Franklin Planner™ Software

User's Guide

FranklinCovey.

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Chapter 1

Welcome to Franklin Planner Software

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Introducing Franklin Planner™ Software

What is Franklin Planner™ Software?

The Franklin Planner Software is a personal information manager (PIM) for the Windows® 95, 98, and NT 4.0 operating systems. You can use the Franklin Planner Software to perform many tasks, including:

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

Who Makes Franklin Planner Software?

Franklin Planner Software was created by Franklin Covey Company, maker of the popular Franklin Planner. Franklin Covey has taken the proven time-management and life-leadership tools of the Franklin Planner system and combined them with the power of the personal computer to create a unique brand of personal management software. Like the Franklin Planner, Franklin Planner Software is an organizational tool that helps you gain control over your life and your time, becoming more effective and leaving more time for you to focus on what matters most.

New Features in Franklin Planner Software

What to look for in your package of Franklin Planner Software

- Values, Roles, Mission, and Long-Range Goal Wizards help you identify and act on what matters most to you (Chapter 3).
- Weekly and daily planning tools (Chapter 5).
- The Weekly Compass helps you focus on your highest priorities and relationships during the week (page 34).

- The new Information Manager organizes all important notes, journal entries, quotes, and documents (Chapter 9).
- New multi-user capabilities allow different members of a family or workgroup to keep individual data and preferences within one copy of Franklin Planner Software (page 21).
- Franklin Planner Software features improved printing capabilities to all Franklin Planner filler sizes and styles.

Franklin Planner Software and the Palm Computing® Family of Connected Organizers

The Franklin Planner Software provides the following features and capabilities for your Palm electronic organizer (such as the Palm VII™, Palm V™, Palm III™, and PalmPilot™):

- HotSync® technology enables you to back up the data stored in your Palm organizer onto your personal computer and synchronize the Palm organizer data with the Franklin Planner Software. The HotSync operation is a one-step procedure that ensures your data is always safe and up-to-date.

- You can synchronize records between the Prioritized Daily Task List, Appointment Schedule, Address and Phone Book, and Red Tabs in Franklin Planner Software with the Task List (a Franklin Covey application), Date Book, Address Book, and Memo Pad, respectively, on your Palm organizer.

For more information on how to use your Palm organizer, install HotSync software, and synchronize Franklin Planner data with your Palm organizer, refer to the manuals that came with your Palm organizer.

Chapter 2

Getting Started

Before You Begin

System Requirements

- Microsoft Windows 95 or greater
- IBM-compatible 486 computer or higher
- 16 MB of RAM minimum
- 40 MB available hard disk space minimum, 60MB recommended
- VGA monitor or better
- CD-ROM drive
- Mouse
- One available serial port

Required for certain features

- 9600 or higher baud modem (28,800 baud recommended)
- Internet SMTP/POP3 or other MAPI compliant messaging software (required for e-mail features)
- Web browsing software
- Internet access
- Windows-compatible printer
- Infrared communication device

Before Installing Franklin Planner Software

- You must have the Windows 95 or higher operating system installed and running on your computer.
- Close any open programs or documents.
- During installation, do not attempt to open another application.
- Make sure you have at least 4 MB of available hard disk space where Windows is installed.
- Make sure you have at least 25 MB of available hard disk space where Franklin Planner Software will be installed.

How to Install Franklin Planner Software

1. Insert the Franklin Planner Installer CD. The Franklin Planner installation screen automatically appears. If you do not see the installation screen, select Run from the Start menu, browse to the CD-ROM drive, and select the Setup.exe file. Click Open. Then click OK.

If you need Franklin Planner Software on diskettes, contact Franklin Planner Software technical support at (801) 975-9999.

2. From the Franklin Planner Introduction screen click Install. The Franklin Planner Installation screen appears.
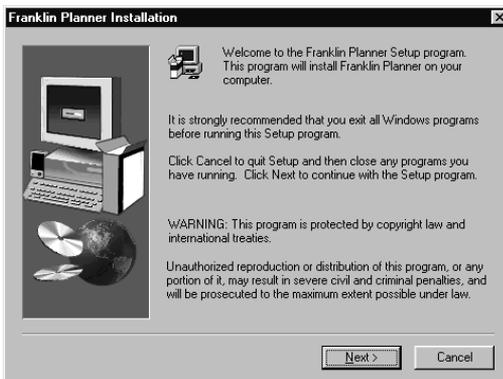
3. Click Next. The Software License Agreement appears.
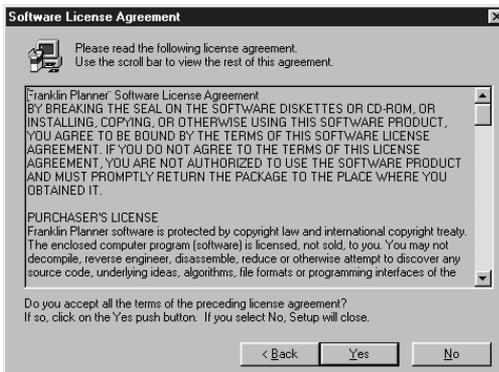
4. Read the Software License Agreement. If you accept the terms of the agreement, click Yes. The Select Components dialog box appears.

5. Select the items you wish to install.

■ Make sure Franklin Planner Program Files and Database Tools & Utilities are checked.

■ If you are converting from ASCEND 5.0, check Convert my ASCEND 5.0 data (see "Converting ASCEND 5.0 Data" on page 19).

■ If you plan to synchronize Franklin Planner data with one of the Palm family of connected organizers, check the Palm Interface Files box. This will install the HotSync manager and conduits (see "Installing the Palm Interface Files" on page 19).

■ If you would like the option to view preloaded data that demonstrates how to use the Franklin Planner, check the Demo User box.

If you load the Demo User data, you can access the data by selecting "Demo User" instead of your user name from the User Login screen when you launch Franklin Planner Software.

■ To install electronic documentation (in Adobe Acrobat format) to your hard drive, check the Documentation box.

6. The Franklin Planner automatically chooses the destination path C:/Program Files/Franklin Covey/ Planner to load the program. If you want to choose a

different location, click the Browse button and navigate to the new location. Click Next.

7. The User Information dialog box appears. Enter a user name. Click Next.

The User Name you enter will be the name of the database file that Franklin Planner Software first opens. If you will be synchronizing with a Palm organizer, your Franklin Planner Software user name and your Palm user name should be the same, to avoid confusion.

IMPORTANT If you are installing Palm Interface Files or Converting ASCEND 5.0 data, there are additional steps during installation. See "Installing the Palm Interface Files" on page 19 and "Converting ASCEND 5.0 Data" on page 19.

8. Click Next. The Select Program Folder dialog box appears. If you like, change the program folder name. Click Next.

9. Follow the on-screen instruction. (If you are installing from diskette, insert the remaining disks when you are prompted.) A graphic displays the status of the installation process.

10. As the installation nears the finish, you will be asked if you want to load the Weekly Compass on Startup.
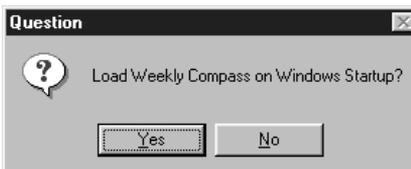
If you click Yes, the Weekly Compass will be loaded into your Windows System tray during startup. For more information about the Weekly Compass, see "The Weekly Compass" on page 34. If you load the Weekly Compass at Startup and also use the Multiple User feature (see "Creating Multiple User Databases" on page 21), the User Login dialog will appear during Windows startup. The User Name you select will determine which database the Weekly Compass will access.

Registration during Installation

11. As the installation nears completion, the Franklin Covey Product Registration window appears to prompt you to register your Franklin Planner Software.

Follow the directions depending on which registration option you select. Choose one of the following options from the drop-down menu, or choose Cancel if you do not wish to register.

- Internet using my Web browser
- Send information by e-mail
- Send information by modem
- Print a form for faxing
- Print a form for mailing

Follow the directions that appear on your screen. The directions will vary depending on which registration option

you select.

12. A message is displayed when installation is complete. You may be instructed to restart your computer.

Installing the Palm Interface Files

If you choose to install the Palm Interface Files, you can synchronize your data between your Palm device and the Franklin Planner. To install the Palm Interface Files:

1. Check the Palm Interface Files box in the Select Components screen. When you start the installation, after entering a User Name, the User Information dialog box will appear.

2. Click Next. The Select Serial Port screen will appear.

3. Select the COM port where you have attached or will attach the Palm device's serial cable. The default selection is the COM1 port.
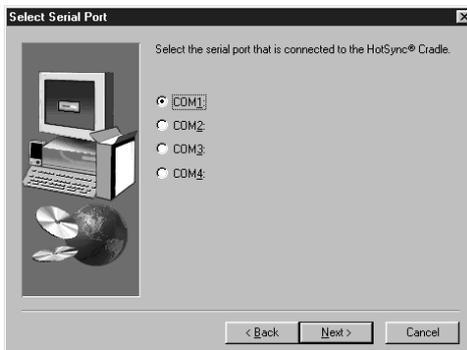
If you don't know which COM port to choose, accept the default selection. You can change the COM port after installation with the HotSync Manager utility (see your Palm manual).

4. Click Next. The Select Program Folder dialog box appears, and the installation continues as described above.

Converting ASCEND 5.0 Data

If you have ASCEND 5.0 installed on your computer and want to convert your data for use in the Franklin Planner Software, follow these additional steps during installation:

1. Check the Convert my ASCEND 5.0 data box in the Select Components screen. When the installation starts, you will be prompted to enter a User Name in the User Information dialog box.

2. Click Next. The ASCEND 5.0 Database Path Selection screen will appear.

3. If you are also installing Palm files, you will first select Palm installation options (see "Installing the Palm Interface Files" above). After selecting Palm options, the ASCEND 5.0 Database Path Selection window will appear.

4. Using the Browse button, locate your ASCEND 5.0 database. When you have located it, click OK, then click Next.

5. As the installation continues, a Conversion dialog box will appear with the prompt "Before you can convert your ASCEND 5.0 database, you need to select the Target Franklin Planner User Database for the conversion." Click OK.

6. The User Login dialog box appears. You need to establish a User name for the ASCEND 5.0 database. Choose the User name from the drop-down menu or create a new user by clicking the Add/Remove Users button. (For information about Multiple Users, see "Creating Multiple User Databases" on page 21.)
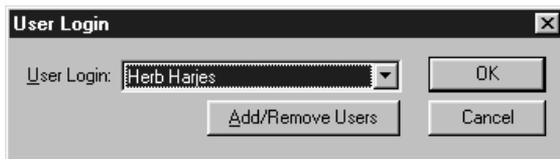
7. Click OK. The installation process will convert your ASCEND 5.0 database. The Select Program Folder dialog box appears, and the installation process will continue as described above.

Upgrading from Previous Versions

If you are a current ASCEND 97 user, there is no special conversion procedure for converting your ASCEND 97 data. The Franklin Planner installation will synchronize your databases automatically.

If you are a current ASCEND 5.0 user, click the Convert my ASCEND 5.0 data box during installation. The installation wizard will convert your database as described in "Converting ASCEND 5.0 Data" above.

Creating Multiple User Databases

The Multiple User feature allows several users to create separate databases using one copy of Franklin Planner Software. However, only one database may be open at a time. This allows several members of one family to maintain entirely separate databases, or for an assistant to easily update a manager's schedule while keeping a separate personal database.

All databases can be password protected. See page "Protecting your database with a password" on page 116.

Adding a New User with a New Database

1. Start Franklin Planner Software if it is not already running, by double-clicking the desktop icon or choosing Start, Programs, Franklin Covey, Franklin Planner, Franklin Planner.

2. From the Options menu, select Preferences. The Preferences window appears. Select the Application Preferences tab.

3. Click Add/Remove Users. The User Profiles dialog box appears. It will display a list of all User Names currently using this copy of the Franklin Planner.

User Profiles

User Name	Location of Database
demo data	C:\Program Files\Franklin Covey\Planner\demo d:
Herb Harjes	C:\Program Files\Franklin Covey\Planner\Herb H:

OK

Cancel

Add...

Delete
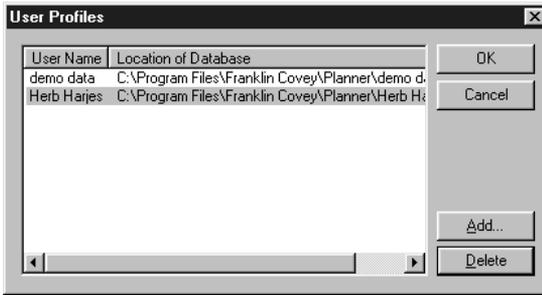
The User Login dialog box appears when you start the Franklin Planner. The User Profiles dialog box appears when you click Add/Remove Users to allow you to pick which database to access.

4. Click Add. The Adding a New User dialog box appears. Check Create a new user with a new database radio button. This option will create a blank database for the new user's name.

Adding a New User

You are about to add a new user.

Will you be creating a new user, or would you like to add a user that already has a database?

⦿ Create a new user with a new database.

○ Add a new user with an existing database.

< Back   Next >   Cancel   Help

Clicking Add a new user with an existing database will allow a user name to link to a database that already exists but is not yet used in the Franklin Planner. See "Adding a New User with an Existing Database" on page 23 for more information.

5. Click Next. You need to establish a new .mdb file for the new user. Click the Browse button. The Create new Franklin Planner database screen will appear. Enter the filename of the new user. Click Save.

...

Adding a New User

You are about to add a new user.

Click the '...' button to name the database that you would like to create.
The new user's login name will be created to match the database name.

Database for new user:

`C:\Program Files\Franklin Covey\Planner\New User.mdb`   `...`

Login name for new user:

`New User`

< Back   **Finish**   Cancel   Help

The name of the file will also be the login name for the new user. The name of the file and the login name must be the same

6. Click Finish, then click OK and OK again to close the Preferences windows.

When you launch your Franklin Planner, the User Login screen will appear and prompt you to pick a user name. This will link you to the appropriate database.

Adding a New User with an Existing Database

1. Start Franklin Planner Software if it is not already running, by double-clicking the desktop icon or choosing Start, Programs, Franklin Covey, Franklin Planner, Franklin Planner.

2. From the Options menu, select Preferences. The Preferences window appears. Select the Application Preferences tab.

3. Click Add/Remove Users. The User Profiles dialog box appears. It will display a list of all User Names currently using this copy of the Franklin Planner.

4. Click Add. The Adding a New User dialog box appears. Click Add a new user with an existing database. This option will enable an existing database not currently used in the Franklin Planner to be accessed. Click Next.

5. Click the Browse button. Select the existing database. If the database is not in the Planner folder, you will need to navigate to the location of the database. The name of the

selected database will appear in the File name field. Click Open.

6. The Login name for the new user will be the same as the file name. Click Finish, then OK and OK again to close the Preferences window.

Deleting a User Profile

1. Start Franklin Planner Software if it is not already running, by double-clicking the desktop icon or choosing Start, Programs, Franklin Covey, Franklin Planner, Franklin Planner.

2. From the Options menu, select Preferences. The Preferences window appears. Select the Application Preferences tab.

3. Click Add/Remove Users. The User Profiles dialog box appears. It will display a list of all User Names currently using this copy of Franklin Planner Software.

4. Select the User Name from the list and click Delete.

5. You will be asked if you want to permanently delete the database. Click Yes. The database and the User Name will be deleted.

6. Click OK and OK again to close the Preferences window.

Registering Your Franklin Planner Software

When you register your copy of the Franklin Planner Software, you are entitled to receive full customer service and technical support. In addition, you will be notified of enhancements, upgrades, and special pricing on future versions of the Franklin Planner, as well as information about other time and life management products from Franklin Covey.

See "Registration during Installation" on page 18 for information registration options during software installation. You can register Franklin Planner Software electronically using your Web browser, by e-mail, by modem, by fax, or by mail.

To register your copy of Franklin Planner Software via mail

You have two options for registering Franklin Planner Software by mail.

7. Print a form for mailing during software installation (see "Registration during Installation" on page 18).

8. Fill out the postage-paid registration card in the Franklin Planner software package and mail it to Franklin Covey.

To register your copy of Franklin Planner software via fax

You also have two options for registering Franklin Planner Software by fax.

1. Print a form for faxing during software installation (see "Registration during Installation" on page 18).

2. Fill out the registration card in the Franklin Planner Software package and fax it to Franklin Covey Technical Support at (801) 975-9995.

Getting Help

Online Help

In addition to this manual, there is Online Help available by choosing Contents and Index from the Help menu. This will open the Franklin Planner Online Help.

For context-sensitive Help, which brings up a Help screen with information about the active item, press F1 or click a Help button and the Online Help will display the appropriate topic.

Technical Support Options

If you encounter a problem that cannot be corrected by referring to online Help or this User's Guide, contact Franklin Covey Technical Support by telephone, e-mail, or fax.

Before requesting support, please experiment a bit to reproduce and isolate the problem. When you do contact support, please be ready to provide the following information:

- The name and version of the operating system you are using.
- The actual error message or state you are experiencing.
- The steps you take to reproduce the problem.

Telephone Support

- Voice: (801) 975-9999, Monday through Friday, 7 a.m. to 6 p.m., Mountain Standard or Daylight Savings Time.
- Fax: (801) 978-1133

E-mail

support_win@franklincovey.com

World Wide Web

http://www.franklincovey.com/customer/tech_support.html

Chapter 3

Discovering What Matters Most
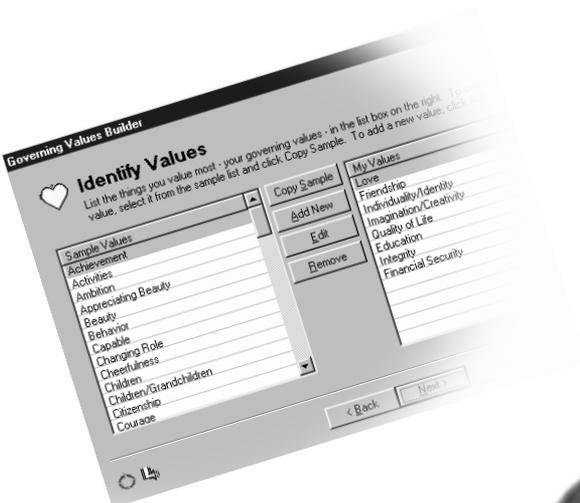
What matters most ... in your life?

Do you spend your time working on the things that are most important to you?

Welcome to What Matters Most™, the Franklin Covey approach to managing your life and your time. The methodology taught in the What Matters Most seminar from Franklin Covey is completely integrated into the Franklin Planner Software. If you are unfamiliar with the this methodology, we strongly urge you to take time to acquaint yourself with the concepts. There are two main avenues for you to learn about the Franklin Covey approach to time and life management.

View a multimedia video from the What Matters Most Wizards

1. Included with this software are several multimedia elements designed to enhance your understanding of the approach, including an 8-minute video overview and several shorter, more focused pieces. All these videos can be viewed from the Multimedia map. To open the Multimedia map, go to the **View** menu, select **What Matters Most**, then select **What Matters Most Introduction**. You can also access the shorter videos from each of the What Matters Most Wizards. The Multimedia map also tracks your progress as you proceed through the What Matters Most process.

2. Also included is a guide called **Discovering What Matters Most**, giving a more in-depth explanation of the Franklin Covey approach.

Additionally, there are references and explanations throughout the online Help files. The information that follows is meant to give you a "jump start" into the What Matters Most approach, and explain how the different Franklin Planner Software modules will help you discover What Matters Most.

The Franklin Covey Approach
to Time and Life Management

There are lots of personal information managers on the market today – so what is it that makes the Franklin Planner so powerful?

The Franklin Planner is so powerful because we are not selling just another time management system. We are showing you how to most effectively manage not just your time, but your life.

When you consider how you are managing your life and your time, ask yourself honestly – are you proactively leading your life forward, or do you feel like you're at the mercy of external forces? Or, in other words, are you spending time on those things of the greatest value to you, or is your life being driven by the less important?

To gain control of your life and time, may we suggest that you need a way to discover where you are, a way to determine where you want to go, and a way to tell whether you are making progress to your destination.

This is done by an elegantly simple three-step process. First, you **Discover**... you identify those things that matter most to you. Then, you incorporate that knowledge as you **Plan** your weekly and daily activities. Then, you **Act** in the moment of choice according to what matters most.

The Discover Phase

Governing Value Wizard

The Discover phase of this process is rather like building a compass to tell you which direction you want to take your life. First, you identify your governing Values, the highest priorities in your life that define your character. With these fundamental values in mind, you then identify who is most important to you, or in other words, your key Roles and relationships. Finally, you consider your unique purpose in life, as you see it, and formulate your Personal Mission. In this way, you Discover what matters most to you, a compass that you can use to effectively Plan and Act in order to gain control over your life and your time.

Role Wizard

Mission Wizard

The Plan Phase

By some simple and effective planning, you begin to bring your daily activities in line with what matters most. This is done by creating a "map" containing long-range goals. These goals are based on what you learned in the Discover phase... in short, matters most to you. Then, you subdivide your goals into easy-to-manage intermediate steps that can be translated into tasks and appointments.

Long-Range Goal Wizard

With long range goals and intermediate steps identified, you then make weekly plans. By planning weekly, and scheduling what matters most first, you create a workable plan that is always linked to what matters most to you.

Weekly Planning Tool

As you plan your week, it is also important to take time to re-create your most important asset–yourself. If you don't take time to re-energize and recharge yourself, you won't be able to do anything else that matters most to you. Stands to reason, doesn't it?

The Franklin Planner software includes a Long Range Goal Wizard and a Weekly Planning Tool to help you establish your long-range goals and make them happen.

The Act Phase

If the Discover phase is your compass, and the Plan phase your map, then it follows that the Act phase is where you take your compass and map in hand and do it.

The Franklin Planner is specifically designed to help you in the Act phase. The first step in the Act phase is to plan your day (yes, this is Act, not Plan). The Franklin Planner software helps you list your daily tasks, prioritize them, and track them as you either complete them, forward them to another date, or discard them.

A key feature of organizing your day is to be realistic. Don't give yourself too much to do. It's not necessary to schedule something for every minute of every day... unless you thrive on that kind of thing. The real purpose of daily planning is simply to set the stage so that you can insure that what matters most is taken care of first.

The Franklin Planner software provides you with a Daily Planning Tool expressly designed to help you organize your day. Not only does it help with the current day, the Daily Planning Tool also allows you to review the previous day, forward incomplete tasks to the future, and give you a picture of how you are doing with making your plan happen.

Daily Planning Tool

Discover, Plan, and Act

The Franklin Covey approach to time and life management is deceptively simple. Through the process of Discover, Plan, and Act, you do more than simply gain insight into what's most important to you ... you also ensure that what matters most *to you* gets into your schedule, *first* ... and you are thus better able to Act on a daily basis according to your what matters most to you.

The underlying power of this method is that your daily task list is no longer a random jumble of items. It reflects your highest priorities and goals.

Do you need another reason to use the Franklin Covey approach? We'll make you a promise:

"As you align your daily activities with what matters most, you will significantly increase your productivity and sense of inner peace."

What Matters Most Tools

What Matters Most Toolbar

♡   Govering Value Wizard

   Role Wizard

   Mission Statement Wizard

   Long-Range Goal Wizard

   Weekly Planning Tool

   Daily Planning Tool

   Weekly Compass (located in the Windows system tray)

What Matters Most Wizards

The What Matters Most Wizards are designed to take you step-by-step through the processes of discovering your Governing Values, your Roles, and your Mission Statement. The Long-Range Goal wizard will assist you in developing goals that are aligned with the things that matter most to you. The Weekly and Daily Planning tools help you plan your week according to what matters most. Finally, the Weekly Compass is a quick reminder of the roles you are working on this week.

The Weekly and Daily Planning Tools are described in Chapter 5. See "The Weekly Planning Tool" on page 59 and "The Daily Planning Tool" on page 63.

Governing Values Wizard

In the Governing Values Wizard, you can ...

- Start building your list of values by using samples provided.
- Add clarifying statements to further define your values.
- Rank your values to make easier the inevitable conflicts between values.

Governing Values Wizard

♡ **Identify Values**

List the things you value most - your governing values - in the list box on the right. To copy a sample value, select it from the sample list and click Copy Sample. To add a new value, click Add New.

Sample Values		My Values
Beauty	Add	Integrity
Behavior	Copy Sample	Duty
Capable		Honor
Changing Role	Edit	Courage
Cheerfulness		Physical Fitness
Children	Delete	Financial Security
Children/Grandchildren		Forgiveness
Citizenship		
Courage		
Creativity		
Education		
Educational Satisfaction		
Enjoyment		

< Back   Next >   Cancel   Help

Roles Wizard

In the Roles Wizard, you can ...

- Start building your list of roles by using samples provided.
- Add key people who define each role.
- Add a tribute statement from each key person to give you an ideal for each role.

Role Wizard

�e **Key Person and Tribute Statement**

A key person is someone you affect when you operate in a particular role. For each key person, enter a tribute statement - something you would want that person to say about you as you perform your role.

My Roles	Key People	
Extended Family	Hydee (manager)	Add
Officer of Marines	Jerry (team leader)	Edit
Sharpen the Saw		Remove
Employee		
Father	Tribute Statement:	
Husband		
Disciple		

Tribute Statement:

Frank had a keen sense of his duty. He used good judgement as he took initiative and took responsibility for his actions. He gave an honest day's work for an honest day's pay, and always sought to improve his ability and the position of the company.

< Back   Finish   Cancel   Help

Mission Statement Wizard

In the Mission Statement Wizard, you can ...

- Build your own mission statement or add additional mission statements (such as a corporate mission statement).
- Answer questions designed to facilitate your thinking about your unique purpose.

Mission Statement Wizard

📝 **Question 5**

What are you motivated by, fascinated with, and passionate about?

To me, the "spirit of exploration" is the greatest single motivator in my life - whether the subject is exploration of unknown parts of this world, exploration of space, exploration of the human soul ... the joy of exploration and discovery impels me to action more than anything else.

< Back   Next >   Cancel   Help

Long Range Goal Wizard

In the Long Range Goal Wizard, you can ...

- Brainstorm the steps involved in pursuing a long-range goal.
- Immediately schedule events that will further your goals.
- Link your goals to the things that matter most to you (your Values, Roles, and Mission).
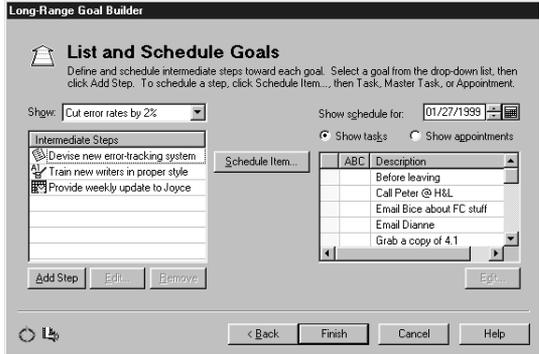
The Weekly Compass

With the Weekly Compass, you can ...

- Quickly scan your weekly roles to see the events you have scheduled that support each role.
- Remind yourself of important activities related to your roles that may not be easily scheduled.

You construct the Weekly Compass with the Weekly Planning Tool. See page 59 for more information.
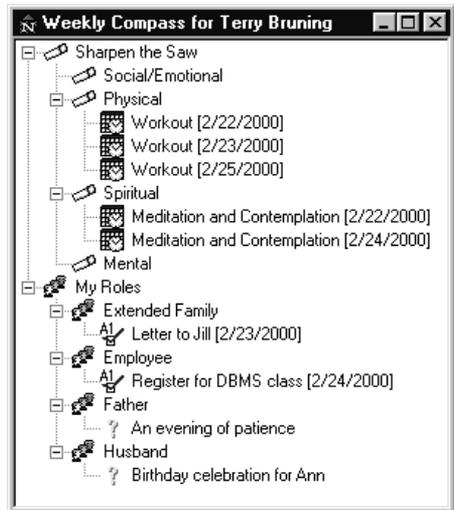
For more information ...

If at any point you are stuck using the What Matters Most Wizards, the online help documentation is always available. Simply hit the **F1** key or click the **Help** button.

Chapter 4

Navigating the Desktop

Basic Navigation

The Main Toolbar

Icon	Description
	Prioritized Daily Task List (Chapter 5)
	Daily Record of Events (Chapter 8)
	Appointment Schedule (Chapter 6)
	Address and Phone Book (Chapter 7)
	Master Task List (Chapter 5)
	Information Manager (Chapter 9)
	Global Search (Chapter 4)

The What Matters Most Toolbar
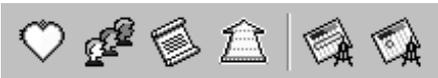
Icon	Description	Icon	Description
	Govering Value Wizard		Long-Range Goal Wizard
	Role Wizard		Weekly Planning Tool
	Mission Statement Wizard		Daily Planning Tool

Refer to Chapter 3 for a description of these wizards and tools.

The Date Navigation Bar

You can navigate to a date in the past or the future simply by clicking on the Date Navigation bar. This bar is found in the Prioritized Daily Task List, the Appointment Schedule, and the Daily Record of Events.

The Date Navigation bar has three components: The Page Date, the Date Controls, and the Go To Date Calendar.

Page Date

The Page Date displays the active date of the modules (+ or - the number of days from the current date). Double click on the Page Date area to instantly reset the modules to the current date.

Date Controls

One Month back   One Month forward

One Week back   One Week forward

One Day back   One Day 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. The module window will change to that date.

Setting Preferences

Customizing your Franklin Planner will help you get the most out of the software. Within the Preferences dialog box, you can customize items such as colors, phone number styles, and views.

1. From the Options menu, select Preferences. The Preferences dialog box appears.

2. Select the appropriate module tab (Application Preferences, Prioritized Daily Task List, Appointment Schedule, Address and Phone, or Information Manager.)

3. Make any changes and click OK.

Following are some of the preferences you can change for each module. The Preference controls are much more detailed than is explained in this text. Go to the Online Help documentation for more specific information (press F1 at any time).

In Application Preferences, you can ...
- Add additional users to the Franklin Planner
- Synchronize dates between modules
- Have a quote displayed every time you start the Franklin Planner
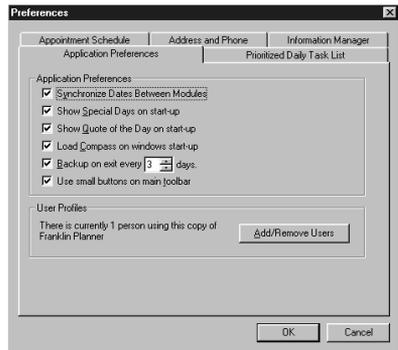
In Prioritized Daily Task List Preferences, you can ...
- Change the types of tasks that are displayed
- Change the color of normal, repeat, and redo tasks
- Establish task forwarding guidelines
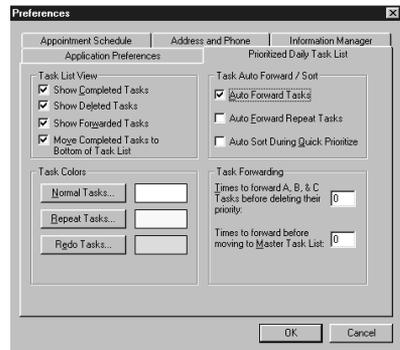
In Appointment Schedule Preferences, you can ...

- Set the specific hours of your work day
- Change the color of weekends, off hours, and work hours
- Change the range of hours that are displayed
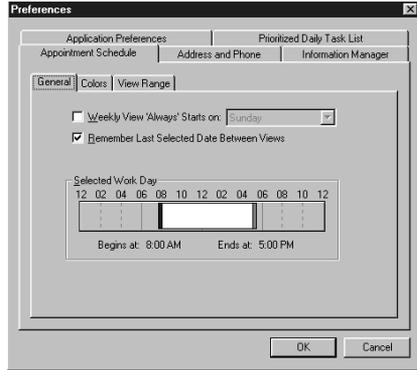
In the Address and Phone Preferences, you can ...

- Establish settings for the Speed Dial feature
- Change the automatic phone number formatting
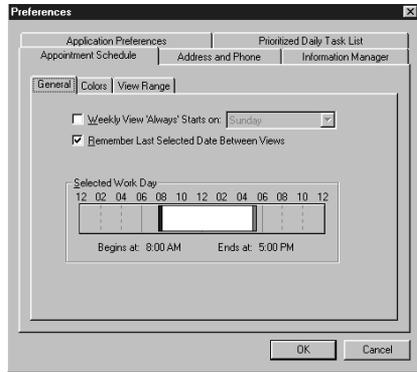
In the Information Manager Preferences, you can ...

- Decide which snap-ins to have in the Information Manager, allowing you to customize Information Manager to your specific needs
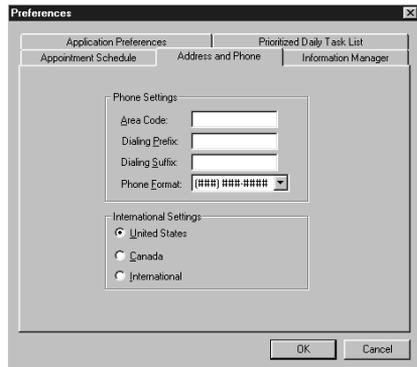
Categories, Searches, and Navigating Between Dates

Creating and Editing Categories

Categories allow you to fine-tune your information for quick reference and the ability to assign a color to each category allows you to visually track tasks and appointments.

Use the Categories dialog box to create categories that are accessible from any module in your Franklin Planner software.

1. From the Edit menu, select Categories. The Categories dialog box appears.

Check the **Show by module** radio button. In this view, select a module from the Modules field and the Categories field will display the categories that are active in that module. For instance, select the Address and Phone module. The Categories field displays checks in front of "Business," "Friend," and "Personal," indicating that these three categories are available in the Address and Phone module.
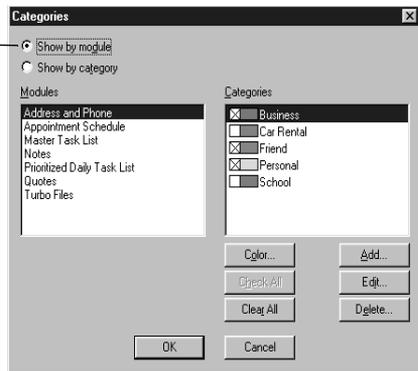
Check the **Show by category** radio button. In this view, select a category from the Categories field and the Modules field will display all the modules in which the category is active. For instance, select Business from the Categories field. The Modules field displays checks in front of the Address and Phone, Appointment Schedule, and Notes modules, indicating that the category "Business" is available in those three modules.
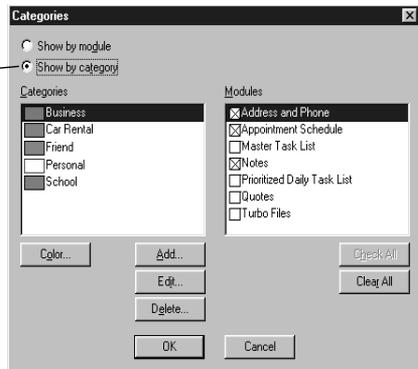
2. To create a new category, click Add (regardless of which radio button you have checked.) The Enter Category

Name window appears. Enter the category name. Click OK. Your new category appears in the category list.

3. To activate a category (in the Show by category view), select the category and check the boxes in front of the modules in which you want to make the category active. To make the category available in all modules, click Check All.

4. To activate a category (in the Show by module view), select the category and check the box in front of it. This will make the category active only in the module selected in the left field. To make the category active another module, select a different module and check the box in front of the category. Clicking Check All will make all categories active for the selected module.

5. To add a color to your category, select the category, then click Color. From the color palette, select one of the basic colors or define a new custom color. For more information about choosing and defining colors, see the documentation that came with your operating system. After you have picked a color, click OK.

Conducting a Global Search

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 the Address and Phone book, the Appointment Schedule, the Daily Record of Events, the Master Task List, the Prioritized Daily Task List, and your Special Days list.

1. Click the Global Search button located on the Main Toolbar. The Global Search window appears.

Enter the word or group of words you wish to locate. Click **Exact Match** to search for the word(s) exactly as it appears in the field. When searching for multiple words, click **AND** to search only for instances when all the words occur. Click **OR** to search for instances when at least one word occurs.

Enter the dates to begin and end your search.

The search results will be displayed here. Double-click on the entry you would like to view in the Module and Description field. You will be taken directly to the area where the information is stored. The Additional Information field displays task status, task priority, description, category, date entered, address and phone number, etc.

Global Search

Search for:
◉ Exact Match
○ AND   ○ OR

Date Range
From:
01/06/1999
To:
02/06/1999

Search in:
Address and Phone
Appointment Schedule
Daily Record of Events
Information Manager
Master Task List
Prioritized Daily Task Lis
Special Days

Select All

Search
Go To
Reset
Close

Module: Description

Additional Information

Select the modules to search. Click Select All to search all the Franklin Planner modules.

Click here to clear current search criteria.

2. Establish your search criteria and click Search.

3. Double-click the information you wish to view. You will be taken directly to the module where the information is stored.

Using the Floating Calendar

The Floating Calendar is a one-month calendar containing date navigation controls and quick access to several frequently used features in the Franklin Planner. To open the Calendar select Calendar from the View menu.

Calendar and Tools

◀◀◀   Feb, 2000   ▶▶▶

S	M	T	W	T	F	S
30	31	01	02	03	04	05
06	07	08	09	10	11	12
13	14	**15**	16	17	18	19
20	21	22	23	24	25	26
27	28	29	01	02	03	04
05	06	07	08	09	10	11

The **Print** button opens the print dialog box for the module that is currently active.

The **Speed Dial** button can be used if you have a modem. If you have a modem connected, you can click this button to bring up the Speed Dial dialog box. See *"Using the Franklin Planner Dialing Function" in the Online Help for more information.*

The G**lobal Search** button opens the Global Search dialog box. See page 41.

The **Goto** button opens the Goto Calendar and allows you to navigate to a specific month and year.

The **Special Days** button opens the Special Days dialog box allowing you to designate recurring events such as holidays and birthdays or one-time events such as vacations and business trips. See page 73.

The **Timers** button opens the Timers dialog box and allows you to track the length of a phone call or task. See *"Using Timers" in the Online Help for more information.*

For more information ...

The Online Help documentation gives detailed information about setting your preferences and categories. To access the Online Help, select **Contents and Index** from the Help menu or press **F1** at any time.

Chapter 5

Prioritize Your Tasks
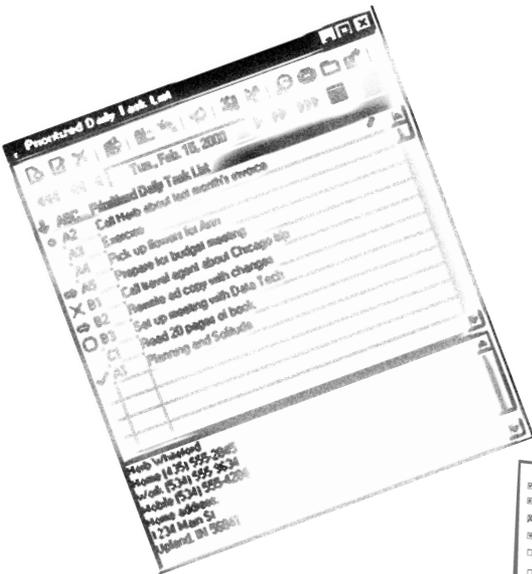
The Prioritized Daily Task List

By incorporating the Franklin Covey time management principles, the Prioritized Daily Task List helps you focus your energy on *what matters most.* The Task List works hand-in-hand with the Weekly and Daily Planning tools, 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:

- Prioritize your daily list of tasks according to what matters most to you
- Forward (or reschedule) tasks to a future date
- Create redo and repeat tasks for tasks you do often
- Link a task to a contact in the Address and Phone book
- Filter your task list to display only certain tasks

Prioritizing is the process of organizing your tasks based on what is most important to you. Assign A, B or C priorities to each of your tasks, based on their importance.

A – Vital (Tasks that must be completed today)

B – Important (Tasks that should be completed today)

C – Optional (Tasks that could be completed today)

Once 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).

Prioritizing tasks helps you effectively handle interruptions

For example, suppose you are working on an A1 task when you are interrupted by a coworker who wants to discuss a project that you consider a B priority. Don't confuse urgency with importance – you're A1 task is still most important to you, so schedule some time with your coworker later in the day to work on that B project, then get back to work on your A1 task.

The Prioritized Daily Task List main view

Displays the action code you assigned the task to indicate its status.

Displays the priority and rank that you assigned to the task.

Displays the task description. You can edit the description from this view.

Displays any task notes that you have added to the task. You can edit the notes from this view.

		Prioritized Daily Task List
↓	ABC	Prioritized Daily Task List
○	A2	Call Herb about last month's invoice
	A3	Exercise
	A4	Pick up flowers for Ann
⇨	A5	Prepare for budget meeting
✕	B1	Call travel agent about Chicago trip
⇨	B2	Rewrite ad copy with changes
⊘	B3	Set up meeting with Data Tech
	C1	Read 20 pages of book
✓	A1	Planning and Solitude

Tue., Feb. 15, 2000

Herb Whiteford
Home (435) 555-2845
Work (534) 555-9634
Mobile (534) 555-4284
Home address:
1234 Main St
Upland, IN 56841

Prioritized Daily Task List Action Codes

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

☐	Not Complete	⇨✓	Planned Forward Completed
✓	Task Complete	○	In Process
⇨	Planned Forward	⊘	Delegated and Completed
✕	Task Deleted	○✓	In Process and Completed
◯	Delegated Task		

The Prioritized Daily Task List toolbar

Add a new task	Get incomplete tasks
Edit a task	Quick prioritize
Delete a task	Time/date stamp
Assign a filter to your task list	Link a contact to a task
Prioritize your entire task list	Attach a file to a task
Create/edit repeat tasks	Spell check
Assign action codes to a group of tasks	Move a task

Creating a New Task

1. Open the Prioritized Daily Task List.

2. Click on the New Task button

or

Select Add Task from the Edit menu.

Clicking on a blank task line is the quickest way to add a task. You can also add a note to the task simply by entering the text in the Notes section while the task is selected.

3. If you click New Task or select Add Task, the Task Properties dialog box will appear.

4. Enter your task information in the Properties tab of the Task Properties dialog box.

Enter a description of the task. This can be edited as needed. A task description can have a maximum of 255 characters.

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

Enter the priority code and the rank of the task (A1, A2, B1, B2, etc.) This can be changed as needed.

Choose a category for your task. The drop down menu lists your categories along with the colors you have assigned to each field.

Select the Action Code from the drop-down menu that best describes the status of the task.

Enter the name of the person to whom you delegated a task. In order to use this feature, you must have the Delegated action code or the Delegated and Completed action code selected in the Task Code field.

Task Properties

Properties | Notes | Repeat | Statistics

Description:

Priority & Rank: Date: 12/21/1998

Category: {None}

Task Code: None

Delegated To:

Contact Links...   Attachments...

OK   Cancel   Help

Link contacts from your Address and Phone list to a specific task.

Attach files, objects, or images to a specific task.

5. Click the Notes tab and enter notes that will provide further description. Any editing done in this tab will be saved and appear in the notes field of the task.

6. Click the Repeat tab. You can enable the repeat feature to easily make any task a repeat task. Descriptions of the features are below.

Check this box to enable the re-peat task dialog box. If you no longer want the task to repeat, uncheck the box and the guide-lines you have established will no longer apply to the task.

Enter a specific date or day of the month for a task to repeat. Enter a "0" in the Month field to repeat a task on the same day every month.

This control reads like a sentence. "This task will repeat once every _____." For instance, enter a "2" in the Every field, and click the Weeks button, and the task will repeat once every two weeks be-ginning on the date entered in the Starting Date field.

Task Properties

Properties | Notes | Repeat | Statistics

☑ Repeat this task

Starting Date: 12/14/1998
Ending Date: 12/14/2048

Day: 0
Month: 0

Every: 0

○ Days
○ Weeks
○ Months

Weekdays
☑ Sunday
☑ Monday
☑ Tuesday
☑ Wednesday
☑ Thursday
☑ Friday
☑ Saturday

Weeks
☑ 1st
☑ 2nd
☑ 3rd
☑ 4th
☑ 5th
☑ Last

OK | Cancel | Help

This control allows you to specify which days of the week on which the task will appear. By default, every day is checked.

This control is used with the Weekdays field to further de-fine the repeat task. After you have selected a Week-day(s), you can then decide which weeks of the month you want to view the task

How to set up some common repeat tasks:

■ Pay rent on the 3rd of every month.

Enter a "3" in the Day field and a "0" in the Month field. The task will appear on the 3rd of each month.

■ Read 10 pages of a book each day.

If they're not already checked, check each of the days in the Weekdays field and each of the boxes in the Weeks field. The task will appear on your task list every day.

■ Update a report once every two weeks.

Enter a "2" in the Every field and click the Weeks button. Set the Starting Date to the day of the week you want the task to begin to appear (if not the current day).

If you have forwarded a daily task to another date, the new date will be displayed.

This will track how many times a particular task has been forwarded.

If you designated a specific person in the Properties tab to whom you delegated this task, the name will appear in this field.

Task Properties

Properties | Notes | Repeat | Statistics

Forwarded To:
Times Forwarded:
Delegated From/To: Bob Smith
Tracking Information:
Estimated Time: 15
Actual Time: 20
(Minutes)

OK | Cancel | Help
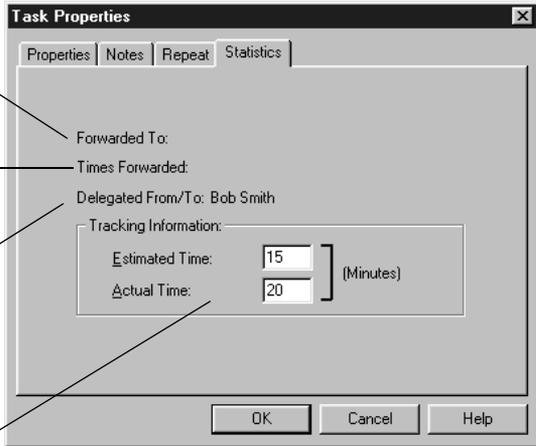
This area is useful for keeping a close account of your time. Before you start a task, enter the amount of time you think it will take you to complete the task in the Estimated Time field. After completing the task enter the actual amount time it took to complete the task in the Actual Time field. To accurately track your time, use the Timers. Select Timers from the File menu to open the Timers dialog box.

7. Click the Statistics tab to view your task statistics. From this tab you will view tracking information about your task.

8. After completing all the pertinent information concerning your task, click OK. The task will appear on your Prioritized Daily Task List.

Editing a Task

1. Open the Prioritized Daily Task List.

2. Select the task you wish to edit and click the Edit Task icon.

3. Make changes as needed (click either the Properties, Notes, Repeat, or Statistics tab). See above for more information.

4. Click OK to exit the Task Properties dialog box.

Creating a Repeat Task

Another way to create a repeat task is to use the Repeat Task dialog box. The controls remain the same as shown above, but you are

not able to track the task statistics or disable the repeat feature (you must simply delete the task if you no longer want it to repeat.)

1. Click the Repeat Task button in the Prioritized Daily Task List Toolbar or select Repeat Tasks from the Options menu. The Repeat Task dialog box appears.

2. Click Add. The Task Properties dialog box appears.

3. Set up the guidelines for your repeat task (click either the Properties , Notes , or Repeat tab).

The controls in the Repeat Task properties box work the same as the controls in the normal task properties dialog box. However, since you are already creating a repeat task, the ability to enable or disable the repeat feature is not available.

4. Click OK to exit the Task Properties dialog box. Then click Close to exit the Repeat Task dialog box.

Creating a Redo Task

A Redo task is rescheduled each time you complete it. For example, you could enter the task "Get a haircut" and set it to recur every 30 days. When you mark the task complete, it will be rescheduled 30 days from the date you mark it complete.

1. Select 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.

Moving a Task to a New Date

1. Select the task you want to move and choose Move Task from the Edit menu or right-click the task and select Move Task from the drop-down menu. The Move Task window appears.

You can also move daily tasks from the Prioritized Daily Task List to the Master Task List by dragging and dropping the tasks.

Select the date to which you want to move the task.

The Tasks on Date and Appointments on Date windows display your tasks and appointments already scheduled for the new date.

Move Task

Date
◀◀◀ Jan, 1999 ▶▶▶

S	M	T	W	T	F	S
27	28	29	30	31	01	02
03	04	05	06	07	08	09
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	01	02	03	04	05	06

Master Task List

☐ Move to Master Task List

Master Task List Category
<None>

Task Description
Call Herb about last month's in

Tasks On Date
Call Herb about last month's in
Call Travel agent about Chicag
Pick up flowers for Anne
Read 20 pages of book
Read Real Estate magazine to

Appointments On Date
Exercise - 5:15 PM - 1:15
Lunch with Chuck and Linda -

OK   Cancel

By checking the Move to Master Task List box, you can move the task to the Master Task List rather than forwarding the task to another day. You can also use the Master Task List Category pull-down menu to select a category for the task.

2. Click OK. The task will be removed from the original date and appear on the new date.

Another way to move a task is to select the task and click the Edit Task button. Change the dates in the date field of the Task Properties box and click OK. The task will appear on the new date.

Defining Categories for the Prioritized Daily Task List

One of the new features in the Franklin Planner Software is the ability to set global categories and share them with any or all of your Franklin Planner Software modules. Within the Categories window you can also set colors for each category. The global categories will allow you to easier and more efficient use of categories.

Printing Your Prioritized Daily Task List

1. Open the Prioritized Daily Task List.

2. Select Print Tasks, Appointments, and Notes from the File menu. The Print Tasks, Appointments, and Notes window appears.

3. The top half of the print dialog is fairly consistent for all the Franklin Planner modules.

4. Click the Options button to view more printing options.

Use this control to set the margins of your printing area. Unless you are familiar with this feature, leave the values at 0.000. If the printout is not aligned, print a test page, then adjust the values as needed and print another test page until the page aligns properly.

Choose which pages of the daily view to print. This emulates the layout of regular planner pages, so the left pages include your task list and appointments. The right pages include your Daily Record of Events and Task/Appointment notes.

Select the starting and ending dates of the information you want to print. Select the same date for each field to print just one day.

This displays your destination printer. If this is incorrect, click Setup and change you printer settings.

Select the filler style (Seasons, Original, etc.) to which you want to print. This will vary by the binder size chosen above.

This control allows you to check which items to include in the printing. Check a box to include the item, or uncheck it to exclude it from this printing.

Select your binder page size from the drop-down menu. You can also print to plain 8.5 x 11 paper.

View the page(s) you are going to print so you can verify that what you want to print is what will actually print.

Make adjustments to the printer setup, such as the printer selection, paper size, or paper source. Make any adjustments, then click OK.

Print Tasks, Appointments and Notes

Paper
Binder: Compact (4 1/4" x 6 3/4")
Left Margin: 0.000
Top Margin: 0.000
Print: Every

Date Range
From: 02/21/2000   To: 02/21/2000

Page Options
Printer: King Kong PS   ☐ Print In Color
Filler: Original

Items to Print
☐ Task & Appointment Notes
☑ Tasks
☐ Appointments
☐ Daily Records of Events

Filter
<None>

Appointments
Range: (Default Range)
Edit Appointment Range...

Print
Preview
Setup...
Cancel
<< Options
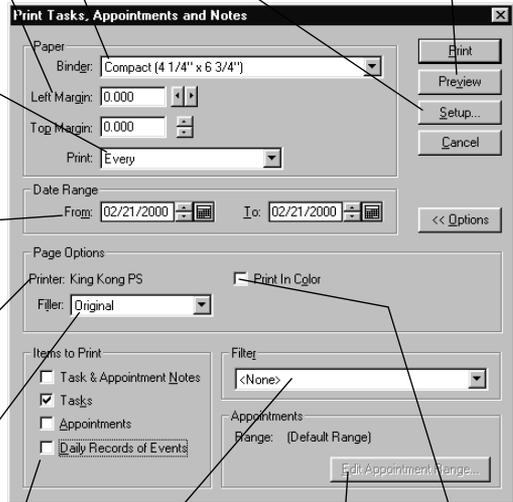
Use the Filter drop-down menu to choose and apply one of your Prioritized Daily Task List Filters before you print to limit your data.

To print in color (i.e. category colors) check the Print in Color box.

The Edit Appointment button allows you to customize how your appointments are printed. However, it will not affect how your tasks are printed. For information on this feature, see "Printing Your Prioritized Daily Task List" on page 53.

5. After you set all of the controls, click Print.

For more information ...

The online help system included with your Franklin Planner Software provides documentation on all of the other features of the Prioritized Daily Task List, including:

- Attaching files and graphics to tasks
- Linking contact information to tasks
- Setting Prioritized Daily Task List preferences
- Using the Quick Prioritize feature
- Establishing and using filters
- HTML Auto-Publish

and more. . .

To access the online help, select **Contents and Index** from the **Help** menu, or press **F1** at any point.

The Master Task List

Tasks that are not immediately urgent but may become a priority in the future should be entered on the Master Task List. For example, perhaps you want to organize a family gathering 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 move the task to your Prioritized Daily Task List when it becomes a priority.

Creating a New Master Task

1. Open the Master Task List module.

2. Click the New Task button

or

Select Add Task from the Edit menu.

The Task Properties dialog box will appear.

3. There are two tabs in the Task Properties box (Properties & Notes). Enter your Master Task information. See below for a description of each field.

Enter a description of the master task. This can be edited as needed. A task description can have a maximum of 256 characters.

Enter a priority (A, B or C) for the task. Master Tasks are not ranked. This can be changed as needed.

Choose a category for the task. The drop-down menu lists your categories along with the colors you have assigned to each field.

Link contacts from your Address and Phone list to a specific task.

Attach files, objects, or images to a specific task.

Keeps track of the number of days the item has been on your Master Task List.

4. Click the Notes tab and enter any notes that further describe this Master Task.

5. Click OK.

Moving a Master Task to the Prioritized Daily Task List

Since the purpose of the Master Task List is to be a waiting area for tasks that are not immediately important, you will want to check the Master Task List on a regular basis to make sure you do not forget any tasks. This is one of the steps of Weekly Planning Tool, which is explained on page 59. When a task becomes a priority, you can move it to the Prioritized Daily Task List so that it becomes part of your daily planning.

1. Open the Master Task List.

2. Select the Master Task that you want to move to the Prioritized Daily Task List.

3. Click the Move Task button. The Move To dialog box appears.

Using the date controls, pick the date on which you want the task to appear on your Prioritized Daily Task List.

These two fields display previously scheduled tasks and appointments for the date selected.

Move To

Move To

◀◀◀ Feb, 2000 ▶▶▶

S	M	T	W	T	F	S
30	31	01	02	03	04	05
06	07	08	09	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	01	02	03	04
05	06	07	08	09	10	11

Tasks on 02/22/2000

Family - plan Disneyland trip
January report to Martha
Submit remaining awards
Work on Indexing guide

Appointments on 02/22/2000

Exercise - 5:15 PM - 1:15
Lunch with Chuck and Linda - 11:

[OK] [Cancel]

4. Click OK. The task will appear on that day's Prioritized Daily Task List.

You can also move tasks back and forth from the Master Task List and the Prioritized Daily Task List by dragging and dropping tasks from one list to the other.

Printing 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 dialog box appears.

3. Make any changes to the setup as detailed below.

4. Click Print.

You can choose to print all pages of your Master Tasks, or just even pages, or just odd pages.

Select your binder page size from the drop-down menu. You can also print to plain 8 1/2 x 11

If you want, you can view the page(s) you are going to print before you print them.

Use this control to set the margins of your printing area. Unless you are familiar with setting margins in Franklin Planner, leave the values at their preset value. If the printout is not aligned properly, print a test page, then adjust the values as needed and print another test page until the page aligns the way you

Select the category of Master Tasks that you want to print. The default is <All> tasks.
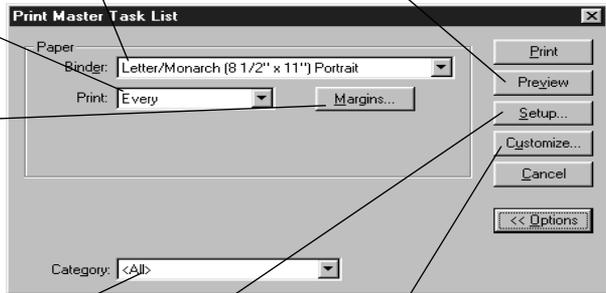
Make adjustments to the printer setup if needed, such as the printer selection, paper size, or paper source. Make any adjustments, then click OK.

With Customize, you can choose width, height, and header and footer options for the printed area of your Master Task printout.

Print Master Task List

Paper
Binder: Letter/Monarch (8 1/2'' x 11'') Portrait
Print: Every   Margins...

Category: <All>

Print
Preview
Setup...
Customize...
Cancel
<< Options

The Weekly Planning Tool

The Weekly Planning Tool is new to the Franklin Planner Software. It is an important part of the Franklin Covey time management process. How to discover what matters most and the significance of weekly planning are outlined in a supplemental booklet included with this software as well as in the online Help.

Using the Weekly Planning Tool

1. Open the Weekly Planning Tool. The icon is found on the What Matters Most toolbar. The Weekly Planning introduction screen appears.

There are five steps in the Weekly Planning process: Review What Matters Most, Evaluate Last Week, Review Master Task List, Select Weekly Compass Roles, and Schedule Weekly Compass Events. The Weekly Planning Tool will take you through each step.

2. Click the Next button until you reach the Review What Matters Most screen. Focusing on the things you consider most important is vital in planning your week.
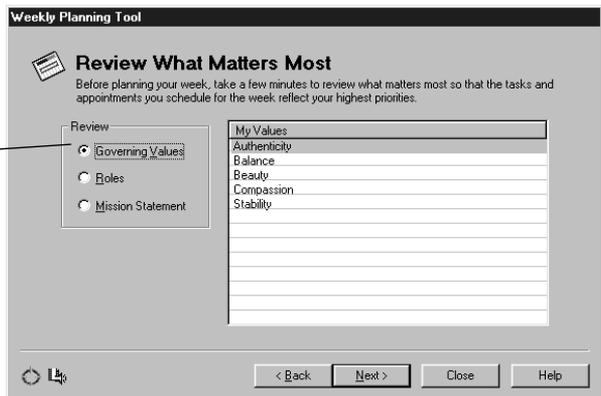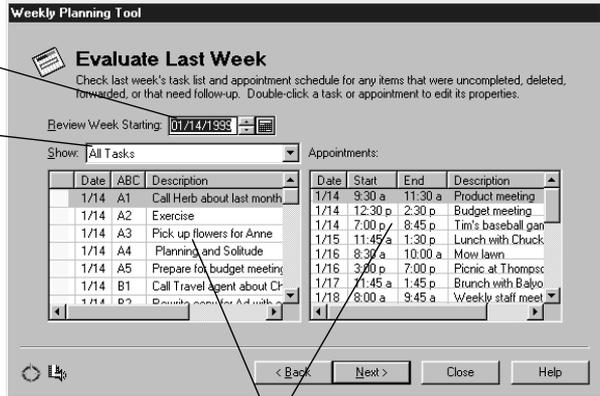
Click each one of the radio buttons to view your What Matters Most information in the field on the right. You cannot make changes to your information from here, as this screen is for review purposes only.

3. The next screen is the Evaluate Last Week screen. Use this screen to see how well you accomplished the most important items and remind yourself of any loose ends.

Choose the week that you want to evaluate.

From the drop-down menu, select to view All Tasks, Complete Tasks, Deleted Tasks, or Forwarded Tasks. These task types are based on the action codes you assigned to the tasks during the week. The Appointments field will display all appointments from the week you selected.

Weekly Planning Tool

Evaluate Last Week

Check last week's task list and appointment schedule for any items that were uncompleted, deleted, forwarded, or that need follow-up. Double-click a task or appointment to edit its properties.

Review Week Starting: 01/14/1999

Show: All Tasks

	Date	ABC	Description
	1/14	A1	Call Herb about last month
	1/14	A2	Exercise
	1/14	A3	Pick up flowers for Anne
	1/14	A4	Planning and Solitude
	1/14	A5	Prepare for budget meeting
	1/14	B1	Call Travel agent about Ch
	1/14	B2	Rewrite computer Ad with a

Appointments:

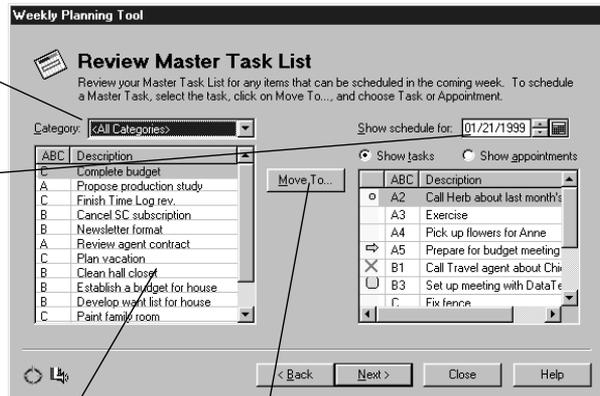| Date	Start	End	Description
1/14	9:30 a	11:30 a	Product meeting
1/14	12:30 p	2:30 p	Budget meeting
1/14	7:00 p	8:45 p	Tim's baseball gam
1/15	11:45 a	1:30 p	Lunch with Chuck
1/16	8:30 a	10:00 a	Mow lawn
1/16	3:00 p	7:00 p	Picnic at Thompso
1/17	1:45 a	1:45 p	Brunch with Balyo
1/18	8:00 a	9:45 a	Weekly staff meet

< Back   Next >   Close   Help

As you review your tasks and appointments, you may find that a task or appointment requires additional attention. Double-click on the task or appointment and the Task Properties or Appointment Properties dialog box will appear. Make changes as needed.

4.   The next screen is the Review Master Task List screen. Since the Master Task List is a "waiting area" for tasks, a regular check of your Master Tasks will keep you on track when those tasks do become important.

Select a category from the Category drop-down menu or view all your Master Tasks.

Use the Show schedule for date field to display your scheduled tasks and appointments for a specific day. This allows you to quickly view a specific day before scheduling a Master Task. Toggle between your scheduled tasks and appointments by clicking the Show Tasks or Show Appointments buttons.

Weekly Planning Tool

Review Master Task List

Review your Master Task List for any items that can be scheduled in the coming week. To schedule a Master Task, select the task, click on Move To..., and choose Task or Appointment.

Category: <All Categories>

Show schedule for: 01/21/1999

ABC	Description
C	Complete budget
A	Propose production study
C	Finish Time Log rev.
B	Cancel SC subscription
B	Newsletter format
A	Review agent contract
C	Plan vacation
B	Clean hall closet
B	Establish a budget for house
B	Develop want list for house
C	Paint family room

Move To...

( ) Show tasks   ( ) Show appointments

	ABC	Description
○	A2	Call Herb about last month's
	A3	Exercise
	A4	Pick up flowers for Anne
⇨	A5	Prepare for budget meeting
✕	B1	Call Travel agent about Chi
☐	B3	Set up meeting with DataTe
	C	Fix fence

< Back   Next >   Close   Help

Displays your current Master Task List.

To schedule a Master Task List item on your Prioritized Daily Task List or Appointment Schedule, select the tasks, click Move To... and select Task or Appointment from the drop-down menu that appears.

5. The next screen is the Select Weekly Compass Roles screen. Roles not only define who you are but also how you spend your time. Decide which of your roles you want to focus on this week.

The My Roles list displays roles you created in the Roles Wizard or the What Matters Most section of the Information Manager. If you created a Weekly Compass the previous week, only the roles you did not select will be displayed.
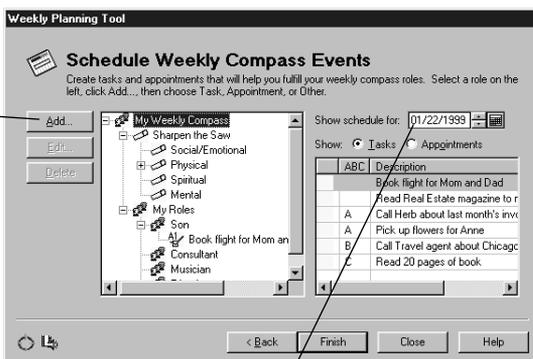

To add a role to your Weekly Compass, select the role from the My Roles list and click Add Role. To remove a role from the Wekely compass, select the role in the right-hand window and click Remove Role.
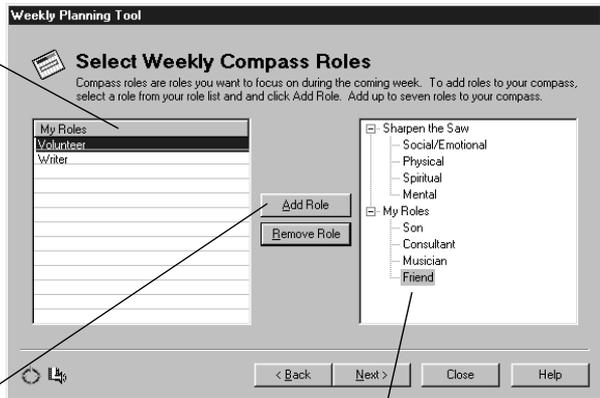
The right-hand field displays the four aspects of Sharpen the Saw as well as other selected roles. Review your roles in the left-hand window and select the ones you will add to your Weekly Compass.

6. The final screen is the Schedule Weekly Compass Events screen. Each one of the roles you just selected should have an event associated with it.

To add an event to a role, select the role, click Add, and select either Appointment, Task or Other from the drop-down menu. If you choose Appointment or Task, the corresponding Properties dialog box will appear. Choose Other if you want to add an unscheduled event to a role. This might be something like "Spend more time with Tim." It is something not tied to a specific time or date but is important to that role. The unscheduled event will appear only on your Weekly Compass. To change or remove a role, select the role and click Edit or Delete.

Weekly Planning Tool

Schedule Weekly Compass Events

Create tasks and appointments that will help you fulfill your weekly compass roles. Select a role on the left, click Add..., then choose Task, Appointment, or Other.

Add...
Edit...
Delete...

- My Weekly Compass
  - Sharpen the Saw
    - Social/Emotional
    - Physical
    - Spiritual
    - Mental
  - My Roles
    - Son
      - Book flight for Mom an
    - Consultant
    - Musician

Show schedule for: 01/22/1999

Show: ○ Tasks ○ Appointments

ABC	Description
	Book flight for Mom and Dad
	Read Real Estate magazine to r
A	Call Herb about last month's invo
A	Pick up flowers for Anne
B	Call Travel agent about Chicago
C	Read 20 pages of book

< Back   Finish   Close   Help

Use the Show schedule for date field to display your scheduled tasks and appointments for a specific day. This allows you to quickly view a specific day before scheduling a Master Task List item or an item corresponding to your Weekly Compass. Toggle between your tasks and appointments by clicking the Show Tasks or Show Appointments radio buttons.

7. You can click the Back button to return to any of the previous screens. Any changes you make will be reflected in the following screens.

8. When you are finished creating your Weekly Compass, click Finish.

You can view the roles-related goals you created throughout the week in the What Matters Most portion of the Information Manager, or by clicking on the Weekly Compass icon in the Windows system tray.

The Daily Planning Tool

The heart of the Franklin Covey methodology is Daily Planning. At the beginning of each day or at the end of the previous day, it is important to give yourself an strategy of how you intend to spend your day. Of course, these plans can change, but without a daily strategy, you could easily spend the entire day dealing with "urgent" or unimportant matters without accomplishing what really matters most to you.

Using the Daily Planning Tool

1. Open the Daily Planning Tool. The icon is found on the What Matters Most toolbar. The Daily Planning introduction screen appears.

There are four steps in the Daily Planning process: Review Yesterday, List Today's Events Realistically, Assign Value to Your Tasks, and Assign Order to Your Tasks.

2. Click the Next button until you reach the Review Yesterday screen. This is important because helps you gauge how you spent the previous day. You may find that you planned appropriately, or that you may need to plan differently.

Select the day you want to evaluate.

From the Show drop-down menu, you can choose to view All Tasks, Complete Tasks, Deleted Tasks, Forwarded Tasks, and Incomplete Tasks. These categories are based on the action codes you assigned to the tasks during the week.
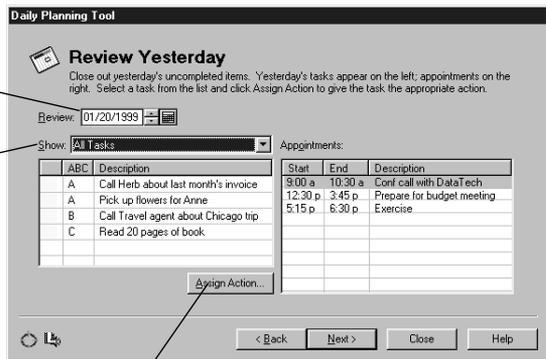
As you review, you may find that the status of one or more of your tasks has changed and requires a different action code. To change the action code, select the task, click Assign Action, and choose the proper code from the drop-down menu that appears.

3. Click Next. The List Today's Events Realistically screen appears. As you think about your day, you probably already have a few items to add to you Prioritized Daily Task List or Appointment Schedule. Remember, be realistic about your time.

This section displays all the tasks on the current day's Prioritized Daily Task List, including any you may have just forwarded from the Review Yesterday screen.
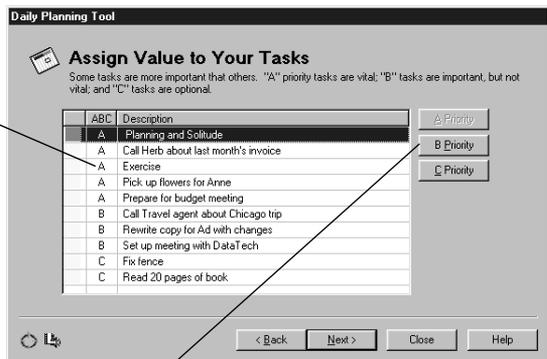
To add a task or appointment, click the Add... button and select Task or Appointment from the drop-down menu. The corresponding Properties dialog box appears. To edit a current task or appointment in your list, select the event, choose Edit, and choose Task or Appointment. You can also double-click the task or appointment you want to edit.

Daily Planning Tool

List Today's Events Realistically
Add tasks or appointments to your list by clicking Add, then choosing Task or Appointment.

Tasks:

	ABC	Description
✓	A1	Planning and Solitude
○	A2	Call Herb about last month's i
	A3	Exercise
	A4	Pick up flowers for Anne
⇒	A5	Prepare for budget meeting
✗	B1	Call Travel agent about Chica
⇔	B2	Rewrite copy for Ad with char
⊔	B3	Set up meeting with DataTec
	C	Fix fence

Appointments:

Start	End	Description
12:30 p	2:30 p	Budget meeting
9:30 a	11:30 a	Product meeting
5:15 p	6:30 p	Exercise
7:00 p	8:45 p	Tim's baseball game

Add...
Edit...
Delete

< Back   Next >   Close   Help

The Appointments list displays the appointments scheduled for today. As you schedule new appointments, make sure you plan realistically and don't overload your schedule.

4. Click Next. The Assign Priority to Your Tasks screen appears. The next step is to Prioritize your daily tasks using the A,B,C priority codes. See page 47 for further explanation of the codes.

This section displays the tasks you just reviewed and created in the previous screens. The list will also display tasks that you forwarded to this day. These tasks may already have priority codes. You can keep those codes, or assign new codes.

Daily Planning Tool

Assign Value to Your Tasks
Some tasks are more important than others. "A" priority tasks are vital; "B" tasks are important, but not vital; and "C" tasks are optional.

ABC	Description
A	Planning and Solitude
A	Call Herb about last month's invoice
A	Exercise
A	Pick up flowers for Anne
A	Prepare for budget meeting
B	Call Travel agent about Chicago trip
B	Rewrite copy for Ad with changes
B	Set up meeting with DataTech
C	Fix fence
C	Read 20 pages of book

A Priority
B Priority
C Priority

< Back   Next >   Close   Help

Select a task from the list, and then choose A Priority, B Priority, or C Priority.

5. Click Next. The Assign Order to Your Tasks screen appears. The final step is to rank your tasks within their priority codes. This should help you determine which of your tasks is the most important and focus you on that task.

You can choose to view all your tasks, or view them according to their priority codes. Select All Task Properties, A Priority Tasks, B Priority Tasks, or C Priority Tasks.
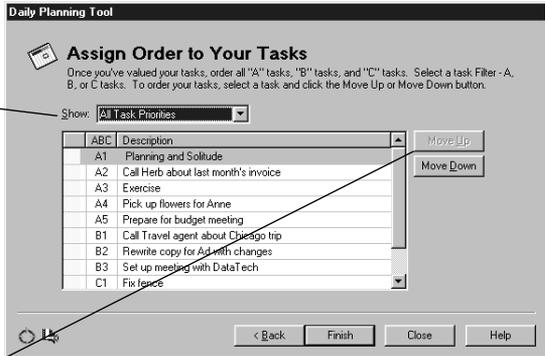
Your tasks are listed in random order. To change the order of your tasks, select a task and choose Move Up or Move Down to place the task in the desired location. The tasks will be automatically renumbered. Continue this process until you have ordered all your tasks just the way you want them.

For more information ...

There are several resources that provide you with additional help and information concerning the Weekly and Daily Planning Tools. The supplemental book provided with this software provides a detailed look at the different stages in the What Matters Most process. There are also multimedia pieces included on your installation CD that visually paint a picture of the process. Finally, the online Help included with the software has detailed help on the Weekly and Daily Planning Tools. You can access the online Help by clicking the **Help** button in each of the screens or by hitting **F1** at any time.

Chapter 6

Organize Your Appointments

Appointment Schedule Basics

The Appointment Schedule is a powerful and easy-to-use organizing tool that helps you manage your time efficiently.

Besides just scheduling appointments, the Franklin Planner Software Appointment Schedule lets you attach notes, files, and contacts to appointments; set reminder alarms; and create repeat appointments.

The Appointment Schedule allows you to:

- Create regular appointments and repeat appointments
- Attach notes, objects, and files to appointments
- View your appointments by day, week, month, or year
- Set early warning alarms for appointments
- Add events such as birthdays, anniversaries, holidays, and vacations to your Appointment Schedule with the Special Days feature

The Appointment Schedule Main View

Appointment Schedule toolbar (see page 69).

Date Navigation Bar (see page 37).

Special Days are displayed at the top of each day (see page 73).

Diplays appointments (customize view and colors in Appointment Preferences).

Add or edit appointment notes (displays any notes entered in the Notes tab of the Appointment Properties dialog box).
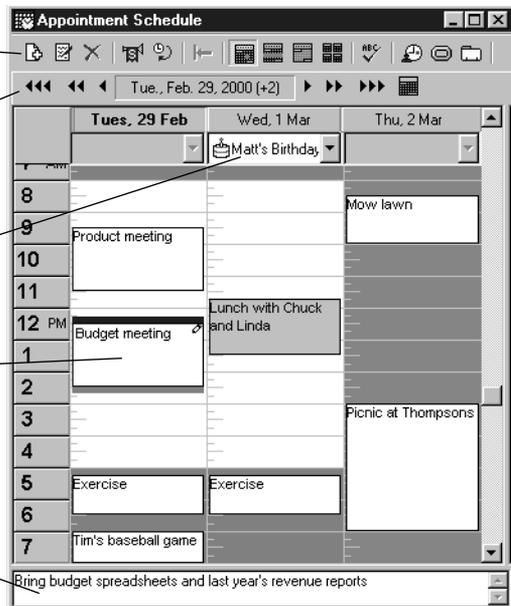
The Appointment Schedule Toolbar

Add a new appointment	
Edit an appointment	
Delete an appointment	
Add a Special Day	
Create a Repeat Appointment	
Link a contact to an appointment	
Move Current Day left	
Daily view	
Weekly view	
Monthly view	
Yearly view	
Spell check	
Date/Time stamp	
Attach a file to an appointment	

Working with the Appointment Schedule

Creating a new Appointment

1. Open the Appointment Schedule.

2. Click the New Appointment button.

   or

   Select New Appointment from the Edit menu.

3. If you click the New Appointment button or select New Appointment from the Edit menu, the Appointment Properties dialog box will appear.

4. There are three tabs in the Appointment Properties dialog box: Properties, Notes, and Repeat.

5. Click on the Properties tab. Enter your appointment information.

Choose a category from the Category drop-down menu. See page 40 for information about creating categories.

Enter a description of the appointment. The description can have a maximum of 255 characters.

Enter the date for the appointment. The default date is today's date.

To set an alarm for the appointment, check the Turn on alarm box. In the Minutes box, enter the number of minutes before the appointment that you would like this alarm to ring.

Indicate the starting time by entering a time in the Start Time field or by dragging the dark blue bar on the timeline to the starting time.

Indicate an ending time for the appointment by entering a length of time in the Duration field or by dragging the dark gray bar in the timeline to the ending time.

Link contacts to the appointment. You can choose to show contact information in the Notes field in the main view.

Attach files, images, or objects to a specific appointment.

6. Click the Notes tab. Enter any notes you want to attach to the appointment. These will be displayed in the Notes field in the Appointment Schedule main view.

7. Click the Repeat tab. Enter information if you want to make this appointment repeat on a regular basis.

Click here to enable the repeat feature for the appointment.

Enter the dates you would like to have the appointment begin and end appearing on your Appointment Schedule.

Enter a specific date or day of the month for an appointment to repeat. Enter a "0" in the Month field to repeat an appointment on the same day every month.

This control reads like a sentence. "This appointment will repeat once every _____." For instance, enter a "2" in the Every field and click the Weeks button. The appointment will repeat once every two weeks starting on the date in the Starting Date field.

This control allows you to specify the days of the week on which the appointment will appear. By default, every day is checked.

Appointment Properties

Properties | Notes | Repeat

☑ Repeat this appointment

Starting Date: 02/29/2000
Ending Date: 03/01/2050

Day: 0
Month: 0

Every: 0
○ Days
○ Weeks
○ Months

Weekdays
☑ Sunday
☑ Monday
☑ Tuesday
☑ Wednesday
☑ Thursday
☑ Friday
☑ Saturday

Weeks
☑ 1st
☑ 2nd
☑ 3rd
☑ 4th
☑ 5th
☑ Last

OK | Cancel | Help

This control is used with the Weekdays field to further define the repeat appointment. After you have selected from the Weekday(s) field, you can then decide which weeks of the month you want to view the appointment.

If you select the 1st, 5th, or Last 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.

8. Click Finish. The appointment will appear on your Appointment Schedule.

How to set up some common repeat appointments:

■ Project meeting on the 3rd of every month.

Enter a "3" in the Day field and a "0" in the Month field. The appointment will appear on the 3rd of each month.

■ Golf every Wednesday morning.

In the Weekdays field, check just the Wednesday box. Then check all the boxes in the Weeks field. The appointment will appear every Wednesday.

■ Lunch meeting once every two weeks.

Enter a "2" in the Every field and click the Weeks button. Set the Starting Date to the day you want the task to begin to appear (if not the current day).

Editing an Appointment

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

1. Select an appointment.

2. Select Appointment Properties from the Edit menu or click the Edit Appointment button. The Appointment Properties dialog box appears.

3. Make changes to the date, duration, category, or description of the appointment. You can also change the alarm settings as well as add or delete any attachments to the Appointment. (If you change the date field, the appointment will no longer appear on the appointment schedule of the original day)

4. Under the Notes tab you can add or edit your appointment notes.

5. After you have finished making your changes, click OK.

Creating a New Repeat Appointment

Another way to create a repeat appointment is to use the Repeat Appointment dialog box. The controls remain the same as the Repeat tab described on page 6-5, but you are not able to disable the repeat feature (you must simply delete the appointment if you no longer want it to repeat.)

1. Open the Appointment Schedule

2. Click the Repeat Appointment button.

or

Select Repeat Appointments from the Options menu.

The Repeat Appointment dialog box appears.

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

4.   Set up the guidelines for your repeat appointment. See page 51 for details on the controls.

5.   When finished, click OK. Then click Close to exit the Repeat Appointments dialog box.

Creating a Special Day

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

1.   Click on the Special Days button.

or

Select Special Days from the File menu.

2.   The Special Days dialog box appears.

3.   Click New. The Special Day Detail dialog box appears.

Enter the number of days before the event that you would like to be reminded. The Appointment Schedule will give you a countdown to the special day.

Enter a description of the Special Day.

Select a Special Day category from the drop-down menu.

If the event is more than one day in length (such as a vacation) enter the beginning and ending dates of the event in the Starting Date and Ending Date fields.

If the event occurs on one specific day (such as a birthday) complete the Month and Day fields.

Special Day Detail

Description:

Early Notification: (days)

Category: Holiday

Day: 0   Starting Date: 02/29/2000
Month: 0   Ending Date: 03/01/2050

Every
0
○ Days
○ Weeks
○ Months

Weekdays
☑ Sunday
☑ Monday
☑ Tuesday
☑ Wednesday
☑ Thursday
☑ Friday
☑ Saturday

Weeks
☑ 1st
☑ 2nd
☑ 3rd
☑ 4th
☑ 5th
☑ Last

OK   Cancel

This control reads like a sentence. "This Special Day will repeat once every _____." For instance, enter a "2" in the Every field and click the Weeks button. The Special Day will repeat once every two weeks starting on the date in the Starting Date field.

This control allows you to specify the days of the week on which the Special Day will appear.

This control is used with the Weekdays field to further define the Special Day. After you have selected from the Weekday(s) field, you can then decide which weeks of the month you want to view the Special Day.

Each time you launch the Franklin Planner you can be alerted if the current day is a Special Day. Go to Application Preferences to show Special Days at Startup. See page 38 for more information.

4.   Click OK. Your Special Day will appear at the top of the day in the Appointment Schedule main view.

Adding an Alarm to an Appointment

1.   Select an appointment.

2.   Select Appointment Properties from the Edit menu or right click on the appointment and select Appointment Properties from the drop down menu. The Appointment Properties dialog box appears.

3.   In the Alarm Properties field, check the Turn on alarm box.

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

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 an appointment, the Alarm button appears as a ringing bell in the upper right corner of the appointment block.

The alarm will use the system default sound to "ring." To set or change this sound, choose Start, Settings, Control Panel, Sounds and adjust the Default Sound.

Printing Your Appointment Schedule

1. Open the Prioritized Daily Task List.

2. Select Print Tasks, Appointments and Notes from the File menu. The Print Tasks, Appointments and Notes window appears. Adjust the settings as needed.

Use this control to set the margins of your printing area. Unless you are familiar with this feature, leave the values at 0.000. If the printout is not aligned, print a test page, then adjust the values as needed and print another test page until the page aligns properly.

Select your binder page size from the drop-down menu. You can also print to plain 8$^{1/2}$ x 11 paper.

View the page(s) you are going to print so you can verify that what you want to print is what will actually print.

Choose which pages of the daily view to print. This emulates the layout of regular planner pages, so the left pages include your task list and appointments. The right pages include your Daily Record of Events and Task/Appointment notes.

Select the starting and ending dates of the information you want to print. Select the same date for each field to print just one day.

Make adjustments to the printer setup, such as the printer selection, paper size, or paper source. Make any adjustments, then click OK.

More printing options are available. See the next page for more details.

3. Click the Options button to view more printing options. See below for descriptions of each feature.

This displays your destination printer. If this is incorrect, click Setup and change you printer settings.

Use the Filter drop-down menu to choose and apply one of your Prioritized Daily Task List Filters before you print to limit your data.

To print in color (i.e. category colors) check the Print in Color box.

Select the filler style (Seasons, Original, etc.) to which you want to print. This will vary by the binder size chosen above.

This control allows you to check which items to include in the printing. Check a box to include the item, or uncheck it to exclude it from this printing.

Page Options
Printer: Xerox DocuPrint P8   ☐ Print In Color
Filler: Plain Paper

Items to Print
☑ Task & Appointment Notes
☑ Tasks
☑ Appointments
☑ Daily Records of Events

Filter
<None>

Appointments
Range: (Default Range)
Edit Appointment Range...

The Edit Appointment Range button allows you to customize how your appointments are printed on plain paper. (This option is not available if you are printing to a Franklin Covey filler.) Click the Edit Appointment Range button. The Edit Appointment Range dialog box appears. If you check Print Appointments Sequentially, your appointments will be printed without showing time in the day that is unscheduled. If you select 15 or 30 minute increments, the entire day will be printed using the increment you select. Use the Range Time drop-down menu to select a range of time that will print. Click OK.

4.   After you set all of the controls, click Print.

For more information ...

The online Help system included with your Franklin Planner Software provides documentation on all of the other features of the Appointment Schedule including:

- Attaching files and graphics to appointments
- Linking contact information to appointments
- Setting Appointment Schedule preferences
- Switching between Daily, Weekly, Monthly, and Yearly views
- Printing weekly, Monthly, or Yearly calendars

To access the online Help, select **Contents and Index** from the **Help** menu, or press **F1** at any point.

Chapter 7

Manage Your Contacts

Address and Phone Book Basics

The Franklin Planner Software Address and Phone book 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 Phone book, you can:

- Keep categorized lists of addresses and phone numbers.
- Create custom categories and filters.
- E-mail a contact directly from your contact list (using your e-mail application).
- Dial (using a modem) any selected number from the Address and Phone book. The Franklin Planner Software Speed Dial function is Microsoft TAPI compliant.
- Print mailing labels and envelopes.
- Print a hard copy of your phone and address book.

The Address and Phone Book Main View

Address and Phone toolbar.

Displays default e-mail for contact. Click the e-mail button to launch your e-mail application.

Search for a contact.

Click header to display list by last name, first name, or company.

Double-click to view and edit contact information.

Last	First	Company
Finch	Pierpont	World Wide Wid
Hamsho	Chuck	
Smith	Bob	Acme Inc.
▶ Whiteford	Milt	Franklin Covey
		DataTech
		World Wide Flov
		World Wide Tra

E-mail: Milt@emailcompany.com

Description	Phone #	Extension
Work	(546) 587-9872	

Description	Address Line #1	Address L
Home	4544 Long Road	

Milt is looking for inexpensive fares to England

Displays contact's phone numbers. Numbers can be edited from this view.

Displays address information. Information can be edited from this view.

Displays any notes you have entered. Note information can be edited from this view.

The Address and Phone Book Toolbar

New entry		Speed Dial
Edit entry		Add contact log
Delete entry		Date/Time Stamp
Create a filter		

Working with Address and Phone Book

Creating a new Address and Phone entry

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

2. Click the New Entry button. The New Phone Entry dialog box appears.

3. There are five tabs in the New Phone Entry dialog box to help you create a complete Address and Phone record: Personal, Address, Notes, Important Dates, and Contact History.

4. Begin creating your Address and Phone entry in the Personal window. Enter your contact's name, spouse's name, company, assistant's name, title, department, and other information. The Personal tab is described on the next page.

Select a category from the drop-down list. For more information on categories see page 40.

Check the VIP box if you consider this a very important record. You can then create a filter to display just the phone records that you have marked as VIP's.

Check the box to add this record to your Speed Dial window.

From the drop-down menu, choose to list the contact by Name, Company, or Name & Company.

A Hailing is useful for printing labels or envelopes if you want to use something other than the contact's First and Last name, such as including a spouse's name on invitations.

If you are using a Palm device, the private setting hides the entry from view on the Palm device. Check the box to mark an entry as private.

Select a description from the Description field. If you want to add or delete available phone number descriptions choose Options menu, Edit Phone Number Types.

Franklin Covey

Save and Close

Personal | Address | Notes | Important Dates | Contact History

General
Last: Whiteford   First: Milt   Spouse: Sherri
Salutation: Mr.   Hailing: Milt & Sherri Whiteford
Company: Franklin Covey   Title: Technical Writer
Assistant: Lori   Department: Technology

Miscellaneous
Category
<None>

VIP   Private
Speed Dial

List by Both

Phone Numbers
Description	Phone #	Extension
Work	(546) 587-9872	

5. Next, select the Address tab. Record the street addresses and e-mail addresses of your contact.

Select a description from the drop-down list, or type in your desired description. You can choose any of the following predefined descriptions: Home, Mailing, Shipping, or Work.

Enter the address(es) of your contact.

Enter an e-mail address into any of the fields, then select the radio button to the right of the field to designate the address that will be displayed as the default e-mail address. The default e-mail address will appear in the e-mail field of the main Address and Phone window when a contact is selected (see page 7-2).
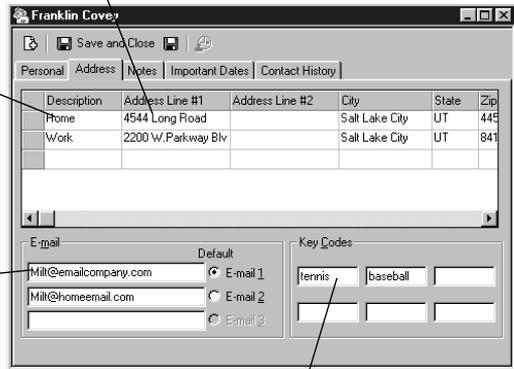
If you maintain a large contact list, adding key codes to an entry will give you additional options when creating a filter or performing a Global Search. (i.e. - Enter "tennis" as a keyword for all your tennis partners, then create a filter that displays only the keyword "tennis" for a quick list.)

6. Click the Notes tab. Enter any additional notes that provide extra information about the contact.

7. Click the Important Dates tab. This tracks any significant dates such as birthdays, anniversaries, etc. for your contact.

Enter a description of the important date, such as "Matt's Birthday" or "My anniversary."

Enter the Date of the occasion.

Complete the Gender field to assist you in purchasing a gift or selecting a card for an individual.

Select a category from the drop-down list. Go to the Options menu and select Important Date categories to create new categories.
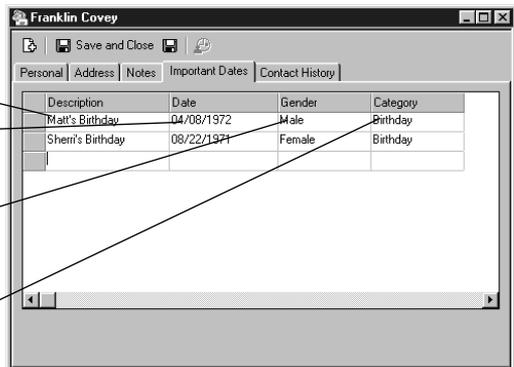
8. Finally, select the Contact History tab. With the Contact History dialog box, you can track phone calls, tasks and appointments for all your important business and personal contacts. You can only access the Contact History tab after a contact has been saved.

Click Add and select one of the following options: Add a New Task, Add a New Appointment, Add a New Contact Log, Add a New Object, Add a New File Attachment, or Add a New Image Attachment. The appropriate dialog box will appear. Press F1 to access the online Help for more information.

As you begin to build a large contact history, you may find it helpful to begin limiting how far back you view the contacts. The software is preset to view the past year of contacts.
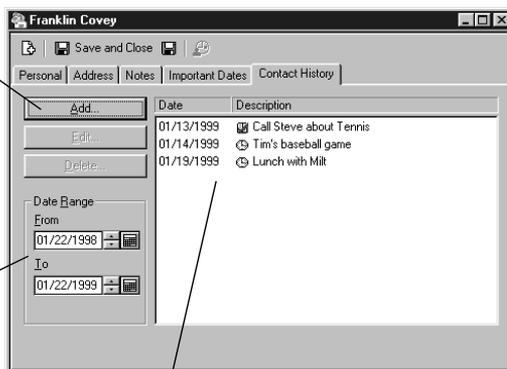
This area will display the date and the description of every item you add.

9. After entering your data, click either the Save button or Save and Close button to save your information. Clicking Save will leave the dialog box open for you to add more information.

Editing 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. You can double-click on the entry to open the entry. The entry window opens with all the Address and Phone information for this record.

3. Make changes to the appropriate fields and click the Save button or Save and Close button

Creating a Mail Merge with your contact data

Your Franklin Planner Software lets you merge names and addresses from your Address and Phone book to your favorite word processor. The Mail Merge supports Microsoft Word 95 and 97, as well as WordPerfect 6.1, 7, and 8. Mail Merge gives you a fast

and easy way to use your Address and Phone book to generate personalized letters.

When you choose Mail Merge, only those names and addresses that match the conditions of the current filter are exported and merged.

To use the Mail Merge feature, you will need to create one or more merge files that can be used to import your Address and Phone information. You can create these files by modifying either AXFORM.DOC (for Word users) or AXFORM.FRM (for WordPerfect users) to create your own personalized letters.

1. Open the Address and Phone book.

2. Choose Mail Merge File from the Options menu.

3. The Mail Merge dialog box appears. Choose the word processor you wish to use (this word processor must be already installed on your computer), then choose the Merge Document you wish to use. To do this, click the Browse button, which brings up the Open Mail Merge Document window. Navigate through your folders until you find the merge document you want to use (a document with a .DOC extension if you are using Microsoft Word, or a .FRM extension if you are using WordPerfect). When you have selected the document, click Open to get back to the Mail Merge window.

4. Next, in the Merge To box, choose whether you wish to merge to a Document or to the Printer. If you merge to a Document, your names and addresses will be inserted into the letter format of your merge document, where you will be able to make changes to the letter before printing. If you merge to the Printer, the merged document will go straight to the printer without giving you a chance to edit it.

5. To finish the merge, click Merge. Your desired word processor is started, and the names and addresses from your Address and Phone book are inserted into the name and address block of the merge document.

If you're adept at using merge files with your word processor, you an also export Address and Phone information to an ASCII

text file for import into your word processor, where you can do much more than simply create letters.

Printing your Address and Phone book

1. Open the Address and Phone book.

2. Select Print Address and Phone from the File menu. The Print Address and Phone dialog box appears.

3. The top half of the print dialog is fairly consistent for all the Franklin Planner Software modules.

Use this control to set the margins of your printing area. Unless you are familiar with this feature, leave the values at 0.000. If the printout is not aligned, print a test page, then adjust the values as needed and print another test page until the page aligns properly.

Select your binder page size from the drop-down menu. You can also print to plain 8^(1/2) x 11 paper.

View the page(s) you are going to print so you can verify that what you want to print is what will actually print.

Choose which pages of the daily view to print. This emulates the layout of regular planner pages, so the left pages include your task list and appointments. The right pages include your Daily Record of Events and Task/Appointment notes.

If you are printing information from the Contact History tab, select the starting and ending dates of the information you want to print.

Make adjustments to the printer setup, such as the printer selection, paper size, or paper source. Make any adjustments, then click OK.

More printing options are available. See below for details.

4. Click the Options button to view more printing options. The Address and Phone print options are contained in three tabs: Report Format, Selection, and Contacts to include .

5. Click the Report Format tab.

Manage Your Contacts
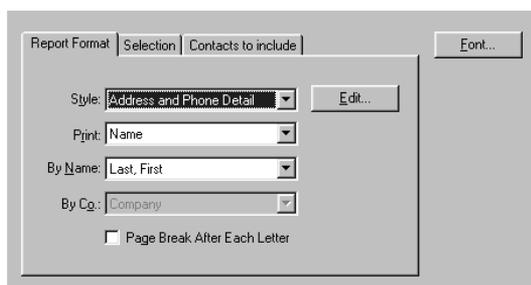
6. Pick the style of report you want to generate form the Style drop-down menu.

   ■ **Address and Phone Detail** will list most of the information from the Personal, Address, and notes tab of the contact's entry.

   ■ **Phone Index** will print phone numbers and e-mail addresses.

   ■ **Contact History** will print information contained in the Contact History tab of the contact's entry (including tasks and appointments created through contacts).

7. The Print drop down menu further defines the extent of the information printed.

   ■ **Company** will print just the company fields from your data.

   ■ **Name** will print just the name fields from your data.

For instance, if you are printing the "B" section of your data, selecting "Company" will print all company starting with "B." Selecting "Name" will print all names starting with "B."

8. The By Name and By Co. fields give you options on how each of those fields is ordered.

   ■ **If you selected Name** from the Print drop-down menu, the By Name field will give you options for how the name information will be printed.

   ■ **If you selected Company** from the Print drop-down menu, the By Co. will give you options for how the company information will be printed.

9. Checking Page Break After Each Letter will begin each letter of the alphabet at the top of a new page.

10. Click the Selection tab.

11. From the Sort by drop-down menu, select the field by which you want your contacts listed.

   ■ **Name/Company** will display your records alphabetically by Name and Company information

   ■ **Postal Code** will group the records by the postal code.

   ■ **State** will group the records by state.

12. The Order field allows you to decide whether you want the records to be printed in Ascending order (Z-A) or Descending order (A-Z).

13. The Address field determines which address(es) from the records you want to include in the printing. These are defined by the categories you assign in the Address window of the contact's entry.

14. The Print From fields determines what range of records you have printed. Records filed by a numeric value "#" are before the letter "A." So the order is "#"-"A"-"B" etc.

15. Click the Contacts to include tab.

You have four choices of contacts to include:

- **Selected contact** – If you select Print Address and Phone while viewing a contact, you can print the one contact by checking this box.
- **Contacts based upon a category** – You can choose to limit your list by choosing a category. Only records that have been assigned that specific category will be printed.
- **Contacts based upon a filter** – You can choose to limit your list by choosing a filter. Only records that match the filter description will be printed.
- **All Contacts** – All your records will be included.

16. Click Print to print your Address and Phone list.

For more information …

The online Help included with your Franklin Planner Software provides documentation on all of the other features of the Address and Phone book including:

- Setting preferences
- Printing labels and envelopes
- Establishing filters
- Quick Call Log
- Linking files, objects, or images in the Contact History tab
- Creating tasks and appointments from the Contact History tab

To access the online Help, select Contents and Index from the Help menu, or press F1 at any point.

Chapter 8

Recording Events

Basics of the Daily Record of Events

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 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

The Daily Record of Events Main View

Daily Record of Events toolbar

Date Navigation bar
(see page 37)

Enter and format text so
that you can easily find
information.

Include files, images,
or objects

The Daily Record of Events Toolbar
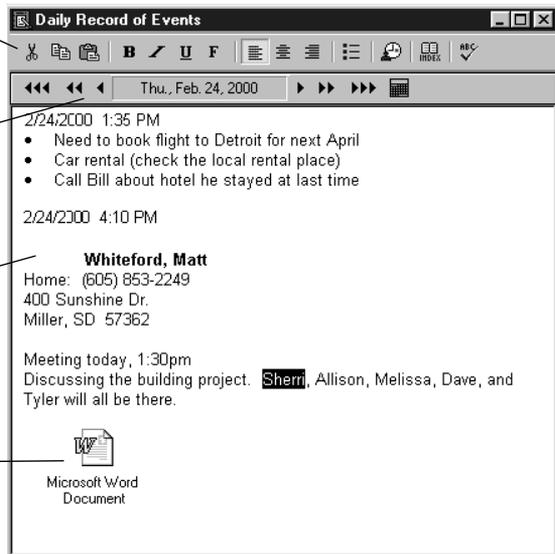
Icon	Description	Icon	Description
✂	Cut selected text	≡	Align text left
📋	Copy text to clipboard	≣	Center text
📋	Paste text from clipboard	≡	Align text right
B	Bold text	☰	Insert bullets
I	Italicize text	🕑	Date/time stamp
U	Underline text	INDEX	DRE Index
F	Change font style	ABC✓	Spell check

Using the Daily Record of Events

Adding a Daily Record of Events entry

1. Click the Daily Record of Events button on the main toolbar. The Daily Record of Events window appears.

2. Enter your data in the text window.

3. Format your data using the Daily Record of Events toolbar.

4. Your data is automatically saved.

Use the Date and Time stamp to track multiple entries on a single day.

Creating a Daily Record of Events Index

The Daily Record of Events Index is helpful because it allows you to track your notes by title or by the date on which the notes were entered.

In the Daily Record of Events Index dialog box, you can:

■ Give titles to your Daily Record of Events entries

■ View Daily Record of Events within a specific date range

■ Sort Daily Record of Events titles by name or date

Adding Entry Titles to the Index

1. With the Daily Record of Events module active, click the Index button or select Index Entries from the Options menu. The Daily Record of Events Index dialog box appears.

2. Click Add Index. The Index Properties dialog box appears.

3. Enter an Index Description. This is the title that appears in the Daily Record of Events Index.

The description you enter an is the title that appears in the Daily Record of Events Index.

Index Properties

Description: |

Index Date: 02/24/2000

OK

Cancel

4. Click OK. The Daily Record of Events entry title appears in the Daily Record of Events Index dialog box.

When you create an Index description, you are giving a brief description of an event recorded on the day's Daily Record of Events. You can give multiple descriptions to one day, but you cannot edit information under each description. If you have multiple descriptions for one day, the information contained in each description will be identical.

Editing and Deleting Index entries

1. Click the Daily Record of Events Index button or select Index Entries from the Options menu. The Daily Record of Events dialog box appears.

2. To edit an entry description, select an entry and click Edit Index. The Index Properties dialog box appears.

3. Make changes to the description or the date and click OK.

4. To delete an entry description, select an entry and click Delete Index. A warning appears, asking if you really want to delete this index. Click Yes. The entry is deleted.

Managing your Index entries

The Daily Record of Events Index dialog box gives you several options for displaying your index entries.

The Display Options field allows you to select which entries will be displayed by limiting the beginning and ending dates. Adjust the List index entries from field to set the beginning date. Adjust the List Index entries to field to set the ending date. Only index entries that fall between the beginning and ending dates will be displayed.

Daily Record of Events Index

Index Entries:

Auto lease information 12/29/1998
Directions to Scott's house 01/01/1999
Merger info 12/19/1998
Planning Meeting 01/03/1999
Shopping list for party 12/29/1998

Go to Date
Add Index...
Edit Index...
Delete Index...
Close

☐ Special Entry

Display Options

List index entries from: 12/08/1998
List index entries to: 01/06/1999

Sort by
◉ Name
○ Date
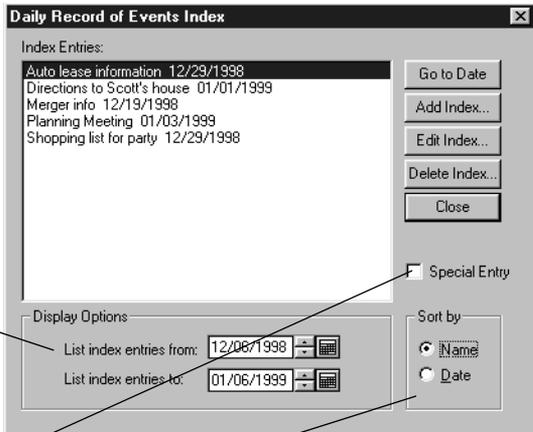
By checking the Special Entry box, you can designate an entry or entries as having special significance. The box will appear checked when you select a Special Entry.

You can sort your entries chronologically by date or alphabetically by name by selecting the appropriate radio buttons in the Sort By field.

Printing Your Daily Record of Events

1. Open the Daily Record of Events.

2. Select Print Daily Record of Events from the File menu. The Print Daily Record of Events window appears.

3. Make changes to the print setup as needed.

Use this control to set the margins of your printing area. Unless you are familiar with this feature, use the preset values If the printout is not aligned, print a test page, then adjust the values as needed and print another test page until the page aligns properly.

Select your binder page size from the drop-down menu. You can also print to plain 8$^{1/2}$ x 11 paper.

Print Daily Record of Events

Paper
Binder: Classic (5 1/2" x 8 1/2") Portrait
Print: Every   Margins...

Print
Preview
Setup...
Customize...
Cancel

Date Range
From: 02/01/2000   To: 02/24/2000
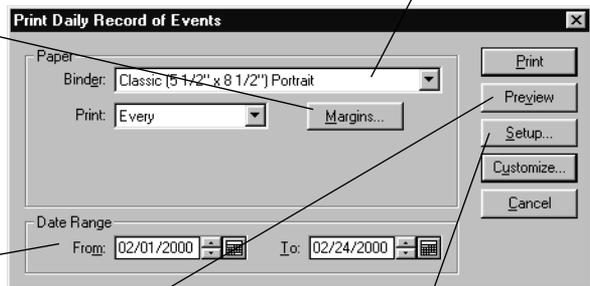
Select the starting and ending dates of the information you want to print. Select the same date for each field to print just one day.

View the page(s) you are going to print so you can verify that what you want to print is what will actually print.

Make adjustments to the printer setup, such as the printer selection, paper size, or paper source.

4. When finished, click Print.

Printing your Daily Record of Events Index

1. Open the Daily Record of Events.

2. Select Print Daily Record of Events Index from the File menu. The Print DRE Index window appears.

3. The Print DRE Index dialog box uses the same controls as the Print Daily Record of Events described above. However, it does have an additional control.

4. Click Options. The window expands.

Select to sort by either date or name. This will sort the entries that fall within the date range alphabetically by name or chronologically by date.

Print options

Sort by: Date

5. When ready, click Print.

For more information ...

To access the online Help, select Contents and Index from the Help menu, or press F1 at any time.

Chapter 9

Storing Your Information

Basics of the Information Manager

The Information Manager contains five modules: What Matters Most information, Turbo Files, Journal, Quotes, and Notes. These areas are useful for storing information that will help you organize your day more efficiently.

- The **What Matters Most** module is a place to review, add, or make changes to your Governing Values, Roles, Mission Statement, or Long-Range Goals. Also, if you do not want to use the What Matters Most Wizards to identify your Values, Roles, Mission, or Long-Range Goals, you can use the forms provided in the Information Manager to do the same things.

- The **Turbo Files** module is a fast, computerized index that allows you to track of miscellaneous information such as the date and title of an interesting magazine article, or the location of an important piece of mail.

- The **Journal** module is a place for you to record daily thoughts or notes.

- The **Quotes** module allows you to store and categorize your favorite quotes. You can attach key words to each quote, making it easier to locate quotes on an idea or topic you might have.

- The **Notes** module is helpful for storing miscellaneous information such as gift lists, idea lists, or any other information that may not be specifically linked to one appointment or task.

Many of the modules allow you to format text using the same text editor available in the Daily Record of Events. See "The Daily Record of Events Toolbar" on page 91 for an explanation of these controls.

In the Information Manager preferences you can select the modules you want to be displayed. See "Setting Preferences" on page 38 for more information.

The Information Manager Main View

Delete an item.

Change the way items in the right pane are displayed.

Add a new item.

Edit an item.

Click node to expand topic.

Expanded nodes reveal more detailed infomation about the contents.

Selected information will be displayed in the right pane.

What Matters Most

Discovering What Matters Most to you will probably be a continual process. However, once you have established a set of governing values, a list of roles, and a mission statement, you may only need to make minor changes from time to time. The What Matters Most module of the Information Manager allows you to build your governing values, roles, mission, and long-range goals, but it does not offer the prompts and specific guidance included in the What Matters Most Wizards. For information on using the What Matter Most Wizards, see chapter 2 of this manual. The Information Manager and the What Matters Most Wizards access the same data, so additions or changes you make in one module will be reflected in the other.

Working with Governing Values

Creating a New Governing Value

1. Open the Information Manager, expand the What Matters Most node, and select the Governing Values topic. Click the New Governing Value button. The Governing Value dialog box appears.

Enter a description of your Governing Value.

Enter a statement that clarifies your value.

The Linked Goals list will display any Long-Range Goals you have linked to this value. If you are creating a new value, the list will be empty.

2. Click Save to save your Governing Value.

3. Click the close button to exit the window.

Editing a Governing Value

1. Select the Governing Value you want to edit and click the Edit Governing Value button.

2. The Governing Value dialog box will appear. Make your changes and click the Save button to save your changes.

3. To edit a Long-Range Goal, select the goal from the Linked Goals list and click the Edit Long-Range Goal button. The Long-Range Goal dialog box will appear. See page 9-7 for infomation on editing goals.

4. Click the close button to exit the window.

Deleting a Governing Value

1. Select the value to delete and click the Delete button. The value will be removed form your list.

Working with Roles

Creating a new Role

1. Open the Information Manager, expand the What Matters Most node, and select the Roles topic. Click the New button. The Role dialog box appears.

Enter a description of your Role.

Enter the Key People that define the role. Click the New Key Person button.

Enter a Tribute Statement for each Key Person.

Displays any Long-Range Goals that you have linked to this role. Since you are creating a new role, the list will be empty.

2. In the Description field, enter a description of your Role.

3. Click the New Key Person button. A "Key Person" will be highlighted in the Key People list for you to add a new Key Person. Enter the name of the Key Person.

4. Click in the Statement field and a cursor will appear. Enter a Tribute Statement for your new Key Person.

5. To edit a Key Person, select the Key Person and click the Edit Key Person button. The Key Person will be highlighted for you to make changes.

6. To delete a Key Person, select the Key Person and click the Delete Key Person button. The Key Person will be removed from your list.

7. Click the Save button to save your Role.

8. Click the close button to exit the dialog box.

Editing a Role

1. Select the Roles node, select the Role you want to edit, and click the Edit Role button.

2. The Role will appear. Make your changes and click the Save button.

3. If you have a Long-Range Goal linked to the role, it will be listed in the Linked Goals list. To edit the Goal, select the Goal and click the Edit Long-Range Goal button. The Long-Range Goal dialog box will appear. Make any changes and click the Save button.

4. Click the close button to close the dialog box.

Deleting a Role

1. Select the Roles topic, then select the role you want to delete.

1. Click the Delete button. The role will be removed from your list.

Working with Mission Statements

Creating a New Mission Statement

1. Open the Information Manager, expand the What Matters Most node, and select the Mission Statement

topic. Click the New button. The Mission Statement dialog box appears.

Enter the title of the new Mission Statement.

Enter the text of the new Mission Statement.

Displays any Long-Range Goals that you have linked to this Mission Statement. Since the Mission Statement is new, the list will be empty.
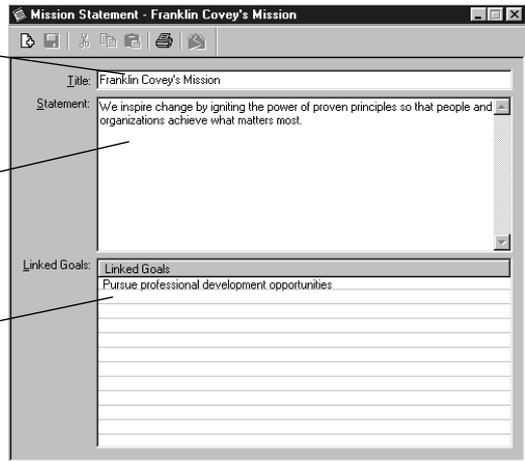
2. Click Save to save your new Mission Statement.

3. Click the close button to exit the dialog box.

Editing a Mission Statement

1. Select the Mission Statement node, select the Mission Statement you want to edit, and click the Edit button. The Mission Statement dialog box appears.

2. Make any changes to the Mission Statement and click Save to save your changes.

3. To edit a Linked Goal, select the goal from the list and click the Edit Long-Range Goal button. The Long-Range Goal dialog box will appear. Make your changes and click Save.

4. Click the close to exit the dialog box.

Deleting a Mission Statement

1. Select the Mission Statement topic, then select the Mission Statement you want to delete.

2. Click the Delete button. The Mission Statement will be removed from your list.

Working with Long Range Goals

Creating a Long Range Goal

1. Open the Information Manager, expand the What Matters Most node, and select the Long-Range Goals topic. Click the New Long-Range Goal button. The Long Range Goals dialog box appears.

Enter a description of the new Long-Range Goal.

Select a Governing Value, Role, or Mission Statement from the drop-down menu. Your new Long-Range Goal should be in line with what you have already identified as What Matters Most.

Enter intermediate steps. These become tasks and appointments.

Long Range Goal - Earn my master's degree in Communication

Description: Earn my master's degree in Communication

Link to: Education

Intermediate Steps:

Description	
Register for classes this semester	1
Research thesis idea	
Meeting with Prof. Vermilion	1

When you view or edit one of your Values, Roles, or Mission Statements, the Long-Range Goal(s) that you have linked to that item will be displayed.

2. Begin brainstorming about the events you will need to do to accomplish this Long-Range Goal.

3. Once you have a list of intermediate steps, decide whether these steps will appear on your Prioritized Daily Task List, Master Task List, or Appointment Schedule. If you wait until "someday" to do these items, most likely they will never get done. Scheduling the intermediate steps will help you accomplish these things you consider to be most important.

4. Enter your intermediate steps by clicking on the appropriate button:

■ Add a Prioritized Daily Task. The Task Properties dialog box will appear for you to schedule a task to appear on you Prioritized Daily Task List.

■ Add a Master Task. The Task Properties dialog box will appear for you to add the intermediate step to your Master Task List.

■ Add an Appointment. The Appointment Properties dialog box will appear for you to schedule a specific appointment time.

5. The Intermediate Steps list will display your events as you schedule each one.

6. Click Save to save your new Long-Range Goal.

7. Click the close button to exit the dialog box.

Editing a Long Range Goal

1. Select the Long-Range Goals node, select the Long-Range Goal you want to edit, and click the Edit Long Range Goal button. The Long-Range Goal dialog box appears.

2. Make any changes to the Long-Range Goal and click Save to save your changes.

3. Click the close button to exit the dialog box.

Deleting a Long Range Goal

1. Select the Long-Range Goal topic, then select the Long-Range Goal you want to delete.

2. Click the Delete button. The Long-Range Goal will be removed from your list.

Turbo Files

Turbo Files are a fast, computerized index that enable 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 Files as sophisticated card files that help you locate items in seconds.

Working with Turbo Files

Creating a New Turbo File

1. Open the Information Manager.

2. Select the Turbo File icon from the tree view.

3. Click the New button. The Turbo File (new) dialog box appears.

Enter any keywords that will help you find items in the future.

Enter the name of the article or title of the document you are filing.

Enter the physical location of the file or document. For example, drawer two, file three, or safety deposit box.

Enter the date the Turbo File was created or edited.

Specify the category of the item being indexed or filed.

Enter any additional information about the file item in the Notes field.

Enter the Turbo File Type. You can subcategorize items within each category by defining a Turbo File Type.

4. When you have finished entering your information, click OK. Your Turbo File will be saved.

Editing a Turbo File

1. Select the Turbo File icon from the tree view.

2. Either double-click on the entry you want to edit or click on the entry and click the Edit Turbo File button.

3. Your Turbo File will open. If necessary, make changes to your information. Click OK when finished.

Deleting a Turbo File

1. Select the Turbo File you want to delete from the right pane.

2. Click the Delete button. The Turbo File will be removed.

The Journal

The Journal module is a place for you to record daily thoughts or notes.

Working with the Journal

Creating a New Journal Entry

1. Open the Information Manager and select the Journal node from the tree view.

2. Click the New Journal Entry button. The Select Journal Entry Date and Description dialog box appears.

3. Select the date to which you want to add a journal entry. Click OK. A Journal dialog box for that date appears.

Use the text editor controls to format your text.

Enter the text of your Journal entry.

> **Journal - Tue., Jan. 26, 1999**
>
> **B** *I* U ≡ ≡ ≡ Arial ▼ 10 ▼
>
> Today I finished my first long-range goal for the year. I closed the deal to buy the building for my new restaurant. It is a very satisfying feeling!
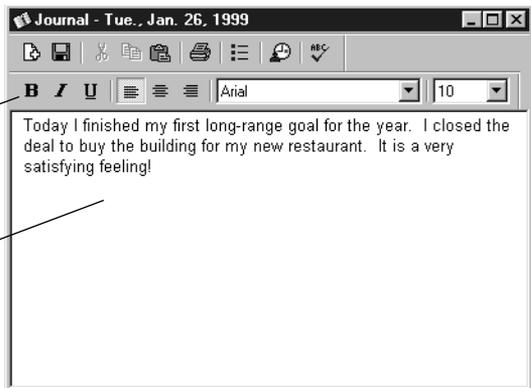
4. Enter your text and apply any of the text formatting tools to your entry.

5. Click Save.

Editing a Journal Entry

1. Select the entry and click the Edit button.

2. Make any text or formatting changes.

3. Click Save.

Adding Journal Index Entries

You can organize your Journal information for quick reference by using the Index feature to include a description of your journal entry.

1. Open the Journal node and select the Index topic.

2. The Index Entries dialog box appears.

3. Click New Journal Index.

4. Enter a description and date for the entry.

5. Click OK. Your journal entry will be filed under the date as well as the description that you entered.

6. When you are finished, click Close.

Deleting a Journal Entry

1. Select the Journal entry you want to delete from the right pane.

2. Click the Delete button. The Journal entry will be removed.

Quotes

The Quotes module allows you to store and categorize your favorite quotes. You can attach keywords to each quote, making it easier to locate a specific quote for an idea or topic.

Working with Quotes

Creating a New Quote

1. Open the Information Manager.

2. Select the Quotes node from the tree view. Click the New Quote button. The Quote dialog box appears.

3. Enter the quote information.

If you desire, choose a Category from the drop-down menu.

Enter the author of the quote.

Enter up to five keywords associated with the quote. As you collect more quotes, you will find it helpful to search through your quotes using these keywords.

Enter the text of the quote.

Quote - The ultimate measure of a man is not where he stands in mome...

Author: Martin Luther King, Jr.

Category: <No Category>

Keywords: measure | challenge | man | integrity |

Quote: The ultimate measure of a man is not where he stands in moments of comfort and convenience, but where he stands at times of challenge and controversy.

4. Click Save. Your quote will be saved.

Editing a Quote

1. Select the quote and click the Edit Quote button.

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

Deleting a Quote

1. Click on the quote you want to delete.

2. Click the Delete button. The Quote is deleted.

Notes

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 Notes. You can create as many Note
files as you want. The Note Categories feature makes retrieval
easier than any manual filing system. Note files are easy-to-use
because you can create, edit and delete with the click of a button.

Working with Notes

Creating a Note

1. Open the Information Manager.

2. Select the Notes node from the tree view. Click the New
   Note button. The New Note dialog box appears.

Enter a description of the Note.

Format the text as desired.

If you desire, choose a category
from the drop-down menu. See
"Creating and Editing Categories"
on page 40.

Enter the text of the Note.
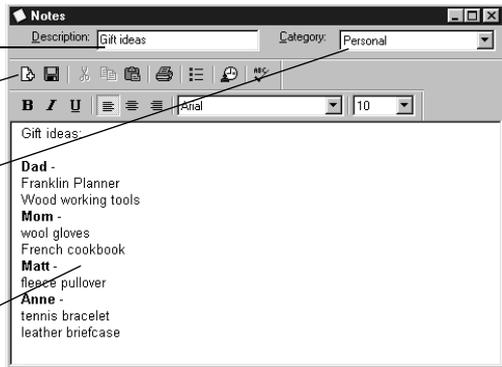
3. Click Save. Click the close button to exit the dialog box.

Editing a Note

1. Select the Note and click the Edit Note button.

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

Deleting a Note

1. Click on the Note you want to delete.

2. Click the Delete button. The Note is deleted.

Printing from the Information Manager

All the modules in the Information Manager use a common print dialog box. The heading of the window will reflect the module you are printing from.

1. Open the specific item (Note, Governing Value, Journal entry, etc.) you want to print.

2. Click the Print button. The appropriate print dialog box appears (i.e., when printing a Note, the Print Notes dialog box appears.)

Make adjustments to the printer set-up, such as the printer selection, paper size, or paper source. Make any adjustments, then click OK.

View the page(s) you are going to print so you can verify that what you want to print is what will actually print.

Select your binder page size from the drop-down menu. You can also print to plain 8¹/₂ x 11 paper.

Use this control to set the margins of your printing area. Unless you are familiar with this feature, use the preset values. If the printout is not aligned, print a test page, then adjust the values as needed and print another test page until the page aligns properly.
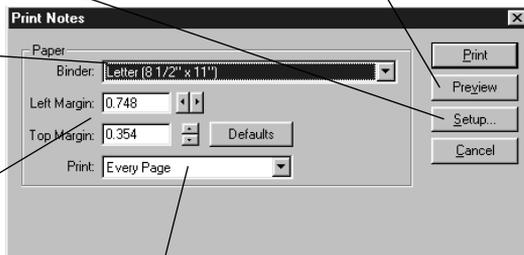
Choose whether you want every page, the left page(s), or the right page(s). The Left page and Right Page options allow you to print your entries double-sided. To do this, select Left page(s) first. After the printing is completed, select Right Page(s), load the pages that were just printed so that information will print on the blank side, and complete the printing job.

3. After you set all of the controls, click Print.

For more information ...

To get help in using any of the modules of the Information Manager, the online help documentation is always available. Simply hit the F1 key or click the Help button.

Chapter 10

Maintaining Your Data

The Basics of Maintenance Tools

The Tools and Utilities application is an independent program that allows you to keep your Franklin Planner database running smoothly.

With Tools & Utilities, you can do the following:

- Back up your Franklin Planner database
- Restore backup files
- Purge or archive old data and compress active data
- Repair your Franklin Planner database when necessary

Opening Tools and Utilities

1. Close Franklin Planner Software and Weekly Compass.

2. Start Tools & Utilities by choosing Start, Programs, Franklin Covey, Franklin Planner, Tools & Utilities.

3. The User Login dialog box appears. From the drop-down menu, select the user name of the database you want to access. Click OK. The Tools & Utilities dialog box appears.

Using the Maintenance Tools

Backing Up the Franklin Planner database

The Franklin Planner database contains the data that you've entered into the Franklin Planner program. You should back up your database regularly so that if the database file is ever lost or deleted, you won't lose all the information and time you've invested. You can restore your backup file if catastrophe strikes.

It's a good habit to make a backup file at least once a week.

IMPORTANT

Always create a Franklin Planner backup file before making major database changes such as:

- Importing data into your Address and Phone book
- Exporting Address and Phone records
- Rebuilding index data
- Purging data from your Franklin Planner database

You can save a backup file on your computer's hard drive, a network server, or a removable diskette. To copy a backup file to diskette, insert a formatted diskette into the disk drive.

Franklin Planner software does not overwrite data on a diskette used for a backup, nor will it format the diskette. Diskettes used to store a backup file must already be formatted.

To back up your Franklin Planner database

1. Open Tools & Utilities by choosing Start, Programs, Franklin Covey, Franklin Planner, Tools & Utilities.

2. Click the Backup button on the Tools & Utilities menu. The Backup Database dialog box appears.

3. Click Browse. Specify a disk drive, folder, and file name for the backup file. Click Save to return to the Backup Database window.

4. Select a compression type from the Compression Type drop-down menu: Minimum, Very Low, Low, Medium-

Low, Medium, Standard, Medium-High, High, or
Maximum.

Selecting Low is faster but may result in a larger backup file,
whereas Maximum is slower but will result in a smaller file.
Standard compression is sufficient for most purposes.

5. Click Backup to create a backup. If your data will not fit
    on one diskette, you will be prompted to insert additional
    diskettes.

6. When the backup is complete the following message
    appears: "The database backup was successful." Click OK.

Your backup is now complete.

Restoring Your Franklin Planner database

If your Franklin Planner database is ever lost or deleted, use the
Restore command to restore your most recent Franklin Planner
backup file. You can also use the Restore command to load a
backup Franklin Planner database from one computer to another.

1. If you saved your backup file on a diskette, insert it into
    the disk drive.

2. Click the Restore button. The Restore dialog box appears.

3. Enter the name and location of the backup file you want
    to restore. (To locate the backup file, click Browse.)

4. Click Restore. When the Restore process is complete, the
    following message appears: "The database has been
    restored."

5. Click OK.

Protecting your database with a password

Create a password so only you have access to your data. Once a
password is set, the Franklin Planner Software cannot be opened
without entering the correct password.

Creating a password

1. Click the Password button. The Change Password dialog
    box appears.

2. Enter a password in the New Password field. (The password can be up to 14 characters and is not case sensitive.)

3. Retype the password in the Verify New Password field.

4. Click Change. The following message appears: "The password has been set."

5. Click OK. Your Franklin Planner files are now secured by your password.

Changing a password

1. Click the Password button to open the Change Password dialog box.

2. Enter your old password in the Old Password field. Enter a new password in the New Password field. Enter it again in the Verify New Password field.

3. Click Change. The following message appears: "The password has been changed."

Removing a password

1. Click the Password button to open the Change Password dialog box.

2. Enter your old password in the Old Password field.

3. Leave the New Password field blank and click Remove. The following message appears: "The password has been removed."

Compacting the Franklin Planner database

As your Franklin Planner database grows, you may want to compress some of your Franklin Planner information to reduce the size of the database, which may allow the program to run faster. If you have deleted old tasks, appointments or other records, compact your database to free this space on your hard drive.

1. Click the Compact Database button. The Compact Database dialog box appears.

2. Click Yes to compact your database. The following message appears: "The database has been compacted."

3. Click OK. Your database files are now compacted.

Purging and Archiving your database

When you purge data from the Franklin Planner Software, you cannot use the data in the software again. Purging the data permanently deletes the data you no longer need from your database.

If you make an archive, the data is saved as a text file and can be opened with a word processor or other text-editing program. However, archived records cannot be opened in the Franklin Planner program.

How often you archive or purge your data depends on your information storage and retrieval needs, your hard disk space, and how much you use the Franklin Planner software. Once a month is usually sufficient for most users. If you find that the program is getting sluggish, you may want to archive or purge old records to improve program speed.

It is recommended that you back up your data before purging. If the purging is not successful, you will need to restore your data from a backup.

Purging Franklin Planner data

1. Click the Purge/Archive button. The Purge/Archive dialog box appears.

2. Select the elements (Tasks, Appointments, and/or Daily Record of Events) you want to purge.

3. Enter the start and end date of the records you want to purge.

4. Click OK. The following message appears: "The database has been purged/archived."

5. Click OK. You have finished the Purge process.

Archiving Franklin Planner data

1. Click the Purge/Archive button. The Purge/Archive dialog box appears.

2. Select the elements (Tasks, Appointments, and/or Daily Record of Events) you want to achieve.

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

4. Check the Archive box.

5. To specify where you want to save the archive file, enter a destination path and File Name, or click the Browse button to select a folder location.

6. Click OK. The following message appears: "The database has been purged/archived."

7. Click OK. The Archive process is complete.

Repairing the Franklin Planner Database

The Repair Database command synchronizes Franklin Planner database files with the index files. In other words, it cleans up any potential problems your index files may have developed.

1. Click the Repair button. The Repair Database window appears.

2. Click Yes to repair the database. The following message appears: "The database has been repaired."

3. Click OK. The Repair process is complete.

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