as a registered user of this program you will recieve it free.(please include both old and new serial numbers.)


## 4. Error message: "The file *Filename* is out of date"

**Explanation:**
A file that is required by A Plan is too old to be used. This is a condition that occurs with files in the Windows library (dll or .vbx), that are frequently used by other programs, and possibly installed by those programs. These files are usually backward compatible, and A Plan will use the newest available file during installation. This will not function if the file is already opened by another running program, or is not located in the system directory under windows.

**Solution:**
If the file is present on the diskette for A Plan, you may simple delete the one on the hard drive, and re-install A Plan. If the file cannot be deleted, you must close any application that is using it, possibly close windows, and delete the file, then re-start Windows.

**Important!:**
Do not just copy the file onto the hard disk. The files on the A Plan diskette are compressed and unusable in that form. The installation serves to expand these programs into usable files.

If the file is not available on the diskette, (something we have yet to experience) then the required file is a part of Windows itself. DO NOT delete this file! It is possible that windows will no longer run without it! CALL US!

## 5. Error Message: "Printer Memory full" or "to much data" etc.

**Explanation:**

When printing the Gantt Diagram a much greater amount of memory is used for the lines and rasters than normal.  This causes problems with some printers.

**Solution:**

- Set the filter to print fewer records.
- increase the lower and right margins so that less information will be printed per page.

- Buy more printer memory modules. (please ask a technician first, as this does not always solve the problem.)
- use a newer Printer driver for windows.(i.e.  The first driver for the new HP Laserjet IV caused this error for any file greater than 20KB in many different programs.)