

PlanPlus™ v.5 for Windows® XP User Manual

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Welcome to PlanPlus for Windows!

PlanPlus™ v.5 for Windows® XP is a full-featured electronic planner and contact organizer, designed for today's business users.

Organize everything in one place

Much more than simply a planner, think of PlanPlus as an electronic binder where you can keep your schedule, project information, meeting notes, and a host of other important information at your fingertips.

Manage calendar & tasks

PlanPlus for Windows' powerful PIM (personal information manager) features helps you manage your busy schedule – projects, meetings, and personal information, so you can stay organized.

Take notes

Use your keyboard or if you have a Tablet PC, your digital pen to take meeting notes, then organize them by projects or categories. Everything is saved automatically and nothing gets lost.

Save & annotate your research & documents

Whether you do research through Google™ or through your organization's databases, the information you wish to save can be stored digitally and organized for quick retrieval. In addition, any of your documents and research can support annotated comments. This allows you to take notes on the digital paper.

Search your notes, research & documents

The full text of all of your notes (even hand-written notes), research, PowerPoint presentations, and your own personal documents are indexed, making it very easy to search and locate the important information – to help you prepare for meetings or grab bibliographic source information for your presentations.

Share your work

Send your notes, your research, or your documents to your colleagues.

Personalize PlanPlus

Customize the look of PlanPlus to match your style, or the style of your college or university.

System Requirements & Installation

PlanPlus System Requirements

To install and run PlanPlus™ v.5 for Windows® XP, your computer must meet the following minimum requirements.

- Computer with 500 MHz or higher (1 GHz recommended), single or dual core processor system
- Pentium® family, Celeron™ family, or AMD K6/Athlon/Duron family, or compatible processor recommended
- Microsoft® Windows® XP operating system SP2 or later for PC
- Microsoft® Windows® XP Tablet PC Edition for Tablet PCs
- 256 MB RAM minimum, 512 MB recommended

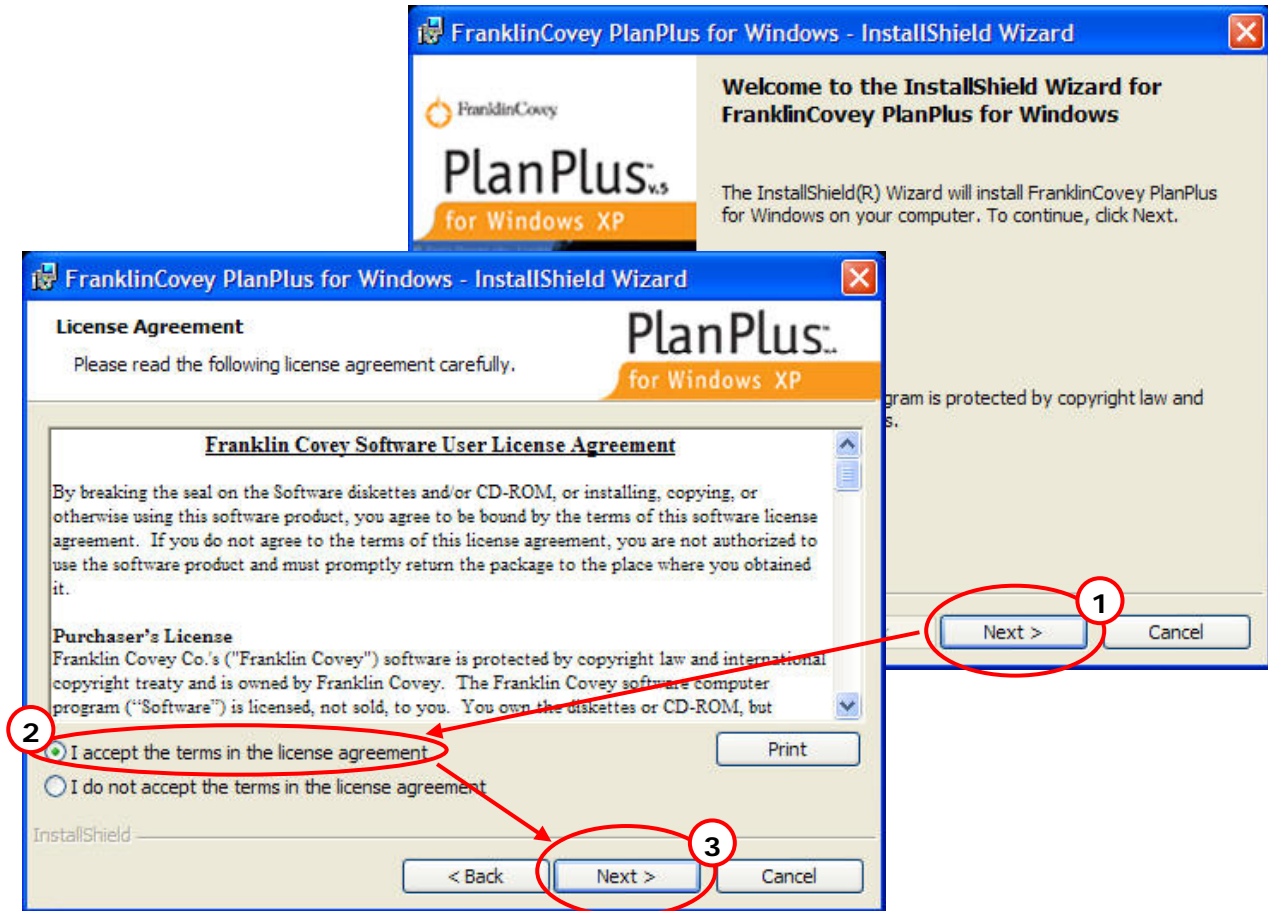
Note: 128 MB may limit performance and available features.

- 100 MB available hard disk space
- CD-ROM or DVD drive (if installing from CD)

PlanPlus Installation

Install from Download

1. From the FranklinCovey website (<http://www.franklincovey.com/downloads/xp/trial.html>), click the **Download PlanPlus for Windows** button.
 - Fill out the registration form and click **Download PlanPlus for Windows**.
 - You will need to click **Run** on two screens that will be displayed.The **InstallShield Wizard** screen appears.



2. Click **Next**.
The License Agreement appears.
3. Click the radio button labeled **I accept the terms in the license agreement** to select it, and then click **Next** to continue.

Note: If you do not accept the terms of the license agreement, the installation will terminate.

The **Customer Information** screen appears.

4

FranklinCovey PlanPlus for Windows - InstallShield Wizard

Customer Information
Please enter your information.

PlanPlus.
for Windows XP

User Name:
Jane Doe

Organization:
MyCompany

Install this application for:

Anyone who uses this computer (all users)

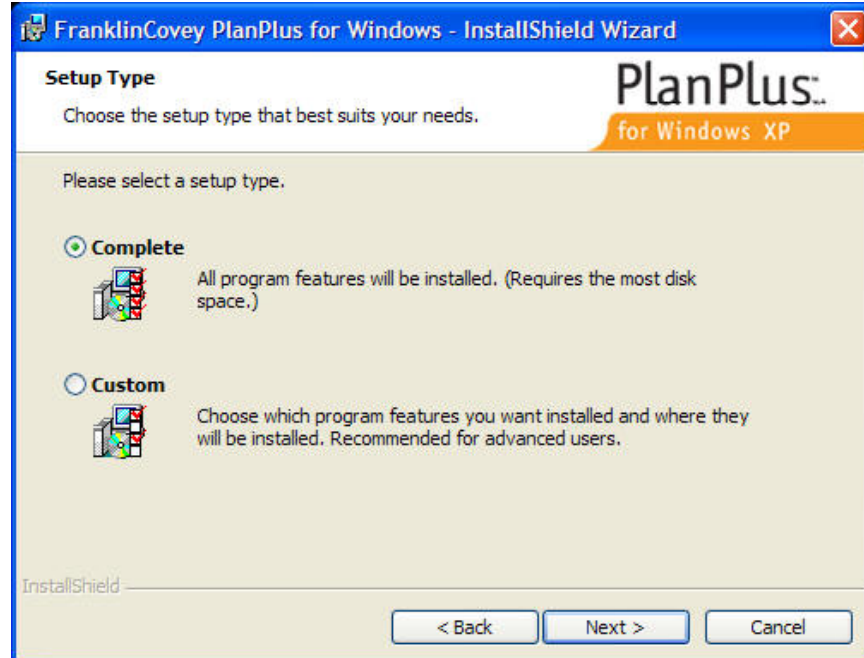
Only for me (Jane Doe)

InstallShield

< Back Next > Cancel

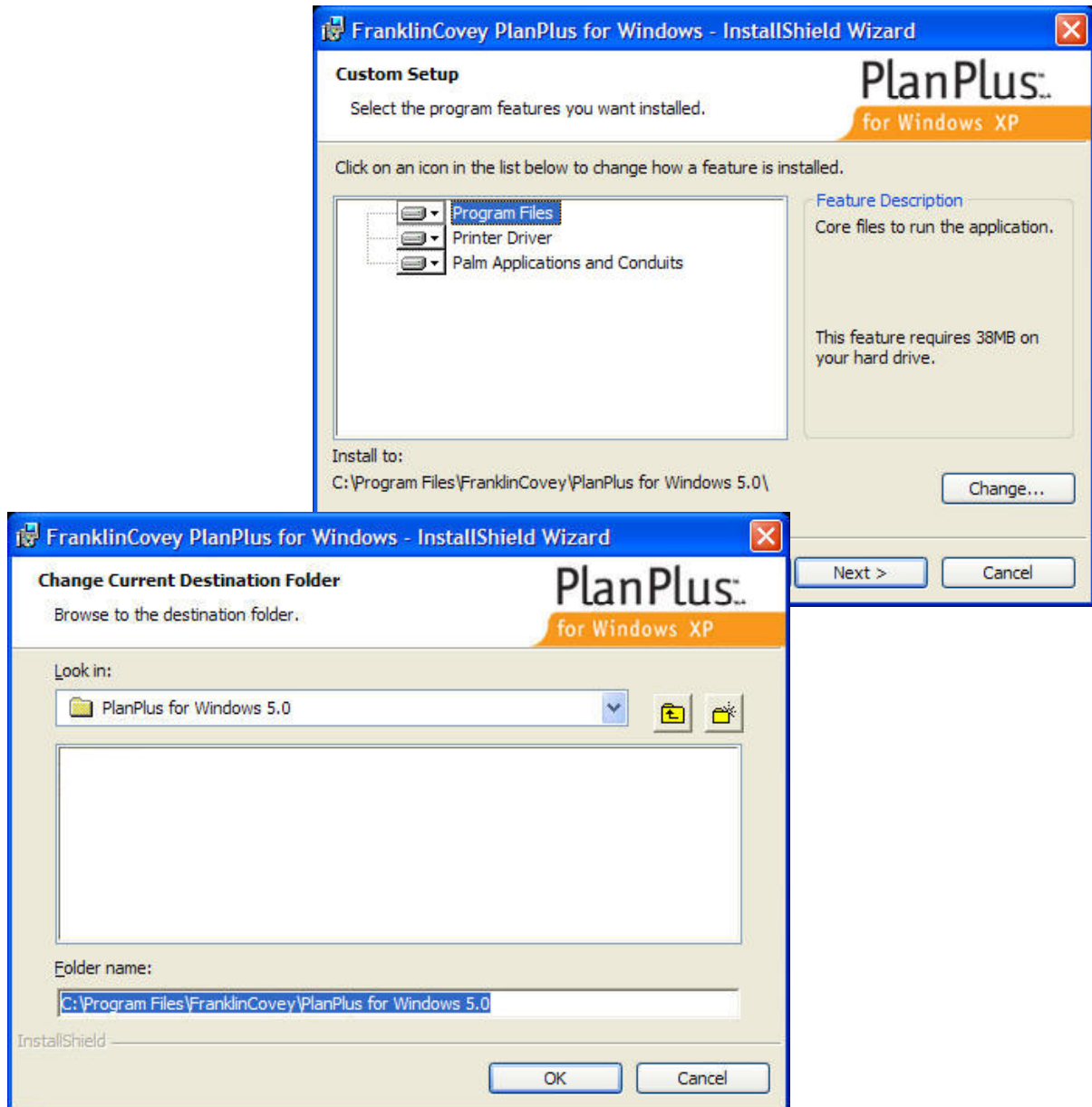
4. Enter your name and organization (such as your company name).
5. Select the application sharing:
 - **Anyone who uses this computer** – this setting allows anyone with access to this computer to also have access to this copy of PlanPlus.
 - **Only for me** – this setting prevents others who might be using this computer, but who are not logged in using your account, from accessing your PlanPlus files.
6. Click **Next**.

The **Setup Type** screen appears.



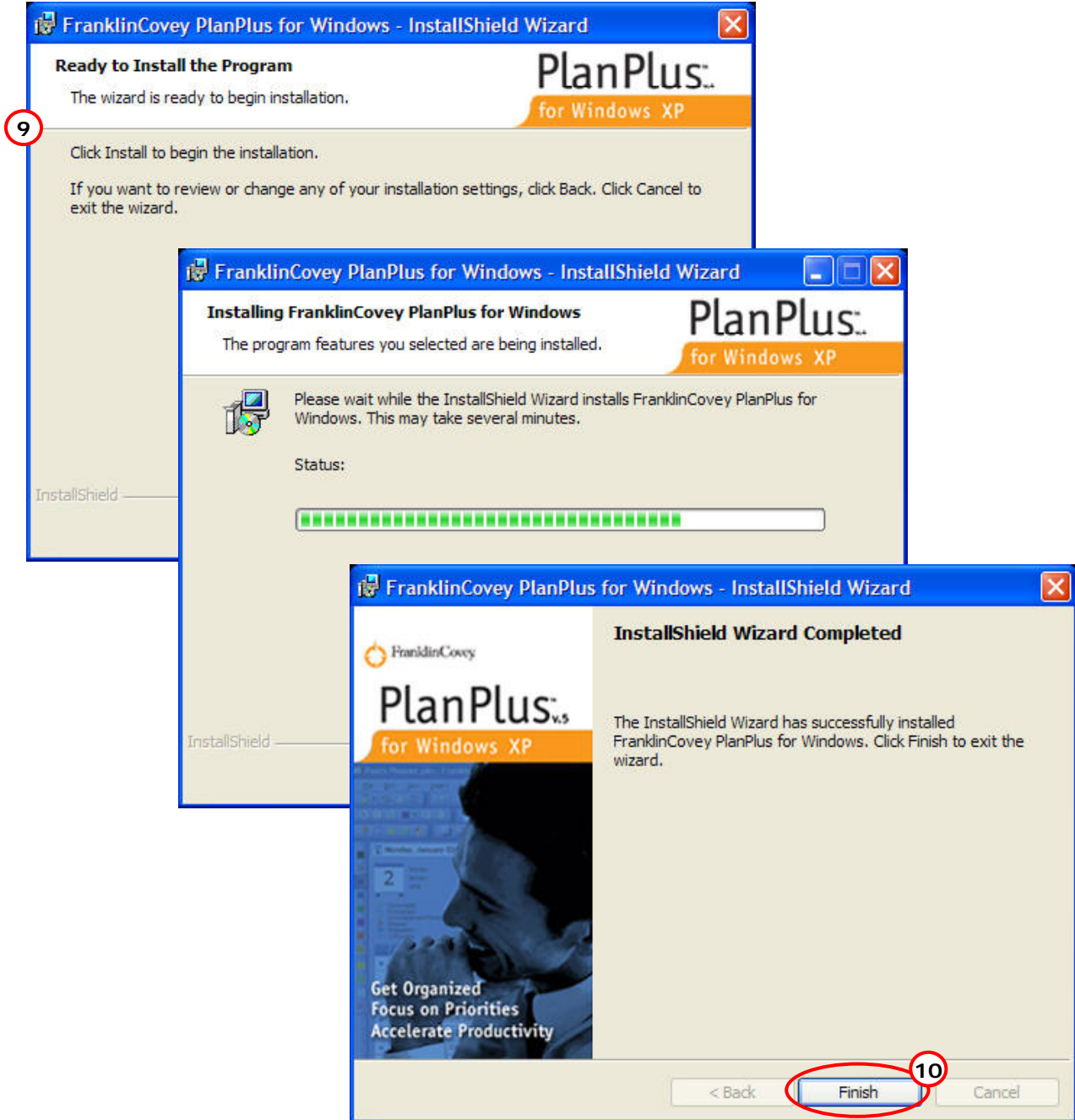
- Choose **Complete** to install all program features
 - Choose **Custom** if you wish to select the specific features to be installed.
7. Make your selection, and click **Next**.

If you selected Custom, the **Custom Setup** screen appears. (If you did not select Custom, skip to the next page).



- From the Custom Setup screen, you may choose to install the program files, printer driver, or both (and, optionally, all subfeatures), to a local hard drive.
 - You may choose not to install the PlanPlus printer driver by selecting the "this feature will not be available" option.
 - You may change the location where the files will be installed by clicking the **Change** button and navigating to the desired destination folder.
8. Make your selection(s) and click **Next** to continue.

The **Ready to Install** screen appears.



9. Click **Install**.

During installation, a screen appears showing the progress of the installation.

10. When installation is complete, the **InstallShield Wizard Completed** screen appears. Click **Finish**.

InstallShield will close and a **PlanPlus for Windows** icon will appear on your desktop.



To Start PlanPlus

Double-click the desktop icon to start PlanPlus. Alternatively, you can launch the program from the Windows Start menu by selecting **Start | Programs | FranklinCovey | PlanPlus for Windows | PlanPlus for Windows**.

- If you have not yet purchased a License Key but wish to purchase one now, you can click the **Buy Online** button from the Trial Version splash screen.
- If you do not wish to purchase a PlanPlus key at this time, you can click the **Continue** button to use the product on a trial basis. In order to use the PlanPlus past the trial period, you can purchase a license (see **Upgrading a Trial Version**, below).

Note: The first time you start PlanPlus, you are given the option to configure PlanPlus for synchronization with a Palm device using the **Configure Palm Wizard**.

If you do not wish to configure PlanPlus for synchronization with your Palm device at this time, you may click **Cancel** to close the Wizard.

In the future, if you choose to configure PlanPlus for synchronization with your Palm device (or wish to modify your configuration settings), you can do so through the sync configuration options on the **Tools** menu.

See ***Synchronizing with Palm applications*** for more information on using these tools.

Upgrading a Trial Version

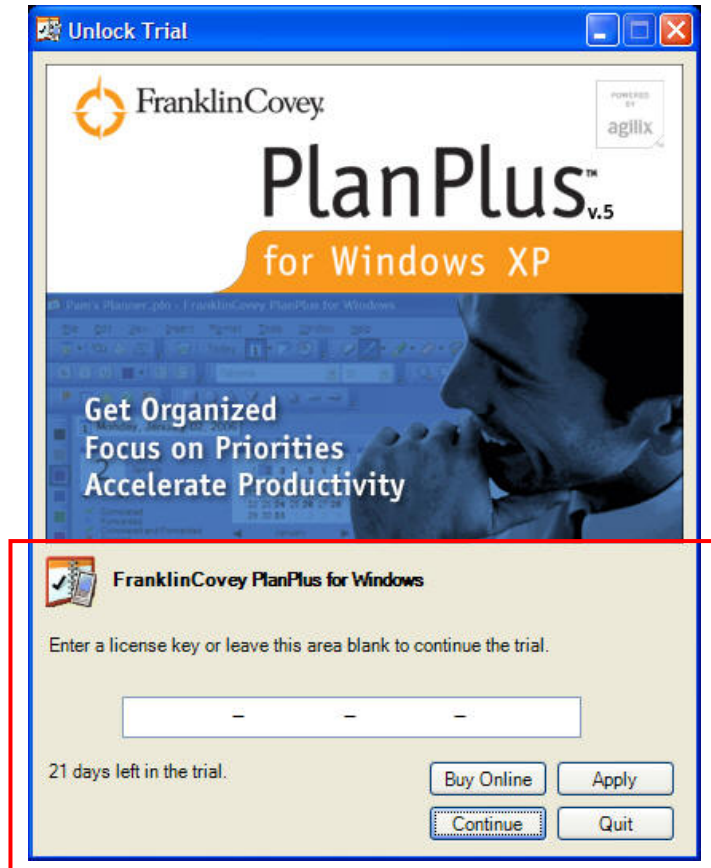
To upgrade a trial version of PlanPlus™ v.5 for Windows® XP:

- Click **Buy Online** on the PlanPlus splash screen to access purchasing options via the Internet. (This option requires an active Internet connection.) You will be prompted with the steps to purchase a PlanPlus License Key online.
- Go to the PlanPlus website at <http://www.franklincovey.com/planplus/xp> to purchase and receive a License Key.

Purchase price and availability may vary.

Note: If you are purchasing this copy of PlanPlus for your personal use, be sure to provide your e-mail address, as your license key will be e-mailed to you.

Some companies may purchase software licenses for their employees. If this is the case at your company, a license key will be provided to you by your IT department or software administrator.



Completing an Upgrade

- Upon purchasing your upgrade and receiving a License Key, enter the License Key number in the space provided on the splash screen and click **Apply**.
- PlanPlus will then be automatically upgraded to a full version.
- The splash screen will be modified (and no longer display the lower portion of the screen) and appear only briefly each time thereafter on starting the PlanPlus application.

Upgrading from Another Version of FranklinCovey Software

To install the PlanPlus™ v.5 for Windows® XP Upgrade, you need to have a purchased version of one of the following products installed on your machine:

- FranklinCovey TabletPlanner 1.x, 2.x, or 3.x
- FranklinCovey PlanPlus for Windows 4.x
- FranklinCovey Planning Software (FPS) 7.x or 8.x

If you are upgrading from one of these products, **do not uninstall it** before installing PlanPlus version 5. During installation, the upgrade will detect whether or not one of these products are installed.

- If the one of the specified versions is detected, installation will continue normally.
- If none of the previous versions are installed on your machine, PlanPlus will display the following message. Clicking **OK** will exit the installation.



Automatic Updates

Notifications for product updates come automatically over the Internet. You will be prompted with the option of automatically updating your PlanPlus whenever a newer version is available. At this point, you will have the option of downloading and installing the new version, which will overwrite your previous version of PlanPlus.

Manual Updates

You can check for updates to PlanPlus manually.

1. With your computer connected to the Internet, choose **Help | PlanPlus for Windows Updates** from the menu bar.
2. You will be prompted if an update is available. Follow the instructions displayed on the screen.

Importing from Franklin Covey Planning Software

If a FranklinCovey Planning Software 7.3 or 8.x database exists on your desktop or notebook computer at the default location, you can choose to import it into your PlanPlus database.

Note: You will have the option of importing FranklinCovey Planning Software data *only* if a FranklinCovey Planning Software database exists on your desktop or notebook computer at the default location.

Please be aware of the following issues and considerations before importing your FranklinCovey Planning Software data into PlanPlus™ v.5 for Windows® XP.

Caution: Straight Import Considerations

The import of FranklinCovey Planning Software data is a “straight import” – that is, no effort is made to resolve duplicates or otherwise reconcile the information that is being imported. If you have duplicate information already on your PlanPlus system, or if there is duplicate information in FranklinCovey Planning Software, it will not be resolved during the import.

Note: We recommend reviewing your imported data, especially your Tasks and Appointments, to ensure the integrity of the data import.

Caution: Interrupting the Import

Because the FranklinCovey Planning Software data import is a “straight import,” if the import is interrupted at any time, the data that has been imported up to the point of the interruption will remain in PlanPlus. If you then import your FranklinCovey Planning Software data again, at a later time because of the interruption, it may result in a duplication of data in your PlanPlus database.

Caution: Handling of Recurring Appointments

Because PlanPlus handles Tasks and Appointments (particularly Repeat Tasks and Recurring Appointments) differently than FranklinCovey Planning Software, some of the imported Tasks and Appointments may be “best guesses” as to how the Task or Appointment should appear in PlanPlus. You should review your imported Repeat Tasks and Recurring Appointments to ensure they still function as you desire, and make any changes necessary for them to function in PlanPlus the way they were intended.

To Import FranklinCovey Planning Software Data

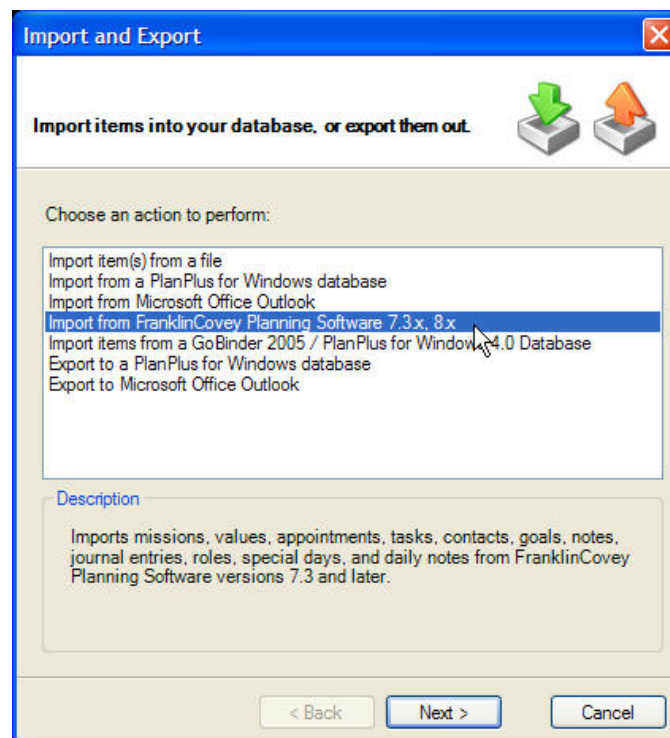
If a FranklinCovey Planning Software database exists on your desktop or notebook computer at the default location, you can choose to import it into your PlanPlus database.

The first time you launch PlanPlus, you are given the opportunity to import your FranklinCovey Planning Software data. If you choose not to import your existing database at that time, you can import it at a later time through the **File | Import and Export** option.

Note: If the FranklinCovey Planning Software database is not at the default location on your desktop or notebook computer, will not be able to import your FPS data.

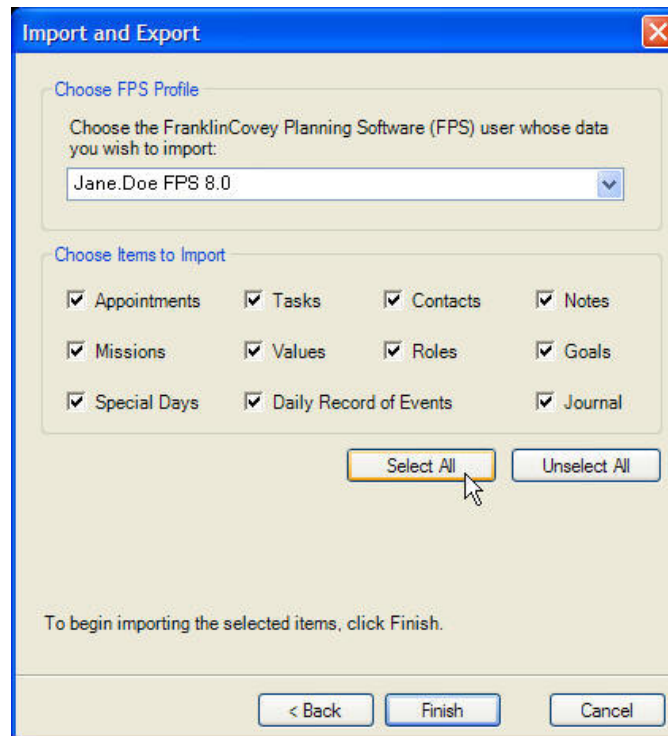
1. From the menu, select **File | Import and Export**.

The **Import and Export** dialog box appears.



2. Select **Import from FranklinCovey Planning Software 7.3x, 8x** and click **Next**.

The **Import and Export** dialog box appears.



3. Select the FPS user data you wish to import from the **Choose FPS Profile** drop-down list.
4. In the **Choose Items to Import** area, place a check in the box next to the items from the FranklinCovey Planning Software database you wish to import.

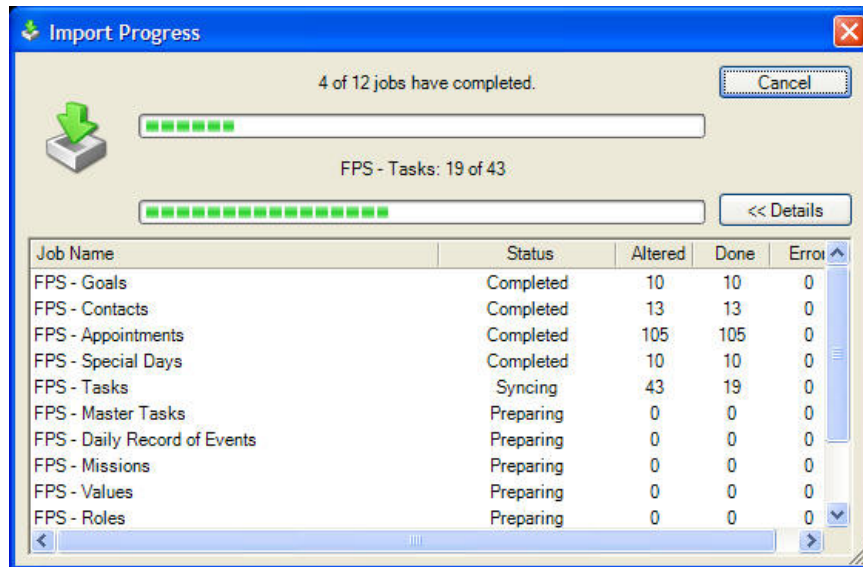
You can choose to import some or all of the following FranklinCovey Planning Software data types (all are selected by default):

Appointments	Tasks	Contacts	Notes
Missions	Values	Roles	Goals
Special Days	Daily Record of Events		Journal

For your convenience, you can use the **Select All** button to choose all options for import, or to use the **Unselect All** button to quickly turn the import off for all options, allowing you to easily identify and enable only those options you wish to select.

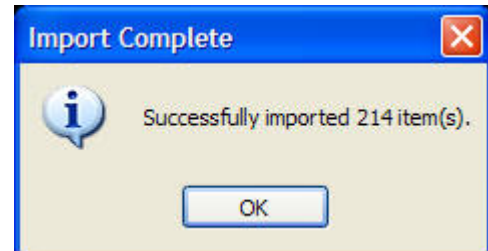
5. When you have made your selections, click **Finish** to begin importing the selected data.

A progress bar will indicate the status of the import (if your database is large, it could take some time to complete the import process).



When the import is finished, a dialog will appear to notify you.

Close this dialog to return to PlanPlus. Your imported data will have been added to your PlanPlus database, and sorted into the appropriate folders, calendar pages, contact list, and so forth.

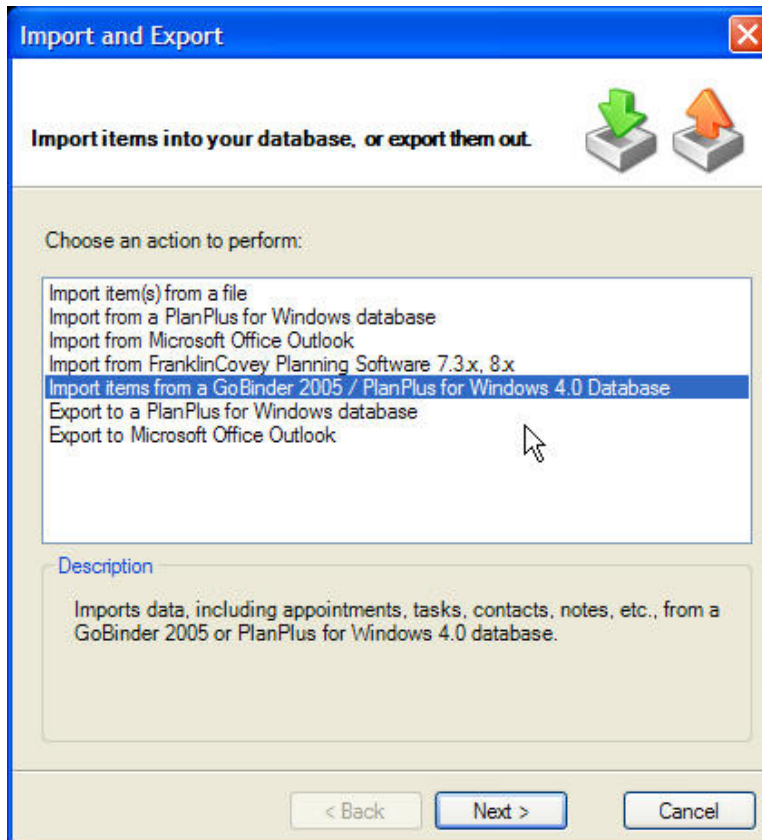


Importing from Earlier Versions of PlanPlus for Windows and Tablet Planner

If you have an existing database from PlanPlus for Windows 4, GoBinder 2005, or Tablet Planner (all versions), you can import it into your PlanPlus for Windows 5 database.

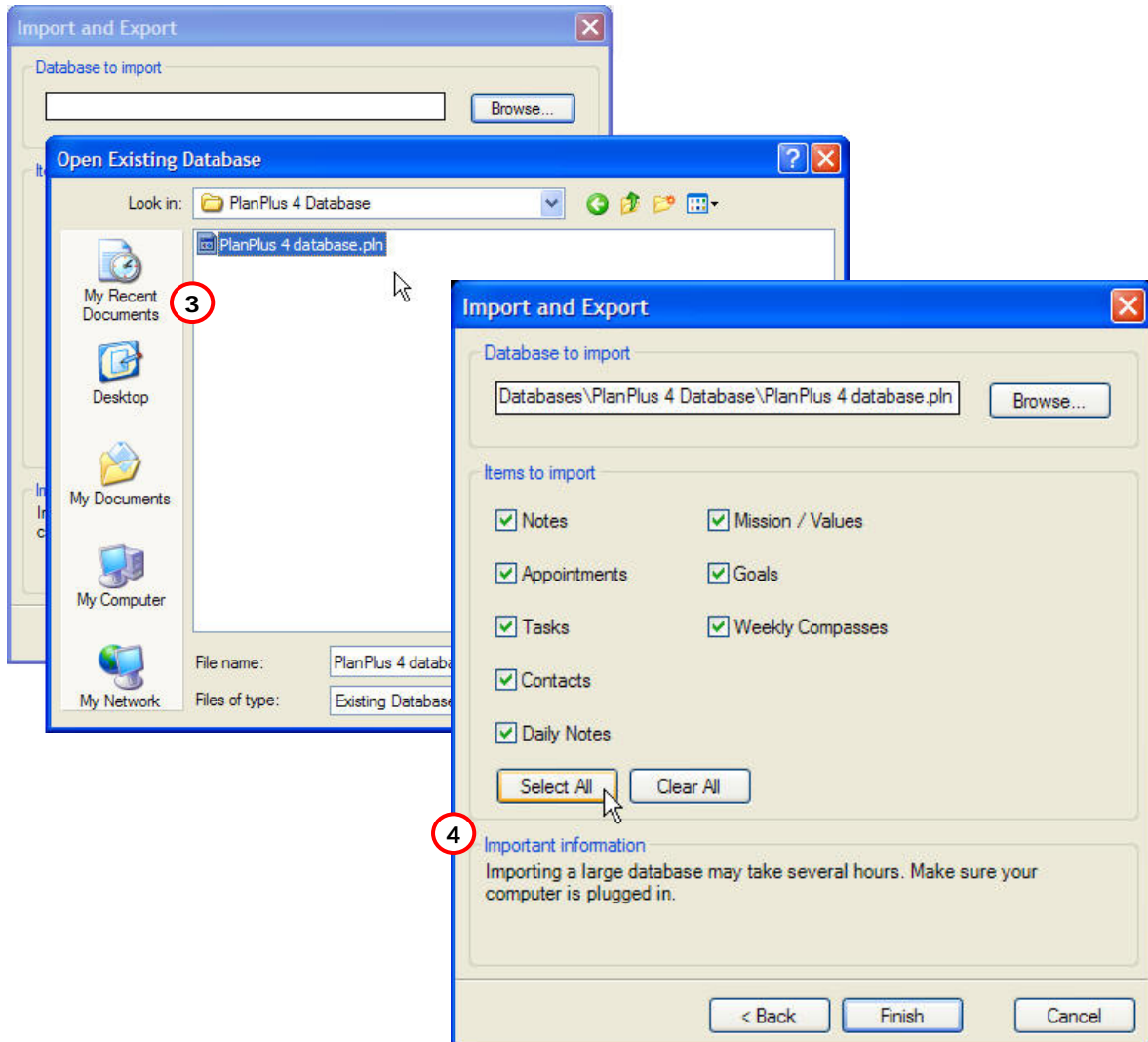
1. From the menu bar, choose **File | Import and Export**.

The **Import and Export** dialog box appears.



2. Select **Import items from a GoBinder 2005/PlanPlus for Windows 4.0 Database** and click **Next**.

The **Import item(s) from** dialog box appears.

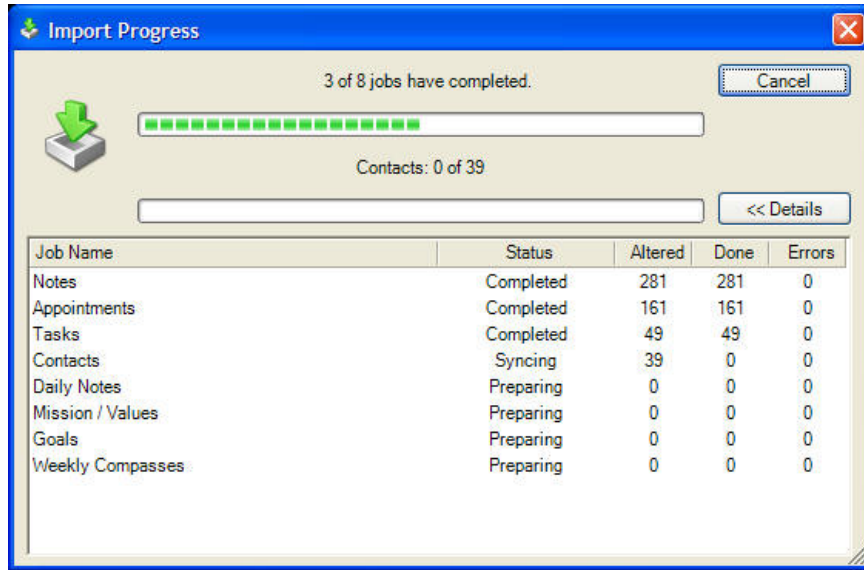


3. Click the **Browse** button to navigate to the file you wish to add, select the file, and click **Open**.

You are returned to the **Import Item(s) from** dialog, and the filename is now listed in the **Database to import** field.

4. In the **Items to import** area, select the types of items you wish to import. You may select all item types, or only a few, as you desire.

- When you are ready, click **Finish** to import the file(s). A progress bar will indicate the status of the import (if your database is large, it could take several hours to complete the import process).



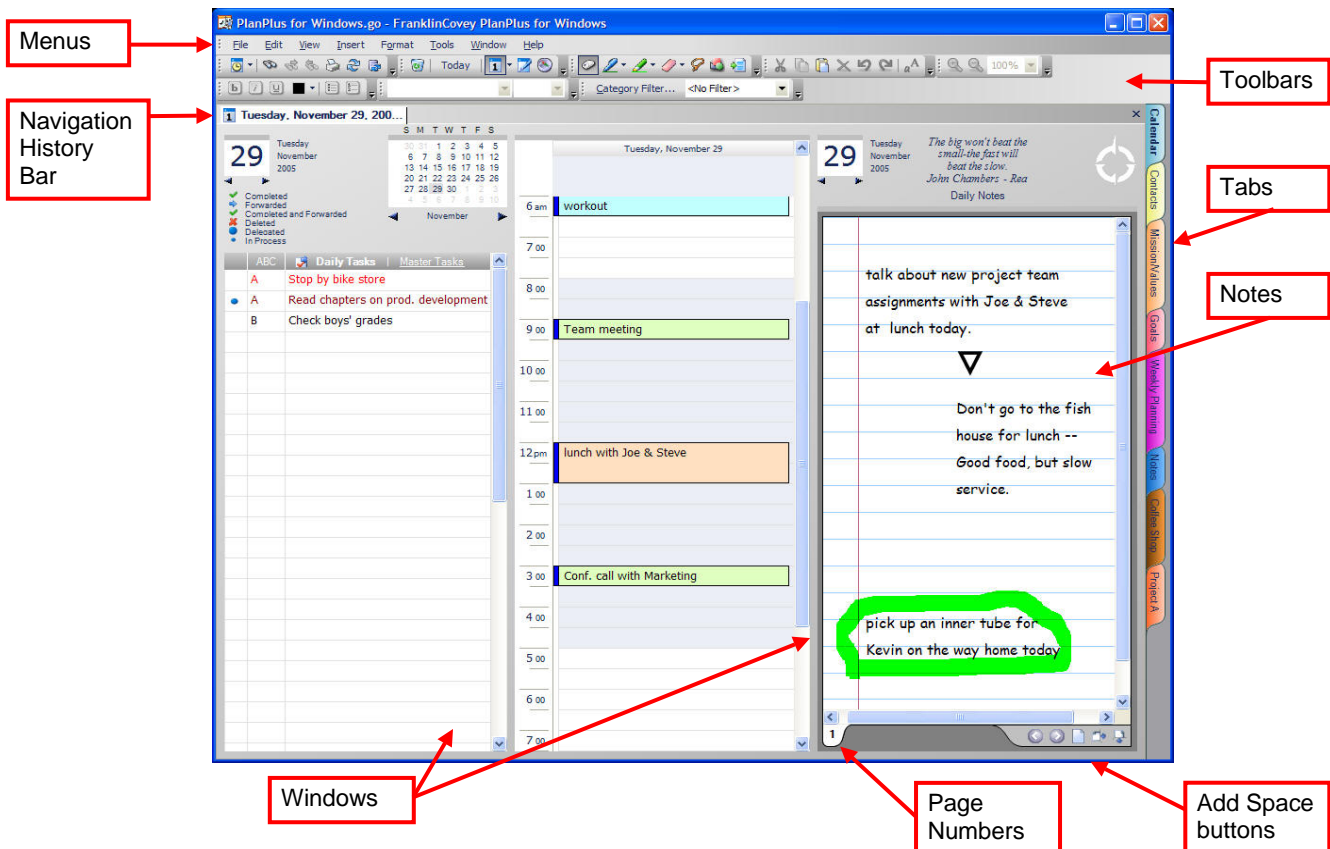
Note: During the import process, if there are items in the database that are password-protected, you will be prompted to provide the password before those items can be imported.

When the import is finished, a dialog will appear to notify you.

Close this dialog to return to PlanPlus. Your imported tabs will have been added to your PlanPlus database, along with any notes, appointments, tasks, or other items you selected.

Getting Around in PlanPlus

Like any application, PlanPlus™ v.5 for Windows® XP has its own collection of menu options, buttons, and other navigational controls. You may wish to review this section to familiarize yourself with PlanPlus features and terminology before continuing.



Using the Menus

PlanPlus menus are similar to those of other applications. You will find commands such as printing, closing, access to different views, and much more within the menu.

Note: You will not find a “Save” option in the menus or buttons. PlanPlus automatically saves your work as you go. All changes and additions are saved immediately.

Access to different menu commands varies depending upon where you are working in PlanPlus. Commands that are not available in a specific area will be inactive (grayed-out).

The following tables will provide you with an overview of each of the menus and their options.

File Menu

Option	Description
New	Creates new PlanPlus database, new project, new notes, appointments, tasks, and contacts.
Open	Opens a selection or another PlanPlus for Windows database.
Delete Appointment	Removes an appointment.
Backup	Allows you to set where you want the Backup file to be stored when you do a PlanPlus database backup. This can be set as the default. (Other configuration settings for automatic and manual backups of your PlanPlus data file are done through the Tools Options menu.)
Restore	Allows you to restore a PlanPlus for Windows database from a backup.
Security	Configures password protection for your PlanPlus database.
Print (Item)	You can print PlanPlus items on standard 8.5 x 11 inch paper. Options that appear on the print dialog will vary, depending on the item you have selected. Specific information for printing PlanPlus items will be provided throughout this user guide in the corresponding chapters.
Save as	Saves data from your PlanPlus data file into a variety of file formats (options may vary depending on the item you have selected).
Import and Export	Allows you to: <ul style="list-style-type: none">▪ Import data into your PlanPlus database from a PlanPlus interchange file.▪ Export data from your PlanPlus database to a PlanPlus interchange file.
Send to	Sends data from your PlanPlus data file to an e-mail recipient.
Exit	Closes PlanPlus.

Edit Menu

Option	Description
Undo / Redo	Undo removes unwanted entries in the order that they were entered (within a section). Redo provides unlimited re-entry of information that has been removed.
Cut/Copy/Paste	Performs the desired action on selection in notes, appointments and tasks.
Copy As Text	Copies data (including digital ink) to the clipboard in plain text format.
Delete	Removes a selection.
Rename	Lets you change the name of Digital Paper input.
Select All	Selects all of the data in the current scope of a note. Selecting this option multiple times increases the scope of the selection each time.
Select Page	Selects one page in a note.
Cancel Selection	Cancels selections made using the <i>Select Tool</i> , or <i>Select All</i> or <i>Select Page</i> commands.
Convert Ink to Text	Converts any selected ink (or all ink on a note page if there is no selection) to text.
Pen Acts As	Changes pen settings to pen, highlighter, eraser, selection tool (lasso), mouse, and shape.
Snap to Grid	Toggles whether or not text, images, and digital ink snap to lines on the paper in your note pages.

View Menu

Option	Description
Search	Launches the search feature.
Next Hit / Previous Hit	New feature in Search that takes you to the next or previous "hit" or occurrence of the search term within the object (note, appointment, etc.)
Find	Searches the current note or document for the specified search term.
Go to	Lets you select a specific date by writing, typing, or selecting it from a pull-down calendar.
Toggle Full Screen	Expands PlanPlus to full screen mode (this view can also be accessed by pressing the F11 key). Press F11 to return to the previous view.
Zoom	Allows you to select zoom options for the current note.
Category Filter	Displays the list of available categories. You may use this option to add categories and assign the selected item to a particular category. <i>Categories can also be created through the Options dialog.</i>
Trash Bin	Allows you to view the contents of the trash bin. You may choose to empty the trash, purge selected items, or restore items to their original folders.
Day View / Week View / Work Week View / Month View	These options allow you to toggle the calendar view <ul style="list-style-type: none"> ▪ Day – Displays the calendar page, tasks list, and daily notes for a single day. ▪ Week – Displays a calendar page for the selected week. Tasks for each day of the week are displayed below the calendar page. ▪ Work Week – Displays a calendar page for the selected work week. Tasks for each day of the work week are displayed below the calendar page. ▪ Month – Displays a calendar page for the selected month. <i>Note that you can customize the Week and Work Week settings through the Tools Options Calendar Options feature.</i>
Contact List	Displays a database-style list of all people with all their information.
Mission/Values	Create a Mission Statement which helps you keep focused on your purpose and meaning in life. Create Values to help guide you in your daily decisions.
Weekly Compass	Create your Weekly Compass to review your Key Roles and Relationships, and create "big rocks" to strengthen them.
Roles	List the Roles you try to balance each day.
Weekly Planning	Plan each week with a quick and easy 4-step process of reviewing what's most important to you, scheduling your goals and tasks.
Goals	List the short term, long term, Business, or Personal goals you want to accomplish.

Insert Menu

Option	Description
Page	Inserts a new page into the current note.
Insert/ Remove Space	Turns on the insert/remove space feature for a note page.
Shape	Allows you to insert a variety of shapes into your PlanPlus notes (rectangle, ellipse, triangle, yield, diamond, star, line, and arrow).
Flag	Allows you to insert a variety of flags into your PlanPlus notes. In addition, the Define Flags option allows you to modify the existing flags, or create new flags of your own.
Hyperlink	Opens the Edit Hyperlink box, allowing you to enter or update a hyperlink that will be placed in the text at your cursor's insertion point prior to selecting this option.
Picture	Inserts an image into the current note page (see Inserting an Image for more information).

Format Menu

Option	Description
Font	Changes the font of the selected text or digital ink.
Alignment	Changes the text alignment to left, right, or center for the selected text.
Decrease/ Increase Indent	Decreases or increases the indent of the current paragraph.
Bullets	Toggles bullet mode on the current text.
Numbering	Toggles numbering mode on the current text.
Change Stationery	Changes the paper type (the background) of the current note page.
Bring to Front/Send to Back	Brings the current selection to the front of the page or sends the current selection to the back of the page.

Tools Menu

Option	Description													
Sync	<p>This menu contains the following submenu options:</p> <ul style="list-style-type: none"> ▪ Connections – Allows you to create or modify a connection to another PlanPlus database, Microsoft Outlook, or a Palm device. ▪ Sync All – Allows you to synchronize PlanPlus with all of the connections you have established ▪ Sync One – Allows you to synchronize PlanPlus with the connection of your choice. ▪ Show Status – Displays the status of your PlanPlus synchronization session. ▪ Print Capture Now – Reserved for future use. ▪ Manage Palm Installation – If you are using multiple Palm devices, allows you to identify and specify on which Palm device you wish to install/uninstall FranklinCovey conduits. 													
Customize	<p>Opens the Customize dialog, allowing you to customize your Toolbars, Commands, and certain Options.</p>													
Options	<p>Opens the Options dialog, which provides extensive flexibility in customizing PlanPlus for your use. From this dialog, you can define your preferences in the following areas:</p> <p style="margin-left: 20px;"><u>General Options</u></p> <table style="margin-left: 40px; border: none;"> <tr> <td style="padding-right: 20px;">View Options</td> <td style="padding-right: 20px;">Ink and PDF Options</td> <td>Print Capture</td> </tr> <tr> <td>Database Options</td> <td>Skins</td> <td>Send Mail</td> </tr> <tr> <td>Notes Options</td> <td>Categories</td> <td></td> </tr> </table> <p style="margin-left: 20px;"><u>Pages Options</u></p> <table style="margin-left: 40px; border: none;"> <tr> <td style="padding-right: 20px;">Calendar</td> <td>Contacts</td> </tr> <tr> <td>Tasks</td> <td>Weekly Planning</td> </tr> </table> <p style="margin-left: 20px;"><i>Detailed instructions for using the tools contained in the Options dialog are provided in Personalize PlanPlus.</i></p>	View Options	Ink and PDF Options	Print Capture	Database Options	Skins	Send Mail	Notes Options	Categories		Calendar	Contacts	Tasks	Weekly Planning
View Options	Ink and PDF Options	Print Capture												
Database Options	Skins	Send Mail												
Notes Options	Categories													
Calendar	Contacts													
Tasks	Weekly Planning													

If you sync more than one Palm device with your computer, the Manage Palm Installation tool can assist you to identify and specify on which of your devices the FranklinCovey applications are to be installed, as well as manage which of your devices (any or all of them, in any combination) should be synchronized with PlanPlus.

In addition, Manage Palm Installation also allows you to uninstall the FranklinCovey conduits, and return your Palm Desktop to its factory settings.

Window Menu

See **Create a Custom View** for more information on manipulating PlanPlus windows.

Option	Description
Close Window	Closes the current active page.
Close Other Windows	Closes all open pages except for the currently active window
Open Window List	This function acts like the history bar, showing a list of the last 10 recently opened windows, allowing you to navigate to any window in the list.

Help Menu

Option	Description
PlanPlus Help	Provides access to the electronic Help.
Register PlanPlus for Windows	Registers your version of PlanPlus to ensure that you are notified about upcoming releases and patches.
Product Suggestions	Opens an online form where you can provide suggestions for future versions of PlanPlus.
Product Support	Opens an online form where you can contact a support representative with any questions you may have about using PlanPlus.
Check for Updates	Accesses the Internet to determine if updates are available for your version of PlanPlus.
Enable Automatic Updates	Toggles the option to automatically scan for product updates to On or Off.
About	Provides version information.

Using the Toolbar

You can access most PlanPlus features from the Toolbars.

There are several components to the Toolbar, but not all are displayed by default. You can choose to view one component, multiple components, or even no components (in which case the Toolbar will not be displayed).

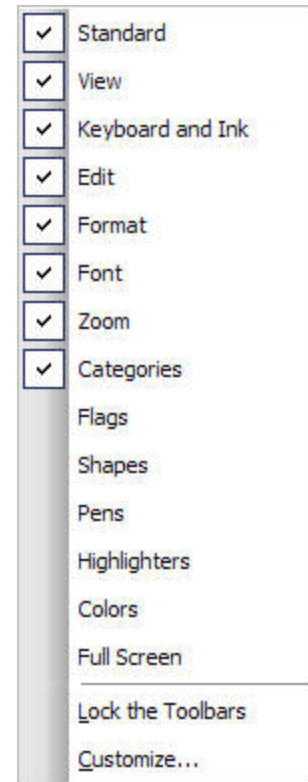
You can drag and drop Toolbar components to other locations along the top, bottom, and sides of your PlanPlus workspace, as desired, pull them off of your PlanPlus screen as "floating palettes," or lock them in place.

Turn On Toolbar Components

You can change the way your Toolbar looks by turning different components of the Toolbar on or off.

1. Right-click (or click and press the digital pen button) on the Toolbar.
2. Select the Toolbar components you wish to display.

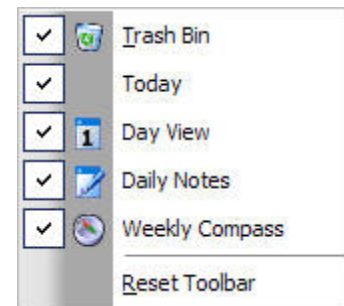
Note: If you turn off all the Toolbar components, you can still right-click in the Menu toolbar area to display the Toolbar list and select the Toolbar component(s) you wish to display.



Hide or Show Toolbar Buttons

You can hide or show Toolbar buttons on each of the Toolbar components.

1. Click on the arrow on the right end of the Toolbar component.
2. The **Add or Remove Buttons** option appears. Click on the down arrow to select this option.
3. A list of toolbars appearing on this toolbar row appears. Select the toolbar you wish to modify.
4. A list of available buttons appears.
5. Click to select the buttons you wish to display, or clear the checkmark to deselect the buttons you wish to hide.



The Toolbar now appears on your screen with the extra buttons, or with buttons removed.

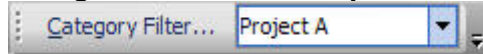
Note: Clicking the **Reset Toolbar** button resets the selected toolbar display to show only those buttons originally displayed by default.



Toolbar Buttons

While you may choose to customize PlanPlus for Windows by hiding or displaying toolbar buttons, or rearranging the positions of the toolbar components to suit your working style, the button functions always remain available to you. For quick reference, each of the PlanPlus toolbar buttons and their functions are described in the tables on the following pages.

Buttons are grouped by the specific toolbar component on which they appear. Toolbars are listed alphabetically below for your reference.

Categories Toolbar Component




Button Image	Button Name	Description
	Category Filter	Opens the Category Filter dialog, displaying a list of all available categories, the color-code associated with each category, and check boxes allowing you to select the category(ies) you wish associated with the current item. Items with multiple categories will be color-coded with the color of the first (alphabetical) category.
	Current Category Filter	Selecting a category from the drop-down list will filter the display to view only items belonging to that category.

This toolbar is displayed by default.

Colors Toolbar Component



Button Name	Description
Color buttons	Color buttons each display their specific color name. When you are in an Ink mode, you may use these buttons to change the color of your pen or highlighter ink..
Custom Color buttons	These color buttons remain empty and inactive until you create additional custom colors through the Color dialog.
 More Colors	Clicking this button opens the Color dialog, allowing you to select from a range of Basic Colors (Windows default colors), Custom colors (created for PlanPlus), or create your own custom colors.

Edit Toolbar Component

Button Image	Button Name	Description
	Cut / Copy / Paste	Allows you to Cut (remove) or make a Copy of the selected item, and Paste it to a new location.
	Delete	Removes the selected item.
	Undo / Redo	<ul style="list-style-type: none"> ▪ Undo removes unwanted entries in the order that they were entered (within a section). ▪ Redo restores information that has been removed.
	Convert to Text	Converts digital ink that was just entered or that has been selected (using the Lasso [select] button) to text.

This toolbar is displayed by default.

Flags Toolbar Component








Button Image	Button Name	Description
	Flags	Flags may be inserted into your PlanPlus Notes to call attention to items of importance. Each of the flags provided have a default purpose, which is listed, however, they may be modified as desired.
	Define Flags	Clicking this button allows you to modify existing flags or create new ones.

Font Toolbar Component

Button Image	Button Name	Description
	Font	Allows you to select a text font from the list.
	Font Size	Allows you to select the font size.




This toolbar is displayed by default.

Format Toolbar Component


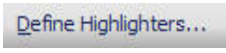
Button Image	Button Name	Description
	Bold / Italics / Underline	Allows you to manipulate the appearance of text.
	Color	Allows you to select the text color.
	Bullets / Numbering	Allows you to apply Bullet or Numbering formatting to text
	Align Left / Center / Right	Allows you to align the selected text all to the left, all to the right, or by the center of each line.
	Increase / Decrease Indent	Allows you to increase or decrease the indentation for the selected text.
	Bring to Front / Send to Back	These buttons allow you to layer objects. <ul style="list-style-type: none"> ▪ Bring to Front places the selected object in front of other objects. ▪ Send to Back places the selected object behind other objects.
	Snap to Grid	Allows you to align objects to a predefined grid.

This first six items on this toolbar are displayed by default.

Full Screen Toolbar Component

Button Image	Button Name	Description
	Full Screen	Clicking this button expands your PlanPlus to the Full Screen view.
	Zoom In / Zoom Out	Increases (Zoom In) or decreases (Zoom Out) the zoom by a preset factor.
	Fit Page	Adjusts the display to show the full page on your screen, even if you resize the window.

Highlighters Toolbar Component

Button Image	Button Name	Description
	Highlighters	Allows you to select highlighter size and color from a predefined group of styles.
	Define Highlighters	Clicking this button allows you to modify the thickness, color, point style, and pressure sensitivity of the highlighters.

Keyboard/Ink Toolbar Component



Button Image	Button Name	Description
	Pen, Highlighter, Eraser	Allows you to select digital ink writing or erasing tools. Select different options or customize tools by clicking the options arrow to the right of each button.
	Lasso (select)	Lets you select ink on daily notes or other note pages by circling an ink item or series of ink items.
	Mouse	Indicates that you are using a mouse rather than a stylus.
	Shape	Clicking this button allows you to draw a free-form object with your mouse or stylus, which will then be converted into a shape object.
	Insert/Remove Space	Allows you to Insert space in a note so that you can add additional text, or Remove unnecessary space from a note.

This toolbar is displayed by default.

Pens Toolbar Component



Button Image	Button Name	Description
	Pens	Allows you to select pen size and color from a predefined group of styles.
	Define Pens	Clicking this button allows you to modify the thickness, color, point style, and pressure sensitivity of the pens.

Shapes Toolbar Component



Button Image	Button Name	Description
<i>(see toolbar image above)</i>	Shapes	From this toolbar, you can click on a predefined shape and place it on a note or document.

Standard Toolbar Component

Button Image	Button Name	Description
	New	<p>Adds a new database, note, appointment, task, contact, or goal at any point in PlanPlus.</p> <p><i>Note: The button image displayed varies depending on your location in PlanPlus, but you can always select any New option by clicking the small arrow just to the right of the button.</i></p>
	Search	<p>Allows you to search for a word or phrase in a <i>PlanPlus</i> note, document, appointment, or task.</p>
	Print	<p>Allows you to print the current item.</p> <p><i>Note: Print options vary depending on where you are in PlanPlus.</i></p>
	Sync All / Sync One	<p>Launches the PlanPlus synchronization process with multiple hosts, applications or devices, or a single host, application, or device that you select.</p> <p><i>Note: The hosts, applications or devices must be pre-configured before this button works.</i></p>

This toolbar is displayed by default.

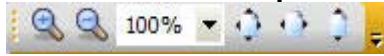
Note: "Sync" in PlanPlus refers to synchronizing data with Microsoft Outlook and Palm OS devices, or with other PlanPlus databases.

View Toolbar Component

Button Image	Button Name	Description
	Trash Bin	<p>Opens the Trash Bin, from which you may restore previously deleted files, or purge deleted files from your PlanPlus database.</p>
	Go to Today	<p>Returns your calendar view to the current date.</p>
	Day / Week / Work Week / Monthly View	<p>These options allow you to toggle between calendar views. The button for the currently selected view will be displayed in the toolbar. Click on the drop-down arrow beside the button to display the list and select a different view.</p>
	Daily Notes	<p>Opens a note page where you may add notes associated with the selected date.</p>
	Compass	<p>Opens the Weekly Compass popup.</p>

This toolbar is displayed by default.

Zoom Toolbar Component



Button Image	Button Name	Description
	Zoom In / Zoom Out	Increases (Zoom In) or decreases (Zoom Out) the zoom by a preset factor.
	Zoom (percent)	Allows you to adjust the size of the display by selecting from a preset list of percentages.
	Fit Page / Fit Width / Fit Height	Adjusts the display to fit on your screen, even if you resize the window. <ul style="list-style-type: none"> ▪ Fit Page zooms to display the full page. ▪ Fit Width fits the page to the width of the program window. ▪ Fit Height fits the page to the height of the program window.

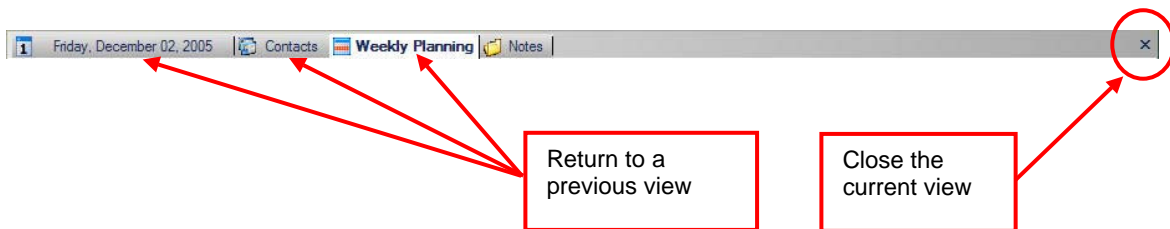
This toolbar is displayed by default.

Using the Navigation History Bar

The PlanPlus Navigation Bar has a “history feature” that lets you quickly move between any of the last ten views you have used in PlanPlus.

To Switch Views

- On the Navigation History bar, click to switch to any of the last ten views you have worked with.



To Close Views from the Navigation History Bar

- Close the active view by clicking the **Close** button at the right end of the Navigation History bar, or by selecting **Window | Close Window** from the menu.
- If multiple views are open, clicking the **Close** button will close each view sequentially, from right to left.

Keyboard Navigation

PlanPlus is well suited for use with a keyboard. Menu options and toolbar buttons are only a mouse-click away, and allow you to easily open a new or existing note, place your cursor in the document, and begin typing. The toolbar buttons also allow you quick mouse access to PlanPlus functions, similar to working in a standard word processor. If you are reading an article, you can use your mouse to select the pen or highlighter to mark important passages.

Using Keyboard Shortcuts

For even greater convenience, many keyboard shortcuts have been provided to help you use PlanPlus quickly and efficiently with your keyboard. Each of the menus can be accessed from the keyboard using the **“Alt”** key and the first letter of the menu item you wish to access.

For example:

- **“Alt” + “F”** opens the File menu, pressing **“N”** will then launch the New submenu (indicated by a >), and finally, pressing **“A”** will open a new appointment. You can also use Arrow keys and Enter keys to navigate through the menu.
- To bypass the menu and instantly perform a command, use the **“Ctrl”** (Control) key and the corresponding letter of the menu option. For instance, **“Ctrl” + “C”** performs the Copy command. Not all functions have a **“Ctrl”** function; however, those that do list the option in the menu with their corresponding function.

The following table lists the PlanPlus keyboard shortcuts. Shortcuts are listed in alphabetical order for convenience. Notice that some options have multiple shortcuts available.

Name	Keys	Description
Bullets	Ctrl + Shift + B	Formats the currently selected text as a bulleted list.
Close	Alt + F4	Close the application
Close Other Windows	Ctrl + Shift + F4	Save and close all open windows
Close Window	Ctrl + F4	Save and close the current window
Copy	Ctrl + C Ctrl + Insert	Copy the selected item to the clipboard
Copy as Text	Ctrl + Shift + C	Copies the selected item to the clipboard as text only, with no formatting
Cut	Ctrl + X	Delete the selected item
Delete	DEL	Deleted selected item or text
Find	Ctrl + F	Find a particular item on the current page
Go To	Ctrl + G	Go to a particular date
Help	F1	View PlanPlus help
Insert Hyperlink	Ctrl + K	Insert a hyperlink
New Window	Ctrl + Shift + N	Open a copy of the current window (if available)
Next control	Tab	Set focus to the next control
Next Tab	Ctrl + PgDn	Show the next tab
Next Window	Ctrl + Tab Ctrl + F6	Show the next window
Numbering	Ctrl + Shift + N	Formats the currently selected text as a numbered list.
Paste	Ctrl + V Shift + Insert	Paste the last copied item to the new location indicated by your cursor position
Previous control	Shift + Tab	Set focus to the previous control
Previous Tab	Ctrl + PgUp	Return to the previous tab
Previous Window	Ctrl + Shift + Tab Ctrl + Shift + F6	Return to the previous window
Print Calendar	Ctrl + Shift + P	Prints the calendar
Redo	Ctrl + Y Ctrl + Shift + Z Alt + Shift + Backspace	Redo the last "undone" action
Rename	F2	Allows you to rename the selected item
Search	Alt + F3	Launches the PlanPlus Search feature
Shortcut menu	Shift + F10	Display the shortcut menu
Show List	Alt + Down F4	Show the drop down list if any
Toggle Full Screen	F11	Toggles the Full Screen display on/off
Undo	Ctrl + Z Alt + Backspace	Undo the previous action
View Next Hit	F3	Takes you to the next "hit" or occurrence of the search term within the object (note, appointment, etc.)
View Previous Hit	Shift F3	Go back to the previous hit.

Working with Ink

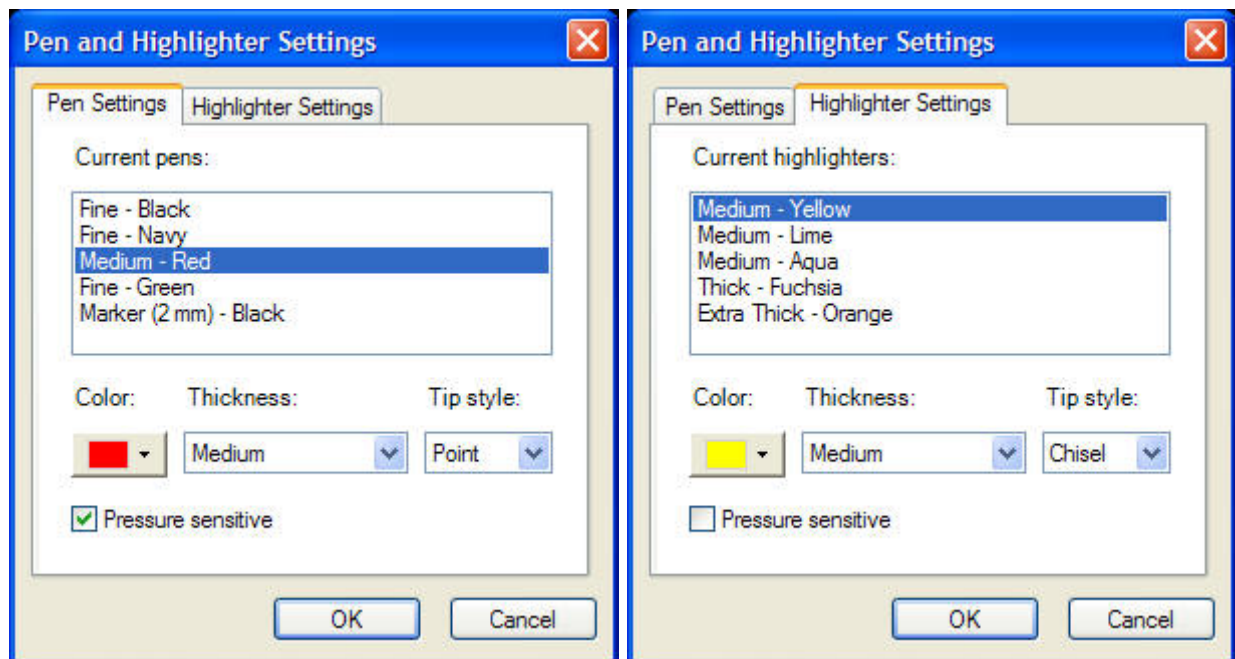
The following pages provide tips for using PlanPlus with Digital Ink on a Tablet PC.

Changing Pen or Highlighter Styles

You can customize pen and highlighter settings for ink color, thickness, and tip style.

The drop-down list on the toolbar displays five pen or highlighter types.

1. On the toolbar, click or tap the small arrow to the right of the **Pen** or **Highlighter** button, and click or tap **Define Pen**.
2. Select the **Pen Settings** tab to modify your pen settings, or the **Highlighter Settings** tab to modify your highlighter settings.



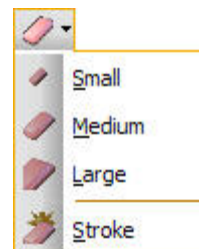
3. Click or tap the desired pen in the list to modify the settings for that pen. Click or tap the options below the list to select the desired color, thickness and tip style.

Note: Some versions of Tablet PCs support pressure sensitivity. This means that as you press harder with the digital pen, the ink that you create on a page becomes thicker. Select the **Pressure Sensitive** check box to enable this feature.


4. Click or tap **OK** to save changes and close, or **Cancel** to close without saving changes.

Erasing an Entire Ink Stroke

1. On the toolbar, click or tap the arrow to the right of the Eraser button, and click or tap **Stroke**. This is the default setting.
2. Click on or tap any part of the ink stroke that you want to erase. The entire ink stroke is erased.



Erasing Portions of an Ink Stroke

1. On the toolbar, click or tap **Eraser** , and click or tap the size of the eraser (small, medium, or large) that you want to use.
2. Drag your cursor or digital pen over the ink that you want to erase.

Note: A single ink stroke will be divided into multiple strokes if portions are removed by an eraser.

Converting Ink to Text

Note: You can use digital ink (and thus convert ink to text) only when using a Tablet PC with Windows XP Tablet PC edition.

Windows TIP (replacing the former *Writing Assistant*) is also available for your use. For details, consult your operating system user materials.

In addition to using ink, you may convert any ink you enter to text.

1. Use your digital pen to write new information.

OR

Use the **Lasso** (select) button  to select previously written ink you wish to convert.

2. Click or tap the **Convert to Text** button .

The ink will be converted to text and displayed on the page. To correct mistranslations, select the word, click the **Mouse** button to switch to keyboard mode, and use your keyboard to make corrections.

Note: Ink may also be converted to text immediately after writing by clicking the **Convert to Text** button as soon as you are finished writing.

Manage Your Calendar, Projects & Deadlines

PlanPlus gives you a powerful set of tools that will help you keep track of your schedule. This section will show you how to navigate your calendar, add and update appointments, and schedule your projects and deadlines.

Calendar

The PlanPlus Calendar provides a summarized view of your daily appointments and tasks.

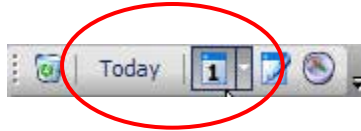
You can move easily from day to day within the Calendar. The current date, whether shown in day, week, weekday, or month view, is first displayed when PlanPlus is opened.

PlanPlus allows you to easily select a date and move from viewing the current date pages to any other date in the past or future.

With the click of the mouse or tap of the digital pen you can move from day to day, or even month to month.

Getting Back to the Calendar

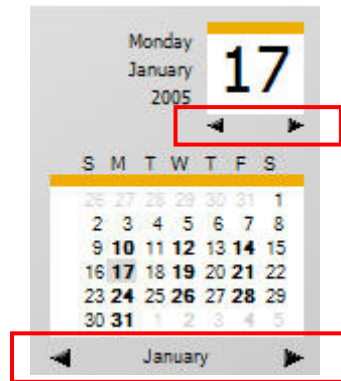
If you move to a different area of your planner, such as the Notes tab, it is easy to get back to the Calendar – simply click the **Calendar** tab or click the **Today** or **Change View** buttons from the toolbar.



Using the Previous and Next buttons

Another way to move from date to date is by using the Previous and Next buttons on the Calendar.

Depending on the calendar view you are using, click or tap the buttons to move to the previous or day, week, or month



Calendar Views

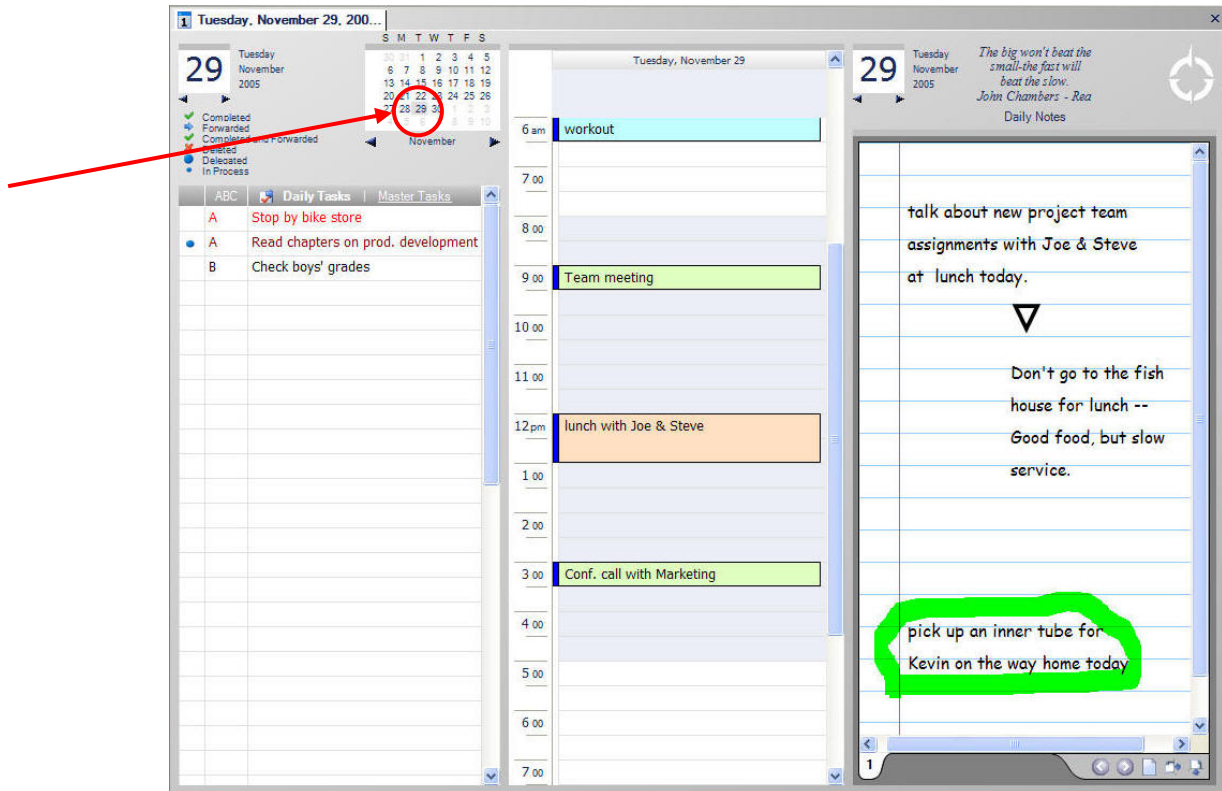
PlanPlus provides the following views of your calendar, allowing you to view your schedule in as much detail as you desire:

- Day View
- Week View
- Work Week View
- Month View

Each of these views is discussed on the following pages.

Using the Day View

The calendar page, task list, and daily notes for the selected day are displayed in the PlanPlus window.



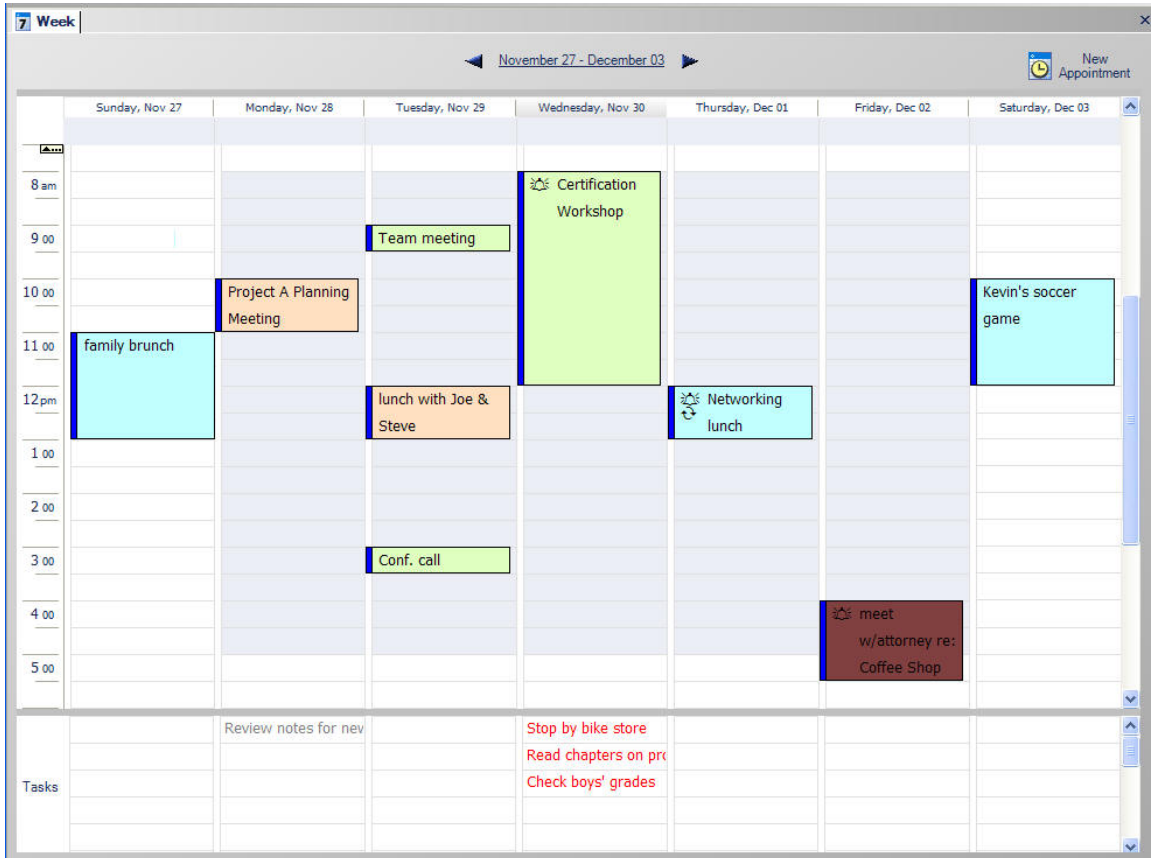
Note: In the mini-calendar, the active date is displayed in **red text**, while the selected date is indicated by shaded text. Dates with tasks or appointments are displayed in **bold text**.

You can view the calendar page for a specific day using any of the following methods:

- To move to a specific day, click the **Previous** or **Next** button beneath the current date to move up or down in single-day increments.
- Within the mini monthly calendar at the top of the page, click the specific date to which you want to move.
- To move to a date in a different month, click the **Previous** or **Next** button beneath the mini calendar to move to the desired month. Once you have reached the desired month, click the specific date within the mini calendar.

Using the Week View

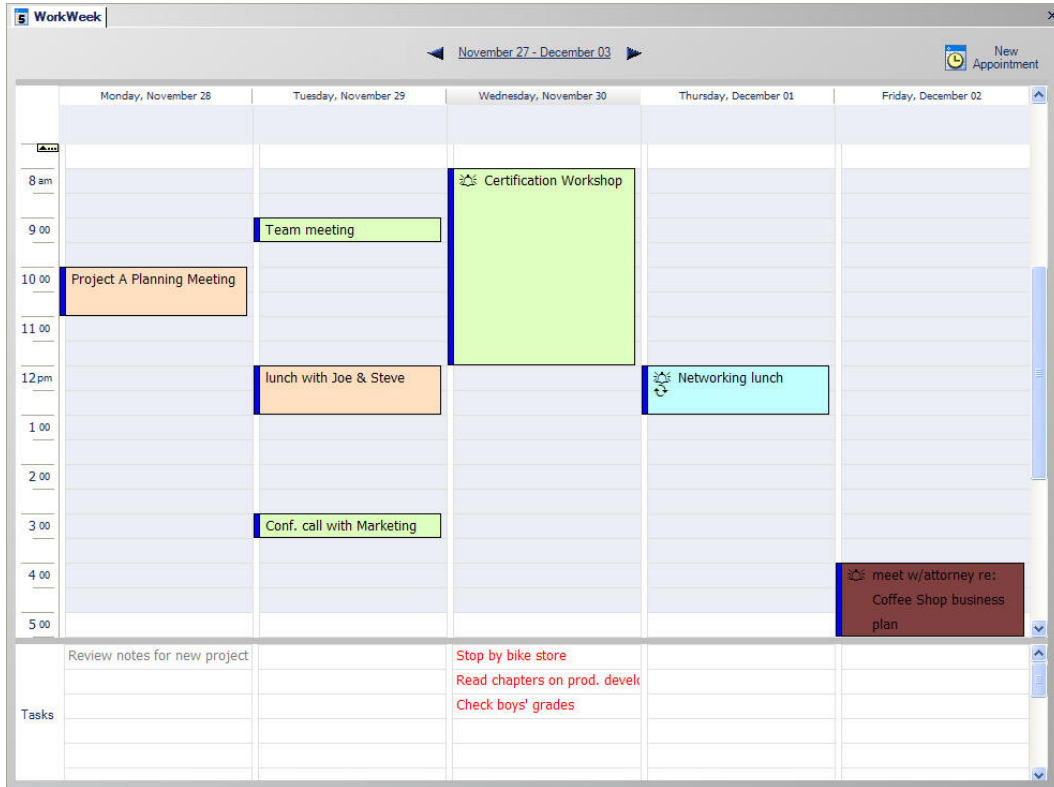
The **Week View** displays all seven days of the calendar week, beginning with Sunday and ending with Saturday.



- When changing from **Day View** to **Week View**, the week displayed is the week containing the currently selected day. You may move to earlier or later weeks by clicking or tapping the **Previous** or **Next** buttons at the top of the calendar page.
- Tasks for each day are displayed at the bottom of the page, and can be edited by clicking or tapping on them and making the desired changes.
- You can add new Appointments by clicking the **New Appointment** button, or by clicking or tapping in the desired time and entering the appointment. If you wish to set a reminder or recurrence for the new appointment, assign it to a category, etc., double-click on the appointment time to open the Appointment window and enter the desired settings.

Using the Work Week View

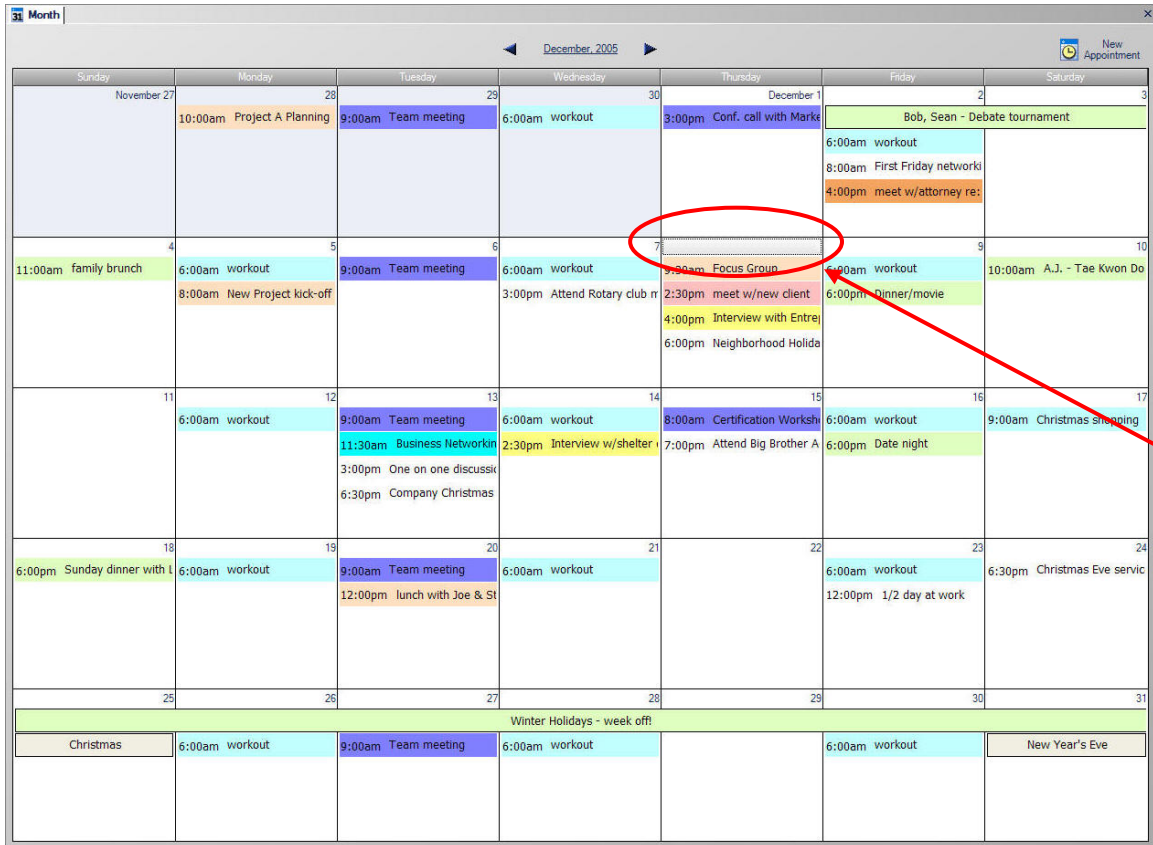
The **Work Week View** displays the five days of the typical "work week" beginning with Monday and ending with Friday.



- When changing from **Day View** to **Work Week View**, the week displayed is the week containing the currently selected day. You may move to earlier or later weeks by clicking or tapping the **Previous** or **Next** buttons at the top of the calendar page.
- Tasks for each day are displayed at the bottom of the page, and can be edited by clicking or tapping on them and making the desired changes.
- You can add new Appointments by clicking the **New Appointment** button, or by clicking or tapping in the desired time and entering the appointment. If you wish to set a reminder or recurrence for the new appointment, assign it to a category, etc., double-click on the appointment time to open the Appointment window and enter the desired settings.

Using the Month View

The **Month View** displays each day of the selected calendar month. The current date is indicated by a shaded bar.



- When changing from Day View to Month View, the month displayed is the month containing the currently selected day. You may move to earlier or later months by clicking or tapping the Previous or Next buttons at the top of the calendar page.
- You can add new Appointments by clicking the New Appointment button, or by clicking or tapping in the desired time and entering the appointment. If you wish to set a reminder or recurrence for the new appointment, assign it to a category, etc., double-click on the appointment time to open the Appointment window and enter the desired settings.
- Open the Day View for a specific day by double-clicking on the date.

Appointment Schedule

With the Appointment Schedule, you can easily schedule events and appointments and associate them with a date and time. You can also add details and notes about the appointment or event.

Adding Appointments

1. Select the date you want to add the appointment.

If you are in **Month View**:

Double-click or tap on the desired date for the appointment

OR

Place your cursor on the desired date for the appointment and click or tap the **New Appointment** button.

OR

Select **File | New | New Appointment** from the menu bar.

If you are in **Day, Week, or Work Week View**:

Double-click or tap on the starting time for the appointment.

OR

Place your cursor in the desired starting time for the appointment and click or tap the **New Appointment** button.


OR

Select **File | New | New Appointment** from the menu bar.

The appointment window will appear.

The screenshot shows a window titled "7 Week Certification Workshop". It contains the following fields and values:

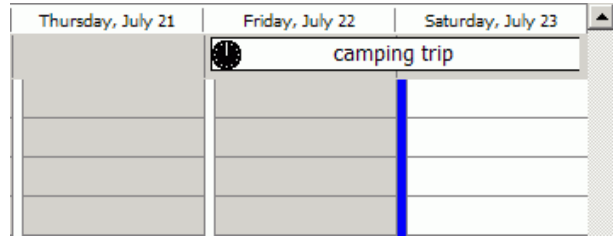
- Subject: Certification Workshop
- Location: Chamber Office (downtown)
- Start Time: Wed 11/30/2005, 08:00 AM
- End Time: Wed 11/30/2005, 12:00 PM
- Reminder: 15 minutes before start
- Categories: Project B
- Notes: Park on West Side of Chamber offices, in visitor parking lot

2. Enter the appointment details and click or tap the Close button .

The appointment is added to the schedule in a shaded box spanning the start and end times of the appointment (end times round to the nearest half-hour increment).

Adding All-Day and Multi-Day Events

Appointments that span an entire day or multiple days are displayed at the top of the Appointment Schedule in day view and as the first appointment in week and month views.



1. Select the date you want to add the appointment.
2. Open the **Appointment Window**.
3. Enter the appointment name, location, and other details as desired

To create an **All Day Event**:

- *Do not* enter a Start or End date or time.
- Click the **All Day Event** check box.

To create a **Multi-Day Event**:

Enter the **Start Date** and **End Date**

If the event will begin and end at specific times (such as beginning at 6 pm on the first day, and ending at noon on the last day), enter the **Start** and **End times**.

If the event has no set beginning and ending times, ignore the Start and End times, and click the **All Day Event** check box.

4. Click **OK** to save the appointment.

Recurring Appointments

You can set up an appointment to occur more than once over a limited period of time (such as a weekly study group meeting), or you can set up a special date that recurs at specified times (such as a birthday).

1. Open the **Appointment Details** page for an appointment.
2. Click **All Day Event** if this is a holiday or recurring special day, such as a birthday.
This will create an appointment not attached to a particular time.
3. Click the **Recurring** button.

The Appointment Recurrence dialog will appear:

4. Set the details of the recurring appointment:
 - Specify whether the appointment should recur daily, weekly, monthly, yearly, or in a different pattern.
The options shown on the right-hand panel will change based on the recurrence option you select, allowing you to more specifically define the recurrence pattern.
 - Indicate the ending date for the recurring appointment. The default for this option is **No end date**.

Modifying Recurring Appointments

You can modify a recurring appointment by opening the appointment and making your changes in the appointment window. When you open a recurring appointment, PlanPlus prompts you to choose from one of two options.

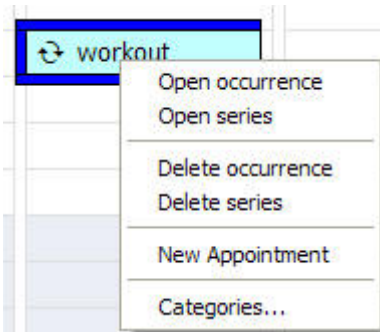
- **Open this Occurrence** lets you modify a single occurrence of the recurring appointment. Changes made to a single occurrence *only* apply to that occurrence of the appointment. Other instances of the appointment retain their original settings.
- **Open the Series** lets you modify all occurrences of the appointment at once.



Deleting Recurring Appointments

You can delete an entire series of recurring appointments, or only a selected occurrence.

1. Right-click on the appointment.
2. Make your selection from the menu that appears.



- The **Open occurrence** and **Open series** options allow you to open the appointment and make changes as described above.
- **Delete this Occurrence** deletes only the selected occurrence of the recurring appointment. Other occurrences of this appointment will not be deleted.
- **Delete the Series** deletes all occurrences of the appointment at once.

Note: Deleting the series *will not* delete any occurrences that have been modified with exceptions to the series, such as appointments with changed times or attached notes.

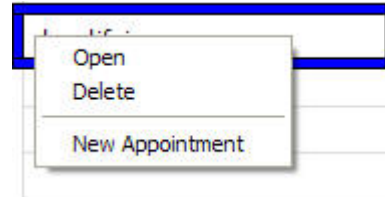
Modifying Appointments

To modify an appointment, you simply have to open it and make your changes in the Appointment Window.

Opening an Appointment

PlanPlus provides multiple options for opening an appointment:

- Double-click on the appointment (from any view)
- Hover your mouse over the appointment, and right-click. Select **Open** from the pop-up menu that appears.



The Appointment Window will appear.

Make any necessary adjustments to the appointment:

- Modify the title, location, start/end dates, start/end times.
- Add notes to the appointment. You can modify the notes section of the Appointment Details page like any other Note in PlanPlus. Changes you make in the Appointment Details page are automatically saved as you enter them.

Deleting an Appointment

1. Right-click on the appointment, and choose **Delete** from the pop-up menu.
2. Click **Yes** to delete the appointment or **No** to cancel deletion.

Moving an Appointment to a New Time

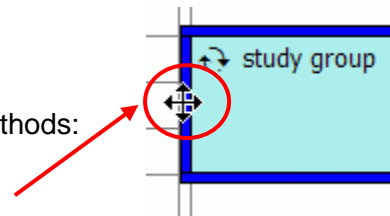
Move appointments to a new time using any of the following methods:

- Modify the appointment time in the Appointment Window.
- Adjust the start and end time of an appointment by dragging the top or bottom bars.
- Click and drag the entire appointment to the new time.

Moving an Appointment to a New Date

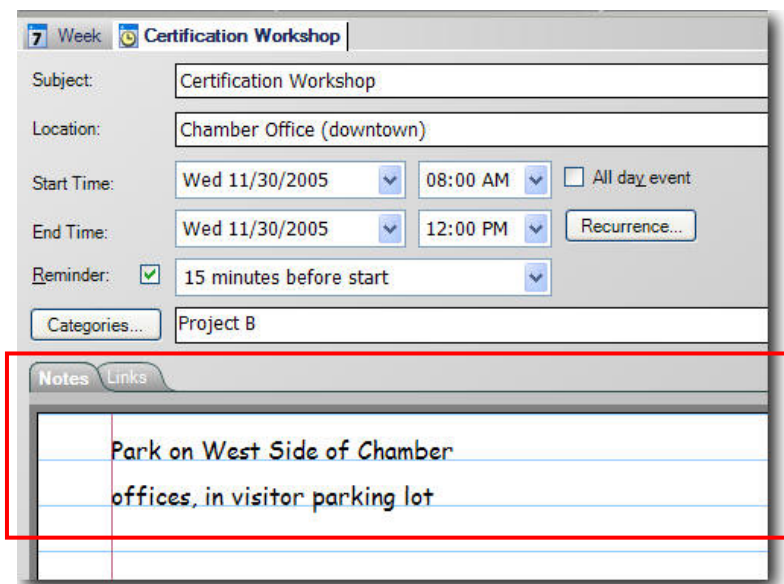
Move an appointment to a new date using any of the following methods:

- Modify the appointment date in the Appointment Window.
- Click-and-drag it to a different date on the mini-calendar.
- Click-and-drag it to the desired day in the Week and Month views.



Appointment Notes

The notes area of the appointment details page provides a place to conveniently log important information.



You can take as many pages of notes as you need.

3. Click to select an appointment on the **Appointment Schedule**, or choose **View Details** when creating an appointment.
4. The **Appointment Details** box appears for that appointment.
5. Add your note, or modify and existing note. For more information about working with Notes, refer to *Take Notes and Organize Information*.

Notes are automatically saved as you add information.

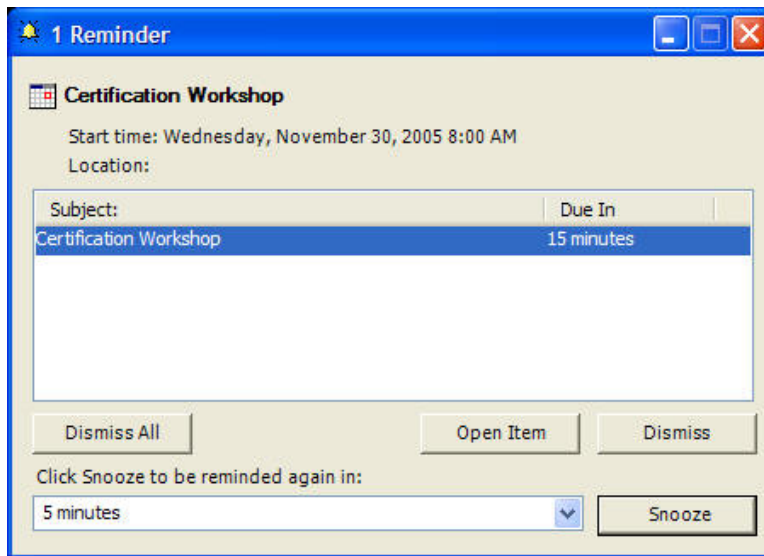
Setting Reminders

You can set reminders (on the appointment details page) to notify you of important events a few minutes or even a few days before the event.

1. Open the **Appointment Details** page for an appointment.
The **Appointment Details** page appears.
2. Click the **Reminder** check box, and click the drop-down menu and set the reminder time.

Reminder Box

When a reminder is executed, it appears in a pop-up box on the screen.



Note: If multiple reminders have been set, more than one may be displayed in the reminder window.

1. To be notified again at a specific interval:
 - Select the desired interval from the drop-down box.
 - Click **Snooze**After the interval passes, the pop-up box will appear again.
2. To clear the reminder, click **Dismiss**.
After clicking **Dismiss**, you will not be reminded again about this item.

Converting an Appointment to a Task and a Task to an Appointment

- Convert any *appointment* to a *task* by dragging it to the Task List. When an appointment becomes a task, the time and any recurring data are removed.
- Convert a *task* to an *appointment* by dragging the task to a time slot on the Appointment Schedule. When a task becomes an appointment, the priority is removed.

Task List

The Task List is a powerful way to keep track of everything you need to get done, and to track your progress.

PlanPlus for Windows' Task List lets you:

- Create a list of tasks.
- Organize your tasks by priority.
- Mark off completed tasks and auto-forward unfinished tasks.
- Attach notes to a specific task.

PlanPlus also allows you to keep track of both your **Daily tasks** and your **Master tasks**.

- **Daily tasks** are those tasks that are attached to a specific date, such as a reminder to yourself to return a library book on its due date. These tasks are displayed in your Daily Task List on the due date (Daily tasks with both Start and End dates will be displayed on each day they are scheduled). If the "auto forward incomplete tasks" option has been activated, they will be auto-forwarded each day until they are completed.
- **Master tasks** are those tasks that are on your "to do" list, but do not have a specific target for their completion. These tasks can be viewed by clicking the Master tasks link in the Daily Task List.

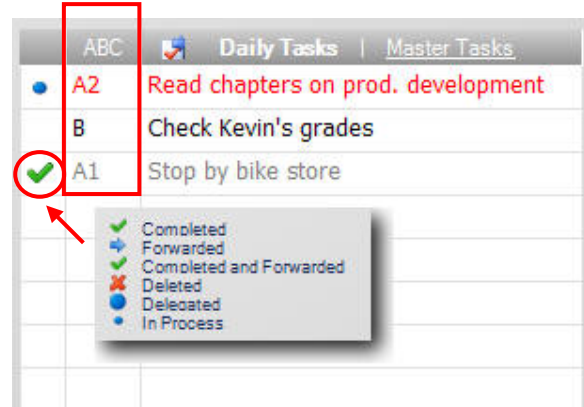
Projects you have added through synchronization with another PlanPlus database may include Tasks and Appointments which will be sorted into the appropriate folders. (See **Downloaded Tasks** for more information.)

Adding a Task in Day View

1. Select the date you want to add the task.
2. Select **Daily tasks** for tasks that are to be completed on that date, or **Master tasks** for tasks with no set target for completion.
3. Click a blank line under **Daily Task List**.
 - If you are in text mode, simply type your text in the line after you click it.
 - If you are in pen mode, write your task directly into the task list.

The task now appears on your task list.

4. In the **Priority** field, enter the priority by clicking on the priority column and choosing the appropriate level – **A** for "high", **B** for "normal", or **C** for "low" priority. Notice that within each of these priorities, you can also rank the item (as in A1, A2, etc.). The level you select will be displayed in the priority column. In addition, high and low priority items will also be marked with changed font colors.



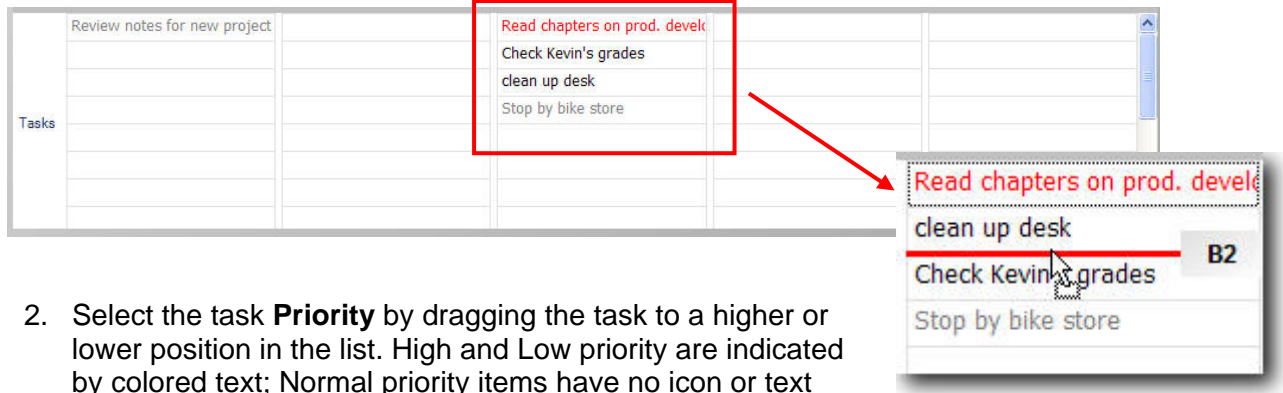
- Items with no priority assigned will be automatically set to "normal" status.
- Unfinished tasks (items carried over from previous days) will be displayed in red text.

5. To mark the status of a task completed, click the box to the left of the task, and select the current status from the list displayed. PlanPlus will place an icon in the status box corresponding to the status you selected. (A "key" to these icons is displayed above the task list).

Note: Colors for overdue, high, normal and low priority tasks can be changed through **Options | Tasks**.

Adding a Task in Work Week or Weekly View

1. Click on the task line below the date where you want to add the task, then enter the task information.



2. Select the task **Priority** by dragging the task to a higher or lower position in the list. High and Low priority are indicated by colored text; Normal priority items have no icon or text coloring associated with them.

The task is automatically saved as you enter it.

Prioritizing Tasks

You can prioritize tasks by clicking the **Priority** column next to each task and choosing a priority.

In Day, Week, or Work Week view, you can change the priority for a task by dragging and dropping the task to a different position in the task list. Items moved upward will be assigned a higher priority, while items moved to a lower position will be assigned a lower priority.

Tasks can be sorted by their priority by clicking the priority column header (in Day view only). Notice that completed items are placed at the end of the priority list.



Unfinished Tasks

If a task remains uncompleted at the end of the assigned date, PlanPlus copies it to the current date's task list and displays it in **red** text. This is called "auto-forwarding."

PlanPlus will forward an unfinished task until it is deleted or completed. You may disable auto-forwarding, if desired, through **Tools | Options | Tasks**.

Note: Master tasks have no due date.

Modifying Tasks

Updating a Task and Adding Details (All Views)

Tasks can contain information about their priority or their status, as well as note pages for writing details about the task or for taking notes.

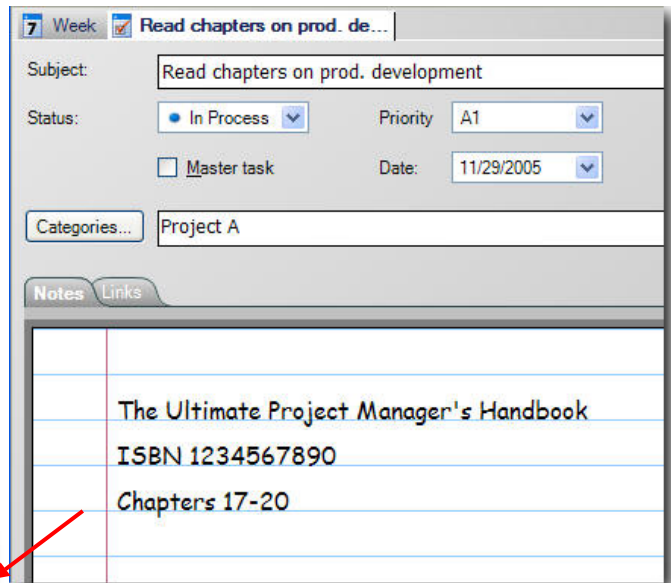
1. Select **File | New | Task**, click the **New Task** button, or double-click or tap on an existing task in either the Day, Week, or Work Week view.

The task details page appears.

Add or adjust the title, status, priority, and beginning and ending dates if desired.

2. Add notes in the bottom section of the box if desired (see **Notes** for discussion of options and features).
3. Click the **Close** button to close the Task Details view and switch back to the previous view.

Notice that if you added a Note to the task, a **Note icon** now appears next to the Task name in the task list.



Note: Tasks are only displayed on all dates between the start and end dates for the task on the daily calendar and on the first visible date within that range on the weekly calendar. If the task is not completed, you may choose to have it automatically forwarded it to the next day and displayed it in red by choosing the Auto-Forward option through **Options | Tasks**. If this option is not selected, unfinished tasks are not auto-forwarded.

Moving a Task to a New Date

Move a task to a new date by dragging it to a different date (on the mini-calendar and in Work Week and Weekly views).

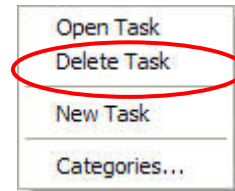
Converting a Task to an Appointment

- You can convert any *task* to an *appointment* by dragging it to the Appointment Schedule. When a task becomes an appointment, the priority is removed.
- You can convert an *appointment* to a *task* by dragging it to the Task List. When an appointment becomes a task, the time and any recurring data are removed.

Deleting a Task

To delete a task:

1. Right-click on a task, or tap and click with the digital pen button.
2. Choose **Delete** from the pop-up menu.



OR

Select the task by double-clicking on it, then choose **File | Delete Task** from the menu bar.

3. The Verify Delete prompt will appear, asking you to confirm the deletion. Click **Yes** to continue or **No** to cancel.

Take Notes and Organize Information

PlanPlus lets you organize everything you need in one place using Tabs to organize your notes and pages.

The following Tabs are installed by default as part of PlanPlus:

- Calendar
- Mission/Values
- Weekly Planning
- Contacts
- Goals
- Notes

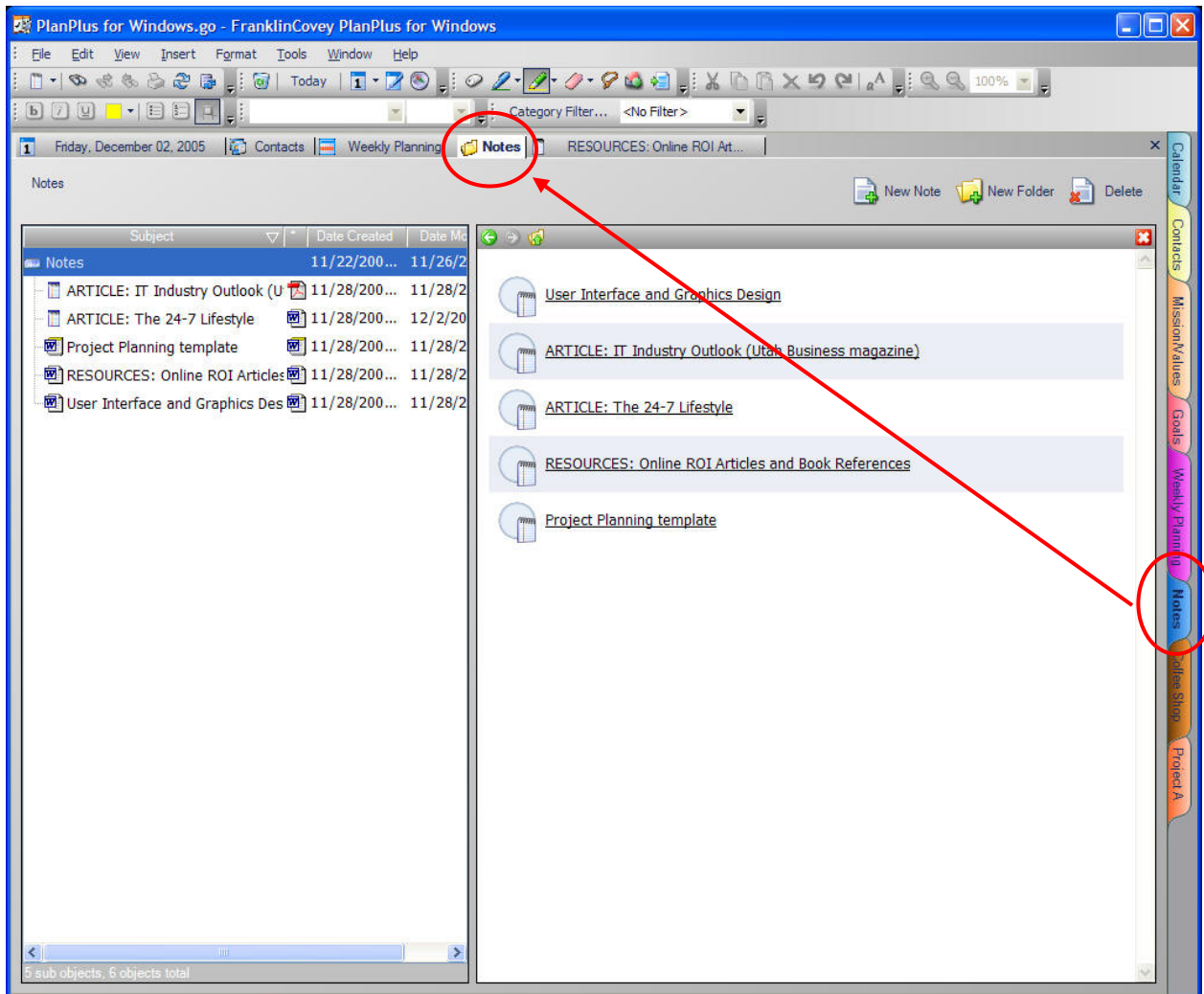
You can create new tabs for projects, meetings, travel, personal notes, family reference information, or whatever helps you best organize your PlanPlus data for easy access.

You can also create folders underneath your PlanPlus tabs, down to any depth you desire. For example, you might create a tab called “Project A” that displays in the PlanPlus main screen, with folders for Meetings, Presentations, Notes, and so forth. In this way, tabs work much the same as folders and sub-folders do in Microsoft Windows. If there are note tabs that were created when you “synched” with FranklinCovey, a Detail View for the project will display the project information in a folder and sub-folder view.


You can easily file just about any type of document (word processing documents, spreadsheets, graphic images, and more) in a PlanPlus tab.

Selecting a Tab

To select a tab, simply click on it.



The content of the currently selected tab is displayed on the screen, and listed in the navigation bar with other previously selected tabs.

- To move between previously selected tabs, click on its title from the navigation bar.
- To view a previously unselected tab, click on the tab.
- To close a tab, select the tab from the navigation bar and click on the  at the end of the navigation bar.

Creating, Deleting, Modifying, and Rearranging Tabs

The following PlanPlus tabs are created for you by default.

- Calendar
- Mission/Values
- Weekly Planning
- Contacts
- Goals
- Notes

These tabs are part of the default PlanPlus installation. You can rename these tabs and modify their color, and rearrange their order, but of these folders, only the Notes folder can be deleted.

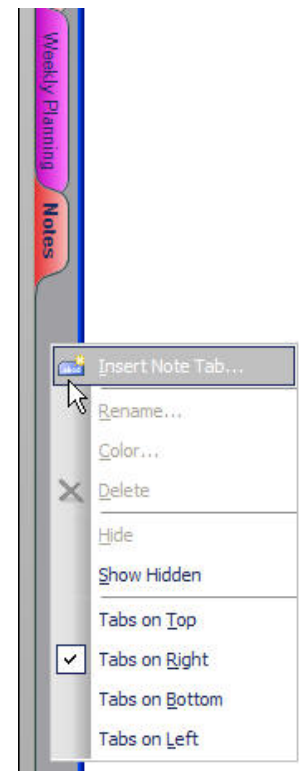
Any additional tabs you create are viewed by PlanPlus as Note tabs. These tabs may be renamed, rearranged, and deleted when you no longer need them.

- You may create any number of tabs that you like, however, only those that fit on your screen (starting at the top of the tab list) will be visible at any one time. If you have more tabs than can be displayed at one time, arrows at the end of the Tab bar will allow you to move forward and back through your tabs list.
- You can create folders within tabs, and even sub-folders within folders, to any depth you like. This greatly increases your flexibility in organizing your PlanPlus data.

To Create a new PlanPlus for Windows tab

1. Position your cursor in the tab area and right-click.
2. From the pop-up menu that appears, select **Insert Note Tab**
3. Give the new tab a name, and click **OK**.

The new tab appears on the PlanPlus tab list.



To Create a Folder Within a Note Tab

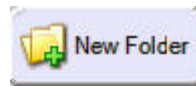
1. Select the **Note Tab** where you want to create a new folder.
2. Click the **New Folder** button.
3. Give the new folder a name, and click **OK**.



The folder appears inside the selected tab.

To Create a Sub-folder Within a Note Tab Folder

1. Select the **Note Tab** where you want to create the new folder.
2. Click on the Folder, where you want to create the sub-folder.
3. Click the **New Folder** button.
4. Give the new folder a name, and click **OK**.

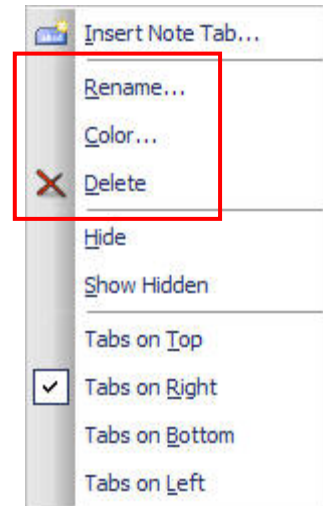


The sub-folder appears inside the selected folder.

In this way, you can create “folders within folders” many levels deep as necessary.

To Rename a Tab or Folder

1. Select the tab you wish to rename, or the folder within a tab that you wish to rename, and right-click.
2. Select **Rename** from the pop-up menu, and rename the folder.



To Change the Color of a Tab

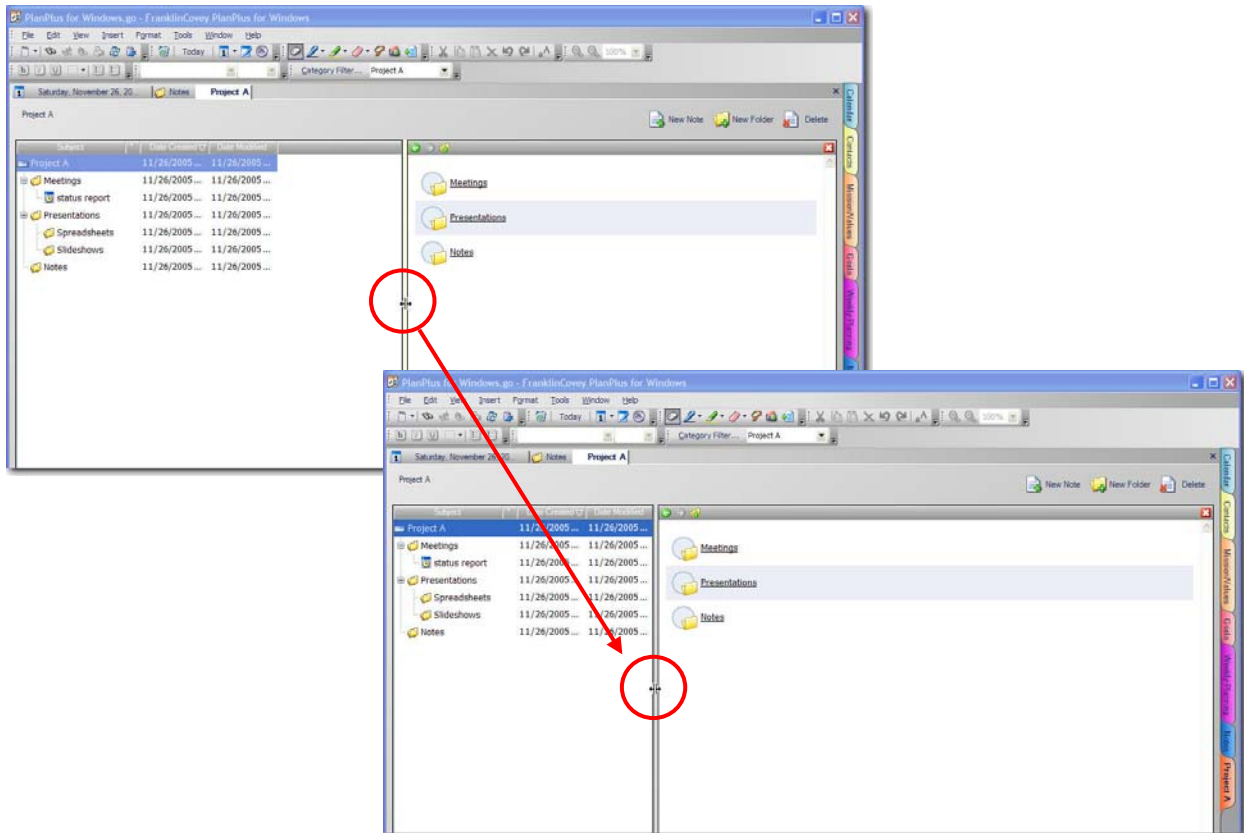
1. Select the tab you wish to modify, and right-click.
2. Select **Color** from the pop-up menu
3. Select the new tab color from the pop-up that appears, and click **OK**.

To Delete a Tab or Folder

1. Select the tab you wish to delete, or the folder within a tab that you wish to delete, and right-click.
2. Select **Delete** from the pop-up menu, and choose Yes when prompted to delete the tab or folder.

Tab/Folder Column Options

You can change the column sizes by dragging the bar separating the columns to adjust the column width to the desired size.



Take and Organize Notes

As you organize your time and carry on your daily activities, you certainly create lists of tasks and appointments – but that’s not all you do.

You take *notes*.

PlanPlus™ v.5 for Windows® XP provides a means for creating and storing information for all occasions including meeting notes, group project planning, personal information, and more.

Notes are stored in many locations, including appointments, tasks, projects, contacts, and note tabs. Each type of note has certain similarities, and certain differences, depending on where it was created and stored. Notes are automatically saved as you create them.

This section includes instructions on using the Notes feature of PlanPlus to take notes more efficiently and effectively, and to retrieve information from your notes where and when you need it.

How do I use Notes?

With PlanPlus Notes, you can “jot down” just about anything that occurs to you, and easily access those Notes at any time. You can also file your Notes in PlanPlus tabs, and even take Notes or annotate on electronic “Digital Paper” documents you create inside PlanPlus (Digital Paper is discussed in greater detail in *Create and Store Digital Paper*).

Daily Notes

The Daily Notes area provides a place to conveniently log important information, tied to a particular day. With Daily Notes, you can take as many pages of Notes as you like, linked to the date displayed in the Daily Notes page.


Daily Notes work much like notes in **Note Tabs**, and can be manipulated in much the same way. However, Daily Notes are associated with a particular day, while notes filed in Note Tabs are independent of any particular day.

Entering Daily Notes

Click on the Daily Notes page at the desired location and enter text using your keyboard or digital pen.

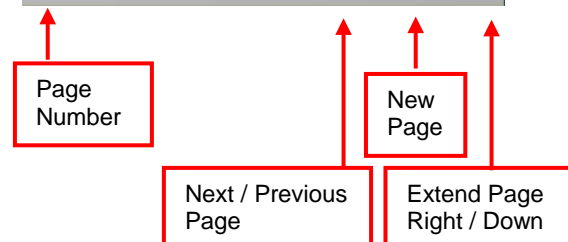
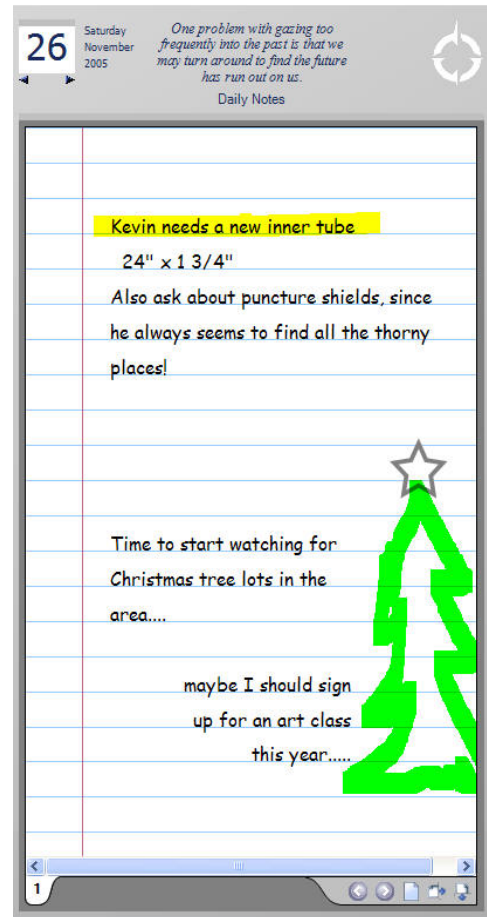
- You can add and resize graphics to your Daily Note, add additional Daily Note pages, and increase or decrease the size of Daily Note pages as desired.
- Daily Noted cannot be filed in a PlanPlus for tab or moved to a different day. However, you can copy text or ink in a Daily Note and paste it into another PlanPlus Note.

Adding Additional Notes Pages

To add another page to the current Daily Notes page, click the **New Page** button at the bottom of the Daily Notes screen. 

- You can add pages only when the current page contains data
- There is no limit to the number of pages you may add, as long as each preceding page contains data.
- As you add pages, numbered tabs for each page are displayed at the bottom of the Daily Notes screen, allowing you to quickly move between pages.

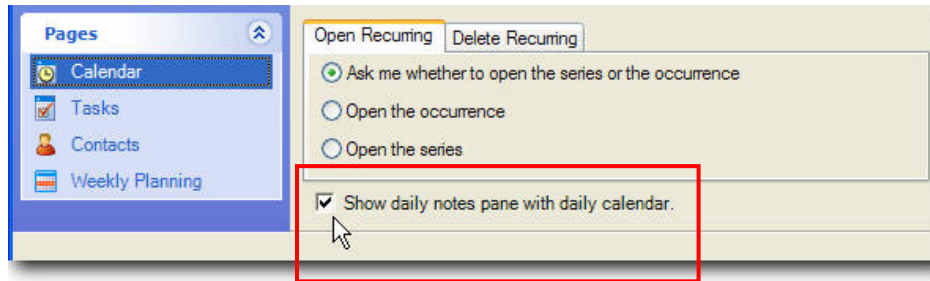
Daily Notes are automatically saved as you add information.



Displaying Daily Notes

Daily Notes can be displayed with the Calendar and Tasks, or separately.

1. From the menu, select **Tools | Options**.
2. From the **Pages** list in the left-hand column, select **Calendar**.



- To display Daily Notes with the Calendar and Tasks, check the **Show daily notes with daily calendar** checkbox.
- To display Daily Notes separately, uncheck the **Show daily notes with daily calendar** checkbox,

If you elect to display Daily Notes separately, simply click on the **Daily Notes** button from the toolbar when you wish to view your Daily Notes.



Add Note Tab Notes

With Note Tab Notes, you can:

- Enter text, either with a keyboard or digital ink (using a Tablet PC).
- Format your text (change the font, change the point size, make it bold or italic or plain).
- Insert or delete space on the Note page.
- Insert manipulate images (such as move, resize, and so on).
- Create sketches with digital ink (if your computer supports digital ink).
- Add a hyperlink.
- Use the **Search** feature to quickly locate the information you need from any of your notes.
- "Grow" note pages to have as much space as you need (both length and width).

Creating a Note Tab Note

1. From any Notes tab (including Notes tabs in project folders), click the **New Note** button.

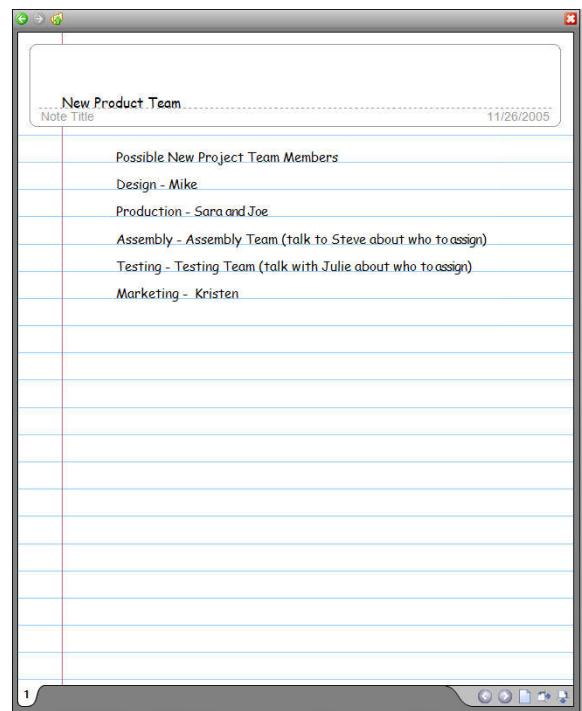


OR

Choose **File | New | Note** from the menu bar.

2. A new, blank Note appears on your screen, ready for use. Enter text in your Note using your keyboard or digital ink.

Your note is automatically saved as you add information, and will be added to the Note folder in which it was created.



Creating a Note from Another Document

If you wish to create a note directly from another document (such as a word processing document, a spreadsheet, a graphic image, or other document), you have two primary options:

- Create the note by using the PlanPlus for Windows print driver. This creates a bitmap image upon which you can make annotations.
- Create the note by importing the document directly into PlanPlus. This creates a bitmap image that you can annotate, as well as stores the native file within the PlanPlus database.

Once the note has been created in PlanPlus, you can add annotations to it using your keyboard or Tablet PC pen, adding text, highlighting, flags or symbols, and so on.

See *Adding Files to Tabs* later in this chapter, and also *Create and Store Digital Paper* for more details on when and how to use each option.

Working with Notes

Entering Text or Ink

You can enter text in any Note with a keyboard or digital ink.

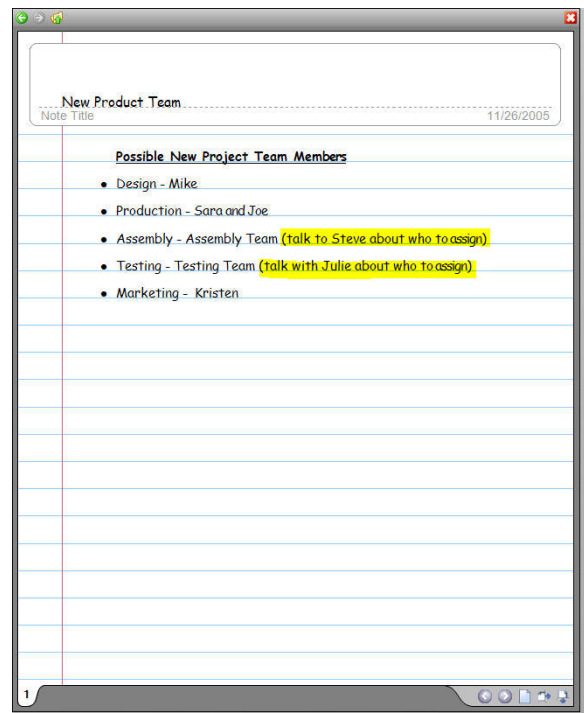
- To enter text, simply click or tap where you wish to begin making your Note, and enter the desired text. Your note is automatically saved as you add information.
- It is strongly recommended that you give the Note a title when you create it. This is the title it will be saved with.

If you leave the title blank, your Note will be saved without a title and will be more difficult to locate the next time you wish to view it.

Formatting Note Text

You can easily apply formatting attributes to your Notes text.

1. Select the text or ink you wish to format.
2. Apply the desired formatting attributes from the Formatting toolbar or the Format option on the menu bar.
 - You can align text in your Note with left, center, or right justification.
 - You can change the typed font, font size, bullet the text, number the text, indent the text, and change the font color and style (bold, italicize, underline)..
 - You can add flags, shapes, and highlighting to any text.
 - In addition to bold, italics and color, when using a pen, you may also customize the pen thickness, style (point or chisel), and pressure sensitivity settings.



Smart Outliner

PlanPlus includes the ability to create outlines very easily. By selecting the Numbering option, you can quickly outline information when entering text in your keyboard.

1. Select the note you want to use to create an outline.

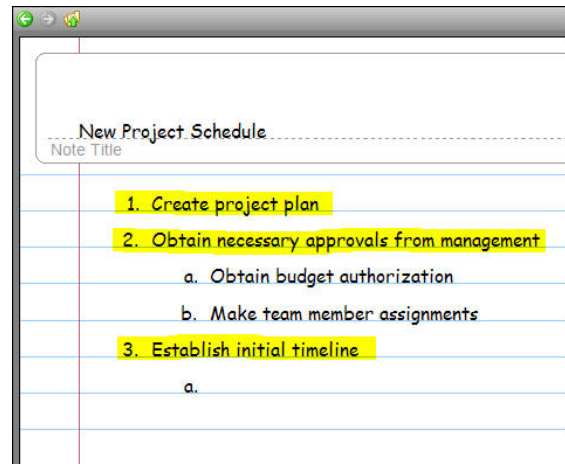
2. Click on the **Mouse** button.



3. Click on the **Numbering** button.



Now you are ready to enter text in an outline by using the Tab and Shift-Tab to go between outline levels.



Converting Ink to Text

Note: You can use digital ink (and thus convert ink to text) only when using a Tablet PC with Windows XP Tablet PC edition. See *Working with Ink*.

Windows TIP (replacing the former *Writing Assistant*) is also available for your use. For details, consult your operating system user materials.

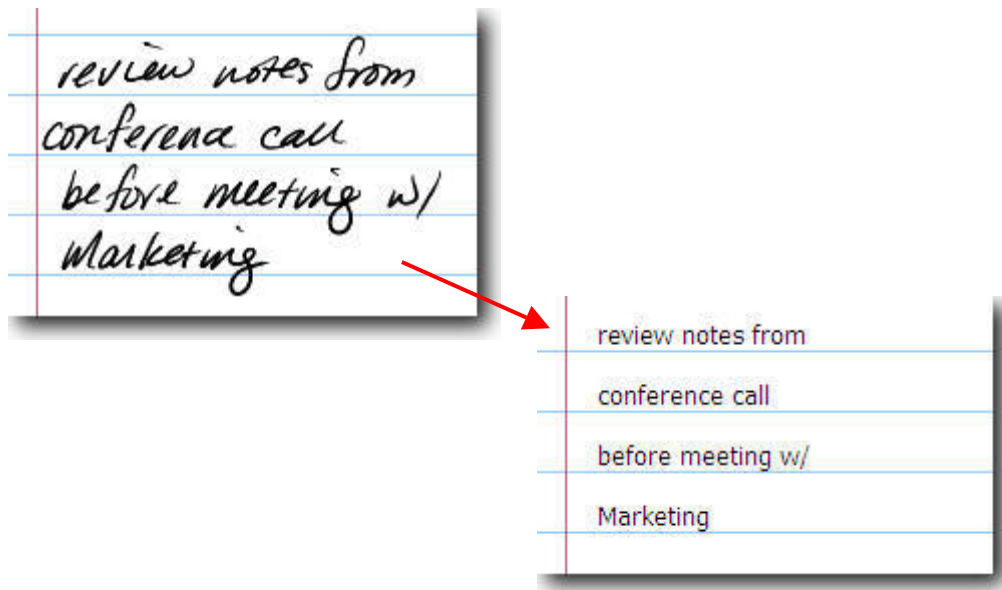
In addition to using ink, you may convert any ink you enter to text.

4. Use your digital pen to write new information.

OR

Use the **Lasso** (select) button  to select previously written ink you wish to convert.

5. Click or tap the **Convert to Text** button .



The ink will be converted to text and displayed on the page. To correct mistranslations, select the word, click the **Mouse** button to switch to keyboard mode, and use your keyboard to make corrections.

Note: Ink may also be converted to text immediately after writing by clicking the **Convert to Text** button as soon as you are finished writing.

Working with Objects in Notes

You can insert pictures or other graphical objects into your note. PlanPlus provides several tools to help you use objects effectively.

Inserting and Using Images

You can insert images into a Note, and adjust the image size.

1. Create your Note.
2. With the new Note on screen, place your cursor where you want to insert the image in the Note, then right-click and choose **Insert Picture**.

OR

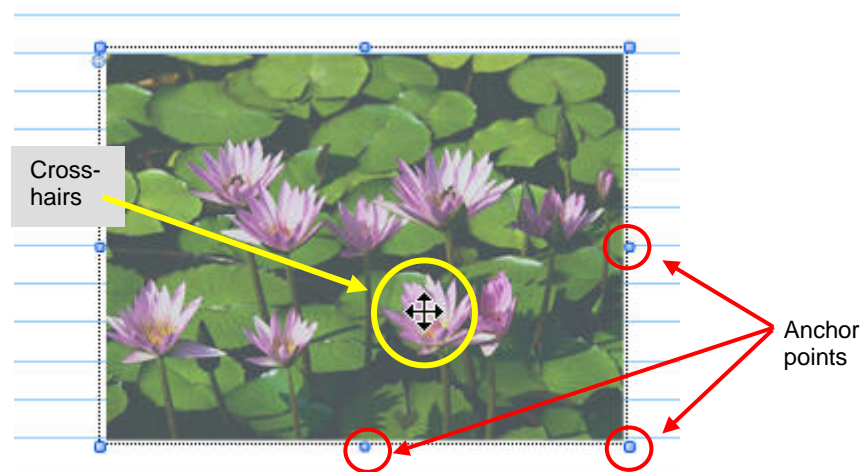
Place your cursor where you want to insert the image in the Note, and choose **Insert | Picture** from the menu bar.

3. Navigate to the location of the image you wish to insert, select it, and choose **Open**.

Moving and Resizing an Image

You can adjust the size of the image in your Note, and even move it around on the page.

1. Click to select the image.
2. Adjust the size of the image by clicking and dragging the **anchor points**.
3. Adjust the position of the image by clicking and dragging the **cross-hairs**.



Snap to Grid



Clicking or tapping the **Snap to Grid** button allows you to align multiple selected objects or blocks of text to a predefined grid. This grid is not visible in your note; however, when this tool is turned on, all objects in your note are aligned by the points of the grid.

Bring to front, send to back



Clicking or tapping the **Bring to Front** or **Send to Back** buttons allow you to layer objects.


- **Bring to Front** places the selected object in front of other objects.
- **Send to Back** places the selected object behind other objects.

Note-Taking Tools

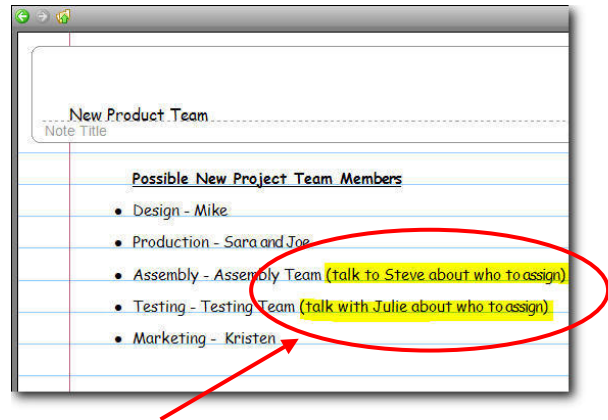
PlanPlus includes several tools to make your note-taking easier.

Note: The Highlighter, Eraser, and Lasso (select) tool can be used with your mouse on a laptop, or on a Tablet PC with Windows XP Tablet PC edition. See ***Working with Ink*** and ***Entering Text or Ink***.

Using the Highlighter


1. Click to select the **Highlighter** tool .
2. Click and drag over the text or ink you wish to highlight.

Note: This does not select the text for an action. It only highlights the text visually on the page.

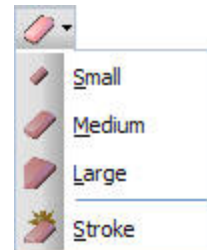


Using the Eraser


Note: If your digital pen has an eraser end, you can simply use the eraser end to erase, without selecting the Eraser tool.

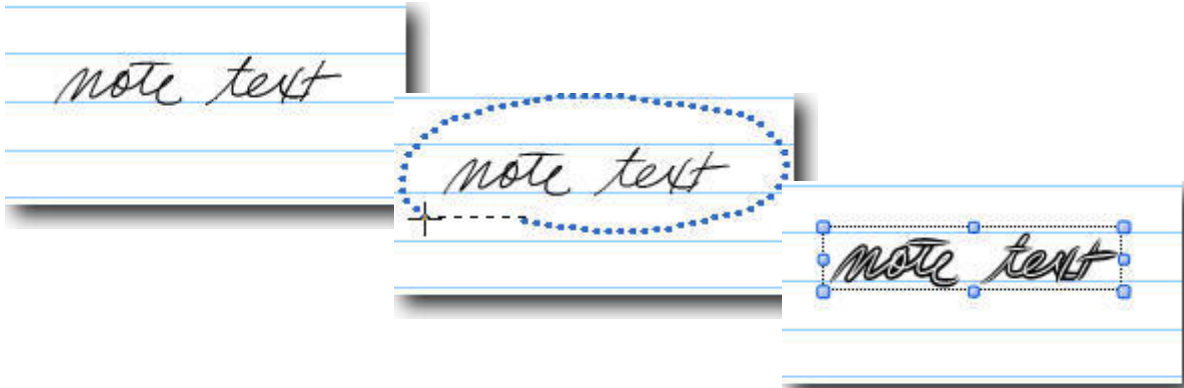
1. Click to select the **Eraser** tool .
2. Click and drag over the ink you wish to erase.

By clicking on the down arrow next to the Eraser button, you can select the eraser mode you prefer. In stroke eraser mode, entire segments are erased simultaneously. In the other three modes, only pieces of segments are erased.

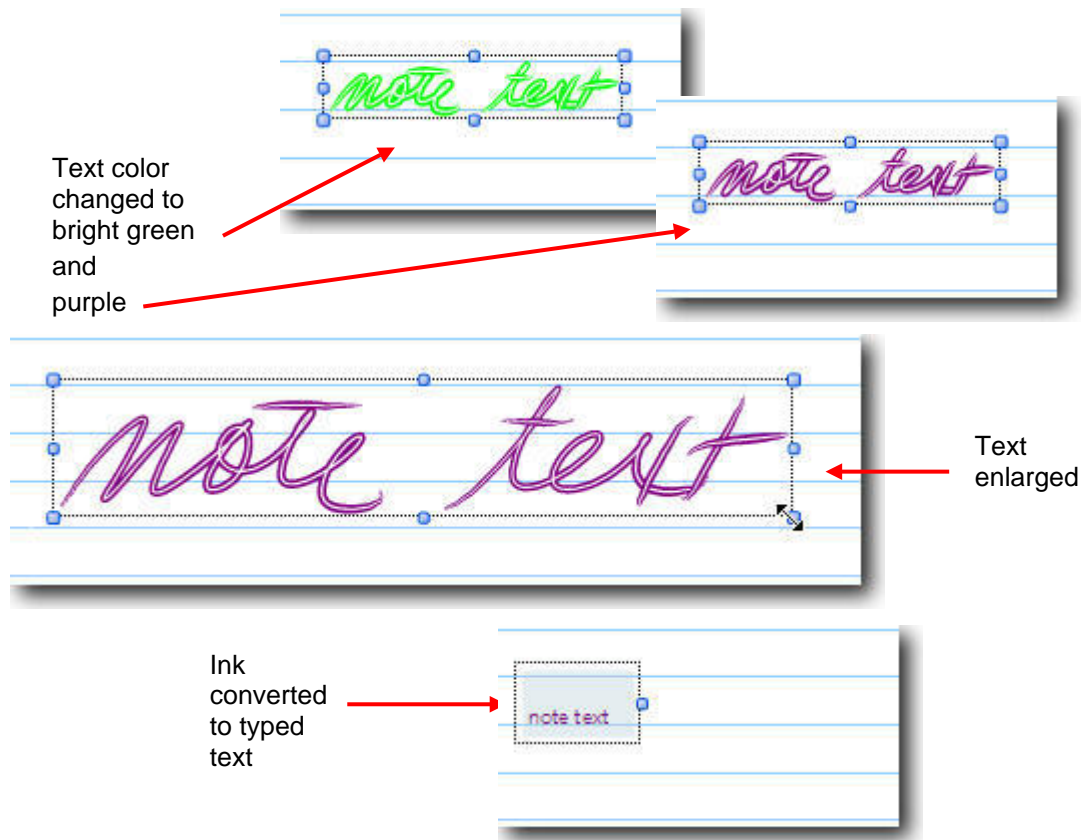


Using the Lasso (select) Tool

1. Open the Note page and locate the text, picture, or ink you wish to move.
2. Choose the **Lasso** (select) button  from the toolbar.
3. Using your mouse or digital pen, draw a circle around the desired item(s). You can select text, flags, shapes, or other digital ink images. Make sure that your start and end points of the circle overlap. When done, notice the selected item(s) are contained within a box.



You can now work with the selection as desired. You can move, resize, copy, cut, paste, delete, or drag/drop, change text/object colors, text styles and fonts, convert ink to text, and so forth. The following illustrations show a few examples of working with the text that was selected above.



Using the Zoom Tools

You can use the Zoom tools to magnify or reduce note pages.

Displaying the Zoom toolbar

- The **Zoom** toolbar is displayed by default. If it has been hidden, it can be redisplayed by simply right-clicking on the PlanPlus toolbar, and selecting it from the list of options.

The Zoom toolbar appears:

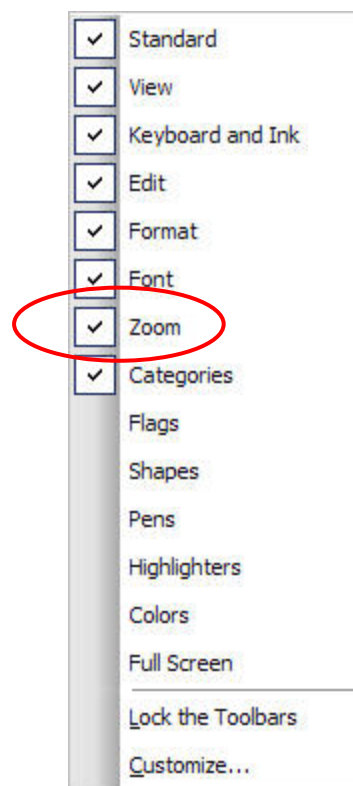



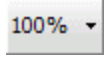

You may select the desired Zoom option from the toolbar.

OR

- Choose **View | Zoom** from the menu bar, and then select the desired Zoom toolbar option.

You can use the Zoom buttons as needed whenever a Note or Daily Notes page is displayed on your screen,



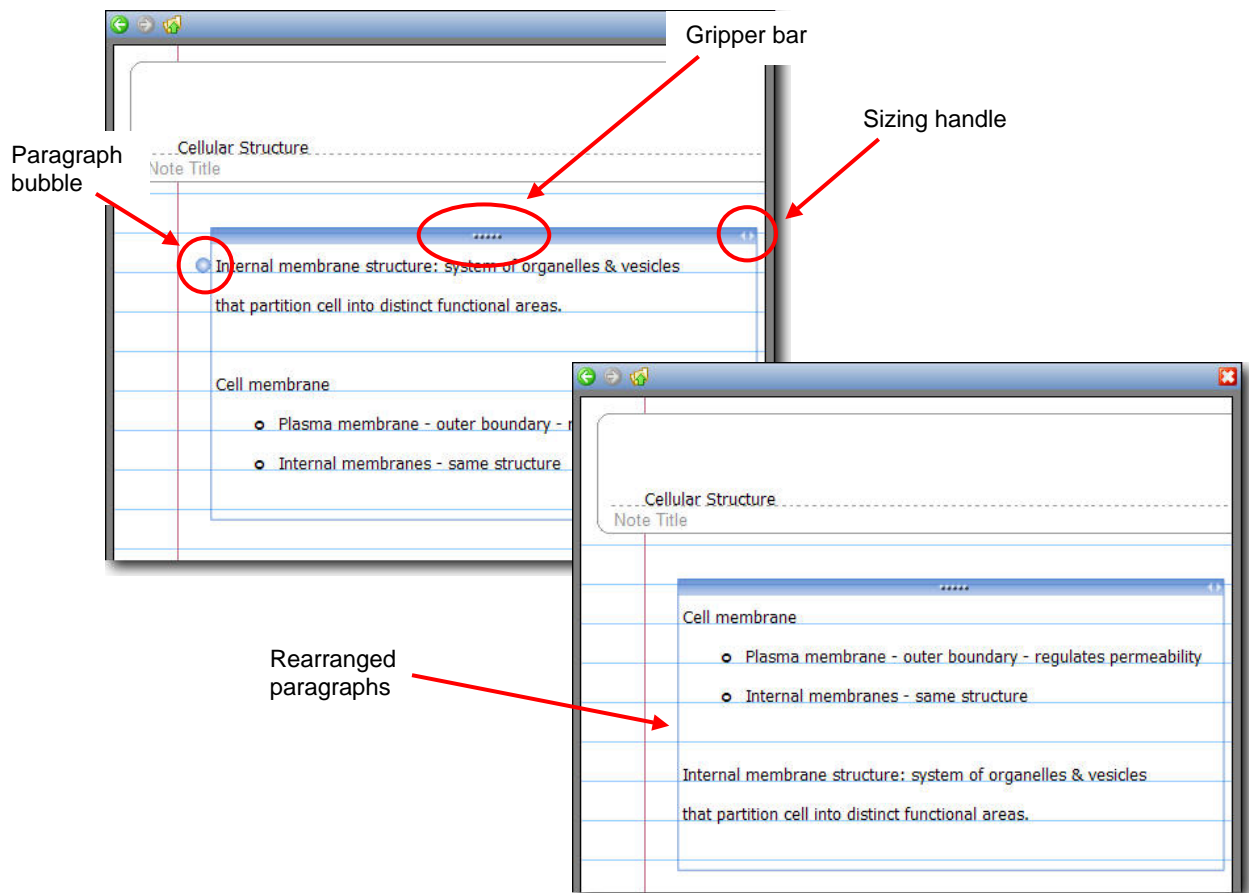
Button Image	Button Name	Description
	Zoom In / Zoom Out	Increases (Zoom In) or decreases (Zoom Out) the zoom by a preset factor.
	Zoom (percent)	Allows you to adjust the size of the display by selecting from a preset list of percentages.
	Fit Page / Fit Width / Fit Height	Adjusts the display to fit on your screen, even if you resize the window. <ul style="list-style-type: none"> • Fit Page zooms to display the full page. • Fit Width fits the page to the width of the program window. • Fit Height fits the page to the height of the program window.

This toolbar is displayed by default.

Zoom settings return to the default setting (**Fit to width**) when you leave the current Note.

Moving and Resizing Text

When you move your mouse pointer over a section of text, a bubble and a gripper bar appear.



These tools allow you to perform a variety of actions:

- Move an entire text section by clicking on the gripper bar and dragging the section to a new location.
- Move a paragraph by clicking on the paragraph bubble and dragging the paragraph to a new location.
- Move a text selection by selecting the text you want to move, clicking on the selected text, and dragging the text to a new location.
- Automatically position a text selection by turning on the Snap to Grid option, and dragging the selected text selection near the grid position you want it to snap to.
- Resize a text section by clicking the sizing handle, moving the mouse left or right, and letting go of the mouse button.

Inserting a Hyperlink

You can insert a hyperlink to a URL within a Note, as well.

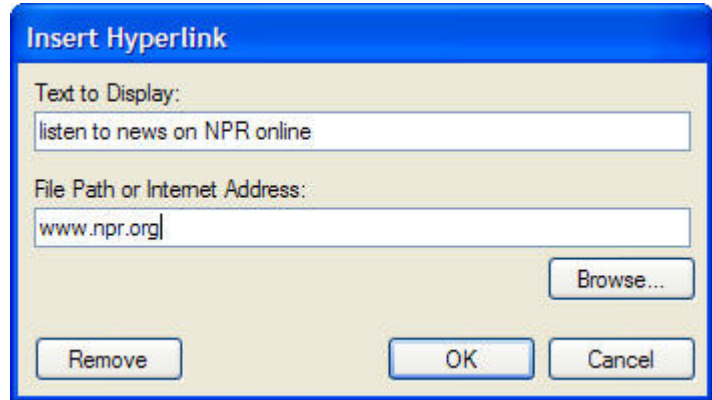
1. Click or tap in the Note at the point where you wish to insert the hyperlink.
2. Choose **Insert | Hyperlink** from the menu bar.

OR

Press **Ctrl + K**.

The **Hyperlink** window appears.

3. Enter the text you wish the hyperlink to display.
4. Enter the URL of the website.
5. Click **OK**.



The hyperlink will be added to your note. If you are connected to the Internet, you may click on the link to open the URL.



Adding Writing Space to Notes

Imagine sitting in a meeting, rapidly writing down every word being said, only to discover that you are about to run out of paper. Rather than frantically scrambling to find another scrap of paper on which to continue taking your meeting notes, PlanPlus allows you to quickly and easily expand your note-taking area. With PlanPlus, you will never run out of “virtual notepaper.”

Adding Space to the Bottom or Right of a Note



If you need additional space to the right or at the bottom of your note, clicking the **Add Space** buttons at the bottom of your note expands your note-taking area. These buttons allow you to expand your note page to the right, or add additional lines at the bottom of the page, as desired.

Adding Additional Notes Pages



To add another page to the current Notes page, click the **New Page** button at the bottom of the Notes page.

- You can add pages only when the current page contains data
- There is no limit to the number of pages you may add, as long as each preceding page contains data.
- As you add pages, numbered tabs for each page are displayed at the bottom of the Notes screen, allowing you to quickly move between pages.

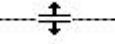
Notes are automatically saved as you add information.

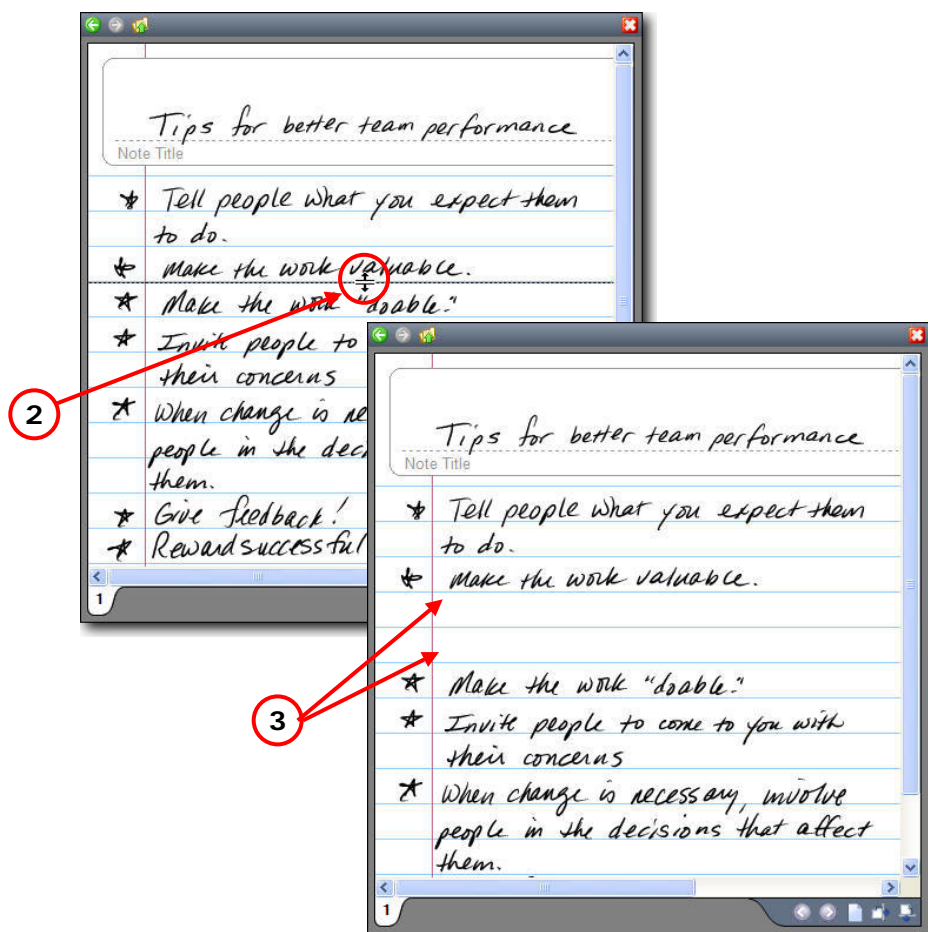
Adding or Removing Space in the Middle of a Note



If you are working with digital ink on a Tablet PC, you can insert or remove space in the middle of a note by using the **Insert/Remove Space** button.

Note: This feature is not available with text notes.

1. Tap on the **Insert/Remove Space** button (or select **Insert | Insert/Remove Space** from the menu).
2. Move the cursor to the place where you want to insert the space, and place the stylus on the screen. The cursor will change shape to an up/down arrow, and a horizontal line will cross the note page indicating the point at which the space will be inserted or removed. 
3. To insert space, drag the cursor **down** until you have created the desired amount of space, and lift the stylus from the screen.



4. To remove space, repeat steps 1 and 2, and drag the cursor **up** until you have removed the desired amount of space, and lift the stylus from the screen.

Copying and Pasting Note Pages and Contents

Note pages and contents can be copied or moved to a new or previously created Note.

Copy vs. Copy as Text

PlanPlus provides two types of Copying functions: Copy and Copy as Text.

- **Copy** puts multiple formats on the clipboard including text. You may Copy both ink and text or just ink. When you select **Copy**, it copies both ink and text (or ink if you only have ink) to the clipboard.
- **Copy as Text** converts any ink you have selected to text and copies the text to the clipboard.

If you only have text (no ink) selected, then both **Copy** and **Copy as Text** work the same.

Copying a Note Page

It is possible to copy one note page from a multi-page Note instead of copying all the pages in a multi-page Note.

1. Open the Note and locate the page you would like to copy.
2. From the menu bar, select **Edit | Select Page**.
3. Press **Ctrl-C**, or choose **Edit | Copy** or **Copy as Text** from the menu bar.
4. Locate and open the Note in which you want to paste the page, or create a new Note within a tabbed section.
5. Navigate through the note to the page *in front of which* you would like the copied page to be pasted.
6. From the menu bar, click **Edit** and select **Paste** (or press **Ctrl-V**). The copied page will be pasted in front of the page in view prior to the paste function.

Note: You can only copy Note pages, not Digital Paper.

Copying All Note Pages

There are two methods you can use to copy all of the pages of a multi-page Note:

To copy to another Note:

1. Open the Note you would like to copy.
2. From the menu bar, choose **Edit | Select All**.
3. Copy the note by pressing **Ctrl-C**, choosing **Edit | Copy** or **Edit | Copy as Text** from the menu bar.
4. Locate and open the Note into which you want to paste the information, or create a new Note within a tabbed section. Navigate to the page *in front of which* you would like the copied pages to be pasted.
5. From the menu bar, choose **Edit**, then **Paste**.

The copied pages will be pasted in front of the page in view prior to the paste function.

To make a duplicate (copy) of a Note

1. From the note list, select the note you wish to copy.
2. Right-mouse click, and from the pop-up menu, select **Make a Copy**.
PlanPlus will make a copy of the new note, which you may now move to a new folder, as desired.

Copying and Pasting from Other Applications

PlanPlus utilizes the Windows Clipboard to allow copying and pasting from other applications into a PlanPlus page.

1. Open the application and file where the information you want to store in PlanPlus resides.
2. Select and copy the information from that application as you normally would to copy it to the Clipboard.

This is typically done by selecting the information, then right-clicking and choosing **Copy**, clicking a **Copy** button, or choosing **Edit | Copy** from the application's menu bar.

3. Locate and open the **Daily Note** or **Note** page within PlanPlus on which you wish to paste the information and click on the page.
4. From the menu bar, click **Edit** and press **Ctrl-V** or select **Paste**.

The information you copied is added to the page.

Note: PlanPlus for Windows currently supports pasting plain text, ink, and images.

Deleting Notes

When you are finished with a note, PlanPlus makes it easy to delete it.

Deleting a Note Page

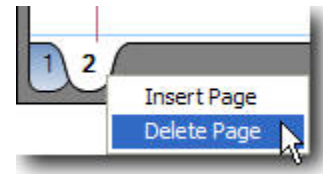
1. From the menu bar, choose **Edit | Select Page**.
2. Right-click on the page you want to delete, and choose **Delete**.

OR

Choose **Edit | Delete** from the menu bar.

Alternatively

1. Open the desired Note, and from the tabbed page numbers at the bottom of the note, right-click on the page number you wish to delete.
2. From the pop-up menu, choose **Delete**.



Deleting an Entire Note

1. Select the Note that you want to delete from the note list (on the left side of your screen).
2. Right-click on the Note and select **Delete**

OR

With the note selected, select **File | Delete Note**.

Choose **OK** to delete the Note.

OR

With the note open, and the cursor in the body of the note, select **Edit | Select All**

Select **File | Delete Selected**.


Choose **OK** to delete the Note.

Using Your Notes

PlanPlus makes it easy to use your notes in a variety of ways. On the following pages, we'll discuss the options available to you for using your notes effectively.

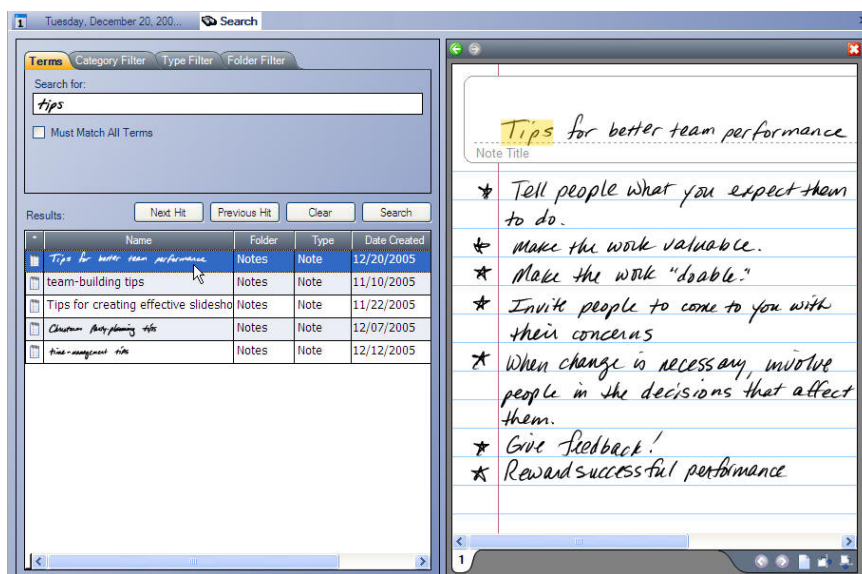
Searching Your Notes

The PlanPlus Search feature allows you to search for information in your text and digital ink Notes. If you have created Notes with digital ink, but have not yet converted the ink to text, Search evaluates the digital ink as if it were typed text. See *Search Your Content* for more information.

1. Click the **Search** button , or choose **View | Search** from the menu bar. The **Search For:** screen appears.

2. Enter the text you wish to find (using the keyboard or digital ink) If you want the search to look for an exact phrase (such as "project team") click the **Must Match All Terms** checkbox.

Optionally, you may further refine your search by selecting options from each of the filter tabs (Category, Type, and Folder)



3. When you have made your selections, click **Search**.

A list of items (including appointments, tasks, imported documents, and Notes) containing the specified text is then displayed.

Selecting an item from this list displays a preview in the right-hand panel. To open this item, double-click on its name from the list.

Note: If you enter search text with digital ink, PlanPlus evaluates the digital ink as text, even if you do not convert the digital ink to text before searching.

PlanPlus for Windows cannot read the text contents of files from applications with proprietary formats, or multimedia files, including JPGs, MP3s, AVIs, MPEGs, and so on. If PlanPlus cannot read the text contained in the file, it cannot search its contents.

See *Search Your Content* for additional information on using the Search tool.

Sharing Notes via E-mail

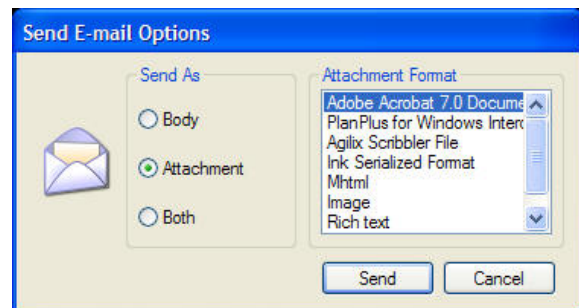
You can send a Note to someone else as an e-mail attachment, whether or not that person uses PlanPlus. If the recipient uses PlanPlus, however, the recipient can place the Note in a PlanPlus tab and view it from within their copy of PlanPlus.

Note: If you use a Webmail application for sending/receiving e-mail, you will need to follow the instructions under the heading *Saving a Note in Another Format* (on the next page). You may then attach your saved note to your e-mail.

1. Open a Note.
2. Choose **File | Send To** from the menu bar.

The Send E-mail Options dialog will appear.

Depending on your e-mail software, you may choose to send the Note in the body of the e-mail message, as an attachment to the message, or both. There are a variety of formats that may be available to you, depending on the option you select.



3. Make your selection, and click **Send**.
4. Depending on your e-mail software, and whether or not it supports Rich Text, a blank e-mail message will open, with the Note attached.
 - If you use Microsoft Outlook (which supports Rich Text), the note will be embedded into the message.
 - If you use Microsoft Outlook Express (which only supports plain text or HTML), the note will be attached to the message as an .mht document. When the recipient opens this file, it will launch a browser window to display the note.
5. Enter the recipient's e-mail address and other information as desired, then send the message normally.

Saving a Note in Another Format

You can save Notes and other PlanPlus items for sharing with another user. This is especially useful if you are using a Web mail or instant message application.

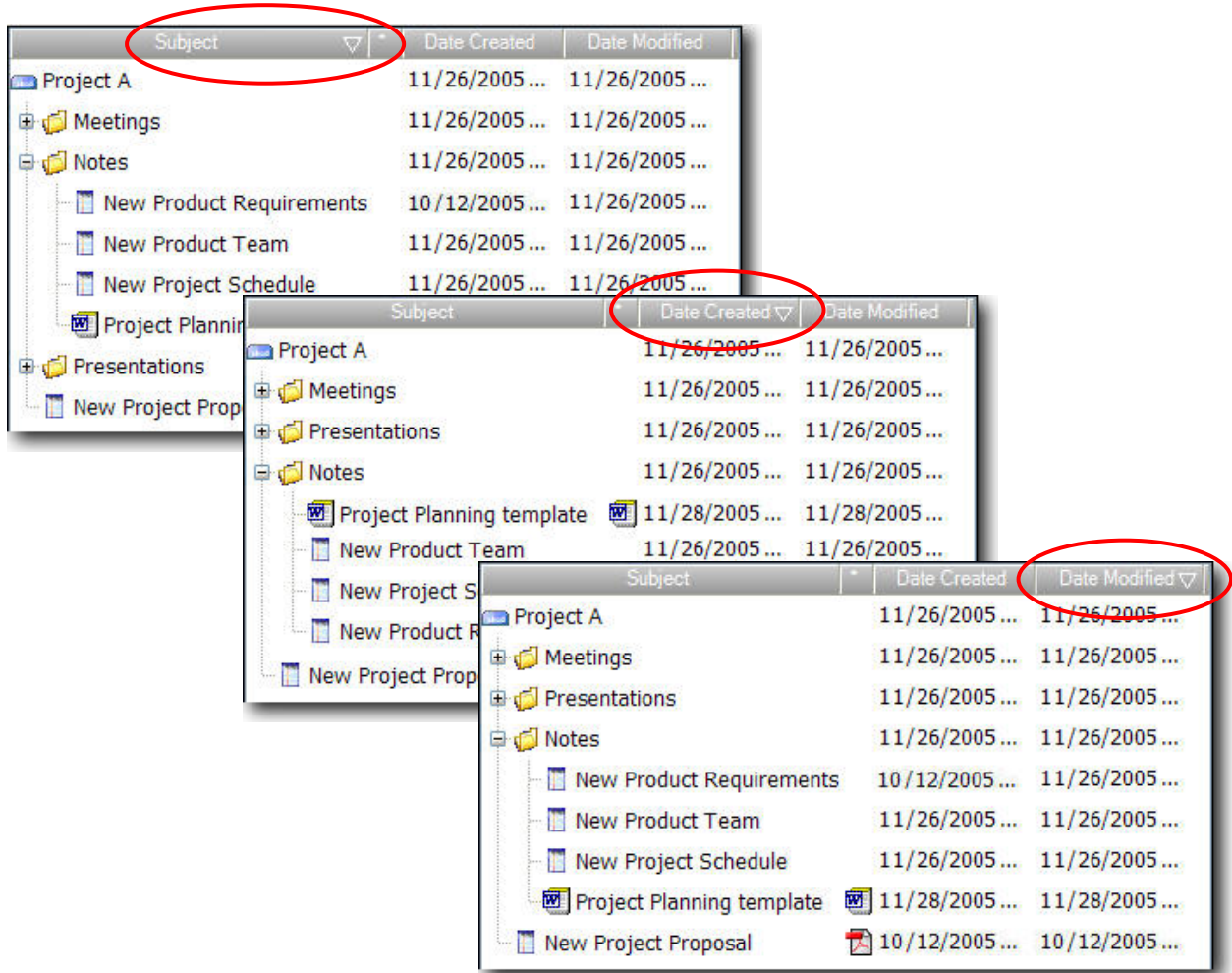
1. Locate the Note (or other item) you wish to share.
2. Choose **File | Save As** from the menu bar. A standard Save As dialog will appear.
3. Select the location where you wish to save the file.
4. Enter the filename (if different from the one displayed).
5. Select the file format from these options:
 - **PlanPlus Interchange File** – If the person you are sending the file to also uses PlanPlus for Windows, you can select the PlanPlus Interchange file format (.go) and they can import it directly into their database.
 - **Agilix Scribbler Format** – The Agilix Scribbler Format is used to send ink pages to any other PlanPlus user.
 - **Ink Serialized Format** – The Ink Serialized Format is a Tablet PC format created by Microsoft to send ink pages to other Tablet PC-aware applications.
 - **Mhtml** – If the person you are sending the file to does not have PlanPlus™ v.5 for Windows® XP, one option is to choose Mhtml. This is a web format that allows the file to be viewed in an Internet browser window.
 - **Image File** – The Portable Network Graphics (.png) format is useful for sharing files with non-PlanPlus users. This format allows you to save the file as a graphical image that can be easily viewed by other PC and Macintosh users, or copied to another application as an image
 - **Rich Text** – A Rich Text File (.rtf) will maintain the text formatting, and can be easily read by most word processors. This format does not support graphics.
 - **Plain Text**. A plain Text File (.txt) keeps the raw text, but loses all formatting and graphics.
6. Click **Save**.

The attachment can now be added to an e-mail or instant message.

Sorting Notes

Notes may be sorted by title, date created, and date modified. The default sort order is based on the **Subject** column.

To sort Notes, click the column heading.

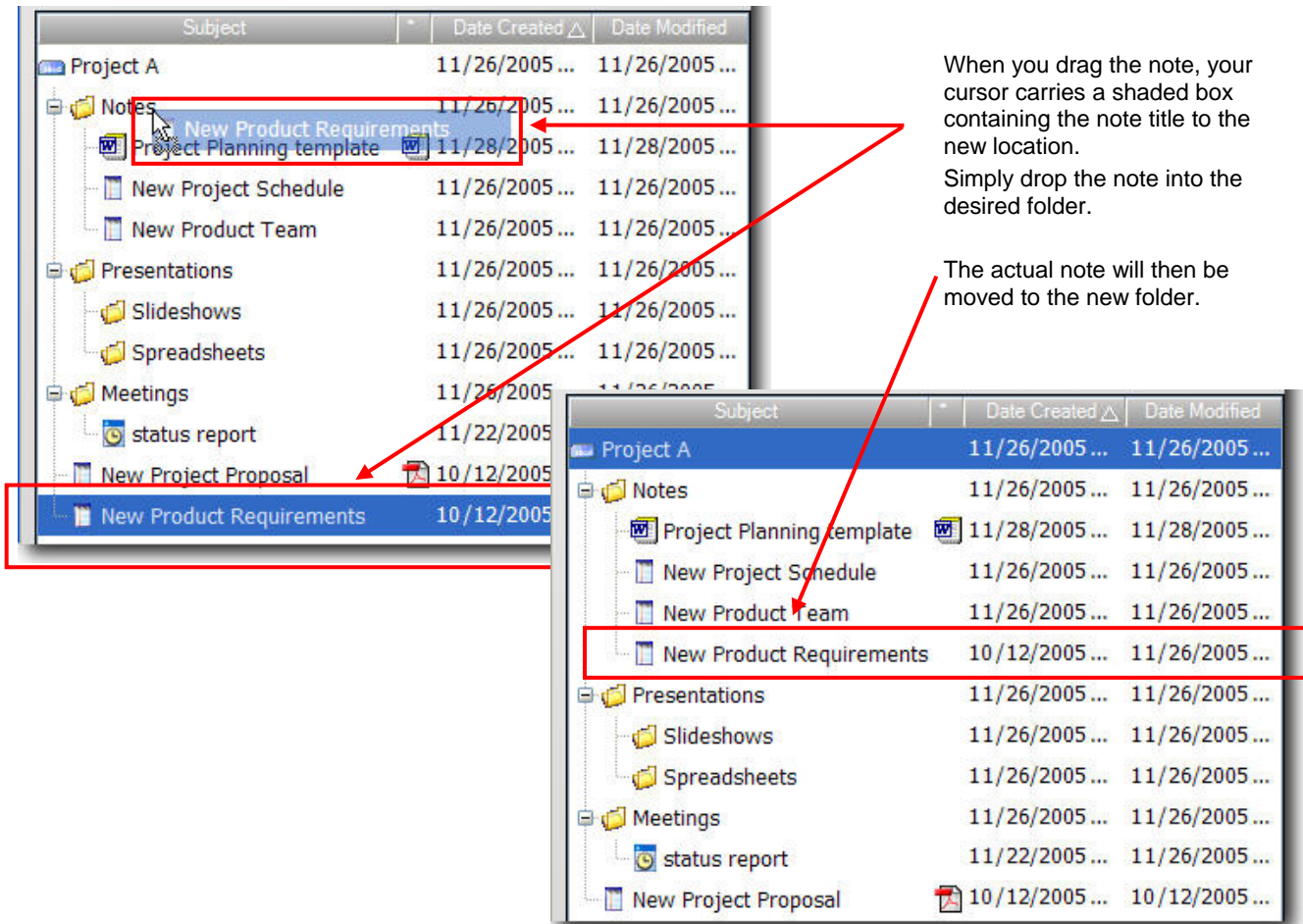


This will sort Notes in a descending order (as indicated by a down arrow next to the column title). Click the column heading again to sort it in ascending order. Note that Folders are sorted first, and then files.

Moving a Note to a Different Note Tab or Folder within any Tab

1. Within a tab, locate the note you want to move.
2. Click and hold the note title.
3. Drag the note title over the Note Tab or folder where you want to place it, and drop it.


The note will now appear in the new location.



Note: You can move a note to another folder in the same tab, or from one Note Tab to another Note Tab by dragging it and dropping it.

Printing Notes

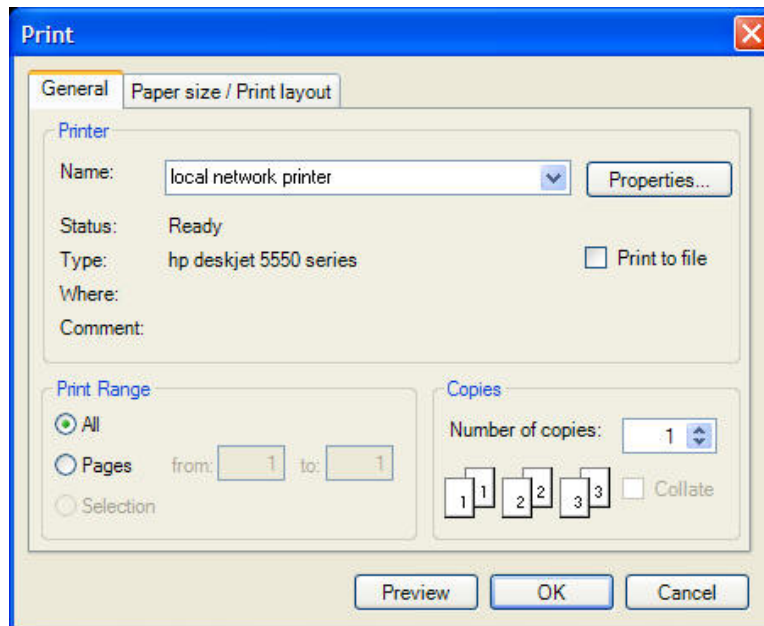
To print a Note:

1. Select the note you wish to print.
2. Click the **Print** button  from the Toolbar.

OR

Choose **File | Print Note** from the menu bar.

The Print dialog box appears, with the **General** tab selected by default, and your default printer selected.



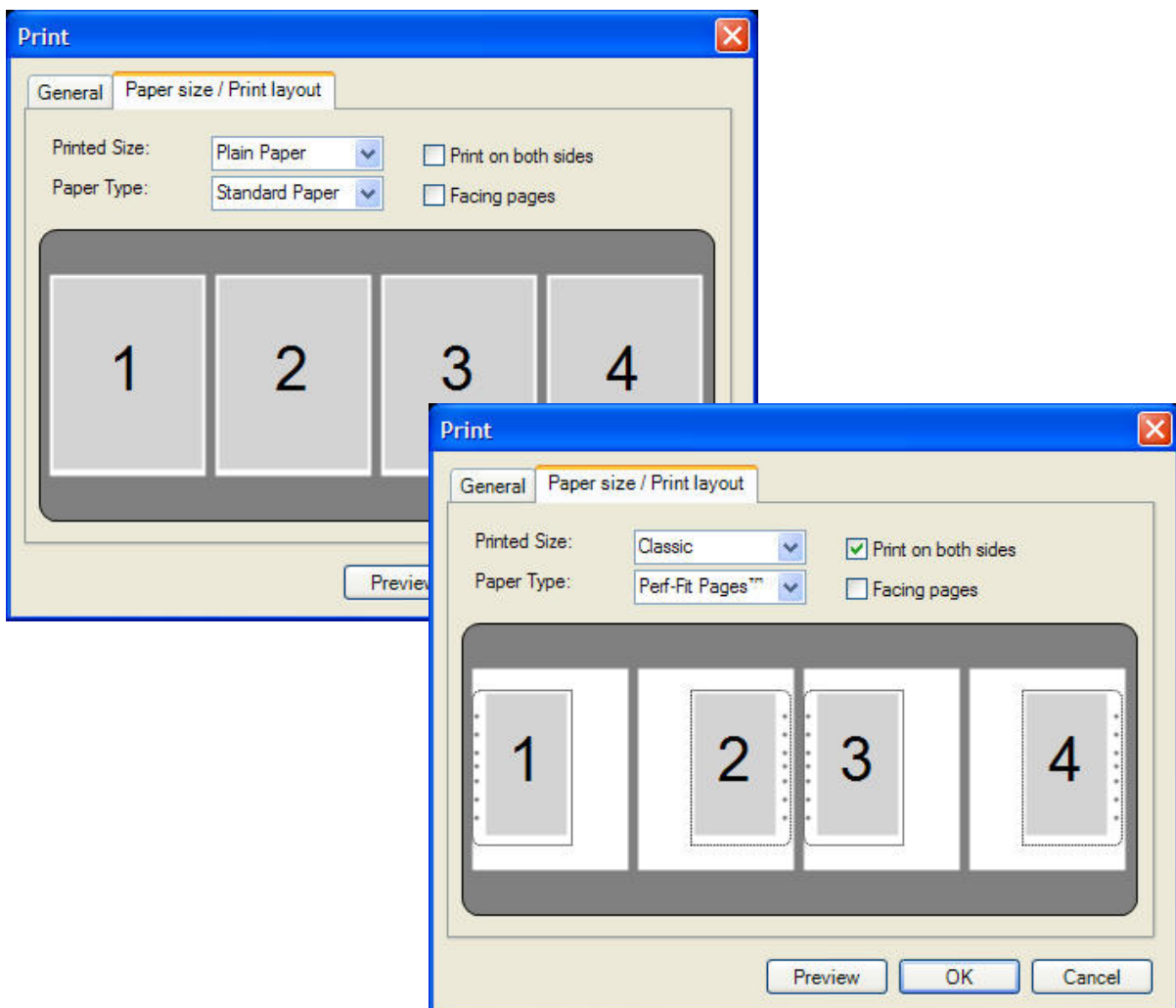
Select the desired printer and print settings.

Note: The options available on the General tab will vary depending on the printer you select.

- Click the **Paper size/Print layout** tab to change the printed size and paper type. PlanPlus for Windows allows you to print Notes on pages designed to fit into your FranklinCovey Day Planner. You may select from the following options (some paper type options are not available for all printed sizes):

Printed Size	Paper Type	Other Options
Plain Paper	Standard Paper	Print on both sides
Pocket	Perf-Fit Pages™	Facing pages
Compact	Classic on Letter	
Classic		
Monarch		

Notice that the sample page layout changes based on your selections (as shown in the following illustrations).



- Click **Print** to send your pages to the printer.

Adding Files to Tabs

A powerful feature of PlanPlus is the ability to add just about any type of file (word processing documents, spreadsheets, graphic images, or slide presentations, to name only a few) to a PlanPlus tab.

There are two modes to add files to tabs: using the PlanPlus for Windows Print Driver and Importing

Add a File with the Print Driver

When you add a file through the PlanPlus for Windows Print Driver, it creates a Digital Paper document.

- **Digital Paper** is an *annotatable image* of the document, PowerPoint, HTML page or other file created through the PlanPlus for Windows Print Driver. The image itself cannot be changed, but you can make annotations anywhere on the image. And text can usually be searched. Creating Digital Paper using the print driver will be discussed in greater detail in *Create and Store Digital Paper*.

Add a File with the Import Option

When you Import a file into a PlanPlus tab, two things happen:

- A link is created so that you can easily open up the file in the application it was created in. For example, if you add a Microsoft Word document to a PlanPlus tab, a link is created that lets you open up the document directly in Microsoft Word.
- Digital Paper is automatically created from the file. The note is added to the tab, and you can easily make Ink or typed annotations on it.
Creating Digital Paper through the Import option will be discussed in greater detail in *Create and Store Digital Paper*.

Create and Store Digital Paper

The Digital Paper feature of PlanPlus lets you make a Note out of just about any sort of document or information.

For example, suppose you would like to “take a snapshot” of a Web page. You can easily use Digital Paper to capture the page in PlanPlus, and then make annotations on it, highlight parts of the page, and add handwritten notes.

Perhaps you would like to do the same thing with a Microsoft Word document ... or a few slides of a PowerPoint presentation ... or maybe you simply want to keep a few pages of an electronic handbook readily available.

With PlanPlus, you now have the ability to “bind” information from these and just about any other software application into PlanPlus folders, and view them from inside PlanPlus. In addition, you can even search the text in the documents, slideshow presentations, or whatever you capture.

There are three ways to create and store Digital Paper.

- Using the PlanPlus for Windows print driver.
- Through the PlanPlus Import feature.
- By importing a PlanPlus for Windows database file, which may include Digital Paper.

The results will vary, depending on the option you select.

Creating Digital Paper Notes Using the PlanPlus for Windows Print Driver

When you use the PlanPlus for Windows print driver, you create an annotatable image from an existing document, rather than creating a note from scratch. You cannot make changes to the annotatable image, like a PlanPlus Note, but you can make notes anywhere *on the image* with text or ink.

Creating a Digital Paper note is as simple as printing a document from a software application. The only difference is that the document does not come out of a printer, but appears in your Notes folder.

To Create a Digital Paper Note Using the PlanPlus for Windows Print Driver

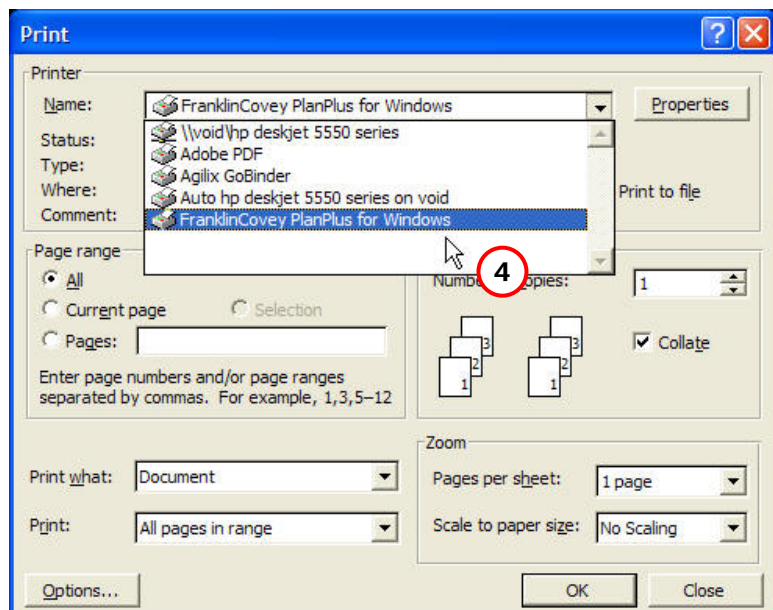
1. Open the software application used to display the note.

For example, if you want to capture a Web page, open your browser and navigate to that page. Similarly, if you want to capture one or more pages from a Microsoft Word document, a Microsoft PowerPoint presentation, or another type of file, open that application.

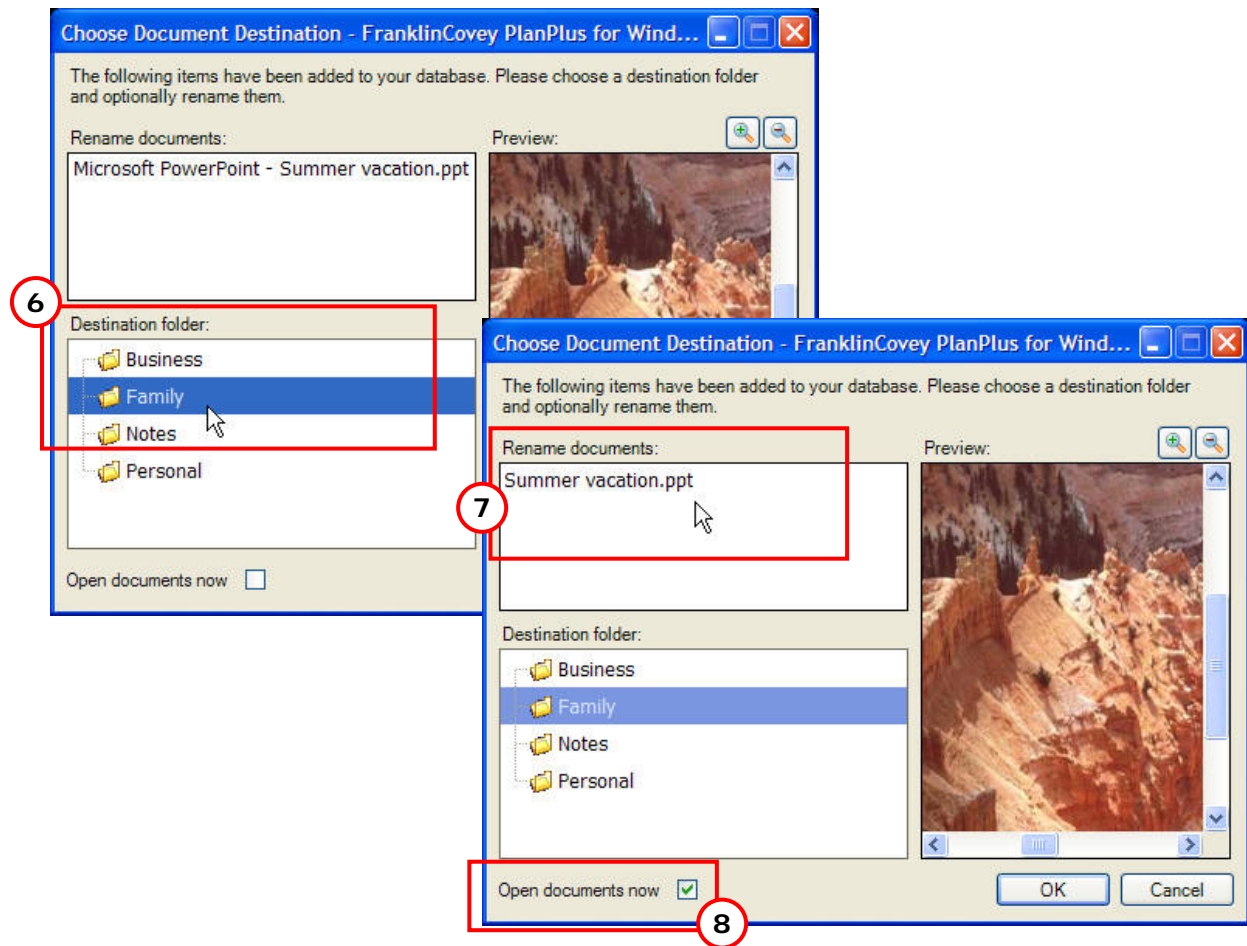
2. Open the file or document, or browse to the Web page you wish to save.
3. Access the **Print** feature as you normally would from that application.

With most software applications, select **File | Print** from the menu bar.

4. When the Printer dialog box appears, choose **Franklin Covey PlanPlus for Windows** as the printer, set other print options as desired, and then print the document. If you do not want to save the entire document, select the page(s) you want printed to PlanPlus for Windows. Click **OK**.
5. The PlanPlus for Windows print driver sends the page(s) you printed to PlanPlus as a single note file.



6. When the **Choose Document Destination** window appears, select the tab and folder where you wish to save the document.



7. If the filename displayed is cryptic (as is often the case with, for example, Web pages), you can rename of the note.
- Select the document in the **Rename documents** window.
 - Type the new name for the document.
8. If you want to open the document in PlanPlus now, click the **Open documents now** checkbox.
9. When you are finished making your selections, click **OK** to continue.

A progress bar will appear, indicating the status of the document conversion to Digital Paper.

When complete, the document will appear in the folder you selected. If you chose to open the document, it will appear in the PlanPlus window. You may make notes and other annotations on it as desired.

Importing

You can import virtually any file that was created by a Windows application, such as a Word document, PowerPoint slideshow, PDF, or image.

You could store pictures, audio files, music, Flash, Quicktime, or even video clips inside PlanPlus, some of which you may have imported as part of your own data management plan, and others which you may have received from friends or colleagues.

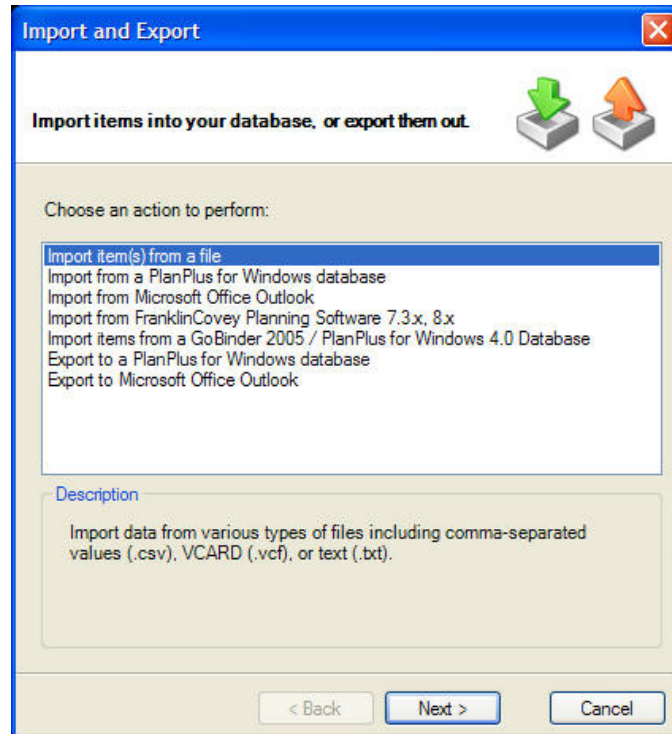
Unlike the PlanPlus for Windows Print Driver, which only creates an annotatable image, Import creates both an annotatable image *and* imports the entire file into the PlanPlus database. After you import, an application icon is associated with the note (displayed to the left of the Date Created column).

Note: Some applications have proprietary formats. In that case, PlanPlus cannot create an annotatable image. In this case, clicking either the note title or the application icon will launch the application associated with the file and open the file.

Creating Digital Paper Using Import

10. Choose **File | Import and Export** from the menu bar.

The **Import and Export** dialog box appears.



11. Select **Import item(s) from a file** and click **Next**.

The **Import item(s) from** dialog box appears, as shown in the illustration on the following page.

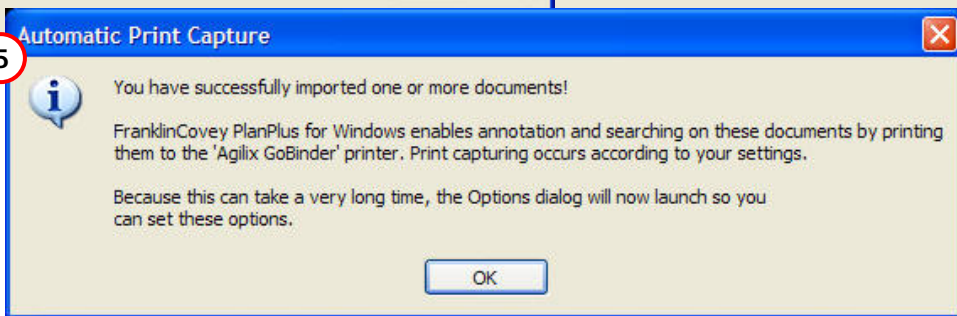
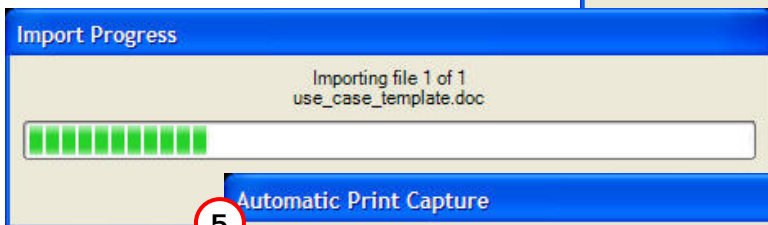
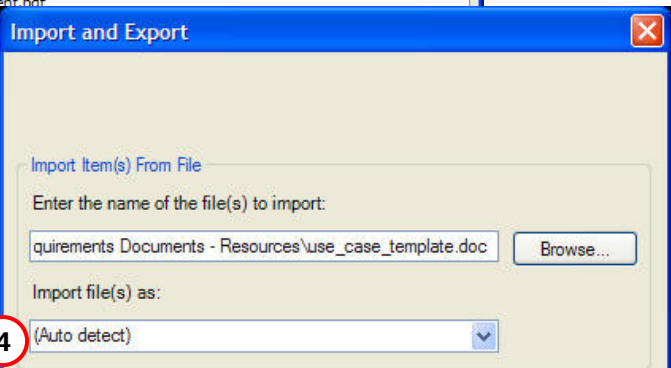
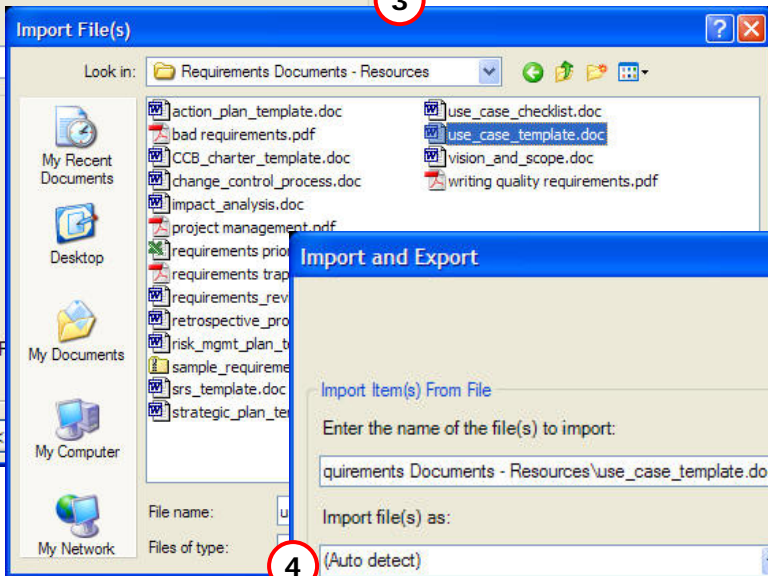
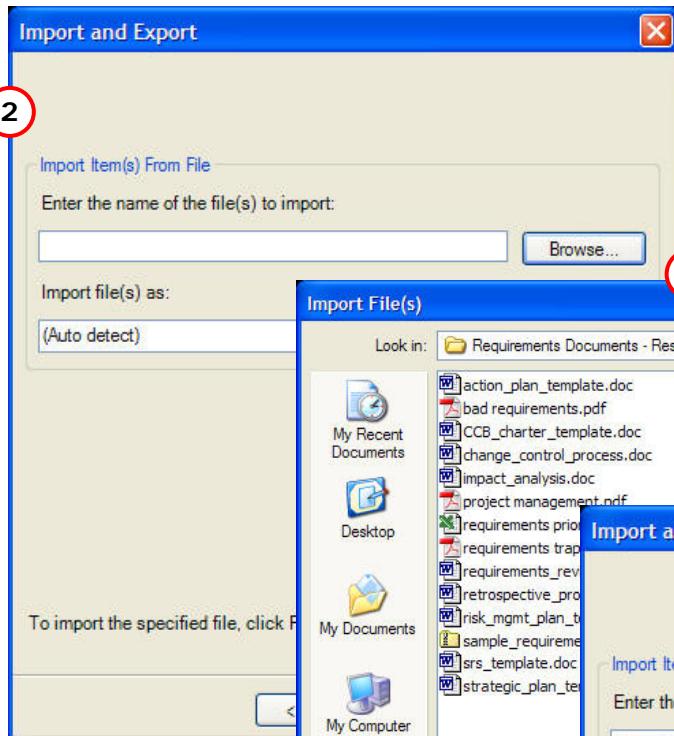
12. Click the **Browse** button to navigate to the file you wish to add, select the file, and click **Open**.

You are returned to the **Import Item(s) from** dialog, and the filename is now listed in the import field.

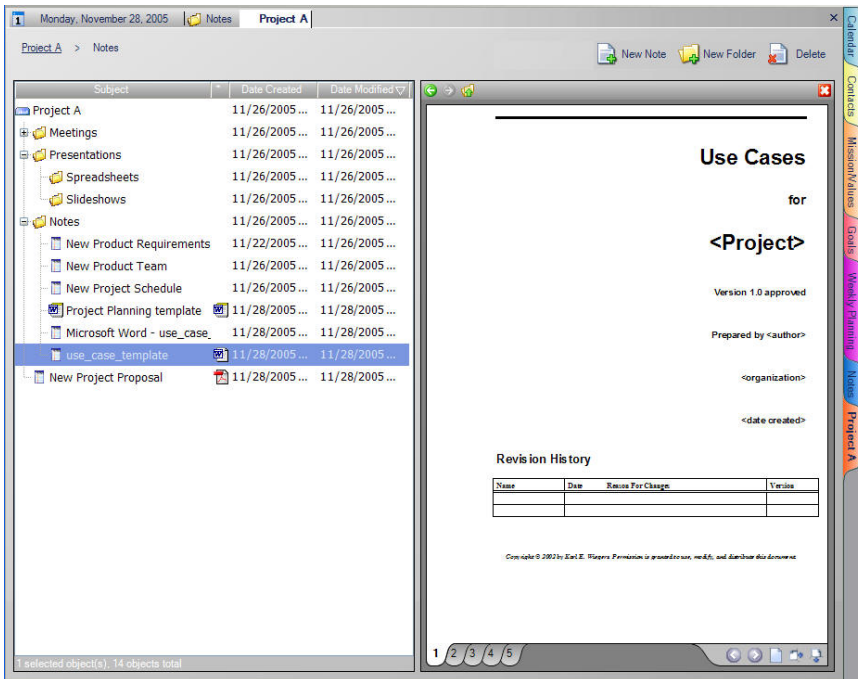
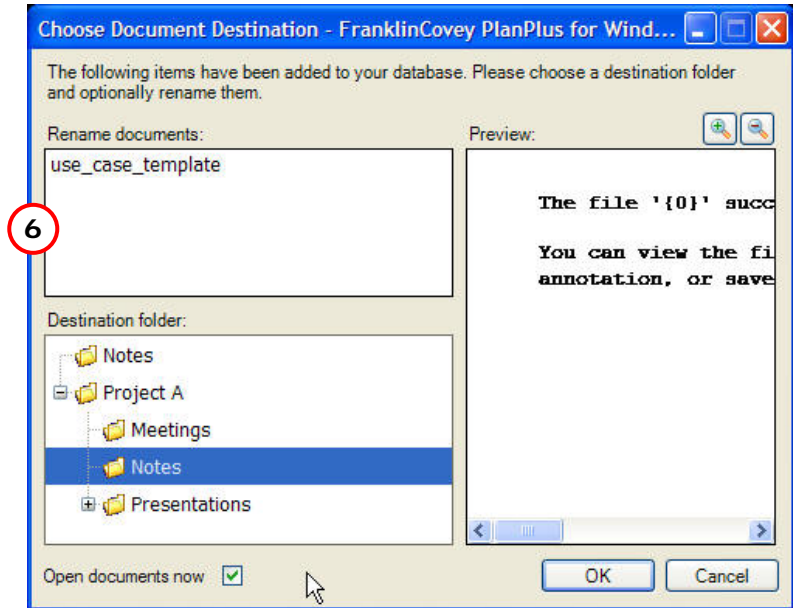
13. You may select a specific **file type** for the import, or you may allow PlanPlus to **Auto Detect** the file type during import (recommended).

14. When you are ready, click **Finish** to import the file(s). A progress bar will indicate the status of the import. An additional dialog box may appear, notifying you that PlanPlus is going to open the Options dialog so that you may set your print capture settings. If this dialog appears, click **OK** to continue.

If the Options dialog appears, make your Print Capture setting selections and click **OK**. You may change those settings at any time by selecting **Tools | Options | Print Capture**.




15. PlanPlus will next ask you to choose the document destination. From this dialog, you may rename the document, and select the destination folder. You may also choose to open the document at this time. When you have made your selections, click OK to continue.



When the file import is complete, PlanPlus will display a preview copy of the document. In addition, it will be listed in the tab you selected.

You can navigate to the file using the mouse or pen to click on the desired folders, or use the up/down buttons on the keyboard to navigate between the folders and the right/left keys to open/close the folders.

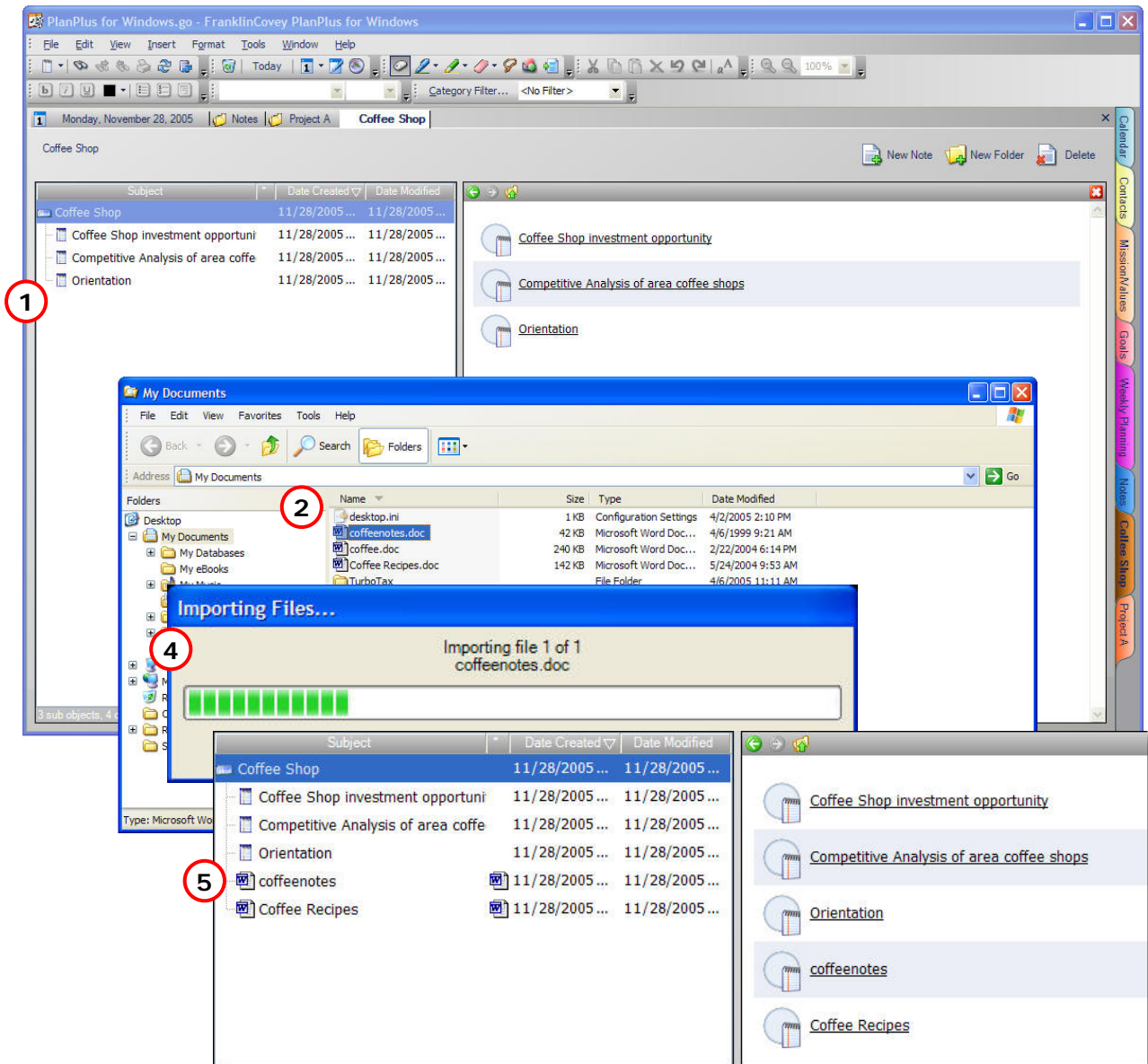
- To view the annotatable note created from the file, simply select the filename from the list, and the document will be displayed in the preview panel. If you wish to view a full-sized version of the annotatable note, click the note icon  (to the left of the document name). This will open the document in the full PlanPlus viewer. You can make digital ink or text annotations on the note in either form.
 - To open the file in the application in which it was created, click the application icon (if available, this will be displayed right next to the document name). This button image will vary depending on the application.

Add a File by Clicking and Dragging

You can also add a file to a PlanPlus tab (or to a folder within a tab) simply by clicking and dragging from Windows Explorer.

1. In **PlanPlus**, select the tab or folder where you wish to add the file.
2. Open **Windows Explorer** and navigate to the folder containing the desired file.
3. From Windows Explorer, **click and drag** the file to the **PlanPlus** window and **drop** it onto the desired tab or folder.
4. A **progress bar** appears, showing the progress of the import.
5. When file import is complete, the file appears in the **PlanPlus** tab you specified.
6. **PlanPlus** automatically invokes its print driver to print the imported file using its native application. This is done rapidly in background. When complete, the image will be displayed in the right-hand panel.

Note: If the PlanPlus print driver has not yet completed background print of documents, PowerPoint presentations, HTML pages and other files downloaded from the FranklinCovey server, automatic printing of an imported file will not happen immediately. When you click on the file within the tab, you will see the following message: *“The file [filename] successfully downloaded, but annotation could not be enabled. You can view the file with its associated application, manually capture it to enable annotation, or save it to disk.”* .

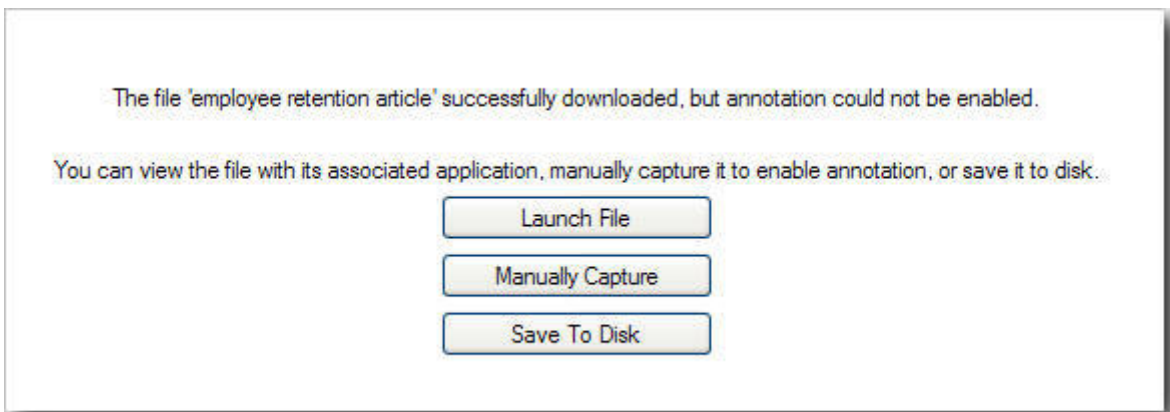


Manually Capture a Document

In certain situations, it may be necessary to manually capture a document to complete the conversion to a Digital Paper image.

- When automatic printing through the PlanPlus print driver has not occurred for a document you have previously saved or imported into a folder.
- During import, when the document file size is larger than the size limit set in **Tools | Options | Print Capture**.

In these situations, when you attempt to view the document, you will see a message, similar to the one shown below, informing you that the print capture has not yet been performed. When this occurs, PlanPlus gives you the option to view the file with its associated application, manually capture it to enable annotation, or save the document to disk.



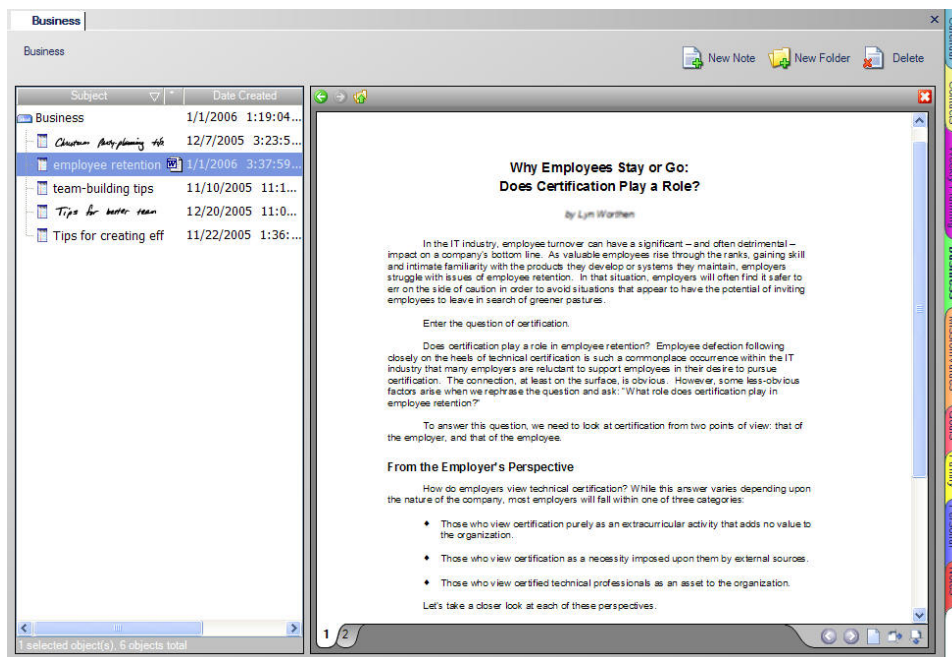
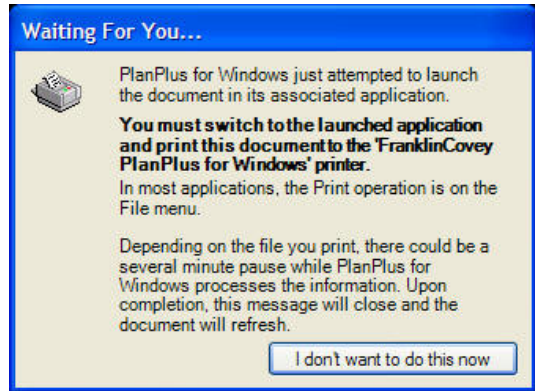
Note: If this occurs frequently, you may want to change the print capture settings (see *Error! Reference source not found.* for more information about adjusting your Print Capture settings).

To Manually Capture a Document


1. Click on the **Manually Capture** button. A popup will appear, giving you instructions for manually capturing the document.
2. Follow the instructions shown on screen:
 - Switch to the launched application
 - Print the document using the "FranklinCovey PlanPlus for Windows" printer.

When the capture is complete, PlanPlus will display the annotatable Digital Paper image of the document. In addition, it will be listed in the tab you selected.

You can move the note to a different folder, if desired, by clicking and dragging it to the new folder.



To navigate to the annotatable copy of the file use your mouse or pen to click on the desired folder and then select the document. Alternatively, use the up/down buttons on the keyboard to navigate between the folders and the right/left keys to open/close the desired folder, from which you may select your document.

- To view the annotatable note created from the file, simply select the filename from the list, and the document will be displayed in the preview panel. If you wish to view a full-sized version of the annotatable note, click the note icon  (to the left of the document name). This will open the document in the full PlanPlus viewer. You can make digital ink or text annotations on the note in either view.
- To open the file in the application in which it was created, click the application icon (if available, this will be displayed right next to the document name). This button image will vary depending on the application.

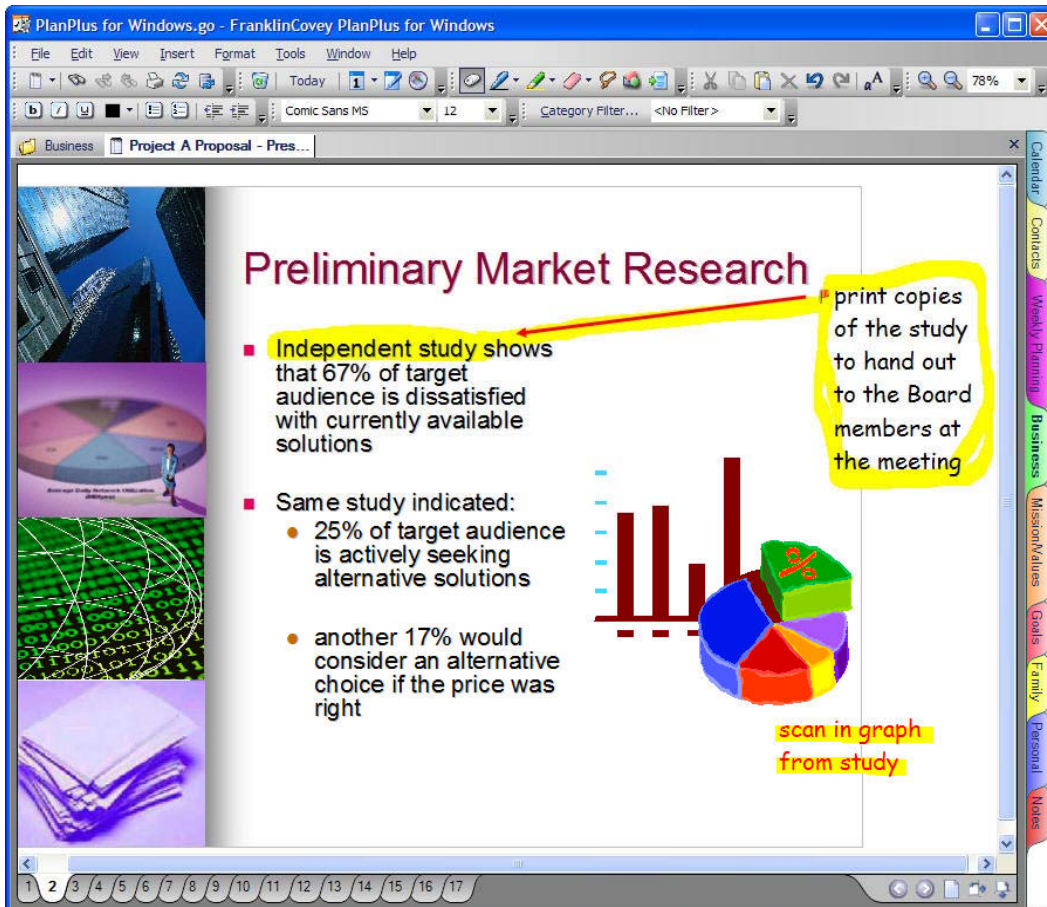
Viewing a Digital Paper Document

1. Navigate to the tab containing the note, then select the note.
 - If you click on the note title, PlanPlus displays the annotatable Digital Paper image.
 - If an application icon is associated with this note, and you click on the icon, PlanPlus will launch the application and display the original file in the native application.
2. If you wish, you can move a Digital Paper note to a different folder.

Modify a Digital Paper Document

Since a Digital Paper document is an image of a note, you can write on it and search it, but you cannot edit it.

For example, you can make typed or digital ink annotations on the note, add space to the right or bottom of the note for graphics or other annotations. You can also share your annotated note with others.



See **Working with Notes** for information on how to modify and annotate Notes in PlanPlus.

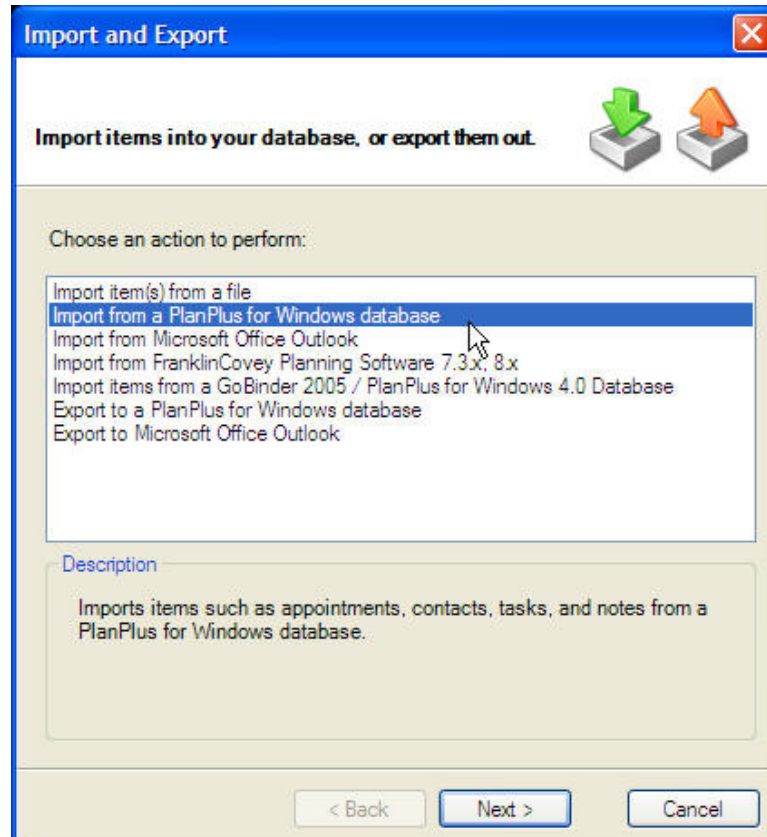
Importing PlanPlus for Windows Interchange Files

You can import PlanPlus™ v.5 for Windows® XP formatted information (.go files) received from another person into your PlanPlus database.

Importing a .go file imports an entire folder and everything the folder contains (which may be as little as a single note or Digital Paper and PlanPlus notes for an entire project).

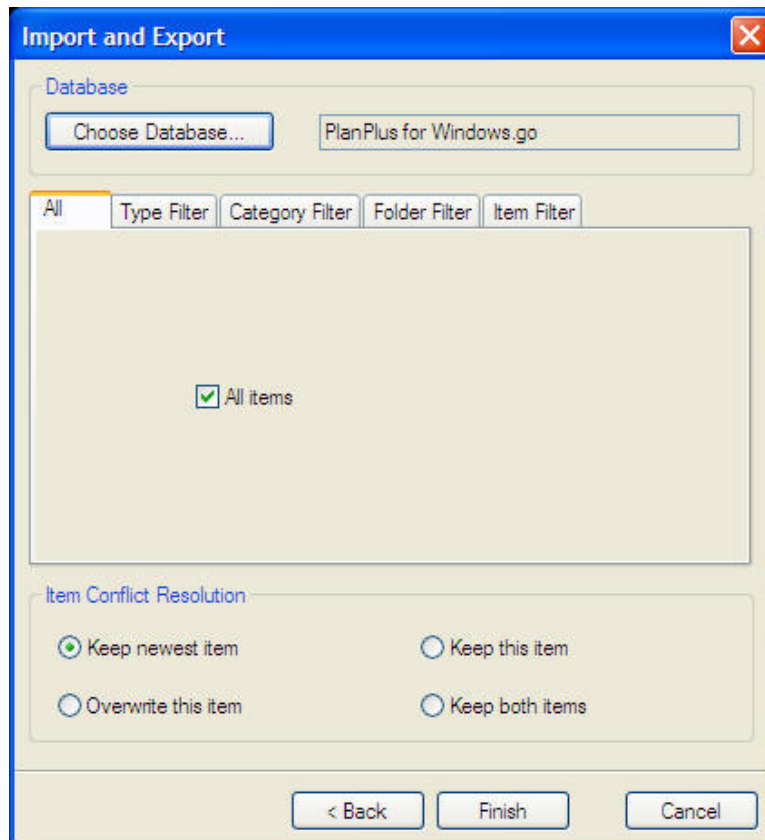
1. From the menu bar, select **File | Import and Export**.

The Import and Export window will appear.



2. Select **Import from a FranklinCovey Database** and click **Next** to continue.

The Import and Export selection dialog will appear



3. Specify the **Database** from which you wish to import the PlanPlus information. If necessary, you may click the **Choose Database** button to locate the database.
4. Identify the item(s) you wish to import. (**All items** is selected by default). The **filter tabs** will assist you in identifying the specific item, type of item, or group of items. When you locate the correct item name or definition, simply check the appropriate box(es).
5. Specify your preferences for **Item Conflict Resolution**. This will allow the system to take the correct action if it finds a copy of any item you are exporting in the target database.
 - **Keep newest item** – replaces the existing item only if the item being imported is newer.
 - **Overwrite this item** – always replaces the existing item with the item being imported.
 - **Keep this item** – never replaces the existing item with the item being imported.
 - **Keep both items** – leaves the existing copy and also places a duplicate (the item being imported) in the database.
6. Click **Finish** to continue.

Exporting

You can export PlanPlus items for sharing with another PlanPlus™ v.5 for Windows® XP user. There are two options to export information:

- Export a single PlanPlus a note or contact.
- Export all or a part of your database, including calendar items, tasks, notes, contacts, and items within a tab or an entire tab and all its contents.

Exporting or Saving a Single Item

1. Locate the item you wish to share.
2. Choose **File | Save As** from the menu bar. A standard Save As dialog will appear.
3. Select the file format.

For notes, you can select from these format options:

- **PlanPlus Interchange File** – If the person you are sending the file to also uses PlanPlus™ v.5 for Windows® XP, you can select the PlanPlus Interchange file format (.go) and they can import it directly into their database.
- **Agilix Scribbler Format** – The Agilix Scribbler Format is used to send ink pages to any other PlanPlus user.
- **Ink Serialized Format** – The Ink Serialized Format is a Tablet PC format created by Microsoft to send ink pages to other Tablet PC-aware applications.
- **Mhtml** – If the person you are sending the file to does not have PlanPlus, one option is to choose Mhtml. This is a web format that allows the file to be viewed in an Internet browser window.
- **Image File** – The Portable Network Graphics (.png) format is useful for sharing files with non-PlanPlus users. This format allows you to save the file as a graphical image that can be easily viewed by other PC and Macintosh users, or copied to another application as an image
- **Rich Text** – A Rich Text File (.rtf) will maintain the text formatting, and can be easily read by most word processors. This format does not support graphics.
- **Plain Text**. A plain Text File (.txt) keeps the raw text, but loses all formatting and graphics.

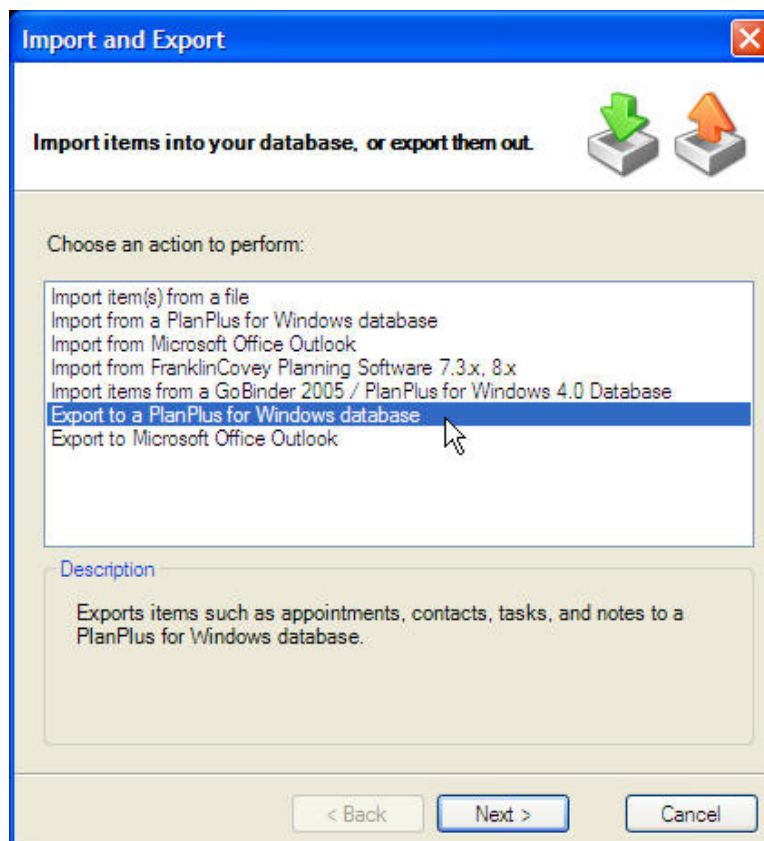
Contacts can be saved in this format:

- **Comma Separated Values**. The .csv format is a common for exchanging basic database and spreadsheet information.
4. Choose the name of the attachment and click **Save**.

Exporting All or Part of Your Database

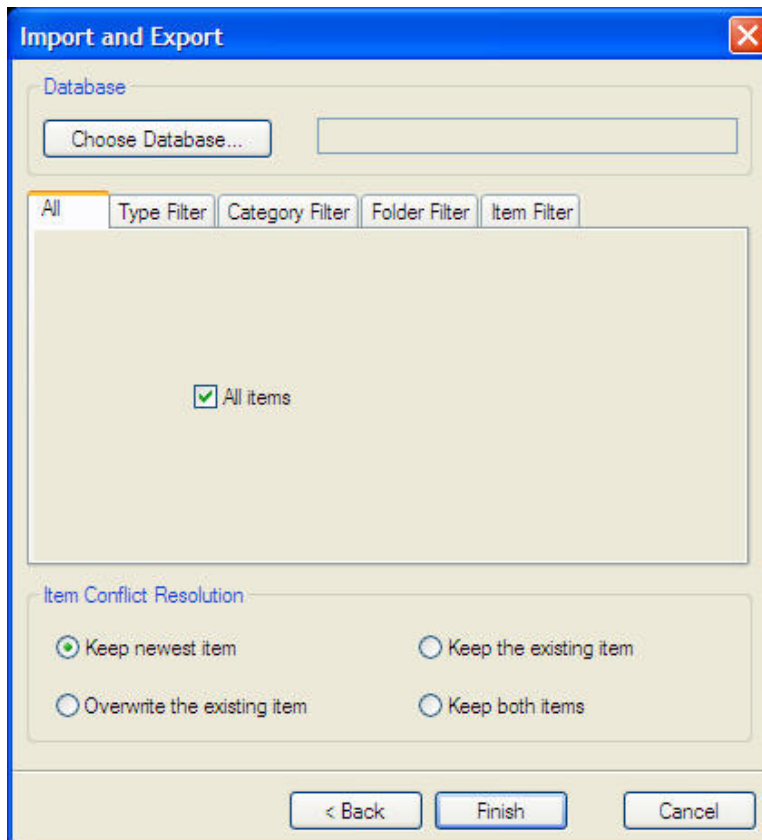
Note: If you have password-protected your PlanPlus database, you cannot export and share the database until you remove the password. This can be done by clearing the password through the **File | Security** option.

1. Locate the Note (or item) you wish to share.
2. Choose **File | Import and Export** from the menu bar.
3. The Import and Export window will appear.



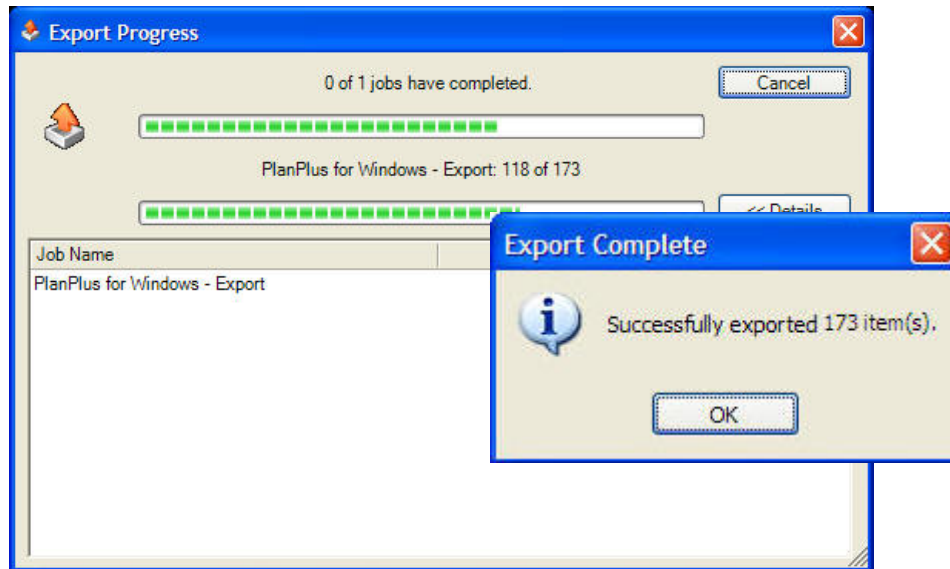
4. Select **Export to a PlanPlus for Windows Database** and click **Next** to continue.

The selection dialog will appear.



5. Specify the **Database** to which you wish to export the Note. If necessary, you may click the **Browse** button to locate the database.
6. Identify the item(s) you wish to export. (**All items** is selected by default.) The **filter tabs** will assist you in identifying the specific item, type of item, or group of items. When you locate the correct item name or definition, simply check the appropriate box(es).
7. Specify your preferences for **Item Conflict Resolution**. This will allow the system to take the correct action if it finds a copy of any item you are exporting in the target database.
 - **Keep newest item** – replaces the existing item only if the item being imported is newer.
 - **Overwrite the existing item** – always replaces the existing item with the item being imported.
 - **Keep the existing item** – never replaces the existing item with the item being imported.
 - **Keep both items** – leaves the existing copy and also places a duplicate (the item being imported) in the database.
8. Click **Finish** to continue.

A status bar will track the progress of the export.



9. When the export is completed, a dialog will appear to inform you of the number of items successfully exported. Click **OK** to close this dialog and finish the export process.

Note: If you have password-protected your PlanPlus database, you cannot export and share the database until you remove the password. This can be done by clearing the password through the **File | Security** option.


Search Your Content

You may search for both ink and text across all parts of PlanPlus, whether the data was created in FranklinCovey, pasted from another application, printed through the PlanPlus print driver, or imported using the Import feature.

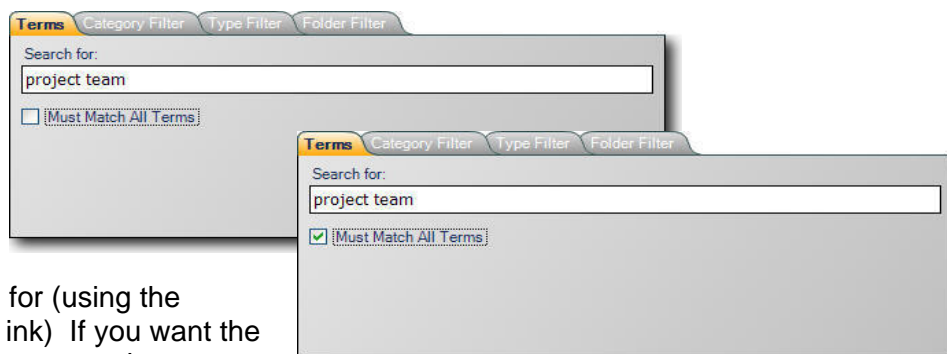
Using the Search Tool

The PlanPlus Search feature allows you to search for information in your text and digital ink Notes. If you have created Notes with digital ink, but have not yet converted the ink to text, Search evaluates the digital ink as if it were typed text.

1. Click the Search

button , or choose View | Search from the menu bar.

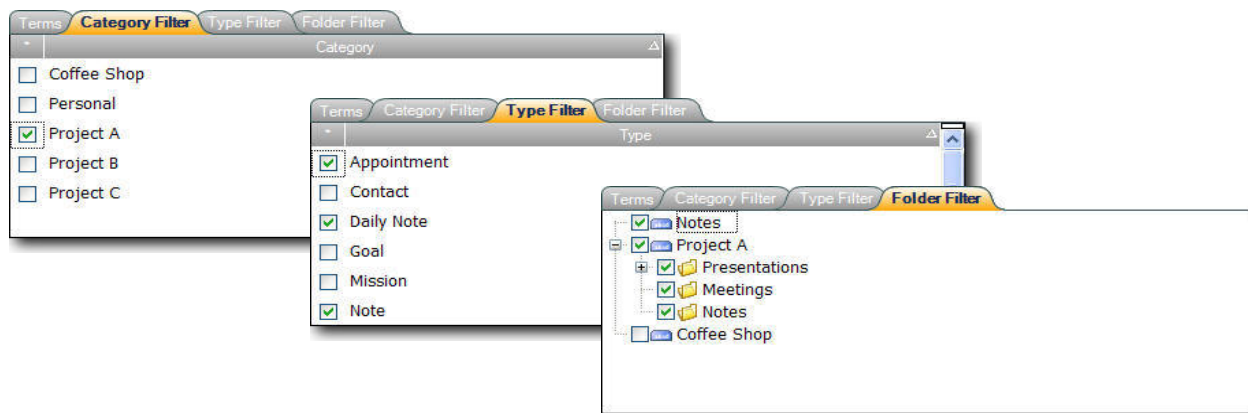
The **Search For** screen appears.



2. Enter the text you wish to search for (using the keyboard or digital ink) If you want the search to look for an exact phrase (such as "project team"), click the **Must Match All Terms** checkbox.

For example, if the search term is "project team," all items containing either the word "project" **OR** the word "tea," will be found. However, if you select the **Must Match All Terms** checkbox, only items containing **BOTH** words will be found.

3. Optionally, you may further refine your search by selecting options from any or all of the filter tabs:



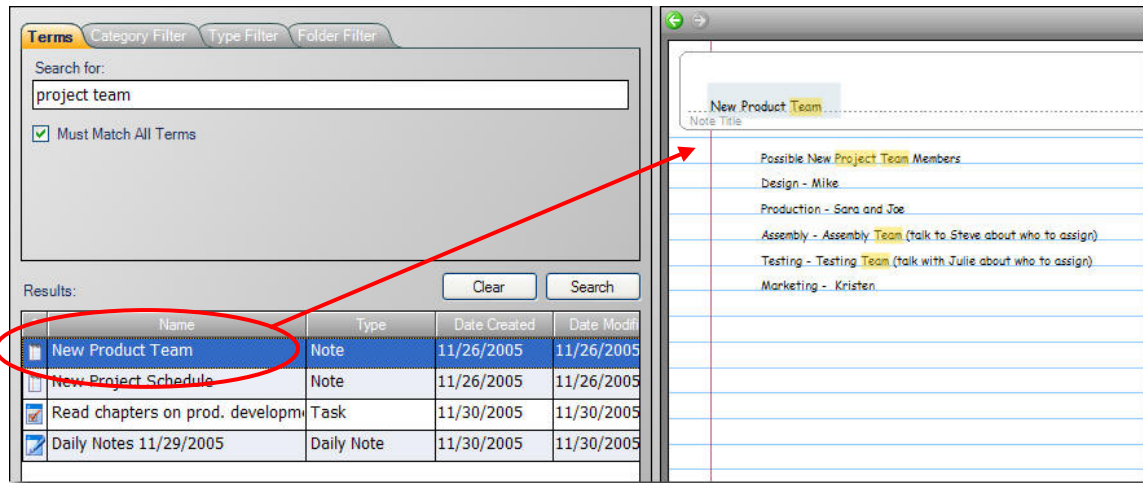
- **Category** – Select the category the search item must belong to, if any.
- **Type** – Select the Type of item you are looking for.
- **Folder** – Select the folder where PlanPlus should search for the desired item.

4. When you have made your selections, click **Search**.

Notes: If you enter search text with digital ink, PlanPlus evaluates the digital ink as text, even if you do not convert the digital ink to text before searching.

PlanPlus cannot read the text contents of files from applications with proprietary formats, or multimedia files, including JPGs, MP3s, AVIs, MPEGs, and so on. If PlanPlus cannot read the text contained in the file, it cannot search it.

A list of items (including appointments, tasks, FranklinCovey Documents, and Notes) containing the specified text is then displayed.



Selecting an item from this list displays a preview in the right-hand panel. To open this item, double-click on its name from the list.

Sorting Search Results

Search results may be sorted by any column. The default sort order is based on the **Date Modified** column.

1. To sort notes, click the column heading. This will sort notes in a descending order (as indicated by a down arrow next to the column title).
2. Click the column heading again to sort it in ascending order.

Column Options

- **Change column size** by dragging the bar (|) separating the columns to adjust their width.
- **Change column location** by dragging the column header or name to a new location on the column bar.
- **Deactivate a column** by right-clicking on the column name and unchecking the box next to the name of the column you wish to deactivate. This column will no longer be displayed.
- **Activate a column** by right-clicking on any column name and checking the box next to the name of the inactive column you wish to see. This column will now be displayed.

Navigating Search Results

To select a document from the search results list, click the item you wish to view.

- A preview of the item will be displayed in the right-hand panel. The search term will be highlighted in yellow on the preview page.
- To move to the next or previous search result, click the desired title.
- To open an item, double-click on it from the search results list.

To Begin a New Search

1. Click the **Clear** button.
2. Create a new search by repeating the Search process for the new information.

Manage Your Contacts

PlanPlus contains a full contact manager.

- Keep track of important information for your colleagues, friends, family members, and other important people.
- Store information about each member of your network.

This is all available to you through the **Contacts Tab**, which provides you tools to store and manage your Contact List.

The Contacts Tab

PlanPlus provides powerful tools for managing and navigating the contact information for the people you know. The Contacts Tab allows you to store basic information, photos, and notes for your family, friends, colleagues, and others.

There are three primary areas in the Contacts Tab:

- The List View
- The Card View
- The Contact View

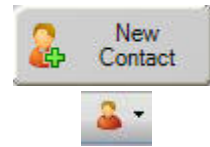
Each of these areas, and how you use them, is discussed on the following pages. We will begin by creating a new contact record, and then review each of the features of the Contacts Tab in turn.

Creating a New Contact

1. Click the **Contacts** tab.

PlanPlus displays all contacts currently in your database (if this is your first use, this window may be empty).

2. Click the **New Contact** button at the top of the Contacts tab, or from the PlanPlus toolbar.



OR

Select **File | New | Contact** from the menu.

PlanPlus opens a new **Contact Information** form to use in entering contact information.

3. Enter basic information about the contact such as name, address, e-mail, and so on. New contact information is saved as you enter it.

The List View

The **List View** displays all information on all contacts in a format that resembles a spreadsheet. If you have more contacts than are viewable in a single FranklinCovey window, a vertical scrollbar enables you to view all the contacts in your list.

File as	First	Last	Company	Home	Work	Mobile
Adams, Beky	Beky	Adams		(123) 456-7890		beky@ema
Allen, Dave	Dave	Allen				daveallen@
Baker, Mark	Mark	Baker		(123) 456-7890	(555) 456-7890	mbaker@e
Brown, Erin	Erin	Brown				erinb@ema
Carillo, Debi	Debi	Carillo				debi@ema
Carlson, Denise	Denise	Carlson				denise@er
Carpenter, Dave	Dave	Carpenter			(555) 456-7913	accounting
Clark, Doug	Doug	Clark		(123) 456-7890		dclark@em
Davis, Connie	Connie	Davis		(123) 456-7890		CLDavis@e
Donner, Dave	Dave	Donner				Dave@ema
Fir, Daniel	Daniel	Fir				daniel@em
Greek Restaurant			Greek Restaura		(555) 456-0123	
Green, Janice	Janice	Green				janiceg@e
Hammond, Jennifer	Jennifer	Hammond		(123) 456-7890		jmh@emai
Harmon, Susan	Susan	Harmon		(123) 456-7890		susank@er
Hirsch, Denise	Denise	Hirsch		(123) 456-7890		dhirsch@e
Italian Restaurant			Italian Restaura		(555) 456-0987	

Customizing the List View

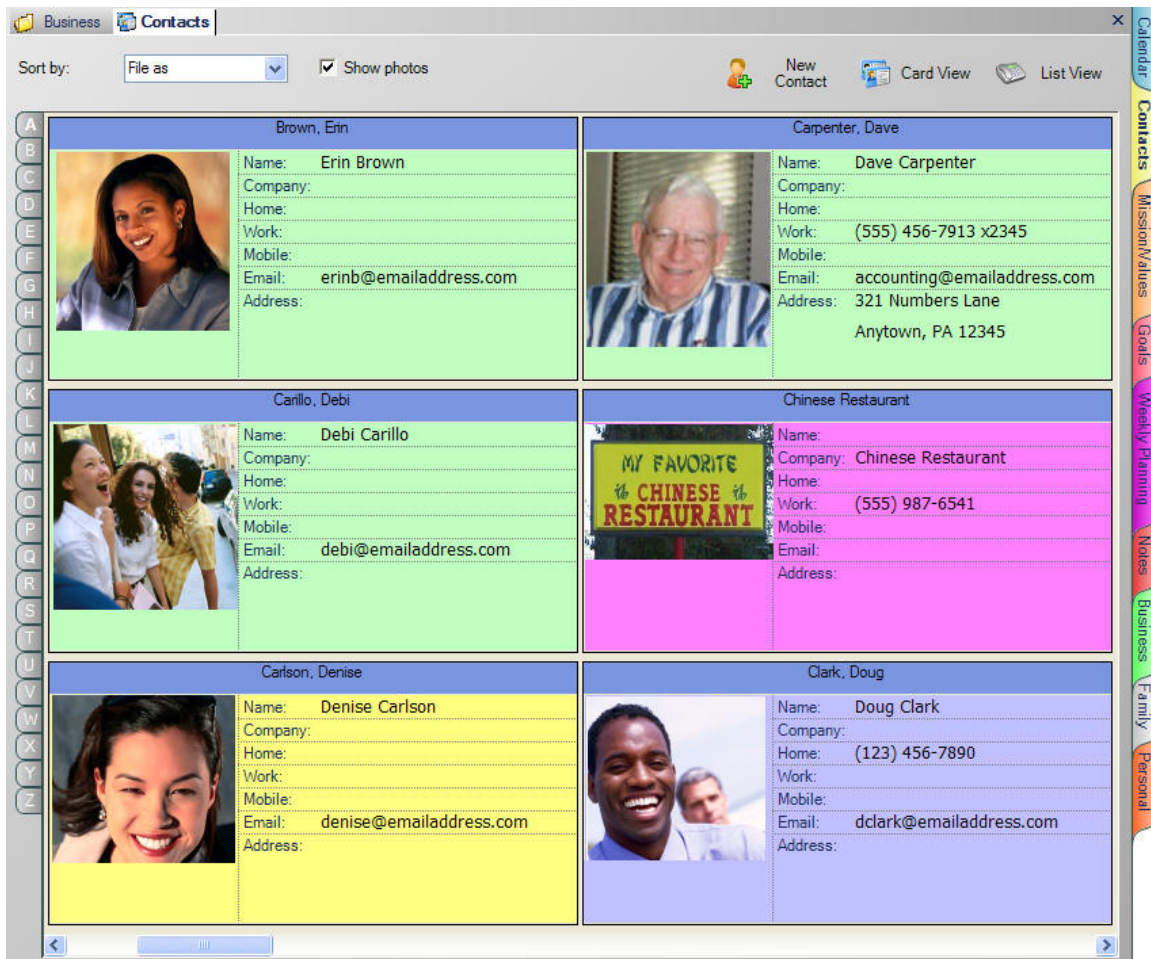
You may customize the List View to display information that suits your needs.

- **Change column size** by dragging the bar (|) separating the columns to adjust the column width.
- **Change column location** by dragging any column header to a new location across the column bar.
- **Configure columns** by right-clicking on any column name. The Configure Column window opens. This window lets you hide or display only those columns you have use for. Select a column name (by checking the box) to display it, or deselect a column name (by removing the check from the box) to hide a column. You can also move a column up or down in the list by selecting it and clicking the Move buttons at the bottom of the window (**up** moves a column to the left in the List View and **down** moves it to the right).
- **Sort** by choosing the column that you wish to sort by and clicking the column name. A **down** arrow will indicate that the column is sorted in descending order. An **up** arrow indicates ascending order.
- **Group** contacts using the Group by drop-down to organize your contacts into groups.

Contacts may not be edited directly in the List View. To edit a contact record, **Open** the record and make your changes in the Contact View.

The Card View

Contacts are displayed in the **Card View** in alphabetical order (last name/first name) based on the **File As** field by default. However, you can sort by any column.

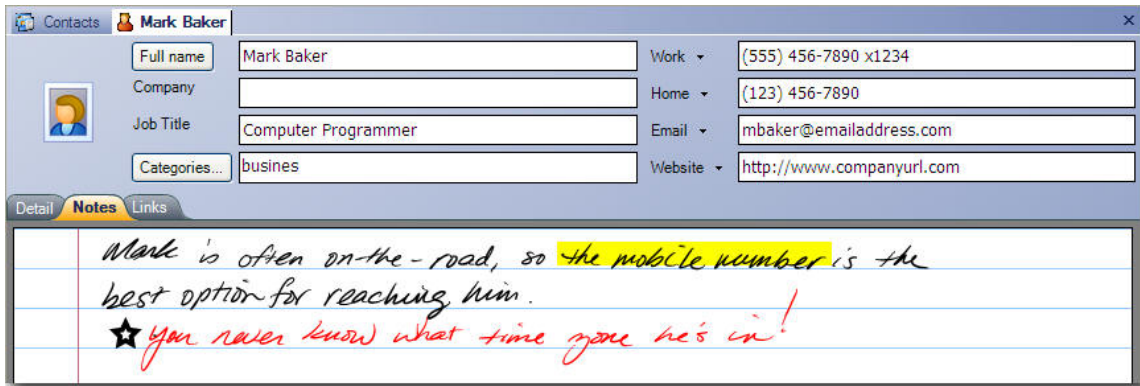


- Address Cards contain a **summary** of each contact record.
- Address Cards are displayed in alphabetical order until the screen is filled. Scroll to the right to view additional contacts filed under the same letter or contacts beginning with the next letter in the alphabet.

Contacts may not be edited directly in the Card View. To edit a contact record, **Open** the record and make your changes in the Contact View.

The Contact View

The Contact View allows you to record additional information about people in PlanPlus.



The screenshot displays the 'Contact View' for 'Mark Baker'. The form includes the following fields:

Full name	Mark Baker	Work	(555) 456-7890 x1234
Company		Home	(123) 456-7890
Job Title	Computer Programmer	Email	mbaker@emailaddress.com
Categories...	busines	Website	http://www.companyurl.com

Below the form, there are tabs for 'Detail', 'Notes', and 'Links'. The 'Notes' tab is active, showing handwritten text:

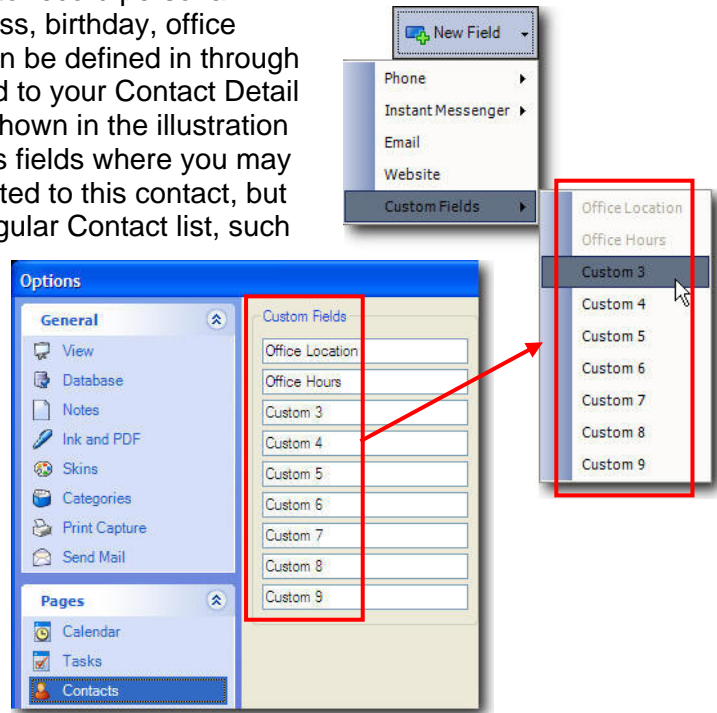
Mark is often on-the-road, so the mobile number is the best option for reaching him.
★ you never know what time you're in!

For instance, in the illustration, you can see that the user chose to include the contact's office phone and e-mail address in the details, and then added a tip about communicating with this individual successfully in the Contact Note.

Recording Contact Details

Detail **Notes** **Links** When in the Contact View, you may record additional information on the **Detail**, **Notes**, and **Links** tabs:

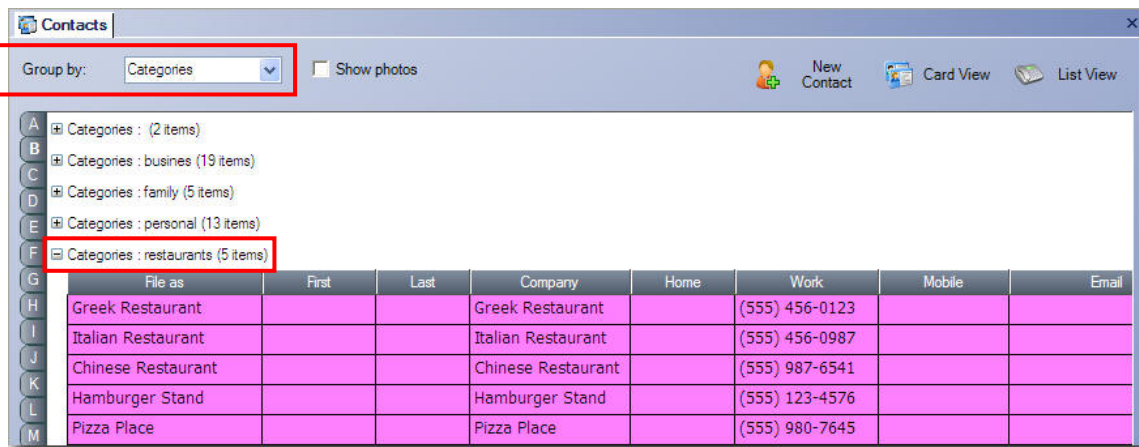
- Contact Details** – provides a place to record personal details, such as work or home address, birthday, office location & hours. Additional fields can be defined in through **Options | Contacts**, and then added to your Contact Detail list using the **New Field** button (as shown in the illustration at right). In addition, this tab contains fields where you may list other individuals who are connected to this contact, but who you don't plan to add to your regular Contact list, such as a colleague's secretary. You can even list events that are connected to this person, such as a wedding anniversary or other significant occasion.
- Contact Notes** – provides a place to conveniently log important information. The notes feature allows you to take as many pages of notes as you need about this contact (as shown above). Enter Contact Notes as you would any other type of Note in PlanPlus. Notes are automatically saved as you add information.
- Contact Links** – PlanPlus has the ability to support links between contacts and projects (such as team members or resources outside your organization), appointments and tasks. Links to projects are automatically created when you download project information from your FranklinCovey server. Links to events are created when events are added on the Details page. Links can also be created to tasks.



Locating a Contact


To find a specific contact, you can use the PlanPlus **Search** feature, or simply navigate the Contact records using optional sorting features to organize the records. You can sort your contacts alphabetically by any column in the List View, or by using the **Group by** options in either the List View or the Card View.

Options in the **Group by** drop down allow you to organize the records by any of the available information headings. For example, as shown in the following illustration, if you wanted to find a restaurant where you and your project team could have lunch, or where you could go out to dinner with your spouse, you might want to sort the List View by **Categories**. You could then select the category of your choice (in this case, "restaurants"), and FranklinCovey will display only those Contacts who are part of that category.




Opening and Closing Contact Records

If you are using the List View,

- Double-click the entry from the list to open the Contact View for that contact.
- Click the **Close** button  in the right-hand corner of the History Bar to close the record.

If you are using the Card View:

- Double-click on the desired address card to open the Contact View for that contact.
- Click the **Close** button  in the right-hand corner of the History Bar to close the record.

Working with Contact Records

PlanPlus allows you to modify or delete Contact records as necessary.

Modifying a Contact Record

1. Locate the contact whose information you wish to update.
2. Double-click on the record to open the Contact View.
3. Enter the updated information. The updated information is saved as you enter it.

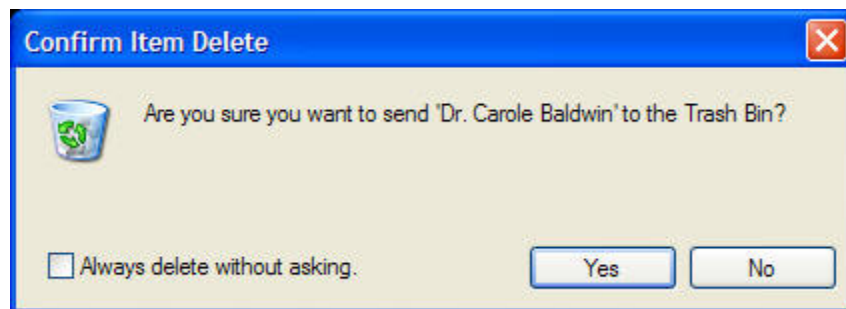
Deleting a Contact

1. Locate the contact record you wish to delete in either the List View or the Address Card view.
2. Select the record.
3. Right-click on the record and select **Delete** from the pop-up menu

OR

Select **File | Delete Contact** from the main menu.


4. You will be asked to confirm the deletion. If you are sure you want to delete this record, click **Yes**. The record will be removed from your Contacts list.



Note: If you delete a contact and need to recover it, click on the Trash Bin button, the contact, then right-mouse click on it and select Restore Items. The contact will be placed back in the contact list.

Printing a Contact List

You can print your contacts in a List, by Address Cards, or individually. To print in each of these formats,

1. Open the desired contact view in PlanPlus. For example, to print a list of your contacts, open the List View by clicking on the Contacts tab, then the **List View** button.
2. Click the **Print** button  from the Toolbar.

OR

Choose **File | Print** from the menu bar.

Stay Organized by Synchronizing Your Data

With our busy schedules, it is very easy to record information in one place, and then not have it when you need it because you are using a different application or even a different computer. PlanPlus provides an easy-to-use tool to help you keep your data organized, accessible, and up-to-date.

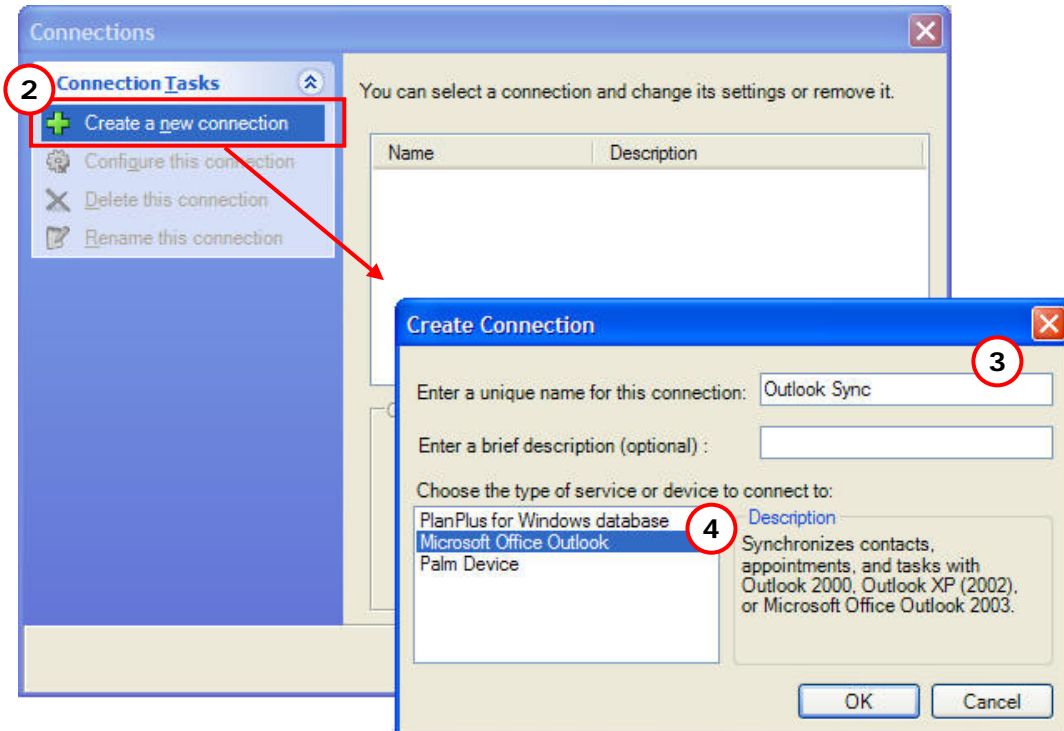
The PlanPlus synchronization tool allows you to synchronize your PlanPlus information in the following ways:

- **PlanPlus for Windows database** – Synchronizes the current database with another one. For example, you can keep your notebook database in sync with your desktop, or you may wish to make incremental backups of your data.
- **Microsoft Office Outlook** – Synchronizes your contacts, appointments, and tasks with Microsoft Outlook (supports Outlook 2000, Outlook XP [2002], or Microsoft Outlook 2003).
- **Palm Device** – Synchronizes your data with a Palm device.

Synchronizing with Microsoft Outlook

You can configure PlanPlus to synchronize with your Microsoft Outlook data by following just a few easy steps:

1. Select Tools | Sync | Connections.
The **Connections** dialog appears.
2. Select **Create a new connection**.
The **Create Connection** dialog appears

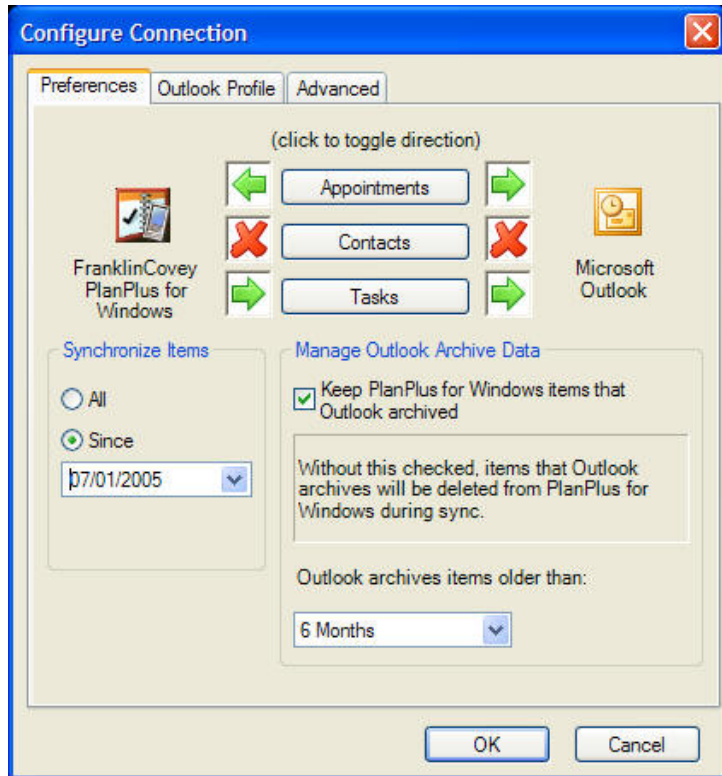


3. Enter a **unique name** and (optionally) a **brief description** for the connection.
4. Choose **Microsoft Office Outlook** as the device you wish to connect to:
5. Make your selections and click **OK** to continue.

The Configure Connection dialog appears.

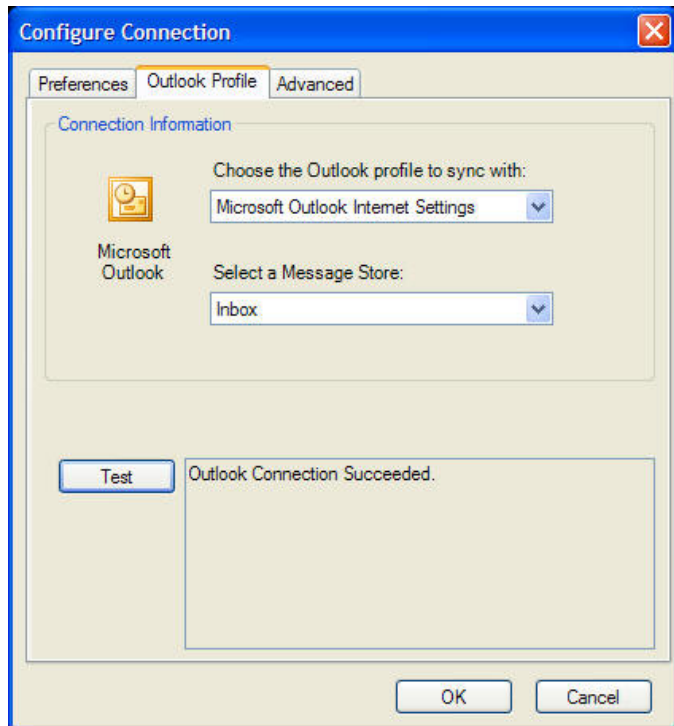
6. On the **Preferences** tab, click on the Appointments, Contacts, and Tasks buttons to specify the items you wish to synchronize between PlanPlus and Outlook.

For example, in this illustration,



- Appointments have been set to a **two-way synchronization** between PlanPlus and Outlook. Appointments in Outlook will be posted to PlanPlus, and appointments in PlanPlus will be posted to Outlook.
 - Contacts synchronization has been **disabled**, meaning that no contact information will be shared between the two applications during synchronization.
 - Tasks have been set to a **one-way synchronization** from PlanPlus to Outlook. Tasks created in PlanPlus will be posted to Outlook, but no tasks created in Outlook will be shared with PlanPlus. (Note that one-way synchronization can also be set to go in the opposite direction, posting data from the service into PlanPlus, but not sharing PlanPlus data.)
7. In the **Synchronize Items** box, select the radio button to identify the items you wish to synchronize:
 - Selecting **All** instructs PlanPlus to synchronize all items, regardless of when they were created.
 - Selecting **Since** instructs PlanPlus to only synchronize those items created after the date you specify.
 8. In the **Manage Outlook Archive Data** box, you may choose to keep items that have been archived in Outlook in your PlanPlus database. This option is selected by default. You should specify how often Outlook archives items (6 months is selected by default).
 9. If you wish to delete archived items from your PlanPlus database, you may de-select this option by removing the checkmark from the box.
 10. When you have made your selections on this tab, continue by clicking the **Outlook Profile** tab.

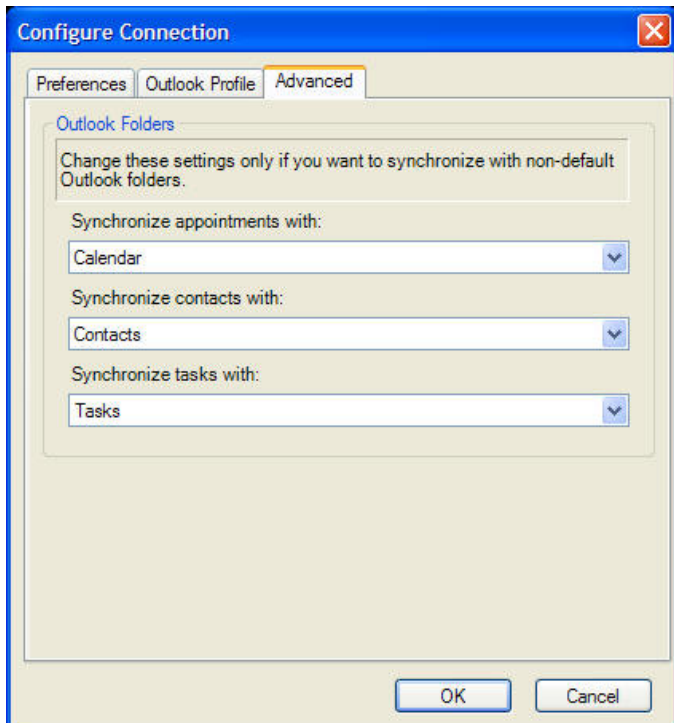
11. On the **Outlook Profile** tab, you will define your connection information.
 - Select the profile you wish to sync with from the drop-down list.
 - Select the Message Store from the drop-down list.
12. After you have entered the connection information, click the **Test** button to test the connection.
13. When you have entered the necessary information on this tab, you may select the **Advanced** tab, if necessary.



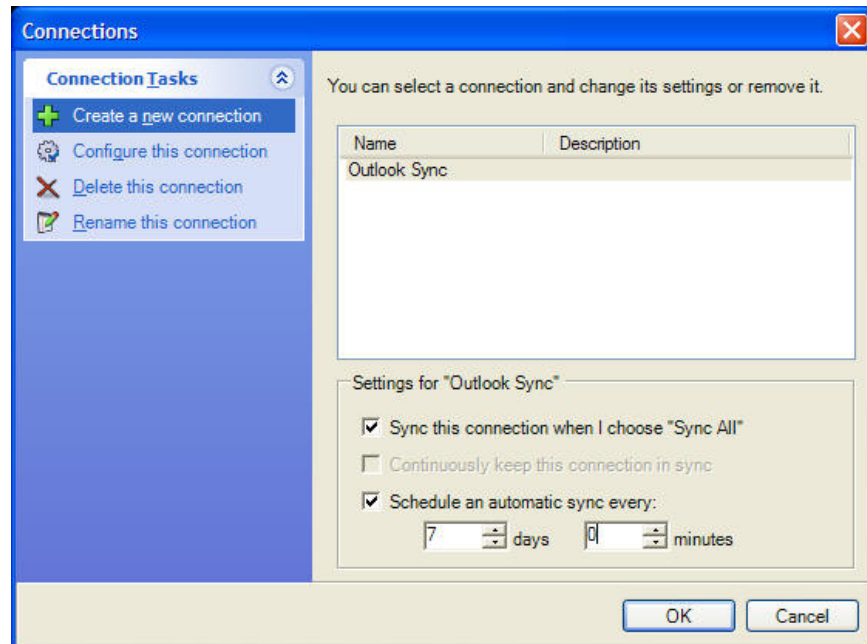
14. On the **Advanced** tab, you can specify any custom settings that may be needed if you wish to synchronize with folders other than the default folders for Appointments, Contacts, and Tasks.

(Note that in most cases you will not need to make any changes on this tab.)

When you have entered all necessary information on each of the Configure Connection tabs, click **OK** to continue.



You are returned to the main Connections window.



Notice that your connection has been added to the list.

In the **Settings** area, you have the following options

- Synchronize this connection whenever you select **Sync All** (from either the Tools menu or by clicking the **Sync All** button). If you do not check this box, you will have the opportunity to select it from the list whenever you click on the **Sync One** button.
- You can also schedule an automatic synchronization between PlanPlus and Outlook at the interval you specify.

15. Make your selection(s) and click OK.

The Connection Configuration is now complete. This connection can now be synchronized whenever you activate a Synchronization session from within PlanPlus.

Synchronizing with Palm applications

If you use a Palm® handheld device with a Personal Information Manager (PIM) such as Palm Desktop software, you can synchronize your PlanPlus data with the data on your Palm device.

The first time you start PlanPlus, you are given the option to configure PlanPlus for synchronization with a Palm device using the **Configure Palm Wizard**, which is described on the following pages

If you do not wish to configure PlanPlus for synchronization with your Palm device at this time, you may click **Cancel** to close the Wizard.

In the future, if you choose to configure PlanPlus for synchronization with your Palm device (or wish to modify your configuration settings), you can do so through the sync configuration options on the **Tools** menu, which will be described later in this chapter.

WARNING: If you already sync your Palm device with Microsoft Outlook, and also plan to synchronize PlanPlus with Outlook, **do not** install the PlanPlus Conduit.

Synchronization Strategies

To avoid duplication of data between PlanPlus, Outlook, and your Palm device, you should carefully plan your synchronization strategy. For example, the following sample strategies each place PlanPlus at the center of your synchronization plan, while avoiding duplication of data:

Sample "one way" synchronization strategies:

Outlook → PlanPlus → Palm device

Palm device → PlanPlus → Outlook

Sample "two way" synchronization strategies:

Outlook ← PlanPlus → Palm device

Palm device ← PlanPlus → Outlook

By taking a few extra moments to consider your synchronization strategy, you will minimize the possibilities for duplication of data.

Configure a Palm Sync Connection Using the Configure Palm Wizard

Note: PlanPlus™ v.5 for Windows® XP does not install the Palm Desktop software or HotSync Manager, but simply adds and modifies conduits for synchronizing PlanPlus and your Palm device. Therefore, it is important that you already have a HotSync connection established between a PIM and your Palm device before configuring the PlanPlus Palm synchronization feature.

When you first launch PlanPlus, the Configure Palm Wizard appears. The Wizard allows you to configure PlanPlus to synchronize with your Palm device by following just a few easy steps:

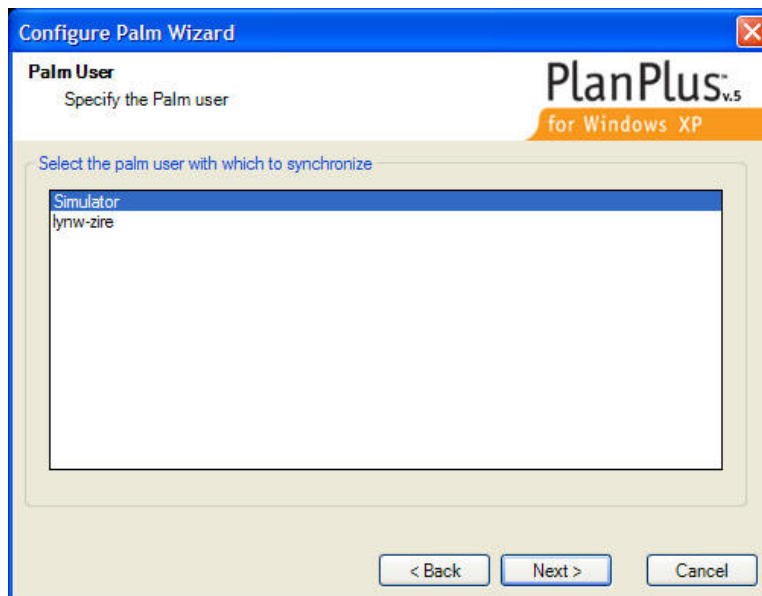
1. The Create Connection dialog will appear.



WARNING: If you already sync your Palm device with Microsoft Outlook, and also plan to synchronize PlanPlus with Outlook, **Cancel** the Wizard and **do not** set up a Palm connection.

2. If you wish to configure your Palm device at this time, click **Next** to continue.

The **Palm User** dialog appears.



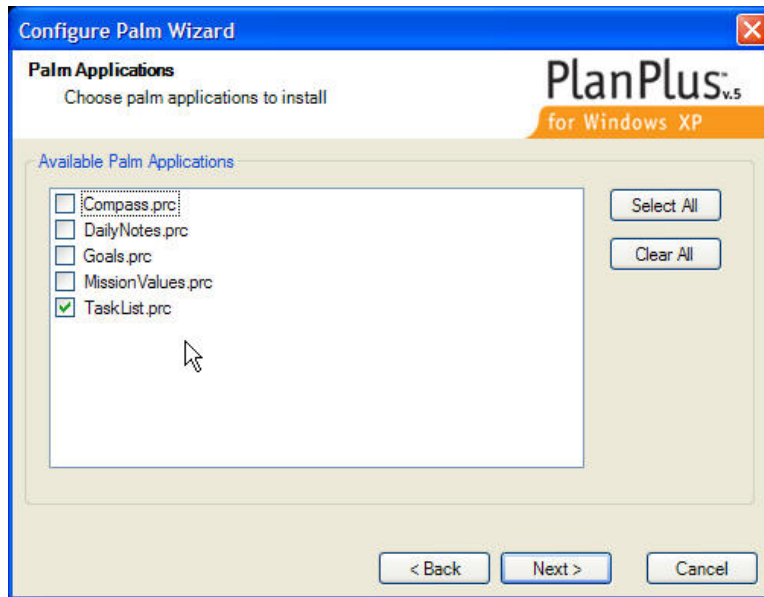
3. On the Palm User tab, you will define your connection information.

If you have multiple Palm devices configured, select the Palm user you wish to sync with from the list.

Note: If you have multiple Palm devices configured, please review *Manage Palm Installation* for instructions on configuring multiple Palm devices.

4. When you have made your selection on this tab, click **Next** to continue.

The **Palm Applications** dialog appears.



5. From the Available Palm Applications area, you may select the FranklinCovey applications that you wish to install on this device.

Note: If you wish to install additional applications, or uninstall previously selected applications at a later time, you may make those changes through the Manage Palm Installation screen. (See **Manage Palm Installation** for more information.).

6. After you have made your selections, click **Next** to continue.

The **Content Options** dialog appears.



7. On this dialog, simply click on the buttons (Calendar, Compass, Contacts, etc.) to specify the items you wish to synchronize between PlanPlus and your Palm device.

For example, in this illustration,

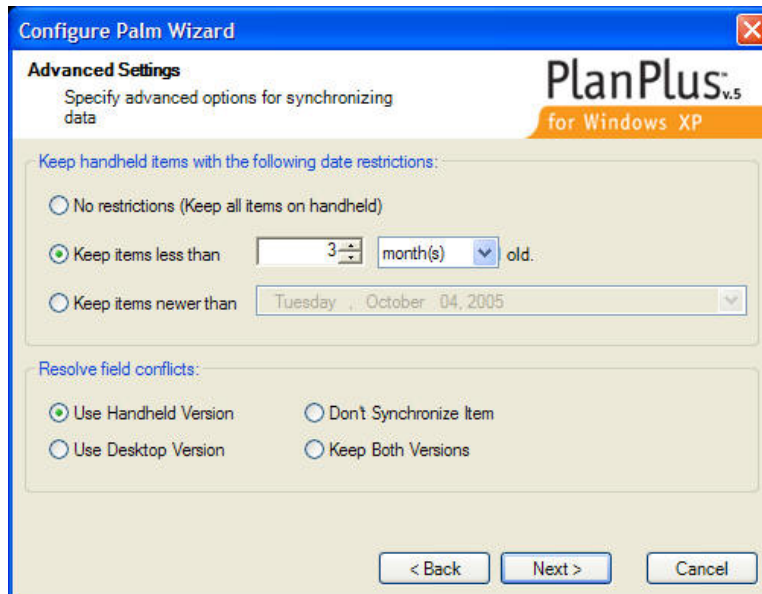
- Calendar and Memos have been set to a **two-way synchronization** between PlanPlus and the Palm device. Appointments on your Palm device will be posted to PlanPlus, and appointments in PlanPlus will be posted to your Palm device.
- Synchronization has been **disabled** for the Compass, Daily Notes, Goals, and Mission/Values, meaning that information in those fields will be shared between the two applications during synchronization.
- Contacts have been set to a **one-way synchronization** from the Palm device to PlanPlus. Contacts created on the Palm device will be posted to PlanPlus, but no Contacts created in PlanPlus will be shared the Palm device.

One-way synchronization can also be set to go in the opposite direction. In that situation, those options would post data from PlanPlus to the Palm device, but no PlanPlus data would be shared.

Another option would be to use the **Synchronize All** button to toggle all options to two-way synchronization, or to use the **Disable All** button to quickly turn synchronization off for all options, allowing you to easily identify and enable only those options you wish to synchronize.

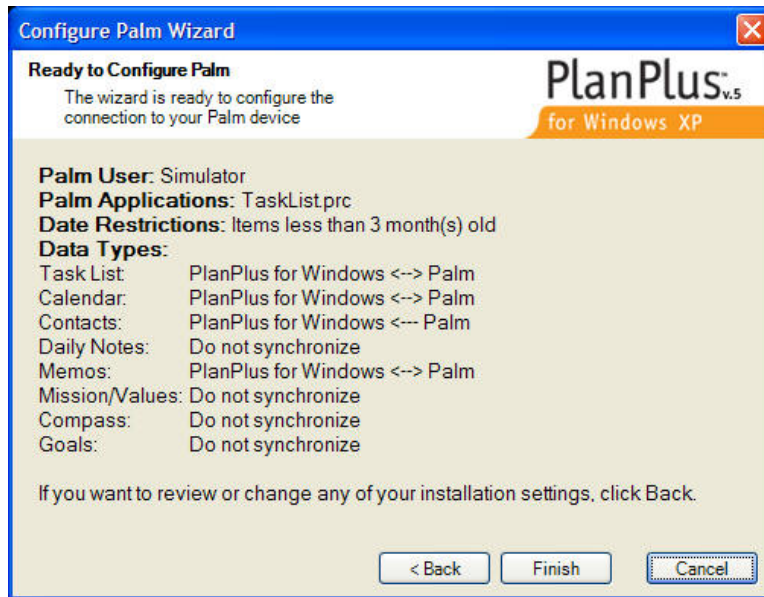
8. When you have made your selections, click **Next** to continue.

The **Advanced Settings** dialog appears.



9. In the **Keep handheld items with the following date restrictions** box, select the radio button to identify the date restrictions for the items you wish to synchronize:
 - Selecting **No restrictions** instructs PlanPlus to synchronize all items, regardless of when they were created.
 - Selecting **Items less than** or **Items newer than** instructs PlanPlus to only synchronize those items created within the time period or after the date you specify.
10. In the **Resolve field conflicts** box, select how you want PlanPlus to handle duplicated information found during synchronization
 - **Use Handheld Version** – this option replaces the item found in PlanPlus with the version found on your Palm device.
 - **Use Desktop Version** – this option replaces the item found on your Palm device with the version found in PlanPlus.
 - **Don't Synchronize Item** – this option skips synchronization for any duplicate items found.
 - **Keep Both Versions** – this option keeps both versions of the item, allowing you to resolve any duplication of data manually in both PlanPlus and on your Palm device at a later time.
11. When you have made your selections, click **Next** to continue.

The Ready to Configure dialog appears.



12. Review your selections. If you wish to make any changes, click **Back** to go back to the appropriate page. When you are ready, click **Finish** to continue.

A status bar will appear briefly, indicating the progress of the configuration. Upon completion, the following dialog will appear.

13. Click **Finish** to close the Wizard.

The Connection Configuration is now complete, and PlanPlus will open. This connection can now be synchronized whenever you activate a Synchronization session from your Palm device. (See **Activating a Palm Synchronization Session** for more information.)



Configuring a Palm Sync Connection

When you first launch PlanPlus, the **Configure Palm Wizard** appears. The Wizard walks you through the steps necessary to configure your Palm sync connection. If you choose not to configure your Palm sync connection using the Configure Palm Wizard, and cancel it, a message will appear informing you that you can configure your Palm connection at a later time through the **Tools | Sync | Connections** option.

Note: PlanPlus™ v.5 for Windows® XP does not install the Palm Desktop software or HotSync Manager, but simply adds and modifies conduits for synchronizing PlanPlus and your Palm device. Therefore, it is important that you already have a HotSync connection established between a PIM and your Palm device before configuring the PlanPlus Palm synchronization feature

To Configure a Palm Sync Connection

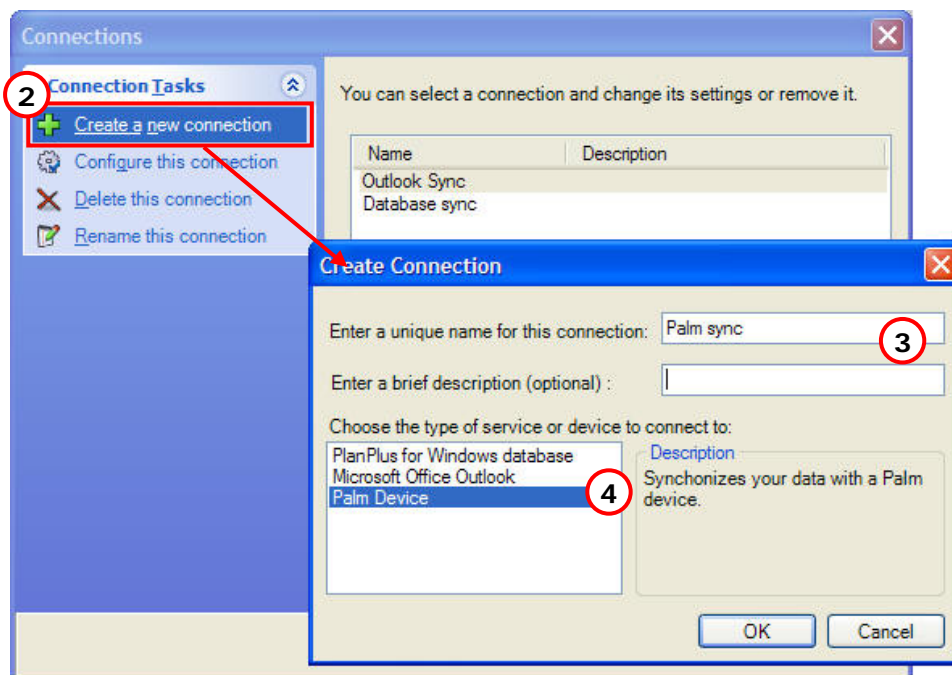
You can configure PlanPlus to synchronize with your Palm device by following just a few easy steps:

1. Select **Tools | Sync | Connections**.

The **Connections** dialog appears.

2. Select **Create a new connection**.

The **Create Connection** dialog appears



3. Enter a **unique name** and (optionally) a **brief description** for the connection.
4. Choose **Palm Device** as the device you wish to connect to:
5. Make your selections and click **OK** to continue.

The Configure Connection dialog appears.

6. On the **Data Types** tab, click on the buttons (Calendar, Compass, Contacts, etc.) to specify the items you wish to synchronize between PlanPlus and your Palm device.

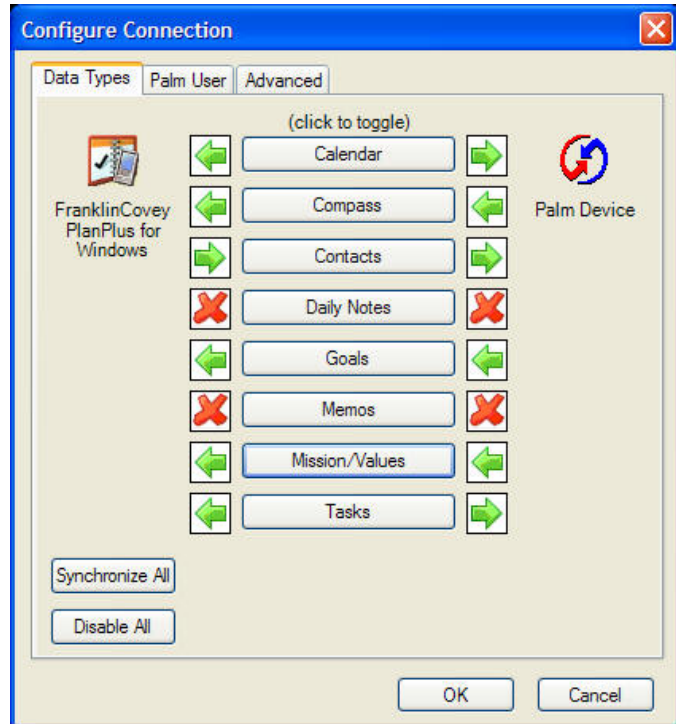
For example, in this illustration,

- Calendar and Tasks have been set to a **two-way synchronization** between PlanPlus and the Palm device. Appointments on your Palm device will be posted to PlanPlus, and appointments in PlanPlus will be posted to your Palm device.
- Synchronization has been **disabled** for Daily Notes and Memos, meaning that no Daily Notes or Memos will be shared between the two applications during synchronization.
- Contacts have been set to a **one-way synchronization** from PlanPlus to the Palm device. Contacts created in PlanPlus will be posted to the Palm device, but no Contacts created on the Palm device will be shared with PlanPlus.

Notice that one-way synchronization can also be set to go in the opposite direction, as shown with Compass, Goals, and Mission/Values options posting data from the Palm device into PlanPlus, but not sharing PlanPlus data.

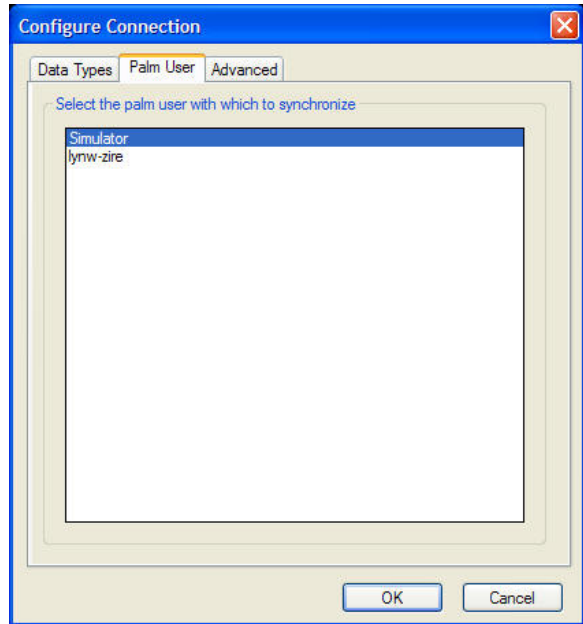
Another option would be to use the **Synchronize All** button to toggle all options to two-way synchronization, or to use the **Disable All** button to quickly turn synchronization off for all options, allowing you to easily identify and enable only those options you wish to synchronize.

7. When you have made your selections on this tab, continue by clicking the **Palm User** tab.



8. On the **Palm User** tab, you will define your connection information.
 - If you have multiple Palm devices configured, select the Palm user you wish to sync with from the list.

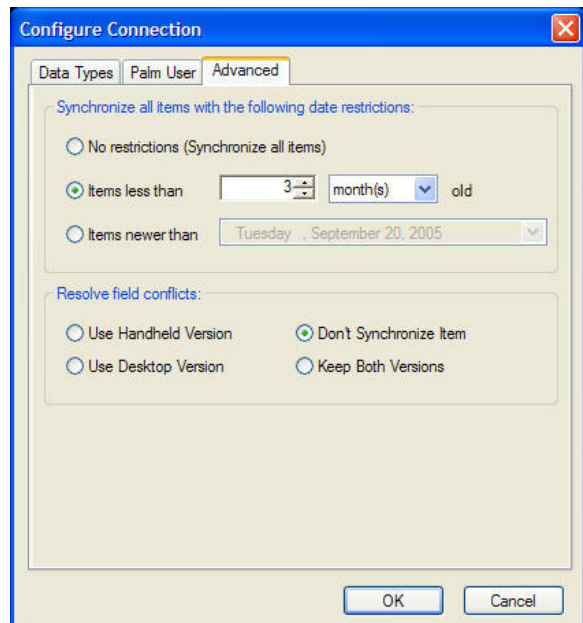
Note: If you have multiple Palm devices configured, please review **Manage Palm Installation** for instructions on configuring multiple Palm devices.



9. When you have made your selection on this tab, select the **Advanced** tab to continue.

10. In the **Synchronize Items** box, select the radio button to identify the items you wish to synchronize:

- Selecting **No restrictions** instructs PlanPlus to synchronize all items, regardless of when they were created.
- Selecting **Items less than** or **Items newer than** instructs PlanPlus to only synchronize those items created within the time period or after the date you specify.

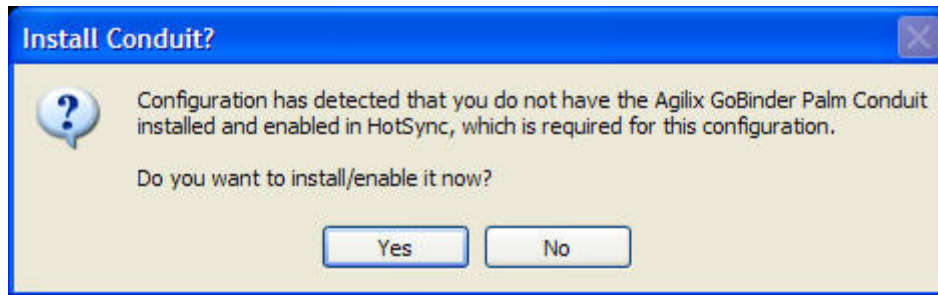


11. In the **Resolve field conflicts** box, select how you want PlanPlus to handle duplicated information found during synchronization

- **Use Handheld Version** – this option replaces the item found in PlanPlus with the version found on your Palm device.
- **Use Desktop Version** – this option replaces the item found on your Palm device with the version found in PlanPlus.
- **Don't Synchronize Item** – this option skips synchronization for any duplicate items found.
- **Keep Both Versions** – this option keeps both versions of the item, allowing you to resolve any duplication of data manually in both PlanPlus and on your Palm device at a later time.

12. When you have entered all necessary information on each of the Configure Connection tabs, click **OK** to continue.

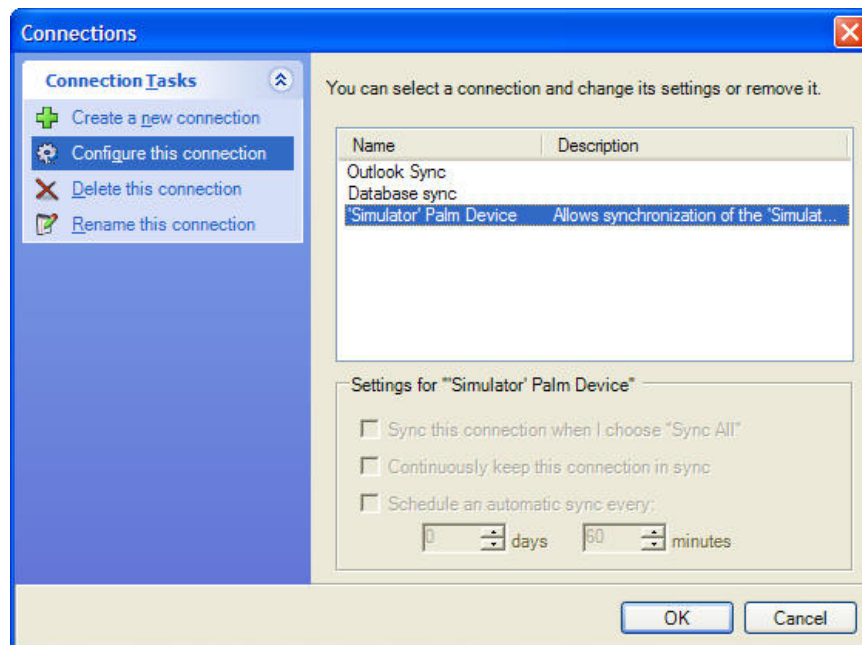
If PlanPlus finds that the **Palm Conduit** has not yet been installed and enabled in HotSync, a dialog will appear asking if you wish to install it at this time.



13. Click **Yes** to continue.

If you click No at this time, you can install the Conduit at a later time by selecting **Tools | Sync | Manage Palm Sync Installation** and installing it from Palm Sync Manager.

You are returned to the main Connections window.



Notice that your connection has been added to the list.

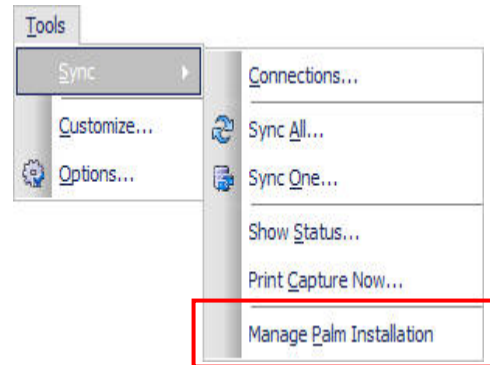
The Connection Configuration is now complete. This connection can now be synchronized whenever you activate a Synchronization session from your Palm device. (See **Activating a Palm Synchronization Session** for more information.)

Manage Palm Installation

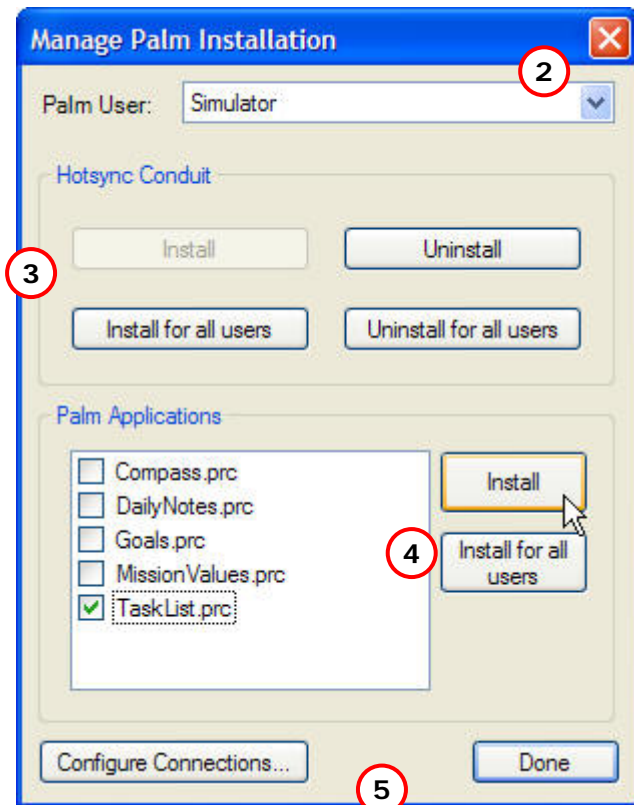
If you sync more than one Palm device with your computer, the Manage Palm Installation tool can assist you to identify and specify on which of your devices the FranklinCovey applications are to be installed, as well as manage which of your devices (any or all of them, in any combination) should be synchronized with PlanPlus.

In addition, Manage Palm Installation also allows you to uninstall the FranklinCovey conduits, and return your Palm Desktop to its factory settings.

1. From the menu, select **Tools | Sync | Manage Palm Installation**.



The Manage Palm Installation dialog will appear:



2. Select the desired **Palm User** from the drop-down list.
3. From the **HotSync Conduit** options, you may select to **Install** the HotSync Conduit for this user, or for all users. If the conduit has already been installed, you may also select to **Uninstall** it.
4. From the **Palm Applications** area, you may select the FranklinCovey applications that you wish to install (or uninstall) on this device for this user or for all users.

Note: If you configured Palm for synchronization using the **Configure Palm Wizard**, the FranklinCovey applications you selected were installed at that time. If you wish to install additional applications, or uninstall previously selected applications, you may make those changes on this screen.

5. After you have made your selections, you may click **Configure Connections** to configure this device for synchronization with Palm Plus, or click **Done** to exit the Manage Palm Installation screen.

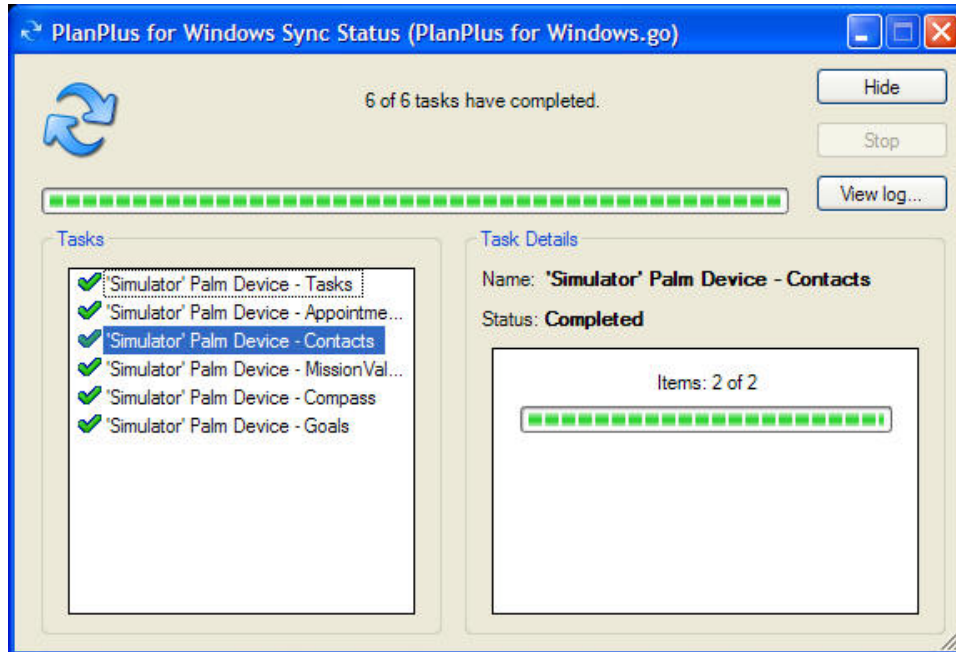
Activating a Palm Synchronization Session

Depending on the type of Palm device you have, you may use various methods for synchronization. For example, you might use a cradle to synchronize, or you might synchronize using a wireless method.

Refer to your Palm OS device documentation for information on activating a Palm synchronization session.



During synchronization, PlanPlus will display a dialog box, indicating the progress of the synchronization.



Synchronizing with another PlanPlus database

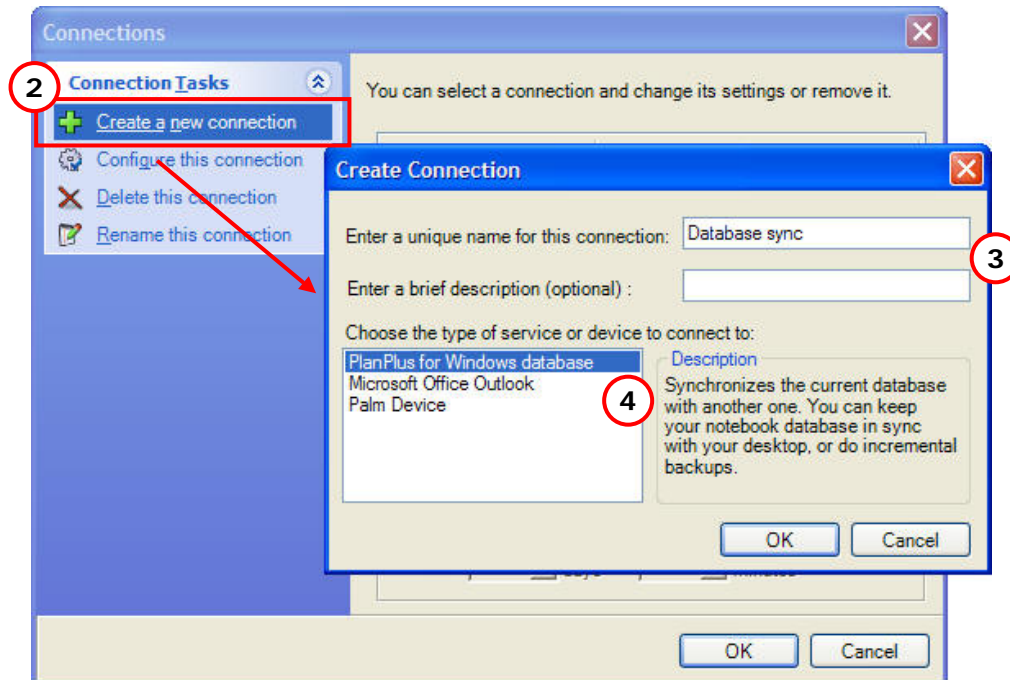
You can configure PlanPlus to synchronize with another PlanPlus database by following just a few easy steps:

1. Select **Tools | Mobilize | Connections**.

The **Connections** dialog appears.

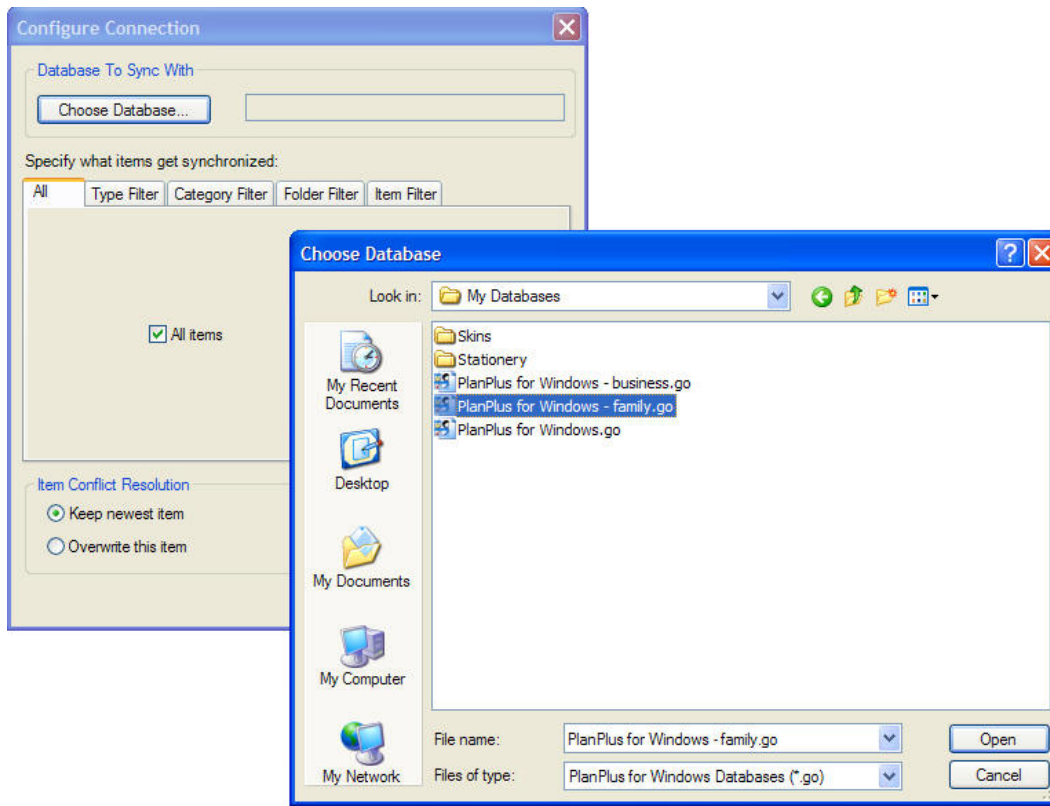
2. Select **Create a new connection**.

The **Create Connection** dialog appears



3. Enter a **unique name** and (optionally) a **brief description** for the connection.
4. Choose **PlanPlus for Windows database** as the device you wish to connect to:
5. Make your selections and click **OK** to continue.

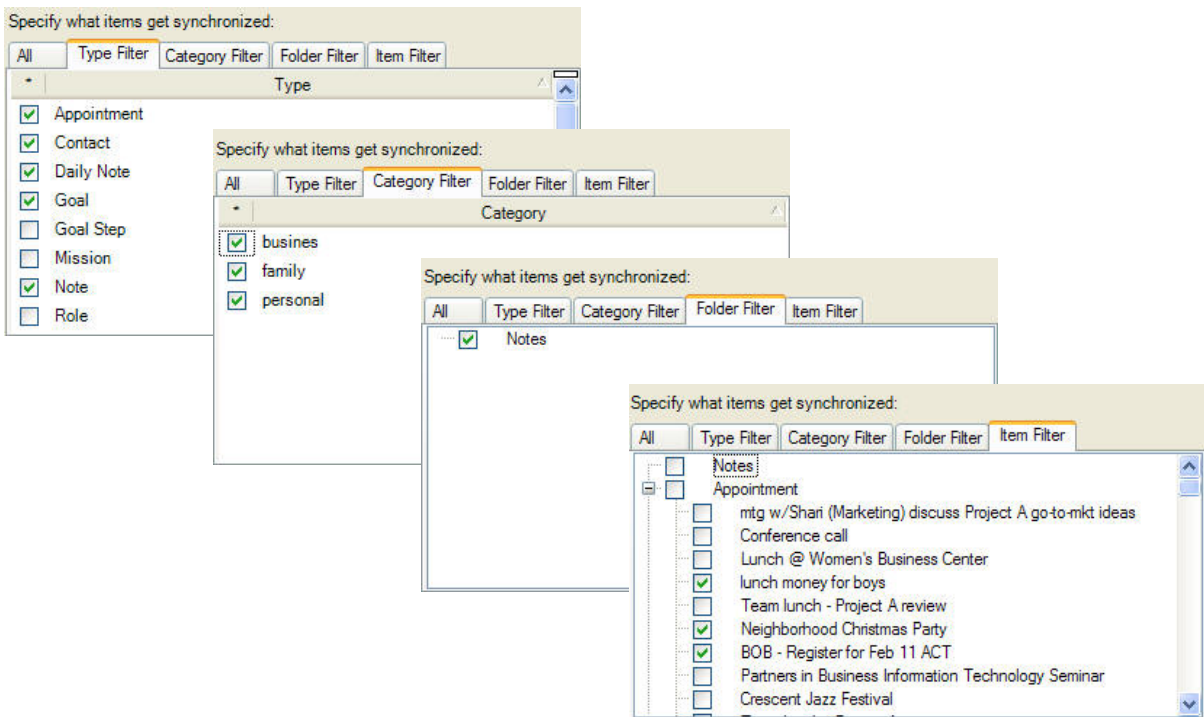
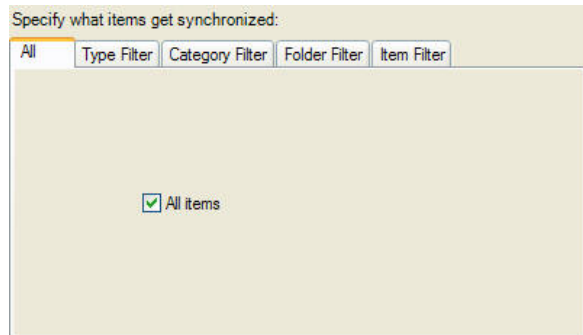
The Configure Connection dialog appears.



6. Select the database you wish to sync with. Click the **Choose Database** button, and browse to the location of the desired database. For example, in this illustration, the individual has created separate databases for their home and business schedules, and wants to keep certain aspects of the two synchronized.

7. The tabs on this screen allow you to specify what items will be synchronized.

- **All tab** – Selecting the "All items" option displayed on this tab configures PlanPlus to synchronize all items of all types and categories, from all folders.
 - When "All items" is selected, it overrides any selections made on the filter tabs.
 - Selecting options from any of the Filter tabs automatically clears the "All items" checkbox.
- **Type Filter tab** – This tab allows you to specify the type(s) of items you wish to synchronize.
- **Category Filter tab** – This tab allows you to specify the category(ies) from which you wish to synchronize items.
- **Folder Filter tab** – This tab allows you to specify the folder(s) from which you wish to synchronize items.
- **Item Filter tab** – This tab allows you to specify the item(s) you wish to synchronize.

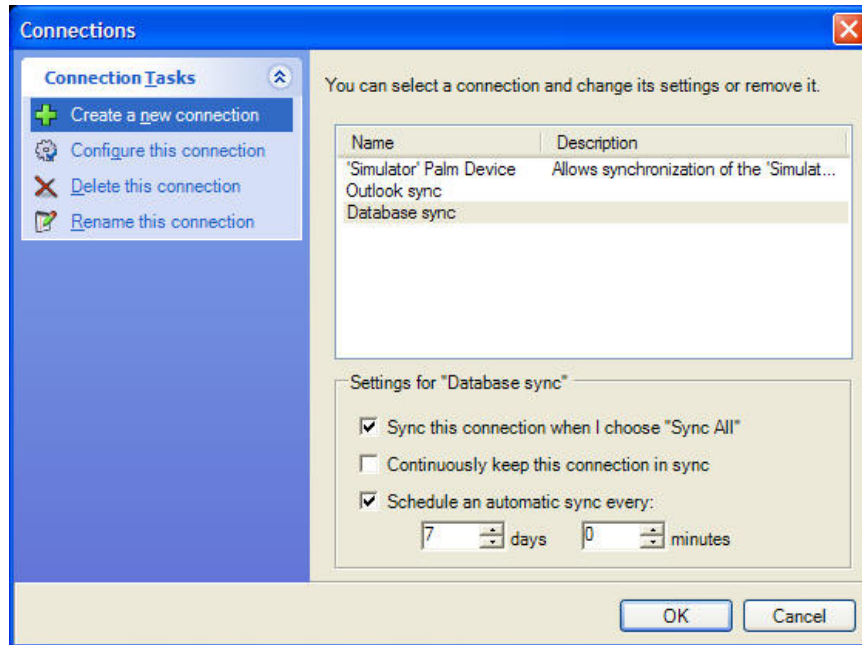


Use the Filter tab options to customize the synchronization as desired.

- In the **Item Conflict Resolution** section, select how you want PlanPlus to handle duplicated information found during synchronization.



- **Keep newest item** – this option keeps the newer item and deletes any earlier version.
 - **Overwrite this item** – this option replaces the information from this database with the duplicate from the other database, regardless of date.
 - **Keep this item** – this option keeps the information from this database, and does not replace it with the duplicate item from the other database, regardless of date.
 - **Keep both items** – this option keeps both items.
- When you have made your selections on this tab, click **OK** to continue.



The Connection Configuration is now complete. This connection can now be synchronized whenever you activate a Mobilization session from within PlanPlus, or can be scheduled to occur automatically on an ongoing basis, or at regularly scheduled intervals. When you have made any desired scheduling selection(s) click **OK** to close this window.

Using Synchronization as a Backup Strategy

This is a fast way to backup your PlanPlus database. Synchronizing your database is similar to using the Backup tool, except that it only backs up *changes* to the data, so it is faster. Compare:

Using the Backup Tool	Synchronizing your Database
Always backs up the entire database	Copies the entire database the first time. Subsequent synchronizations only copy data changes.
Can be set to occur automatically on a regular schedule.	Can be set to occur automatically on a regular schedule.
Saves all configuration data (including tab colors and deleted items stored in the Trash Bin)/	Does not save configuration data.

A practical strategy may be to set the Backup Tool to make a complete backup of your database on an occasional basis (such as every two weeks, or once a month), and schedule the Database Synchronization to make interim, data changes-only backups on a more frequent schedule (such as every few days, or once a week). You should base your backup schedule on the your work habits – an individual using PlanPlus on a regular basis, and storing a large amount of data may wish to make backups more frequently than an individual who uses PlanPlus less frequently or who stores data only occasionally.

Activating an Outlook or Database Synchronization Session

You can activate a PlanPlus synchronization session with Microsoft Outlook or another PlanPlus database using either of the following methods:

- From the menu, select **Tools | Synchronize | Synchronize All** (or **Synchronize One**).
- From the Standard toolbar, click on either:

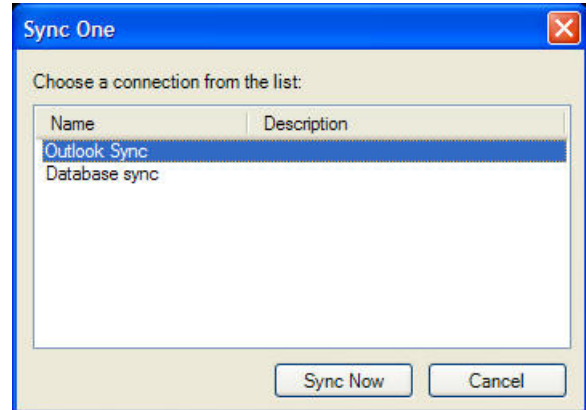


the **Synchronize All** button, or

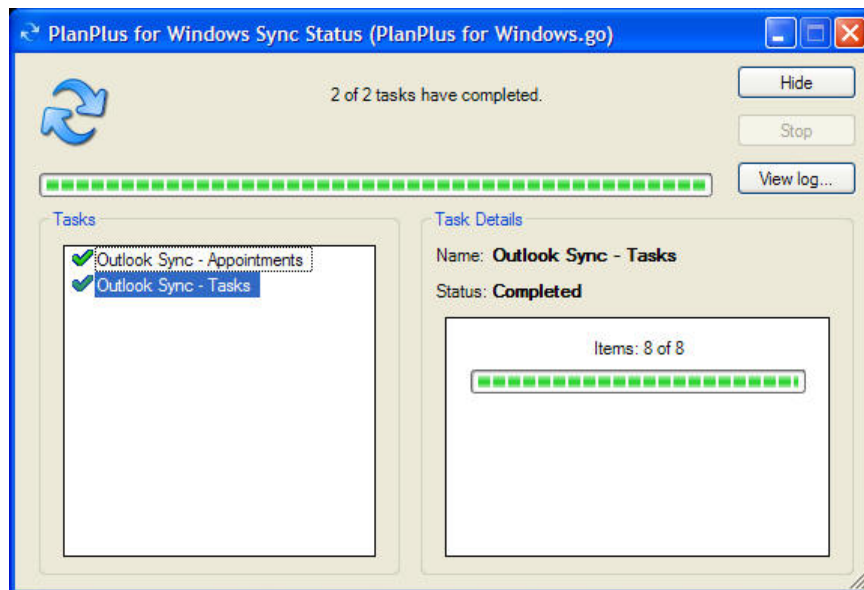


the **Synchronize One** button.

Note: When you select **Synchronize One**, a dialog will appear, from which you may select which of your available connections you wish to synchronize. Make your selection, and click **Synchronize Now**.



PlanPlus will display the status of the mobilization (the items displayed will vary from those shown in this illustration, based on your mobilization selections.)



When the synchronization is complete, any data you chose to synchronize with Outlook or with another database, such as appointments, tasks, notes, etc., will be included in your current PlanPlus database.

Downloaded Tasks

When you synchronize data (from Outlook, a Palm application, or another PlanPlus for Windows database), any tasks that are also transferred during the synchronization will be downloaded into your Tasks list.

Downloaded tasks will be displayed on the Task List corresponding to their Due Date.

Unfinished Downloaded Tasks

As with tasks you create manually, if a downloaded task remains uncompleted at the end of the assigned date, PlanPlus copies it to the current date's task list and displays it in red text. This is called "auto-forwarding." You may disable auto-forwarding, if desired, through **Tools | Options | Tasks**.

PlanPlus will forward an unfinished task until it is deleted or completed.

Using the FranklinCovey Planning System

PlanPlus™ v.5 for Windows® XP includes FranklinCovey Planning System modules to help you discover and achieve your highest priorities.

In this section, you will find information on how to use the following FranklinCovey Planning System modules:

- Mission and Values
- Goals
- Weekly Compass®
- Weekly Planning

The FranklinCovey Planning System does not simply make you more efficient, it makes you more *effective*.

Mission and Values

What makes the FranklinCovey Planning System uniquely powerful is its ability to help you integrate your highest priorities into your planning. The starting point in discovering what matters most to you is identifying your Values and discovering your Mission.

Why should I identify my Mission and Values?

By identifying your Mission and Values, you discover your highest priorities. “Discover” is a useful word here because you are simply taking a bit of time to *discover* what you probably *already know* about yourself.

Understanding your highest priorities has two components – discovering your Values and discovering your Mission. Nothing spectacular here – you are simply thinking about what you care about, what motivates you to action, the foundation for how you make decisions.

If you have already identified your Values and Mission, so much the better, but if this is something you have not really thought of before, a small investment in time will pay big dividends.

Missions and Values, whether for individuals or organizations, are highly personal. There is no “right way” to create a Mission or a Value, no “right way” to express yourself or to formulate a Mission or Values for your organization. What is most important is that your Mission and Values be meaningful for you.

To Identify Your Mission

By identifying your Mission, you create a powerful document that expresses your sense of purpose and meaning in life. Your Mission can act as a governing constitution by which you evaluate decisions and choose behaviors. It focuses on what you want to *be* and what you want to *do*, and also focuses on the values or principles upon which *being* and *doing* are based.

Missions are also vital to successful teams and organizations. A Mission creates a frame of reference in the hearts and minds of individuals, a set of criteria or guidelines by which they will govern themselves and make choices each day.

Considerations

Here are some things to consider as you think about your unique Mission:

- Your personal Mission will be unlike anyone else's. It will be customized to your unique talents, gifts, and contributions.
- Your personal Mission may be written – and it may be five words or five pages long – but not all Missions are written.

To help you begin thinking about your Mission, ask yourself some questions:

- What are my greatest moments of happiness and fulfillment?
- What are the activities of most worth to me in my personal life?
- What are the activities of most worth to me in my professional life?
- What are my natural gifts, talents, strengths, and abilities?
- What am I motivated by, fascinated with, passionate about?
- How can I best contribute to my community?

Try the “fast write”

Armed with this summary, you can then formulate your own Mission. We recommend a “fast write” exercise as a means of formulating an initial draft of your Mission.

Find someplace where you will be free from distractions. Put on some music that inspires you. Start with a pen or pencil and a clean sheet of paper, or a blank document with your favorite word processor. Think about the above questions.

Then, just **write**. Do not worry about spelling, or grammar, or punctuation. You are simply trying to take what is milling about in your head and dump it where you can see it. Write for about five minutes. If you go a little long or short, do not worry about it. Then take a look at what you have written.

You may well have the beginnings of your personal Mission.

The following are samples of actual Missions related by individuals and organizations. Look at these and see how they work, but the point isn't to "pick one" and use it. Make your Mission and Values your own.

Examples of Personal Missions

The image displays five overlapping windows, each representing a different personal mission statement or a list of values. The windows are styled to look like standard software windows with titles, borders, and close buttons.

- Top-left window:** Titled "Mission", it contains a list of 15 values:
 - Be orderly in person and in work
 - Be sincere yet decisive
 - Concentrate all abilities and efforts on the Task at hand, not worrying about the next job or promotion
 - Defend those who are absent
 - Develop one new proficiency a year
 - Do not fear mistakes—fear only the absence of creative, constructive, and corrective responses to those mistakes
 - Facilitate the success of subordinates
 - Hear both sides before judging
 - Hustle while you wait
 - Keep a sense of humor
 - Listen twice as much as you speak
 - Maintain a positive attitude
 - Never compromise with honesty
 - Obtain counsel of others
 - Plan tomorrow's work today
 - Remember the people involved
 - Seek and merit divine help
 - Succeed at home first
- Top-right window:** Titled "Mission" with the subtitle "My personal mission", it contains a paragraph:

I will always be aware of what matters most in my life and do everything I can to keep those things at the forefront of my daily living. I will be honest and forthright in my dealings with others. I will find joy in the world around me and share that joy with others. I will laugh daily and encourage others to do so as well. I will work hard and play hard. I will support and believe in those I love, even if I do not always agree with choices they make. I will be the best wife, mother, and grandmother I know how to be, learning and growing in those roles every day. I will live my life with integrity and the hope that when I am gone, I will be remembered as a person who lived by my values daily.
- Middle-left window:** Titled "Mission" with the subtitle "Service", it contains a paragraph:

I live to serve my talents as a communicator, artist and independent businesswoman. I create balance in work, play, community and inspiration and pass this on to those I interact with.
- Middle-right window:** Titled "Mission", it contains a list of four values:
 - To celebrate the best in others
 - To live every day to its fullest
 - To take the leap of faith
 - To value every day as a new beginning
- Bottom window:** Titled "Mission" with the subtitle "My mission statement", it contains a paragraph:

I lead my life centered around principles of excellence, empowerment, growth and humility. I remember what is important in life, recognize my own and other's strengths, and consistently work toward becoming my best balanced self—for the benefit of myself and those around me.
- Bottom-most window:** Titled "Mission" with the subtitle "Live, love, laugh", it is currently empty.

Examples of Team Missions

Mission Title: Charis Web Design Department Mission

Our mission is to produce the finest expert website design through constant innovation and inspiration. For us – nothing is more important than delighting our clients through delivering exceptional website design solutions.

We seek to:

- Serve the client
- Create inspired design
- Research, apply and develop expert web technology

Our Business Values:

- We have profound respect for our clients and each other
- We deliver
- We understand
- We care
- We innovate
- We do web (not print, not ads – just web!)
- We enjoy the process!

Our Design Values:

- It must be inspired
- It must be user centered
- Consider every click
- Creativity stretches the limits. But form follows function
- Is this is the best way?
- Create superb customer experience

Mission Title: Kodak Canada Image Check Mission

We are an association of independent Imaging Experts who best satisfy customer needs in Canada by providing leading edge diversified imaging solutions and services in a way that delivers total customer satisfaction and enhanced revenue opportunities for Members so that we are fully committed, other retailers want to join and customers want to come back.

Mission Title: Princeton University Purchasing Department Mission

- To obtain all goods and services necessary for the students, faculty and staff in the most cost effective and efficient manner
- To provide value-added service to support the teaching and research consistent with the mission of the institution
- To maintain a commitment to excellence through professional ethics and best business practices
- To ensure compliance with all state and federal regulations
- To encourage open competition among vendors through fair negotiation, competitive bidding and contract buying
- We are bound by our profession to continuously strive to seek innovative and effective processes that do not impede, but rather facilitate the acquisition process.

We can assist you by:

- Listening to your needs
- Finding the best value
- Identifying new and custom sources
- Obtaining and reviewing quotes
- Negotiating terms and conditions
- Placing orders and resolving issues
- Limiting liability and maximizing compliance
- Maintaining quality and standards
- Providing timely and value-added service

Mission Title: Durango Georgia Paper Company Customer Service Mission

Customer Service works as a liaison between our Customers, Sales, and Manufacturing to provide accurate and timely information. Working as teams with other departments allows us to satisfy the needs and surpass the expectations of our most valuable asset, our customers.

Examples of Organizational Missions

The image displays three overlapping screenshots of a software interface, each showing a mission statement. The windows are titled 'Mission Title:' and contain text in a blue-lined text area.

Nike Corporation Citizenship Mission

To lead in corporate citizenship through proactive programs that reflect caring for the world family of Nike, our teammates, our consumers, and those who provide services to Nike.

ECeurope.com Mission

Helping small and medium-sized enterprises worldwide locate new business partners and drive their export sales ECeurope.com was conceived so that trade opportunity notices in the business-to-business sector are made accessible to small and medium-sized enterprises across Europe and around the world, regardless of economic status or geographic location.

ECeurope.com has three key aims in relation to international trade:

- Increase international awareness of modern information technologies;
- Enable effective application of Information Technologies;
- Promote the use of our electronic marketplace in order to reduce the procedural costs of companies active in international trade.

ECeurope.com will consolidate its position as the largest business-to-business electronic marketplace in Europe for small and medium-sized enterprises. Ultimately, ECeurope.com will aim to become the

erships with key old and new

SAIC Mission

SAIC is a company of people dedicated to delivering best-value services and solutions based on innovative applications of science and technology.

- We commit to exceeding our customers' expectations for quality, responsiveness, and professional excellence while delivering within the agreed price and schedule.
- We maintain the highest standards of ethical behavior and professional integrity.
- We employ people of exceptional creativity, expertise, and determination who work closely with one another and with our customers.
- We pursue technical growth and market diversification to increase value for our customers and opportunity for our employees.
- We motivate and reward outstanding performance through our employee ownership system.
- We foster a working environment that encourages technical objectivity, professional and financial growth, and entrepreneurial freedom.

To Identify Your Values

So, what is important to you? Integrity? Fidelity to your friends? Loyalty to a job, your family, or a defined set of principles?

Use the Mission and Values module to record the values you identify.

More Than One Value?

You probably have more than one Value, but your list of Values need not be tremendously long. And you do not have to be the perfect exemplar of your Values. Part of the reason you want to identify your Values is to identify those areas where you want to improve.

Clarify Your Values

As you identify each Value, you should also **clarify** it. For example, if you value “Integrity,” what does that mean to you? Does it mean “I never tell lies” or does it mean “I am honest and trustworthy in my personal and business dealings”? Or does it mean something else? By clarifying your values, they become more real to you.

You may have already given this subject a good deal of thought, or you may not have thought about it at all. In any case, by looking inside at what is most important to you and identifying and clarifying these things as Values, you will have taken a giant step toward understanding what truly matters most to *you*.

Examples of Values

The following are a few sample Values with some sample clarifying statements. These are provided primarily to give you ideas on how you will do your own clarifying statements.

If these samples work for you, great, but the point isn't to pick from this list of Values to make your own list. Your Values should reflect what matters most to you, not what matters most to someone else.

The image displays a collection of overlapping screenshots from a software application, illustrating examples of values and their corresponding clarifying statements. On the right side, a 'Value' dropdown menu is visible, listing the following options: Authenticity, Beauty, Career, Contribution, Courage, Financial Security, Fitness, and Humility. On the left side, several overlapping windows show the 'Value' and 'Clarifying Statement' fields for each of these values. Each window contains a text box for the value and a text area for the clarifying statement. The values shown in the windows are: Authenticity, Beauty, Career, Humility, Courage, Fitness, and Contribution. The clarifying statements are: 'I hide behind no mask -- I put up no facade. My life is an open book for any to read, whether they wish to benefit from my mistakes or find fault with them. I am aware of my shortcomings, strive to overcome them, and make no effort to flaunt them -- but neither do I hide them and try to give the appearance of being someone I am not.', 'Let no one look at me and say "It's a nice makeup job, but I do not care for what is beneath the surface."', 'I am an honest and faithful employee, a concerned and caring manager, and a breadwinner for those I love. Not necessarily in that order.', 'I have seen honor and integrity go unrewarded. I certainly cannot exalt myself simply because I have been relatively well rewarded.', 'I understand the difference between physical courage and foolhardiness. I also understand the difference between moral courage and obstinacy.', 'There is so much I want to do, and so many influences to keep me from doing it. Let not my body be one of the limiting factors.', and 'We no longer have debtor's prisons, but there are plenty of other ways for debt to restrain freedom. I will pay all my just debts, and strive to stay free of debt after that. It seems foolish to pay interest to another when I have so much else I could do with that interest.'

To Learn More About Missions and Values

There are several resources you can use to help you better understand how and why to identify your Mission and Values, either for yourself or for your organization. Most of these resources are available on the World Wide Web, so you will need Internet access in order to take advantage of them.

The following links will take you to articles and other resources available on the World Wide Web that will aid you in planning your day in order to be most effective. To access these resources, you will need an Internet connection. Use the URL shown to navigate to the article.

Three Resolutions

by Stephen R. Covey

from Priorities magazine

<http://www.franklincovey.com/ez/library/three.html>

Character First

an interview with Stephen R. Covey

from Priorities magazine

<http://www.franklincovey.com/ez/library/char.html>

Finding Purpose

from WomenToday.com

<http://www.womentodaymagazine.com/selfesteem/purpose.html?a=515p>

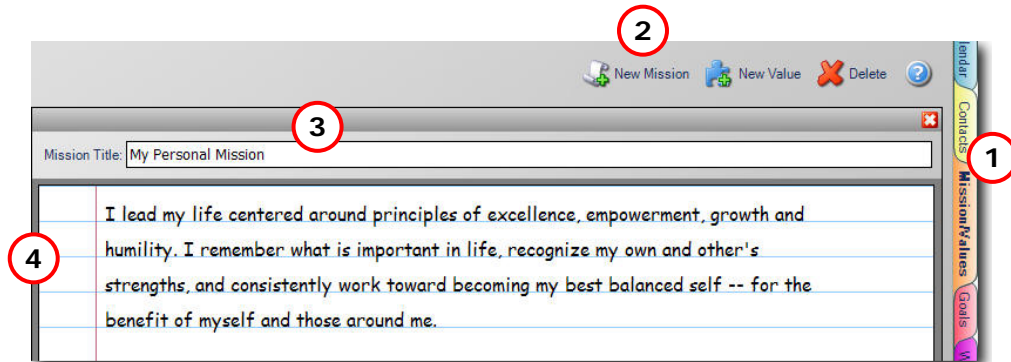
Mission Possible

from BusinessWeek.com

[http://www.businessweek.com/archives/1999/b3642034.arc.htm?\\$sap](http://www.businessweek.com/archives/1999/b3642034.arc.htm?$sap)

Recording a Mission Statement

1. To enter a new Mission in PlanPlus, click the **Mission/Values** tab.
2. Click the **New Mission** button.
3. Enter a **Mission Title**.
4. Click in the **Mission Note** area and enter the details of your Mission.

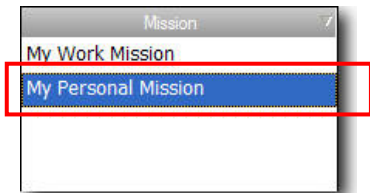


You can use the Mission Notes to clarify the details of your Mission.

Mission Notes work the same as Notes elsewhere in PlanPlus. You can add text and graphics, format text, resize and move graphics, add or delete pages, and much more.

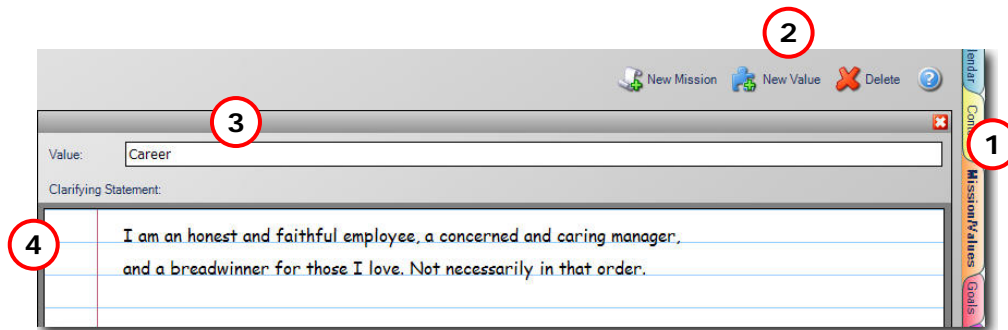
When you have finished recording your Mission, it will be added to the Mission list in the left-hand column.

You can create multiple Mission statements, each with its own clarifying notes. Simply give each separate Mission a different title.



Recording a Value

1. To enter a new Value in PlanPlus, click the **Mission/Values** tab.
2. Click the **New Value** button.
3. Enter a **Value Title**.
4. Click in the **Value Note** area and enter a clarifying statement for your Value, if desired.

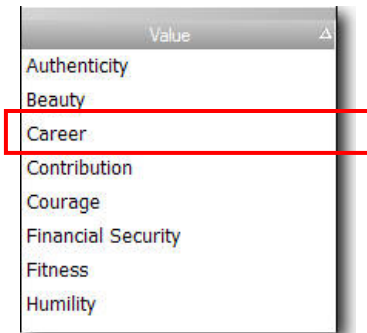


Value Notes work the same as Notes elsewhere in PlanPlus. You can add text and graphics, format text, resize and move graphics, add or delete pages, and much more.

You can use the Value Notes to clarify the details of your Value.

When you have finished recording your Value, it will be added to the Value list in the left-hand column.

You can create multiple Values, each with its own clarifying notes. Simply give each separate Value a different title.



Goals

Goals are the critical link between *discovering* what matters most to you and *acting* on what matters most to you.

You begin to bring your daily activities in line with what matters most by setting long range goals, then subdividing those goals into manageable chunks. So, with *what matters most* to you firmly in mind, set some goals.

Why Should I Set Goals?

The most valuable goals are connected to your “inner passion.” When a goal is in alignment with your principles and mission, you will find it gives you energy and that seeing it through is easier.

Goals give you a way to move forward with a greater sense of purpose. To achieve challenging yet realistic goals, you must clarify them in two areas:

- **Why?** Why would you want to achieve it? What purpose does it serve to you, or to others?
- **How?** That is, how would you achieve it? What steps would you have to take to actually see it through?

Finally, break each goal into smaller, achievable steps with deadlines and work them into your weekly plan accordingly.

How Do I Identify a Goal?

When you realize that Goal is a “dream with a deadline” rather than just something you think you might get around to someday, using PlanPlus Goals feature becomes quite simple.

- First, you create a goal by entering it in the Goals module, and entering the description of the goal.
- Then, you create intermediate steps (either Tasks or Appointments) by clicking the New Intermediate Step button. You then enter the details of the intermediate step. When you finish entering the intermediate step, one or more new Tasks or Appointments will appear on your schedule. During the Weekly Planning process, you can also drag-and-drop intermediate steps directly onto your Task List.
- Finally, you act on the intermediate steps. PlanPlus cannot cure you of a tendency to procrastinate, of course, but it does provide you with a simple and effective method of planning that lets you focus on what is most important to you, without overloading yourself.

Examples of Goals and Intermediate Steps

When you have identified the goal and intermediate steps, you can begin to plug in the intermediate steps to your Daily and Master Tasks lists. On the following pages are some examples of goals set by other individuals.

Example One

In our first example, suppose you would like to learn a second language, either as a student, for business reasons, or simply because you want to be better able to communicate with the people around you. Following is an example goal for learning a second language, broken down into intermediate steps with associated deadlines.

	Name	Deadline
<input type="checkbox"/>	Become fluent in Spanish.	05/20/2007
<input type="checkbox"/>	Locate a roommate who speaks Spanish	12/30/2005
<input checked="" type="checkbox"/>	Check company newsletters ad section	12/01/2005
<input checked="" type="checkbox"/>	Post a message in company cafeteria and break room b	12/08/2005
<input checked="" type="checkbox"/>	Call Carlos to see if he has any friends looking for a roo	12/08/2005
<input type="checkbox"/>	Select and register for courses to complete Spanish mir	
<input checked="" type="checkbox"/>	Conversational Spanish (Span 101, 102) Spring 2006	12/06/2005
<input checked="" type="checkbox"/>	Spanish Reading and Grammar (Span 2020, 203) Summ	04/09/2006
<input checked="" type="checkbox"/>	Spanish Literature (Span 350) Fall 2006	08/09/2006
<input checked="" type="checkbox"/>	Spanish Phonetics (Span 370) Fall 2006	08/09/2006
<input checked="" type="checkbox"/>	Advanced Reading and Grammar (Span 310) Summer 2	04/19/2007
<input checked="" type="checkbox"/>	Advanced Reading and Grammar (Span 410) Fall 2007	08/10/2007
<input checked="" type="checkbox"/>	Latin AmericanHistory (Hist 320) Fall 2007	08/10/2007
<input type="checkbox"/>	Practice speaking Spanish regularly	
<input type="checkbox"/>	Take as many Spanish-speaking Customer Service calls	
<input type="checkbox"/>	Go to SpanishRound Table discussion group on Thursda	
<input type="checkbox"/>	Read out loud (30 min on T/Th) to practice pronounciat	
<input type="checkbox"/>	Click here to add a step	
<input type="checkbox"/>	Click here to add a goal	

Goal subject:

Why:

Deadline: Completed

Categories...

Intermediate Steps Notes Links

I live in a city where a high percentage of people speak Spanish. Some of my friends have received some pretty nice promotions and landed some good jobs because they are bilingual. I have wanted to learn Spanish ever since I took a trip with my family to Argentina. I realized that learning another language opens up a whole new world of opportunities. I'd really like to get a marketing position with an international company that is based in my city. It has recently started operations in South America and will need a lot more people in a few years. It would be awesome to travel and work in South America.

Example Two

A goal should be challenging, and there are as many different kinds of challenges as there are different people. In this example, a busy executive decides to set a challenging goal designed to test his capabilities, strengthen his relationship with his wife, and improve the skills of his coworkers.

Naturally, these intermediate steps can be placed on the Compass, or become Appointments or Daily and Master Tasks.

Goal subject:

Why:

Deadline: Completed

Categories...

Intermediate Steps Notes Links

	Subject	Deadline
<input type="checkbox"/>	Mentor Mike and others to take on more responsibility in the	08/01/2005
<input type="checkbox"/>	Research international sailing protocol	03/01/2006
<input type="checkbox"/>	Buy a new sailboat	05/01/2006
<input type="checkbox"/>	Ensure that I can take off for three months w/o any adverse e	08/01/2006
<input type="checkbox"/>	Sign up for advanced sailing technique training	04/01/2007
<input type="checkbox"/>	Get Chloe enthusiastic about the trip	09/01/2007
<input type="checkbox"/>	Procure hotel and land excursion packages in Europe	
<input type="checkbox"/>	Click here to add a step	

Example Three

This sample illustrates a goal for some long-desired home improvements.

The screenshot shows a window titled "Goal subject: Landscape the side and back yards at home". Below this, there are fields for "Why: to make the yard more pleasant", "Deadline: 05/31/2006", and a "Completed" checkbox. A "Categories..." button is also present. Below the form are tabs for "Intermediate Steps", "Notes", and "Links". The "Intermediate Steps" tab is active, showing a table with columns for "Subject" and "Deadline".

	X	Subject	Deadline
	<input type="checkbox"/>	Save up for the project - each payday set aside 10% of check	
	<input type="checkbox"/>	Get recommendations for qualified landscapers	01/15/2006
	<input type="checkbox"/>	Work w/Brad on design ideas each weekend until we are satisfied	03/18/2006
	<input type="checkbox"/>	Get estimates from top three landscapers	04/08/2006
	<input type="checkbox"/>	Prioritize the work	04/22/2006
	<input type="checkbox"/>	Schedule the work	04/29/2006
	<input type="checkbox"/>	Have a celebration barbeque!	05/31/2006
	<input type="checkbox"/>	Click here to add a step	

	<input type="checkbox"/>	Have "Project A" demo complete and fully funded	12/15/2005
	<input checked="" type="checkbox"/>	Research grant options	06/30/2005
	<input checked="" type="checkbox"/>	Apply for at least two grants (govt/online creative org.)	07/31/2005
	<input checked="" type="checkbox"/>	Obtain written backing from department chair	08/14/2005
	<input checked="" type="checkbox"/>	Inquire about current Internet availability for students	08/15/2005
	<input checked="" type="checkbox"/>	What level are they at?	
	<input checked="" type="checkbox"/>	Plans for the next five years?	
	<input checked="" type="checkbox"/>	Talk with Teigh about Geffen connection (funding)	09/14/2005
	<input checked="" type="checkbox"/>	What will she need to see?	
	<input checked="" type="checkbox"/>	How can we anticipate his team's concerns/needs?	
	<input checked="" type="checkbox"/>	Ask Bryce about possible Universal Internet connection	09/14/2005
	<input checked="" type="checkbox"/>	Review demo script with Glenn (revisions/edits)	10/01/2005
	<input checked="" type="checkbox"/>	Layout entire project (scripting, deadlines, etc.) w/Laine	10/21/2005
	<input checked="" type="checkbox"/>	Meet with Jose (project manager)	11/01/2005
	<input checked="" type="checkbox"/>	How long to create a schedule/milestones?	
	<input checked="" type="checkbox"/>	Create varying schedules/deadlines based on budget and	
	<input checked="" type="checkbox"/>	Confirm team members for demo development	
	<input checked="" type="checkbox"/>	Verify that Oliver is still on board (telecommute?)	
	<input checked="" type="checkbox"/>	Post ad at the university for interns/research positions	11/14/2005
	<input checked="" type="checkbox"/>	Schedule team kick-off meeting	11/28/2005

Example Four

Personal and home improvement are worthy goals, but you can also apply the Goals process to your business responsibilities.

Example Five

When you set goals, you are “forced” to think of all aspects of the goal. What does it really take to achieve 110% of your sales quota for next quarter?

	<input type="checkbox"/>	Achieve 110% of sales quota for next quarter	03/31/2006
	<input type="checkbox"/>	Sort account list into hot, warm, and cold prospects	01/03/2006
	<input type="checkbox"/>	Meet with assistant re: other leads/opportunities	01/05/2006
	<input type="checkbox"/>	Make at least five cold calls per day based on last quart	12/06/2005
	<input type="checkbox"/>	Create marketing piece on sales promotion	01/09/2005
	<input type="checkbox"/>	Generate mailing list for marketing piece	01/12/2006
	<input type="checkbox"/>	Promotional mailing	01/15/2006
	<input type="checkbox"/>	Call all hot and warm prospects regarding promotion	02/02/2006
	<input type="checkbox"/>	Schedule appointments with all hot prospects re: prom	02/09/2006
	<input type="checkbox"/>	Follow-up on calls and appointments	02/28/2006
	<input type="checkbox"/>	Close sales	03/31/2006

Goal subject:

Why:

Deadline: Completed

Categories...

Intermediate Steps | Notes | Links


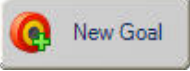
	X	Subject	Deadline
	<input type="checkbox"/>	Talk with Joelle about her kids' organization	03/06/2006
	<input type="checkbox"/>	Does she know how to find other organizations?	
	<input type="checkbox"/>	How do I know which is the right group to hook up with?	
	<input type="checkbox"/>	What kind of hierarchy/organization is typical?	
	<input type="checkbox"/>	Find at least five organizations I am interested in	03/14/2006
	<input type="checkbox"/>	Learn who I should talk with at each organization	03/29/2006
	<input type="checkbox"/>	Interview organization leaders to determine what/if they need	04/13/2006
	<input type="checkbox"/>	Write up drafts for nonprofit business plans with Kaufman slant	05/11/2006
	<input type="checkbox"/>	Estimate implementation schedule	
	<input type="checkbox"/>	Determine necessary support/infrastructure	
	<input type="checkbox"/>	Make selection and hold kickoff meeting with organization & team	12/07/2005
	<input type="checkbox"/>	Click here to add a step	

Example Six

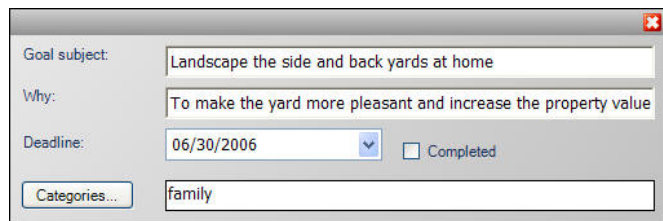
The Goals process can also be used to plan your community improvement goals.

To Create a New Goal

You can create a new goal using a variety of methods:

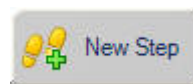
From the Menu	From the General Toolbar	From the Goals Tab (method 1)	From the Goals Tab (method 2)
Select File New New Goal.	 Click on the New Goal button.	In the left-hand column, enter the name of the new goal on the first blank line labeled Click here to add a goal.	Click the New Goal button, and enter your new goal on the new blank goal line that appears in the left-hand column  (Goal lines are identified with a Goal icon.)
A blank Goal page will appear, where you can enter the Goal.		Click your mouse outside the goal, and then click on the goal to display a Goal page for the new goal in the right-hand column. (Double-clicking on the goal will open a full-sized Goal page.)	

1. Enter a the **Goal Subject** (name).
2. Enter **Why** you want to achieve this Goal (optional).
3. Set a **Deadline** for the goal or intermediate step in the Deadline column. You can use a type the deadline into the field (using *mm/dd/yyyy* format) or click the down arrow associated with the field to display a selection calendar.
4. Identify the **Category(ies)** this goal belongs to (optional).
5. Identify the **Intermediate Steps** to achieve this goal. (Intermediate steps are the tasks and appointments that support a goal.)
 - Beneath the goal (on the Intermediate Steps tab in the Goal page view), click on the first blank line labeled **Click here to add a step.**










OR


- Click on the **New Step** button to add a blank line.

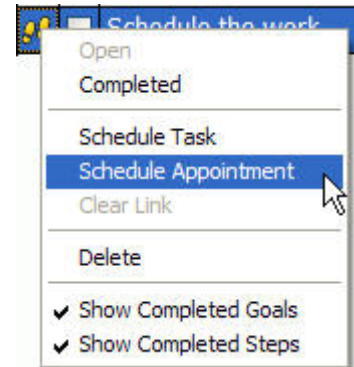


Enter the Intermediate Steps required to complete the goal.

Intermediate Steps		Notes	Links	Subject	Deadline
	<input type="checkbox"/>			Save up for the project - each payday set aside 10% of check	
	<input type="checkbox"/>			Get recommendations for qualified buidlers	01/14/2006
	<input type="checkbox"/>			Work w/Brad on design ideas each weekend until we are satisfied	03/18/2006
	<input type="checkbox"/>			Get estimates from top three landscapers	04/08/2006
	<input type="checkbox"/>			Prioritize the work	04/22/2006
	<input type="checkbox"/>			Schedule the work	04/30/2006
	<input type="checkbox"/>			Have a celebration barbeque!	06/30/2006
	<input type="checkbox"/>			Click here to add a step	

To Turn an Intermediate Step Into a Task or Appointment

1. Click on the **Step** icon  to the left of the intermediate step.
2. Select **Schedule Task** or **Schedule Appointment** from the drop-down list.
 - Depending on which you select, the Task Details or Appointment Details screen will appear. You schedule the Tasks or Appointments in exactly the same way you would any other Tasks or Appointments.
 - When you have finished adding Intermediate Steps, all steps will appear below the goal.
 - If you have scheduled Tasks or Appointments with your Intermediate Steps, you can choose to edit the steps from within the Goals screen, or you can go to the Appointment Schedule or Daily Tasks to edit them.



To Edit an Intermediate Step from the Goals Screen

1. To edit a Task or Appointment from the Goals screen, simply move your mouse over the Task or Appointment you wish to edit, and double-click on it.
2. The Task or Appointment Details screen appears. From the Details screen, you may make any changes to the Task or Appointment that you desire, just as you would for any other Task or Appointment.

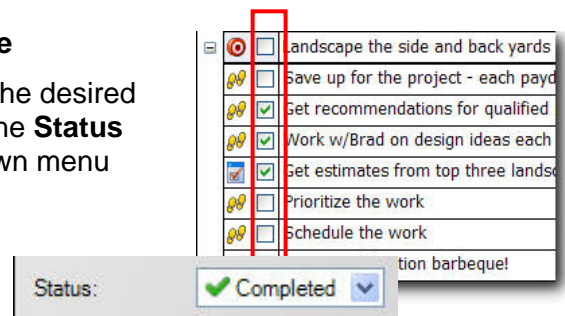
Changes are saved automatically as you make them.

To Mark a Goal or Intermediate Step as Complete

1. From the Goals screen, place a check mark by the desired task by clicking the **Complete** field. Next, click the **Status** field, then choose **Completed** from the drop-down menu

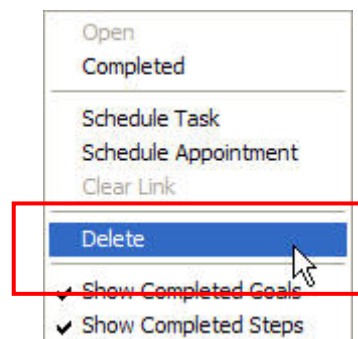
OR

Open the **Task Details** screen, then right-click in the **Status** field and choose **Completed** from the drop-down list.



To Delete a Goal or Intermediate Step

1. Right-click on the Goal or Step you wish to delete.
2. Choose **Delete** from the drop-down list.
The Confirm Delete window appears.
3. Choose **Yes** to confirm the deletion, or **Cancel**.



Weekly Compass®

The Compass is a powerful method of helping you focus on your key roles and relationships, setting goals to help you strengthen those relationships over the course of a week.

This section tells you how to use the Weekly Compass module in PlanPlus to create a Compass.

Why Should I Use the Weekly Compass?

With the Compass, you review your key Roles and relationships and create “Big Rocks” to strengthen those roles and relationships. You may wish to focus on a particular role for the week, or you may set goals for several or all of your roles.

Strengthen Relationships

The Weekly Compass is not intended to reduce the people you care most about to simple Tasks and Appointments. It is simply a method of keeping the needs of the people you care about continually in mind.

For example, perhaps your old friend Joan has been much on your mind these days. She recently moved to another city, and you really feel like you should keep in touch. So, in your role of Friend, you might set a goal for the week of “Write a letter to Joan.” It can be that simple.

Similarly, your Big Rocks can also be simple or complex. You may create Big Rocks for all your roles, or just a few, Or just one. What is most important is that you create Big Rocks that strengthen the relationships defined by your roles.

Select Roles

As you create your Weekly Compass, we recommend you identify a maximum of seven roles that you want to focus on, then ask yourself a simple question:

“What is the one thing I can do this week
that will have the most significant impact on this role?”

As you answer this question, you will identify the goals that belong on your Weekly Compass.

Identify Your "Big Rocks"

A good way to think of the Tasks and Appointments that support your highest priorities is to think of them as "Big Rocks." Your Big Rocks are the most important things you want to accomplish this week. All the other things on your list can be represented by "little rocks" – things that still must get done but which are not as important.

It's like filling a bucket with rocks. If you fill the bucket with little rocks first, you may not have enough room left in the bucket to fit in all the Big Rocks. But, if you start with the Big Rocks, the little rocks can be poured into the remaining space. By putting the Big Rocks into the bucket first, even if all the rocks do not fit, at the least the most important ones are in.



Your weekly schedule is very similar to the bucket – it has limited space (time) which must be filled with both important activities (Big Rocks) and non-essential activities (little rocks). If you put your Big Rocks into your weekly schedule first, you can fill in the gaps in the rest of the available time with your little rocks.

Big Rocks and Quadrant II of the Time Matrix

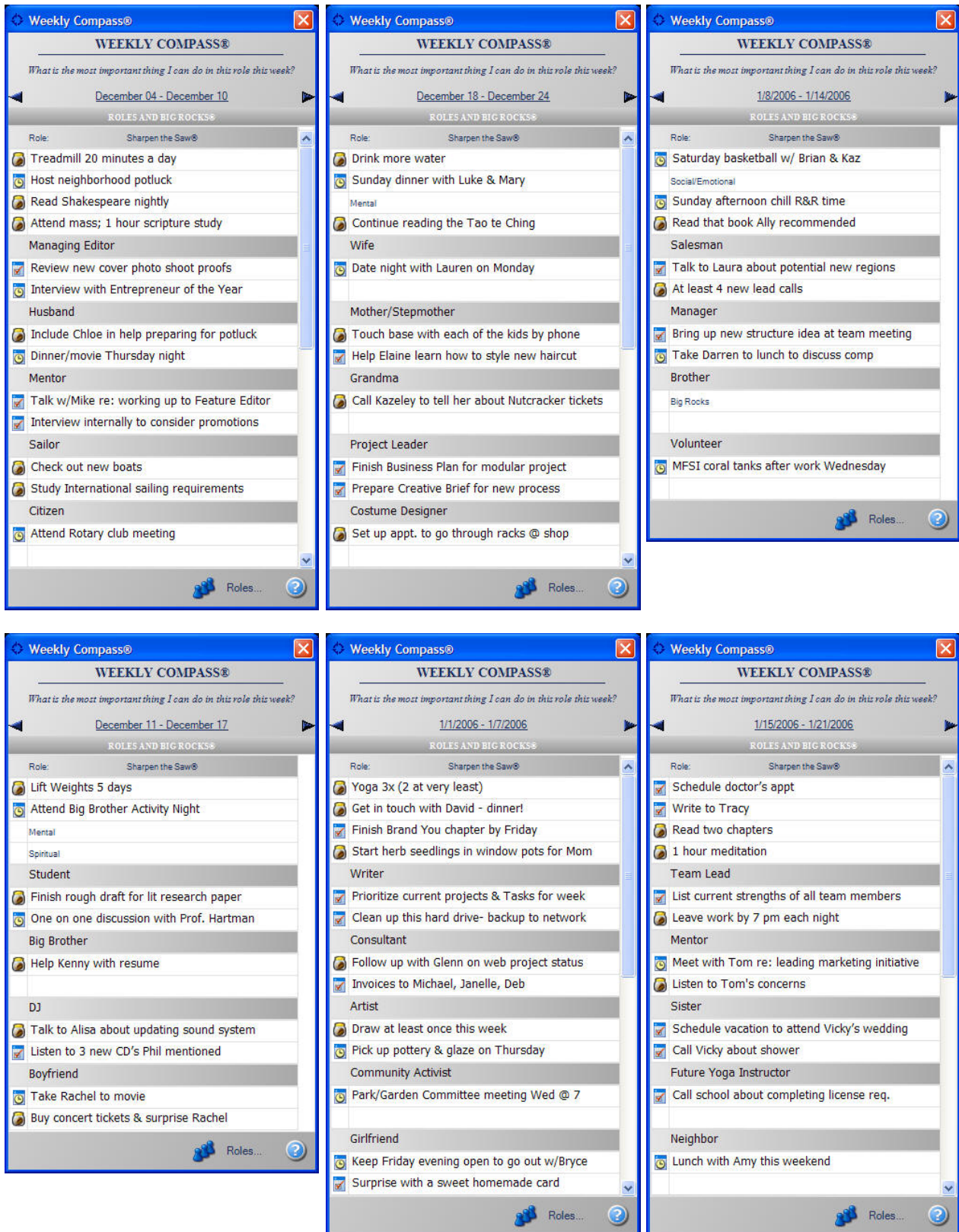
If you remember the Time Matrix, you will know that Quadrant II activities are those activities that are very important, though not particularly urgent at the moment. For this discussion, it is enough to say that the Big Rocks that you want in your schedule will often be Quadrant II activities – activities that may not be urgent (meaning they may not be screaming for attention right now) but are extremely important. Quadrant II activities include planning, prevention, and relationship-building.

Quadrant I	Quadrant II
Very Important Urgent	Very Important Not Urgent
Less Important Urgent	Less Important Not Urgent
Quadrant III	Quadrant IV

Of course, some of your Big Rocks may well be Quadrant I activities, both urgent and important. That's okay, but do not let the urgency of an activity fool you. Something that is screaming for your attention right now may be both urgent and important, or it may be simply urgent, and not very important at all.

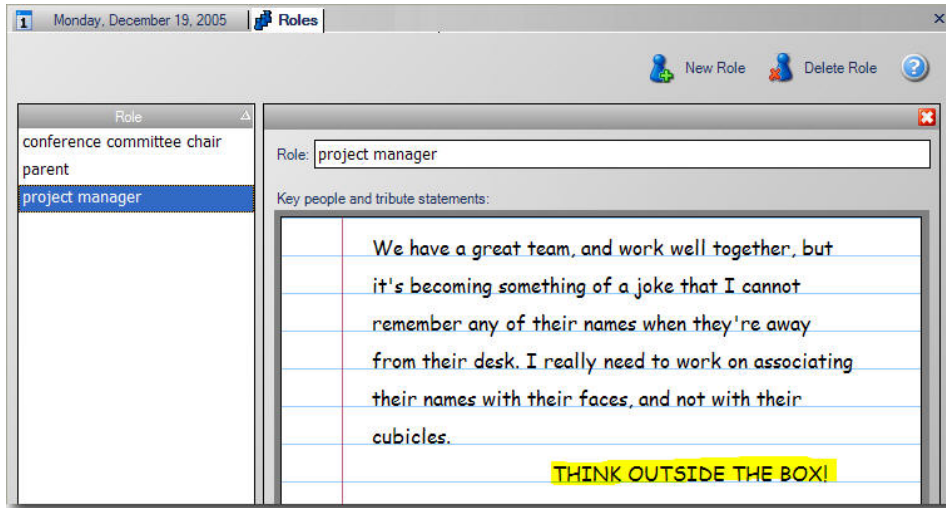
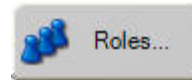
Examples of a Weekly Compass

Following are examples of Weekly Compasses for several different individuals.



Creating Roles

1. From the Weekly Compass, click on the **Roles** button.
2. The Role window will appear. Enter the name of the Role you wish to create in the Role field.



3. In the Role Notes, you may record any key people and tribute statements that apply to this Role, insert pictures of important individuals related to this Role, and make any other notes that you desire about this role, as desired.
4. You may identify as many Roles as you feel apply to the various distinct areas of your life. Each Role you identify will be listed in the Role column on the left-hand side of the screen. These Roles will be available for you to select when creating your Weekly Compass.


Creating a Weekly Compass

Creating a Weekly Compass involves three main steps.

- **Identify Sharpen the Saw Goals.** These goals address renewing your most important resource – yourself. The Sharpen the Saw portion of the Compass has been divided into the four aspects of personal renewal – Physical, Mental, Social/Emotional, and Spiritual.
- **Identify the Roles you want to focus on this week.** We recommend listing no more than seven roles.
- **Add Big Rocks to your Roles.** Your Big Rocks should answer the question: “What is the one thing I can do this week that will have the most significant impact on this role?”

To Create a Weekly Compass

1. Open the Weekly Compass using any of the following methods:

- From the menu, select **View | Weekly Compass**.
- From the View toolbar, click on the **Compass** button. 
- From the menu, select **View | Weekly Planning** to open the Weekly Planning tab, and then click on the **Schedule Compass** button.
- Click on the **Weekly Planning** tab to open it, and then click on the **Schedule Compass** button.




2. To add a new Role to your Compass, click on a **Role** field.
3. Select the name of the Role from the drop-down list. If you want to create a new Role, you can click on the **Roles** button to return to the Roles page and create a new role. (See Creating Roles.)
4. Identify **Big Rocks** for the Roles you have selected.
 - Type a brief description of the Big Rock in the field beneath the role. Two lines are provided by default.
 - If you need to enter additional Big Rocks for a Role, click on the icon field to the left of any of the Big Rocks you have previously entered, and select **Insert Big Rock** from the popup menu that appears.



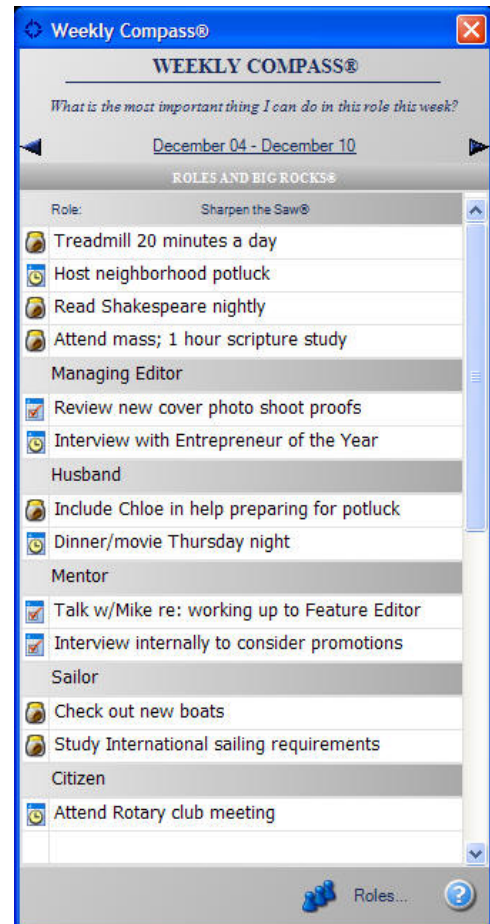
Your Weekly Compass is now ready for you to use for your Weekly Planning, or simply to review whenever you want to remind yourself of your goals.

Viewing the Weekly Compass

You can open the Weekly Compass using any of the following methods:

- From the menu, select **View | Weekly Compass**.
- From the View toolbar, click on the **Compass** button. 
- From the menu, select **View | Weekly Planning** to open the Weekly Planning tab, and then click on the **Schedule Compass** button.
- Click on the **Weekly Planning** tab to open it, and then click on the **Schedule Compass** button.

You can review your Roles and Big Rocks, and make modifications to your entries from either view of the Weekly Compass.



To Learn More About the Weekly Compass

There are several resources you can use to help you better understand the Weekly Compass and how it can work for you. Most of these resources are available on the World Wide Web, so you will need Internet access in order to take advantage of them.

Following are links to resources available on the World Wide Web. To access these resources, you will need an Internet connection. Use the URLs shown to navigate to these articles.

Your Spirit: Breathing Space

from Oprah.com

http://www.oprah.com/rys/omag/rys_omag_breathespace.jhtml

Online Resources: Work-Life Balance

from FastCompany.com

<http://www.fastcompany.com/online/resources/balance.html>

This site provides a number of resources from which you can select the topics that interest you.

Are You Stressed Out?

Interactive Assessment

<http://www.franklincovey.com/ez/stressedout/movie.html>

Weekly Planning

There are four steps in the Weekly Planning process. Although it is not mandatory to do all four every single week, we recommend doing them all for best effect.

Why Should I Plan Weekly?

Perhaps the metaphor of “being unable to see the forest for the trees” is useful here. Weekly planning gets you thinking about tomorrow, and the next day, and the next week, rather than just living from day to day. By planning weekly, you can make sure that you get your “Big Rocks” into your schedule first.

By taking twenty minutes at the start of each week to plan your week, you will experience a significant increase in productivity.

The Weekly Planning Process

Weekly Planning is accomplished in a simple, four-step process.



Review Mission – This beginning step encourages you to access the deep burning “yes!” created by the awareness of first things in your life, the “yes!” that generates passion and energy and makes it possible for you to say “no” – with confidence and peace – to the less important.



Schedule Goals – This step enables you to set principle-based goals that will create quality-of-life results. This step provides a medium for breaking these goals into smaller, achievable steps with deadlines, and then schedule them into your weekly plan.



Schedule Compass – This step enables you to focus on roles and relationships through which you can achieve balance. The Compass empowers you to put your Big Rocks – your important Quadrant II goals – into your schedule first and schedule other things around them.



Schedule Tasks – This final step allows you to review “all the other things” that you need to do and schedule them on appropriate days throughout the week.

Throughout each step of the Weekly Planning process, you are encouraged to evaluate your progress toward your goals from the previous week.

How Do I Create a Weekly Plan?

The process of weekly planning is a very straightforward process of connecting with what matters most to you, then “putting first things first” by scheduling the **Big Rocks** that will help toward your goals and that will help you strengthen your relationships. This section shows you how to use the Weekly Planning feature to do your own weekly planning.

Open the Weekly Planning Module

Click the **Weekly Planning** tab in PlanPlus.

OR

From the menu, click **View | Weekly Planning**

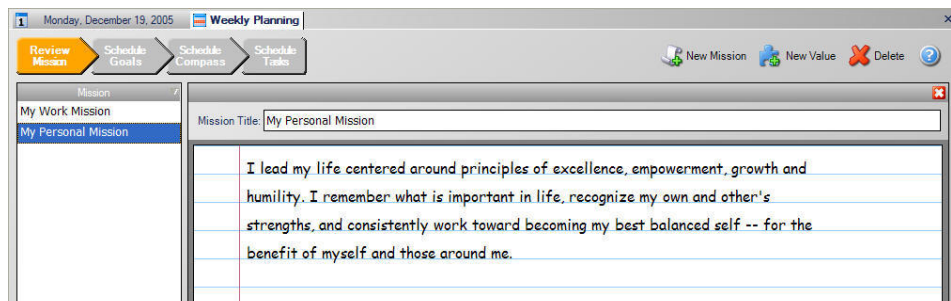
The Weekly Planning screen appears, with the Review Mission step appearing first.

Weekly Planning Step 1: Review Mission

In the Review Mission step, you review your Mission and any Values that you have entered in the Mission module.

1. Click the **Mission** that you desire to review.

Review Mission is intended to “re-connect” you with your highest priorities. Even if you do not make any changes or additions to your Mission and Values information, you should still review it to refresh your mind as to what you think is truly important in your life.



If you wish to modify or add information to the Mission/Values module, you can do it from here.

2. Click **New Mission** or **New Value** to create a new Mission or Value.

OR

Highlight the item you want to change and edit the name or content of the item.

3. When you have finished reviewing your Mission and Values, click **Schedule Goals** at the top of the Weekly Planning module to continue.

Weekly Planning Step 2: Schedule Goals

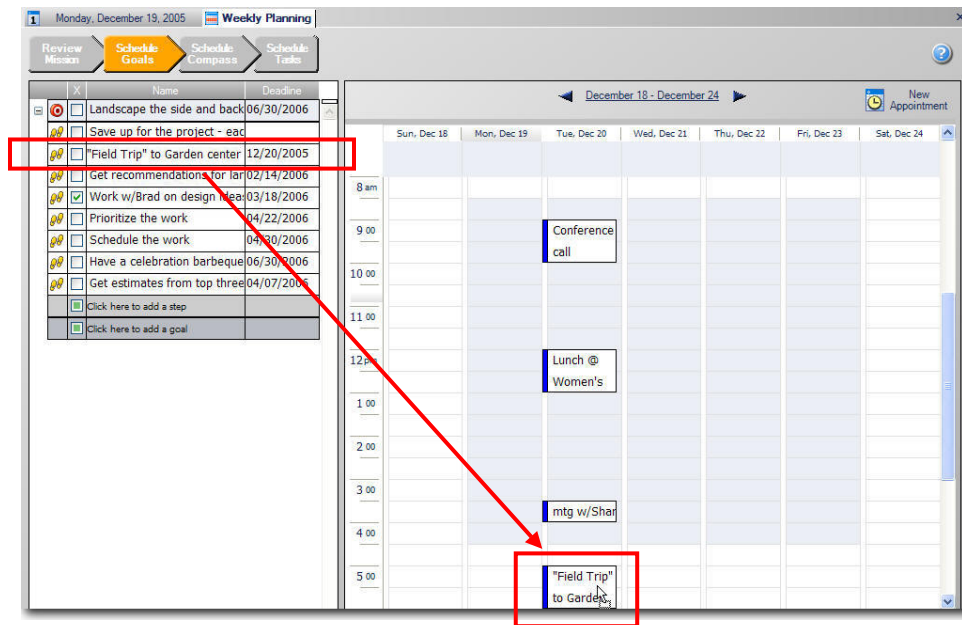
The Schedule Goals portion of the Weekly Planning process helps you take your long range Goals and make them a reality by integrating them into your weekly plan.

1. Click **Schedule Goals** at the top of the Weekly Planning module.

When you click **Schedule Goals**, the screen changes to show your schedule, your Task list, and all the Goals you have already created.

From this screen, you can put existing Goals and Intermediate Steps into your schedule, or you can create new Goals and Intermediate Steps to put into your schedule.

2. To schedule an Intermediate Step, simply drag-and-drop the Intermediate Step from your Goals list onto your schedule at the desired location.
 - You can easily convert a Goal or Intermediate Step into an Appointment by clicking and dragging the item to your Appointment Schedule. Once a Goal or Intermediate Step has been converted to an Appointment, an Appointment icon will appear next to the item in your Goal list.
 - If you drag a step to a date different from the originally scheduled due date, the due date will be updated with the new date.



Remember, Goals are “overarching” statements of something you wish to accomplish, while Intermediate Steps are the steps you will take to accomplish your goal. Intermediate steps should be easily converted to an Appointment or Task. If one cannot, the Intermediate Step is probably too general.

Weekly Planning Step 3: Schedule Compass

With Intermediate Steps from your Goals placed on your schedule, the next step is to put your Big Rocks into your weekly schedule. These Big Rocks comprise what you want to do this week to strengthen your relationships.

1. Click **Schedule Compass** at the top of the Weekly Planning module.

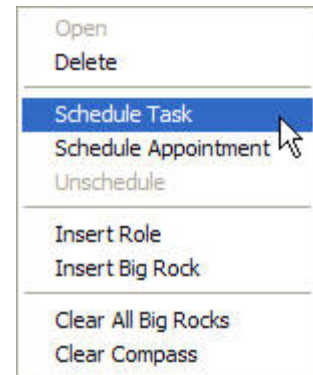
When you click **Schedule Compass**, the left-hand panel changes to show your Weekly Compass. Your schedule remains in the right-hand panel.

2. Schedule your "Sharpen the Saw" goals. Review each of the goals you have listed in the "Sharpen the Saw" category, to determine if it will best fit into your week as a Task or as an Appointment. To place your goals onto your schedule, you can drag-and-drop the goal onto your schedule,

OR

Right-click on the desired goal and make your choice from the popup menu:

- **Delete** – This option allows you delete this Goal (Big Rock). Deleting a Big Rock also removes any Tasks or Appointments from your schedule that were created from that Big Rock.
- **Schedule Task** – If you choose this option, a **Task Details** view appears, with the goal listed in the Title. You may set a due date, priority, etc., for this Task, just like any other Task. (Note that the task is initially created as a Master Task - deselecting this option allows you to change it to a Daily Task and specify the task's due date.)
- **Schedule Appointment** – If you choose this option, an **Appointment Details** view appears, with the goal listed in the Title. You may set a due date, priority, etc., for this Appointment, just like any other Appointment.
- **Insert Role** – This option allows you to add additional roles to your Compass.
- **Insert Big Rock** – This option allows you to add an additional Goal to this role.
- **Clear All Big Rocks**. Choose this option to clear all Big Rocks from the compass, while leaving the roles listed. (Note that this also removes any Tasks or Appointments from your schedule that were created from those Big Rocks.) This option is helpful if your Roles and Tasks have been auto-forwarded from the previous week, and you want to revise your Compass for the current week, without having to re-select your roles.
- **Clear Compass**. Choose this option to clear all Big Rocks on the entire Compass. This also removes any Tasks or Appointments from your schedule that were created from your Big Rocks.

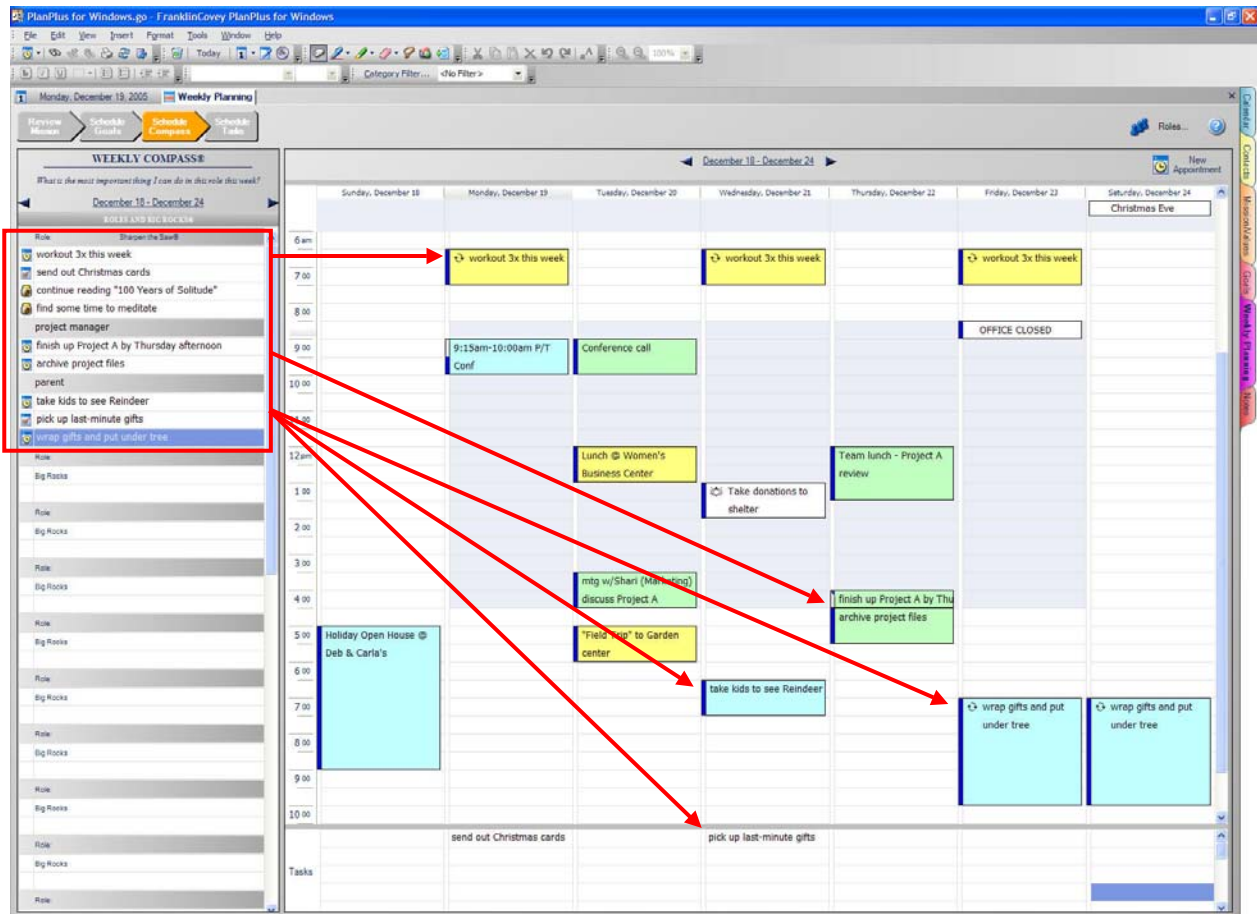


3. Schedule the Big Rocks for your other Roles.

After you have entered the Goals, Tasks, and Appointments for your role to yourself, you next schedule the Big Rocks you have identified for your other roles. To place your goals onto your schedule, you can drag-and-drop the goal onto your schedule,

OR

Right-click on the desired goal and make your choice from the popup menu, to schedule your Goals as Tasks and Appointments in your weekly schedule.



When you have finished, most, if not all of your Big Rocks will be on your schedule as Tasks or Appointments.

Weekly Planning Step 4: Schedule Tasks

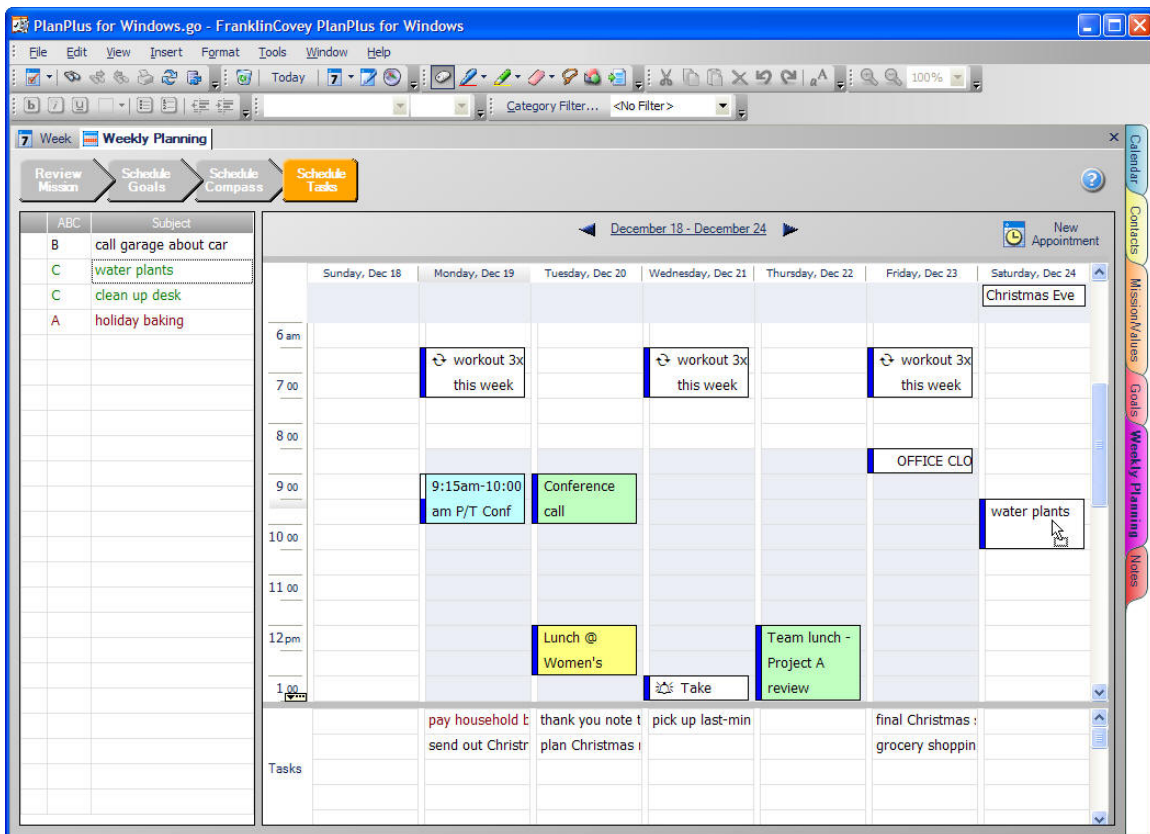
The final stage in Weekly Planning is to “fill in” your additional Tasks and Appointments around your Big Rocks.

1. Click **Schedule Tasks** at the top of the Weekly Planning module.

When you click **Schedule Tasks**, the left-hand panel changes to show your Master Tasks list. Your schedule remains in the right-hand panel.

2. Schedule any Master Tasks you desire by clicking the Task and dragging it to the desired date and time (to create an Appointment) or to the desired date in Daily Tasks (to turn the Master Task into a Daily Task).
 - If you wish to add additional Master Tasks, enter them into the Master Tasks list. You can convert them to Appointments or Daily Tasks, if desired.
 - If you wish to add Daily Tasks to your schedule, click a blank Task line for the desired date from the Task panel at the bottom of the schedule, and enter the Task.

You can open the Task Details view (to add additional information and Notes) for any task by double-clicking on the Task.



When you have completed scheduling your Tasks, your Weekly Planning is complete, and your schedule is now ready for you to begin your week. You can review your Mission, Goals, Compass, and Task list at any time during the week, as well as add additional Tasks and Appointments as they arise.

Personalize PlanPlus

You can personalize PlanPlus to reflect your personal style and work preferences in a number of ways.

- You can rearrange the position of tabs and toolbars, and adjust the screen layout.
- You can set a variety of Options that will allow you to tailor PlanPlus' functionality to your work preferences.
- You can use "skins" to customize the colors, buttons, and icons in PlanPlus to match your tastes, company style, etc.

In this chapter, we will look at the tools available for customizing PlanPlus.

Using PlanPlus Options

The **Options** window is one of the most versatile features of PlanPlus. Using the tools available on the Options window, you can modify several PlanPlus functions to suit your own work style.

- **View options** – choose how you want to interact with your workspace.
- **Database** – specify your backup preferences.
- **Note options** – select your fonts, stationery, and magnification.
- **Ink and PDF options** – modify ink entry settings and select PDF font swapping level.
- **Skins** – create a custom look for your PlanPlus interface.
- **Categories** – create and modify categories.
- **Print Capture** – set size and print capture options.
- **Send Mail** – select your e-mail provider, and default messaging.
- **Calendar** – specify your Calendar settings.
- **Tasks** – specify how you want PlanPlus to handle Tasks.
- **Contacts** – define custom fields for your Contacts.
- **Weekly Planning** – set options for the weekly planning, weekly compass and goals screens.

To access the Options window:

1. From the menu, select **Tools | Options**.
2. The Options window will appear.

Note: You may move back and forth through the various Options pages, but keep in mind that *until you click OK, your settings are not saved*. Clicking **Cancel** at any point will cancel ALL changes made since you opened the Options window.]

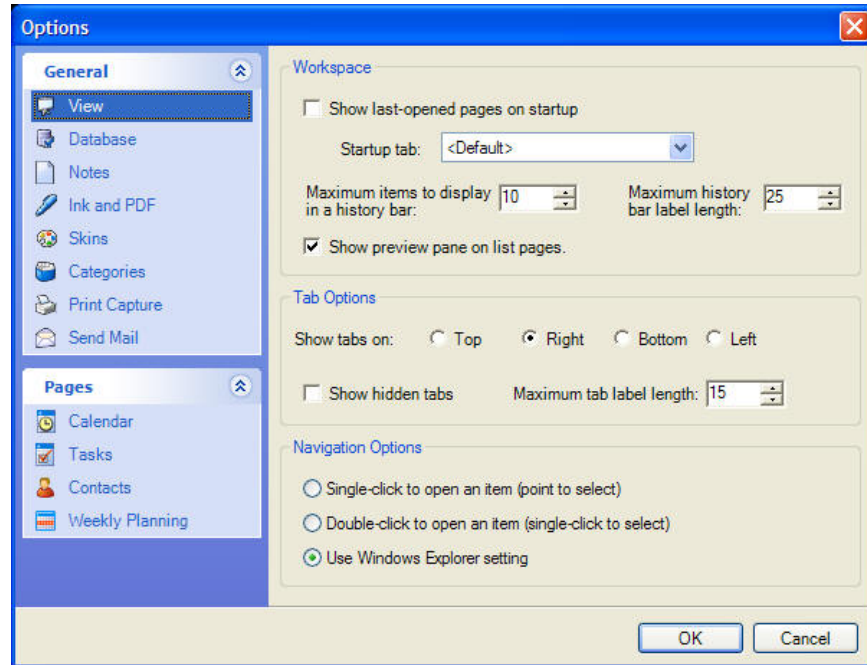
To be sure your changes are not lost, you may wish to close the Options window by clicking **OK** after having made any changes, and then reopening Options if you wish to make additional changes.

View Options

The View Options page lets you choose how you want to interact with your workspace.

1. To open the View Options feature, choose **Tools | Options** from the menu bar.
2. Select **View Options** from the list.

The **View Options Configuration** window appears.



Select the desired options and click **OK** to close Options and save your changes.

Workspace settings

- To have PlanPlus display your last open pages the next time you start up, check this box.
- To select a preferred Startup tab (such as the Calendar), select it from the drop-down list.
- Select the maximum number of items that you wish to have displayed in the history bar. The default is 10.

Tab options

- Select your preference for the location of your PlanPlus Tabs (top, right, bottom, or left)
- If you have hidden tabs, checking this box will display them.

Navigation options

PlanPlus can be customized to suit your preferences, whether you are more comfortable using a keyboard or a digital pen.

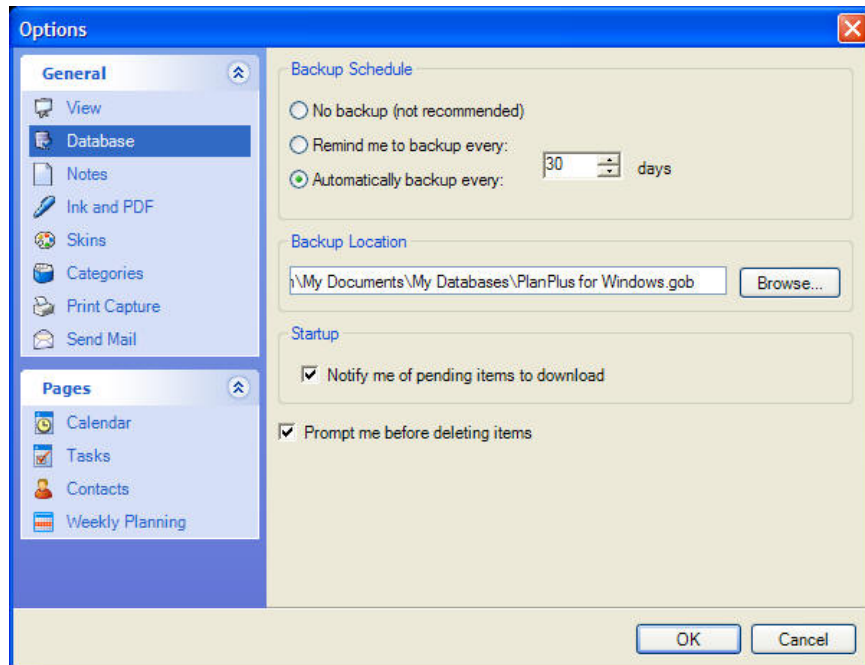
- Select the "click" option that is most convenient for you.
- For keyboard users, the option to "Use Windows Explorer setting" has been provided for convenience.

Use Database Options to Define Your Backup Strategy

The Database page allows you to specify your backup preferences.

1. To open the Database feature, choose **Tools | Options** from the menu bar.
2. Select the **Database** option from the list.

The **Database Backup Configuration** window appears.



Select the desired options and click **OK** to close Options and save your changes.

Backup Schedule

You may select

- **No backup** (not recommended)
- **Scheduled backup reminders at intervals you specify**
- **Scheduled automatic backups at intervals you specify** (30 days is the default setting)

Backup Location

If you wish to change the location of your backup file, click Browse, and navigate to the desired location, such as another folder on your hard drive, a flash drive, or even a network drive.

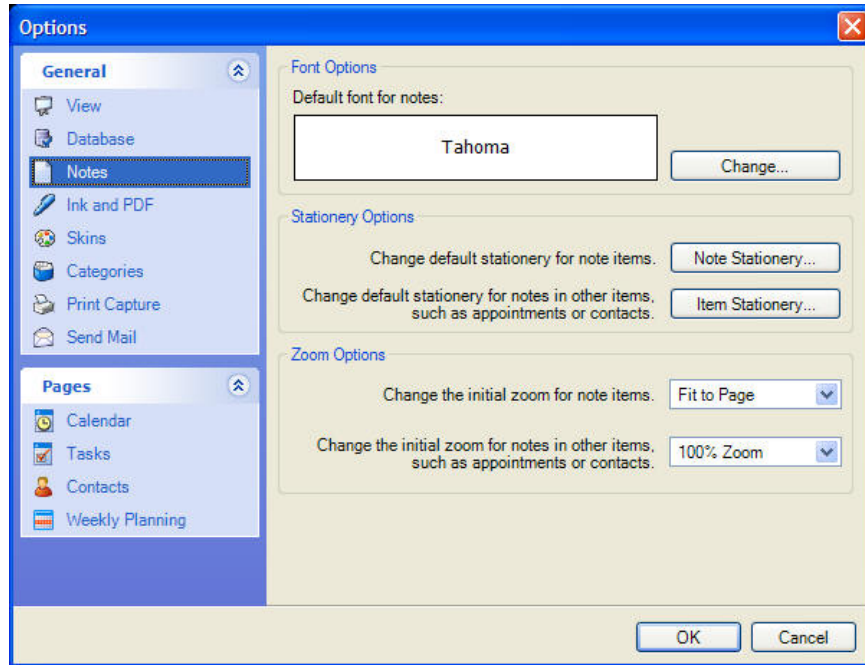
You may also select to be notified of pending items available for download, and to be prompted before deleting items.

Note Options

The Note Options page lets you select your fonts, stationery, and magnification

1. To open the Note Options feature, choose **Tools | Options** from the menu bar.
2. Select **Note Options** from the list.

The **Note Options Configuration** window appears.



Select the desired options and click **OK** to close Options and save your changes.

Font options

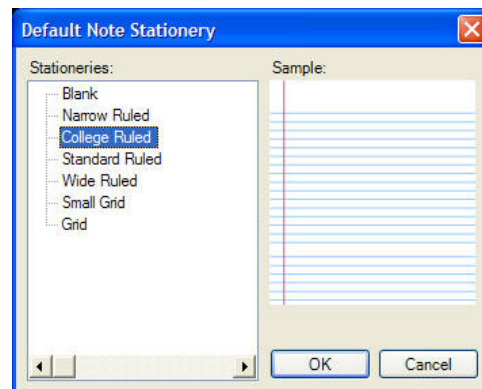
Click the Change button to select your preferred font for notes. Tahoma is selected by default.

Stationery options

Clicking the **Stationery** buttons associated with each type of note opens the Stationery dialog, from which you may select the type of stationery (background) you wish to use for your Notes, as well as for all other types of notes in PlanPlus (such as Contact Notes, Appointment Notes, and so on.).

Zoom options

Select your **Zoom** (magnification) preferences for your PlanPlus Notes, as well as for all other types of notes in PlanPlus.

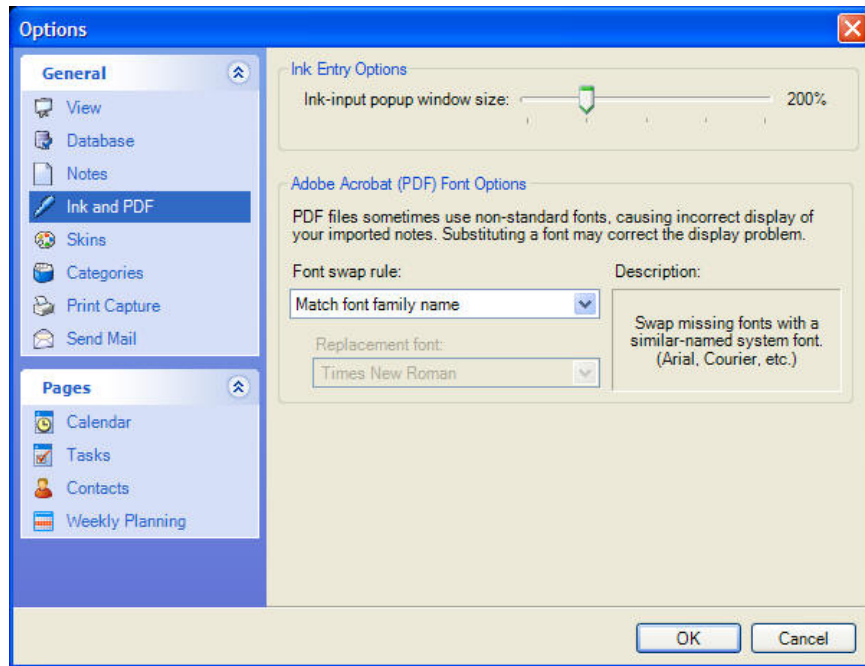


Ink and PDF Options

The Ink and PDF Options page lets you modify your ink entry settings and select PDF font swapping level

1. To open the Ink and PDF Options feature, choose **Tools | Options** from the menu bar.
2. Select **Ink and PDF Options** from the list.

The **Ink and PDF Options Configuration** window appears.



Select the desired options and click **OK** to close Options and save your changes.

Ink Entry options

Use the slider to adjust the size of the Ink-input pop-up window.

PDF Font Swap Level

Sometimes, when a Digital Paper image is created from a PDF (whether printed, or from imported or downloaded PDF documents), they are difficult to read because of the small "pixellated" fonts created during the process. (This is particularly true when the font that was used to create the document is not installed on your computer.) PlanPlus lets you change the way the pages appear by "swapping" the font in the PDF to an easier-to-read font. Using this feature, your meeting notes or other important documents not only look better, but are also much easier to read.

Note: Font swapping does not make the fonts on the page larger, but simply changes them to a standard font type available on your computer. In this way, when you zoom in or print the document, the text is easier to read.

Choose the desired option

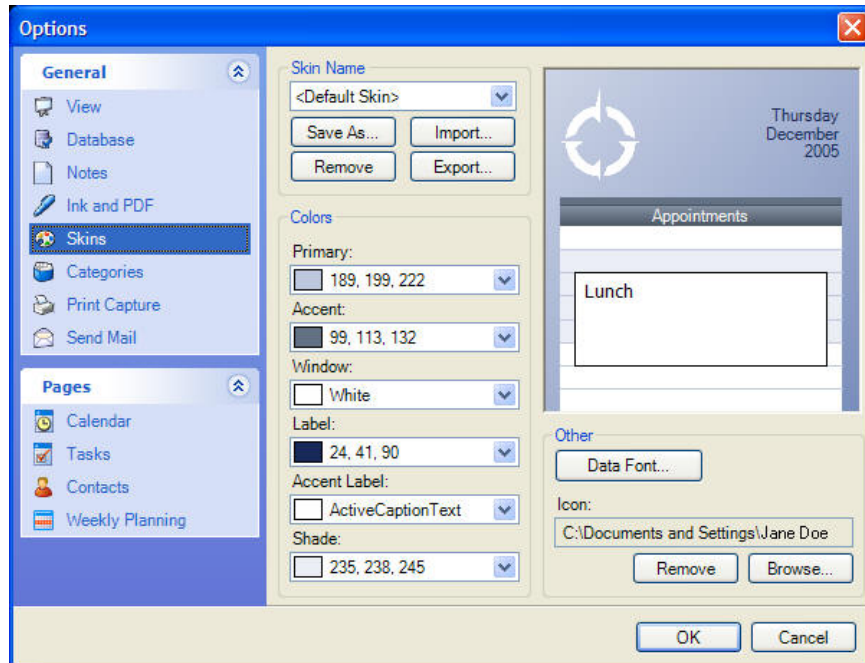
- **None** – No fonts are changed.
- **Match font family** – Fonts are swapped only when a font is found on your computer that matches the family name of the font in the document. This is the default selection.
- **Match based on font attributes** – If no font is found on your computer that matches the font used in the Note or Digital Paper document, a match is automatically selected that best approximates the document font.
- **Force swap when match not found** – This option allows you to choose the font that is to be used if no matching font is found on your computer.

Customize PlanPlus with Skins

A "skin" is a customized color scheme for your PlanPlus display. PlanPlus has a particular color scheme when you install it – using the Skins feature, you can customize the coloring of various aspects of PlanPlus, and save your customized color schemes for later use.

1. To open the Skins feature, choose **Tools | Options** from the menu bar.
2. Select the **Skins** option from the list.

The **Skin Configuration** window appears.



Select the desired options and click **OK** to close Options and save your changes.

Using Pre-Defined Skins

You can use the **Skin Name** field to choose from pre-defined color schemes.

1. Click on the arrow in the **Skin Name** field.
2. Choose the desired pre-defined skin name from the drop-down list.

The drop-down initially lists the "Default" color scheme. Color schemes you create are added to this list, allowing you to easily change schemes as you desire.

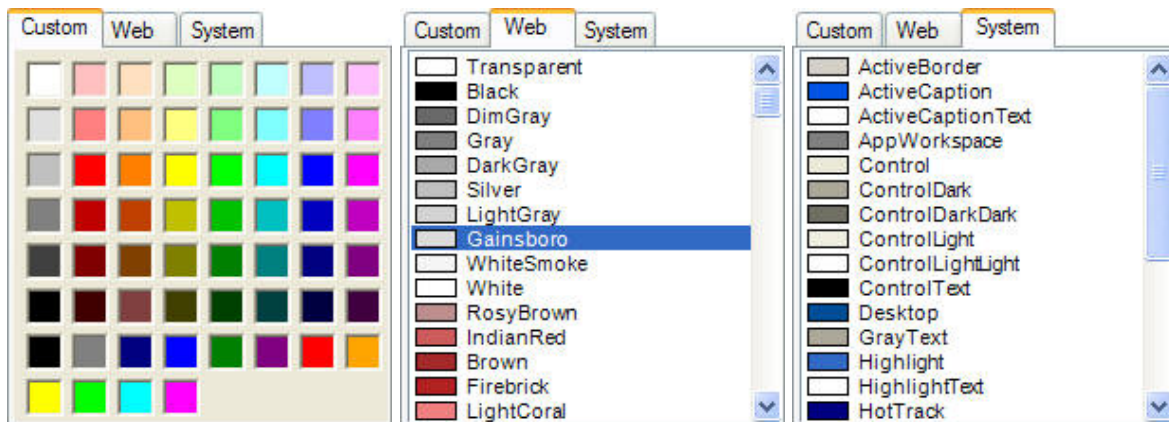
Customizing Skin Colors

A skin consists of several different colors, representing different items on the PlanPlus screen.

- **Primary** – This is the overall color. The default skin has a sky-blue primary color.
- **Accent.** “Accents” are the bars that separate the different areas of the PlanPlus screen.
- **Background** – Backgrounds are the areas of the PlanPlus screen where you enter Tasks, Appointments, or Daily Notes.
- **Label** – Labels are the titles of the different areas of the PlanPlus screen, such as “Appointment Schedule” or “Daily Notes.”
- **Accent Label** – Accent labels represent the labels for active captions, such as the text at the top of pop-ups and dialog boxes.
- **Shading** – Appointments and other items that span time on the PlanPlus screen are represented by shaded areas.

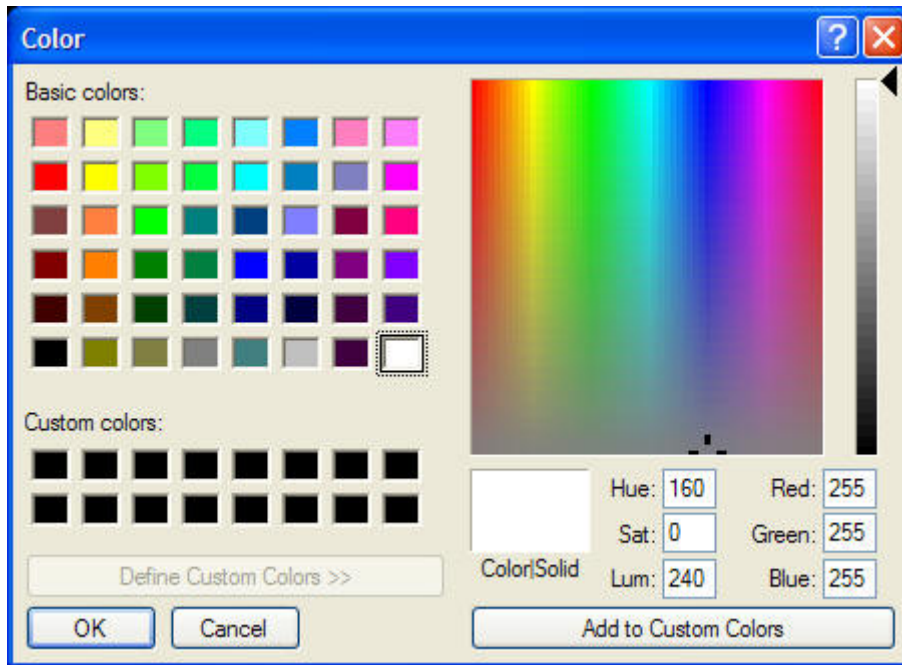
1. To customize colors, click the drop-down arrow in the desired **Skin Color** field

The **Color** window appears. PlanPlus provides three color palettes from which you may select:



2. You may select a new color from any of these menus.

3. If you wish to create a new custom color, clicking in the blank area in the lower right-hand corner of the Custom color palette will open the Color definition window.



4. From this window, you may create custom colors. The custom colors you create will be added to the empty squares in the lower-left of the window. When you are finished creating colors, click **OK** to return to the Skins window.

Note: There are far too many color combinations to describe here. You may wish to experiment a with different color combinations to find a combination you like.

5. You may now select your Custom color(s) from the Custom tab.
6. Adjust colors for other PlanPlus screen elements as desired, until you have achieved a pleasing result.

Customize the Icon

If you wish, you can replace the PlanPlus icon on the main PlanPlus screen with an icon or other graphic image of your own. This is a great place to put your company logo.

You can use icons or graphics in **.bmp**, **.jpg**, **.jpeg**, **.gif**, or **.ico** formats.

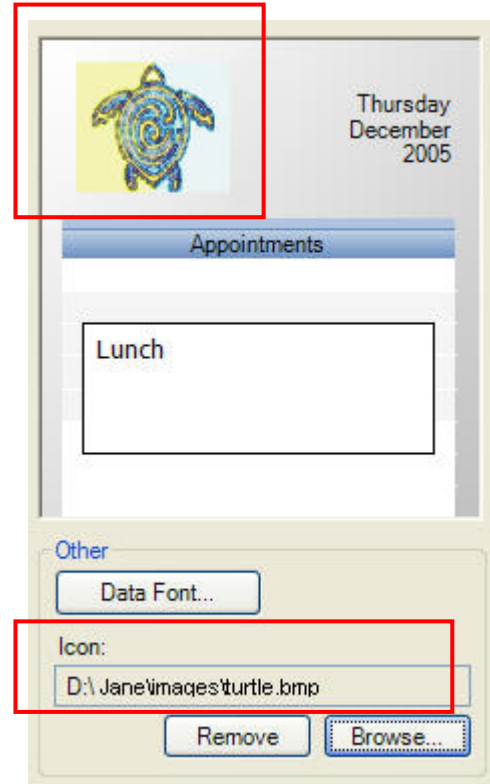
1. From the Skin Configuration window, click the **Browse** button associated with the **Icon:** field.
2. Navigate to the location of the desired icon or graphic, select it, and click **Open**.

A preview of the new icon or graphic will appear in the Skins window in the place of the PlanPlus icon. When you click **OK**, this image will replace the icon on the main PlanPlus screen.

Save Custom Skins

To save a customized skin, simply customize a skin to your preferences, according to the instructions above, then save the scheme with a unique name.

1. Under the **Skin Name:** field, click the **Save As ...** button.
The **Save Skin As ...** window appears.
2. Enter a name for the custom skin, and click **OK**.
The new skin name is added to the Skin Name: list.



Export and Import PlanPlus Skins

You can also share your PlanPlus skins with other PlanPlus users, or import skins customized by other PlanPlus users.

Export a PlanPlus Skin

1. In the **Skin Name:** field, click the arrow and select the PlanPlus skin you wish to export.
2. Click the **Export...** button.

The **Export** window appears.

3. Enter a name for the skin, then navigate to the location where you wish to save the skin and click **Save**.

The exported skin can then be copied or distributed by e-mail to another PlanPlus user.

Import a PlanPlus Skin

1. Click the **Import...** button below the **Skin Name:** field.

The **Import** window appears.

2. Navigate to the location of the skin you wish to import, select it, and click **Open**.

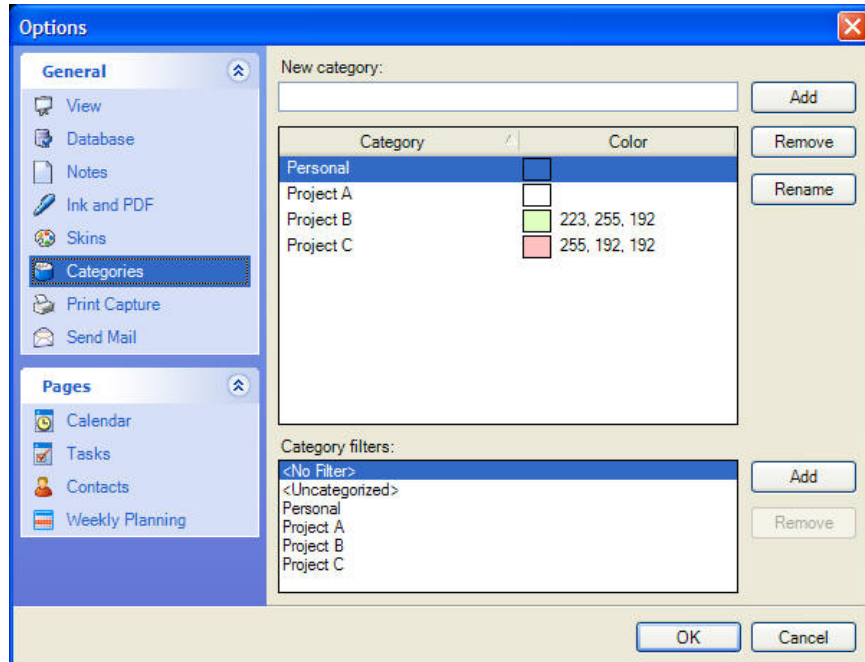
The skin name is added to the **Skin Name:** list, ready for you to use.

Create and Modify Categories

The Categories page allows you to create and modify FranklinCovey categories.

1. To open the Categories feature, choose **Tools | Options** from the menu bar.
2. Select the **Categories** option from the list.

The **Categories Configuration** window appears.



Select the desired options and click **OK** to close Options and save your changes.

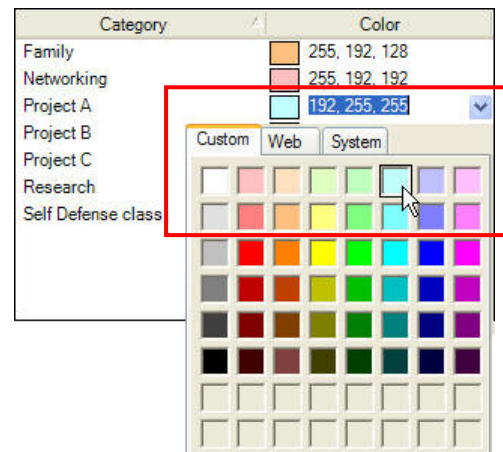
New Category

To create a new category, enter the category name in the **New category** field and click **Add**.

Category Colors

For your convenience, you may select a color to associate with each category. These colors will be used in Appointments, and Contacts to make organizing information more efficient.

When you move your mouse over the color area, you will notice a down arrow button on the far right. Clicking this arrow will open a color palette, from which you may select your choice of color for the category. Clicking in one of the empty boxes at the bottom of the color palette opens the Define Custom Colors window, from which you may make additional color selections.

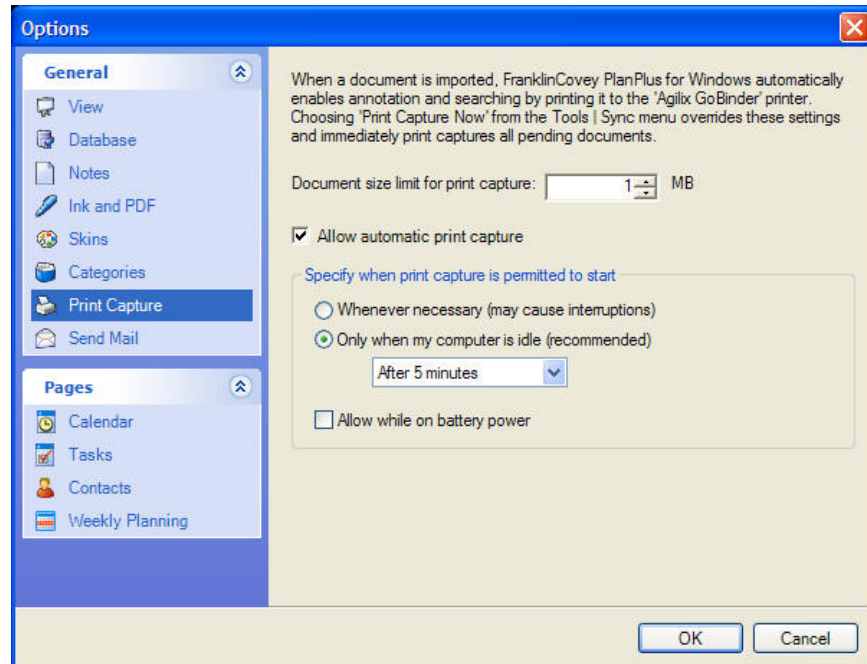


Remove Categories

To remove a category that is no longer in use, select it from the list and click **Remove**. You will be prompted to confirm the deletion.

Print Capture

The Print Capture page allows you to define the maximum document size when you use the PlanPlus for Windows printer or import a file. Other options on this page are reserved for future use.

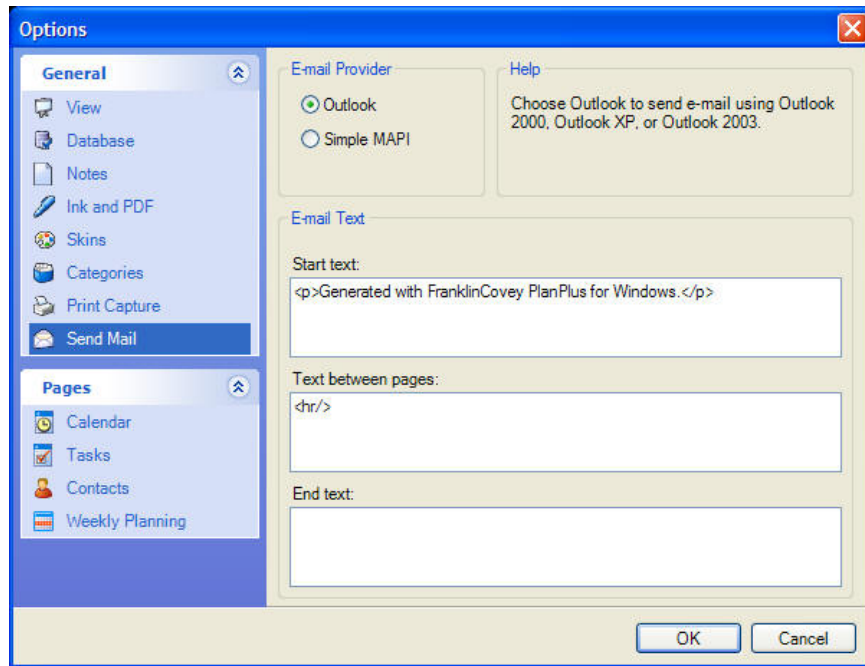


Send Mail

The Send Mail page allows you to specify your e-mail provider type and your default messaging preferences.

1. To open the Send Mail feature, choose **Tools | Options** from the menu bar.
2. Select the **Send Mail** option from the list.

The **Send Mail Configuration** window appears.



Select the desired options and click **OK** to close Options and save your changes.

E-mail Provider

Select the type of e-mail application you use: Outlook or Simple MAPI (such as Outlook Express or Thunderbird)

E-mail Text

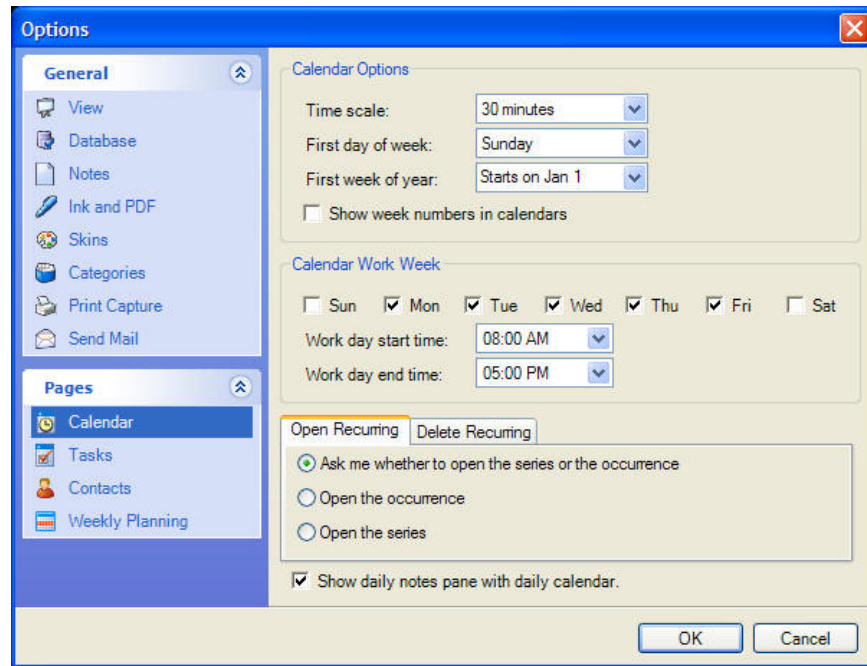
Enter any text that you wish automatically appended to the beginning or end of e-mail messages sent from PlanPlus for Windows, or text that you wish to have placed between pages of a PlanPlus for Windows e-mail message (such as when sending Notes to a colleague). You may use simple HTML formatting, if desired.

Customize Your Calendar Settings

The Calendar page allows you to specify details about your calendar and how you want certain calendar actions to function.

1. To open the Calendar feature, choose **Tools | Options** from the menu bar.
2. Select the **Calendar** option from the list.

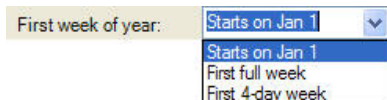
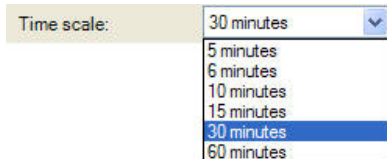
The **Calendar Configuration** window appears.



Select the desired options and click **OK** to close Options and save your changes.

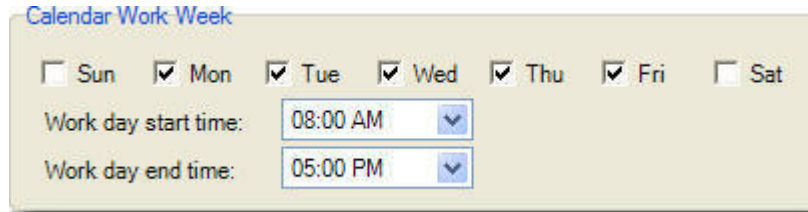
Calendar Options

- **Time scale** – By default, the calendar displays time in 30-minute increments. You may adjust this to suit your preferences by selecting another time scale from the drop-down box.
- **First day of week** – By default, the calendar displays Sunday as the first day of the calendar week. You may select any other day from the drop-down list that suits your schedule.
- **First week of year** – By default, the calendar displays the week of January 1 as the first week of the year. You may adjust this to suit your preferences by selecting another week from the options in the drop-down list.
- You may also choose to show the week numbers in your calendars.



Calendar Work Week

By default, the calendar work week has been defined as Monday – Friday, 8:00 am – 5:00 p.m. You may modify this as desired, to suit your work week and schedule by altering the selections in this area.



The screenshot shows a dialog box titled "Calendar Work Week". It contains a row of checkboxes for the days of the week: Sun (unchecked), Mon (checked), Tue (checked), Wed (checked), Thu (checked), Fri (checked), and Sat (unchecked). Below this row are two dropdown menus: "Work day start time" set to "08:00 AM" and "Work day end time" set to "05:00 PM".

Open/Delete Recurring

By default, whenever you open or delete a recurring item, you are asked if you want to open/delete only the specific instance or the entire series. On these tabs, you may specify your preferences for treating recurring items.

Show or Hide Daily Notes with Calendar

Finally, you may select to show or hide the daily notes panel when the calendar is displayed by selecting/deselecting the checkbox.



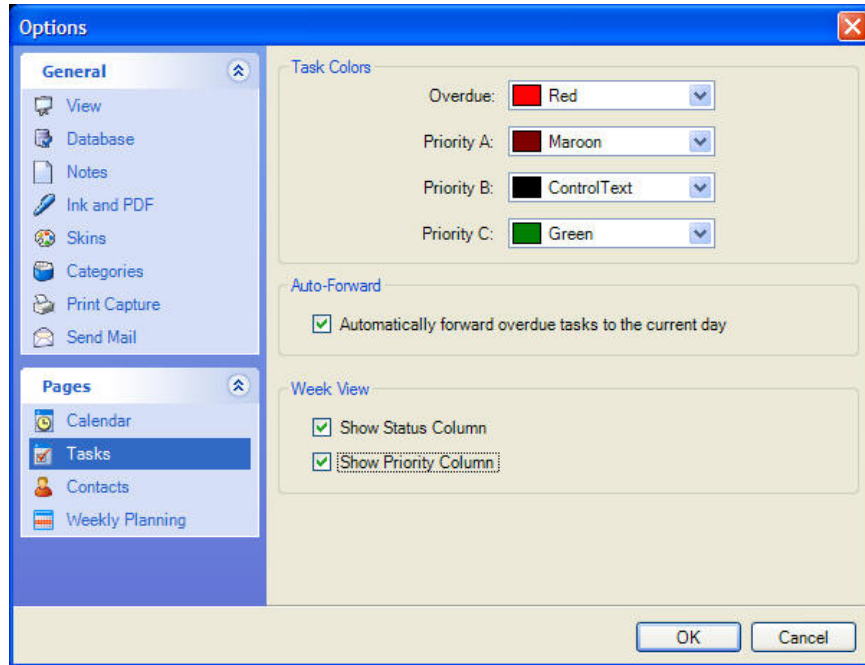
The screenshot shows a single checkbox that is checked, with the text "Show daily notes pane with daily calendar." next to it.

Tasks

The Tasks page allows you to specify how you want PlanPlus to handle Tasks.

1. To open the Tasks feature, choose **Tools | Options** from the menu bar.
2. Select the **Tasks** option from the list.

The **Task Configuration** window appears.



Select the desired options and click **OK** to close Options and save your changes.

Task Colors

By default, PlanPlus prints Overdue tasks in **Red**, High Priority tasks in **Maroon**, Normal Priority tasks in Black, and Low Priority tasks in Green. You may adjust these font colors as desired.

Auto Forwarding

Selecting this option instructs PlanPlus to automatically forward any overdue tasks to the current day.

Week View

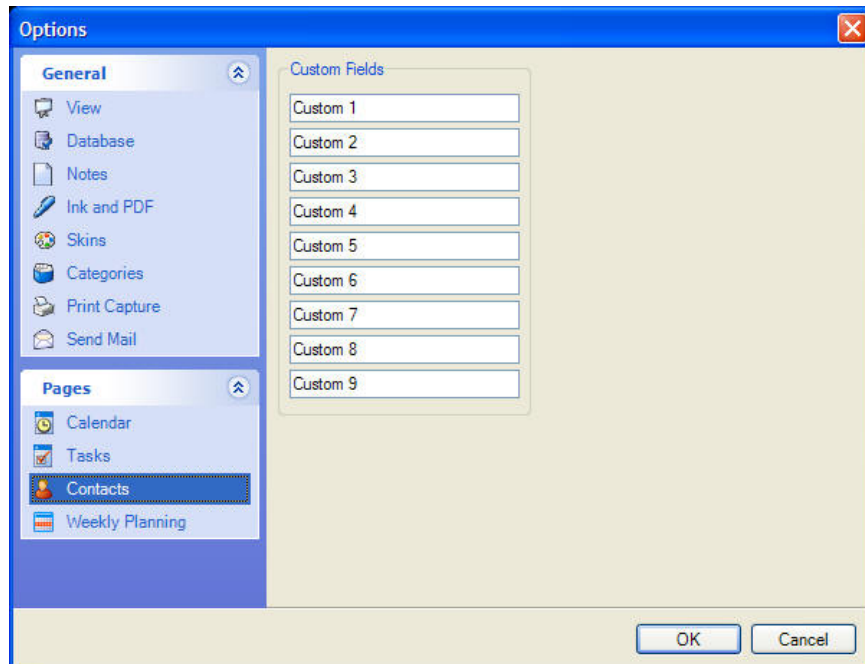
These options allow you to choose whether or not you wish to view the Status Column (in progress, delegated, completed, etc.) and/or the Priority Column (A1, A2, B1, B2, etc.) in the Calendar Week view.

Contacts

The Contacts page allows you to define custom fields for your Contacts.

1. To open the Contacts feature, choose **Tools | Options** from the menu bar.
2. Select the **Skins** option from the list.

The **Contacts Custom Fields Configuration** window appears.



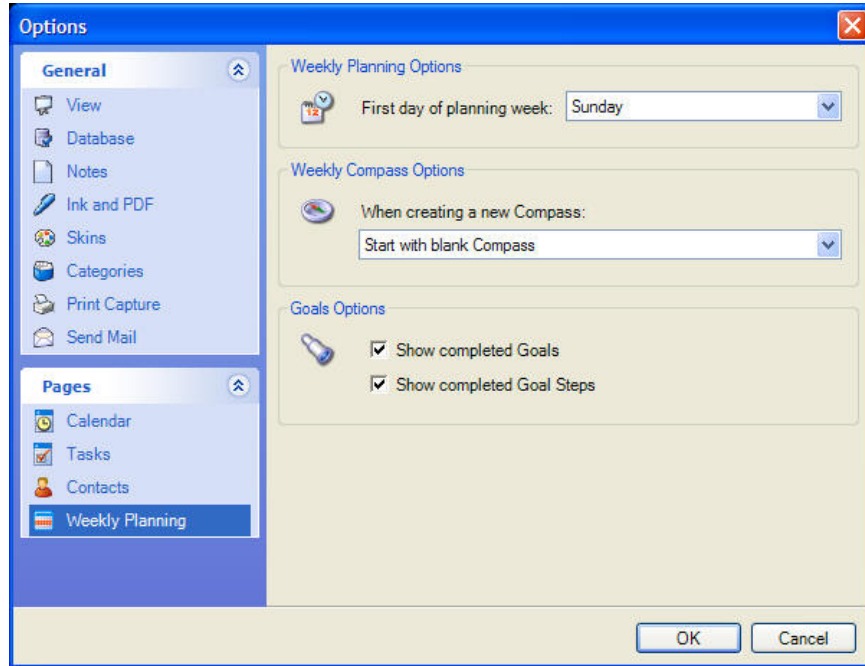
Modify the desired fields and click **OK** to close Options and save your changes.

Custom Fields

The Contacts Information View provides a number of predefined fields for organizing contact information. However, if you find that you need a field that has not been provided, you can customize the fields listed in this window for your own use.

Weekly Planning Options

The Weekly Planning page allows you to set the first day of the week, choose from among three weekly compass options and set goals options.



Select the desired options and click OK to close Options and save your changes.

Weekly Compass Options

Weekly compass options are similar to auto-forwarding tasks. You can choose to carry over your Roles to from week to week, as well as your Big Rocks (important tasks) from the previous week.

Goals Options

You can also choose to show completed Goals and Goal Steps (by checking the boxes by each of these options) or to not show the completed Goals and Goal Steps (by deselecting these options).

Create a Custom View

In the default view, the appearance of your PlanPlus screen depends entirely on the tab that you select. For example, if you select the Calendar tab, your Task List and Appointment Schedule will be displayed in the main window pane. If you then select the Notes tab, the Calendar tab will remain listed in the History Navigation Bar, and your list of Notes will appear in the main window pane.

However, if you wish, you can make a variety of modifications that will customize your PlanPlus display to the way you prefer to work and view information.

Modify Tab Appearance

Place your cursor over a tab and right-click. This will open the Tabs pop-up menu, allowing you to make the following selections:

- **Insert Tab** – Add a new project tab or note tab.
- **Rename** – Rename the selected note tab.
- **Color** – Choose a different color for the selected note tab.
- **Delete** – Delete the selected note tab.
- **Hide** – Hide the selected note tab.
- **Show Hidden** – Display note tabs that have previously been hidden.
- **Locked** – Indicates that the selected note tab is locked.
- **Tabs on Top/Right/Bottom/Left** – Allows you to position the note tabs on the desired edge of the PlanPlus window.

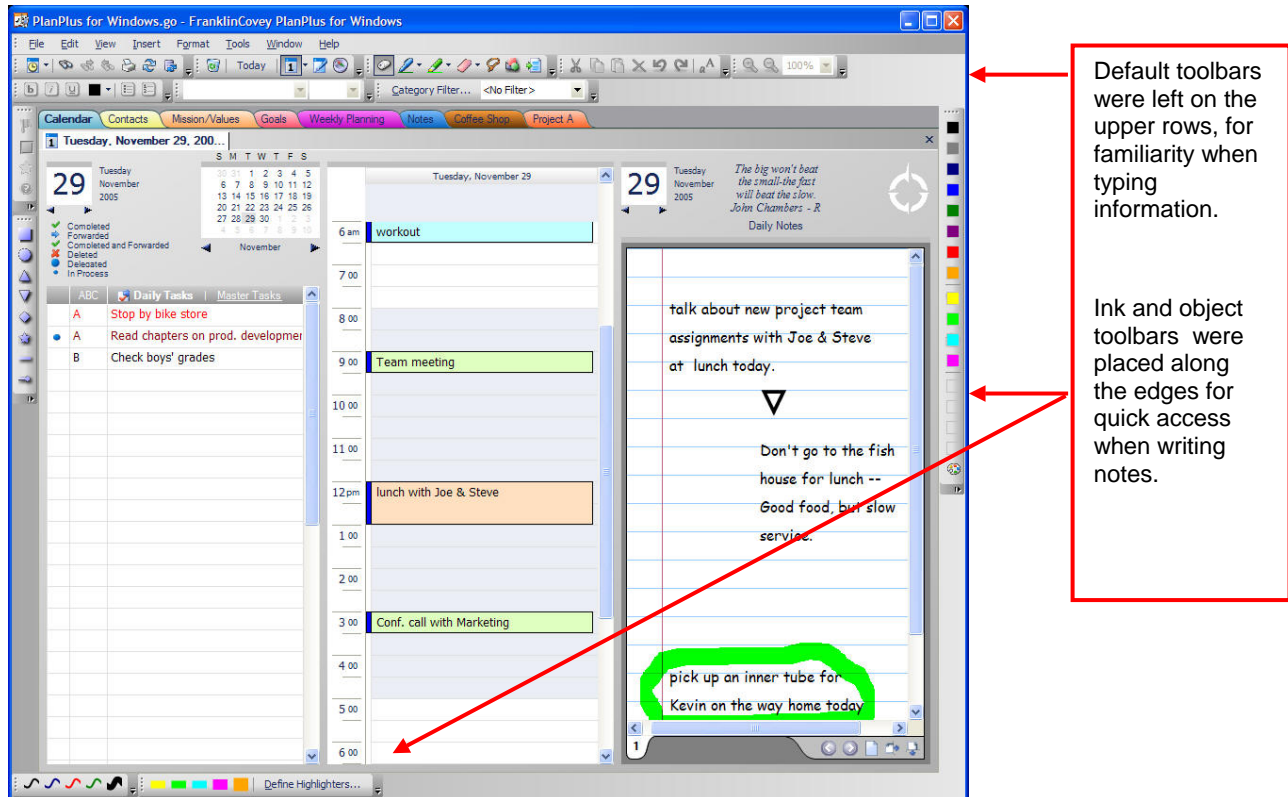
The available options may vary, depending on the tab you have selected. Options that are unavailable will be grayed out.

Modify Toolbars

Customize the toolbars by hiding buttons you seldom use, or displaying those that you frequently need.

You can also drag the toolbars to any edge of the PlanPlus window, or rearrange their order as desired.

In this customized layout, we placed many of the toolbars around the edges of the PlanPlus window.



Adjust the Layout of Your Screen

1. Open the tabs that you want to view.

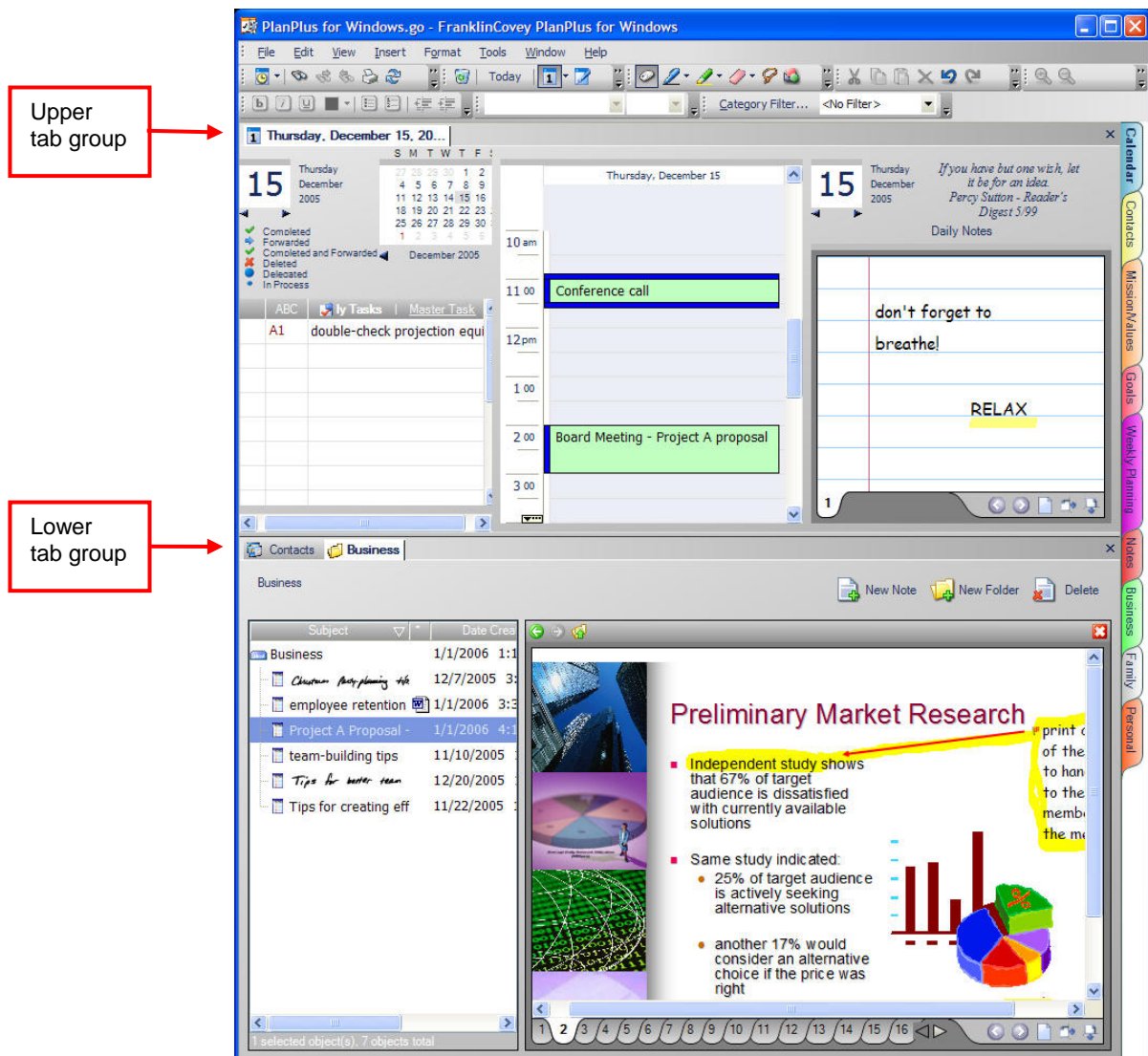
For example, you might choose the Calendar, and the tab for a specific project.

Entries for the Calendar and the project tab will appear in the Navigation Bar.

2. Select one of the entries (for example, the project tab) and drag it onto the active window.

A pop-up will appear, asking if you want to create a **New Horizontal Tab Group** or a **New Vertical Tab Group**. Select the desired option.

PlanPlus will create a new tab group, and place the module in it. In the following example, we have created multiple Horizontal Tab Groups.



As you open additional items, they will display, by default, in the original tab group, however, you may move them to other groups as desired. You may also move items between any new tab groups you create, or even back to the original tab group. If you wish to completely remove a tab group, you must first close or move the items it contains.

If you are working with multiple tab groups, and close PlanPlus, the next time you open PlanPlus, it will remember your tab group layout and open using that format.

With a little experimentation, you can find the PlanPlus page layout that best suits your working style.

Manage PlanPlus

As a safety precaution, PlanPlus™ v.5 for Windows® XP provides easy-to-use options for backing up and restoring your data. These features protect your critical notes and project information.

Automatic Backups

PlanPlus automatically creates a backup of your database when you close the PlanPlus application. Frequency of the backup is user defined.

Note: If you suspend your Tablet PC rather than shut it down, you will need to close PlanPlus and restart it to back up your databases.

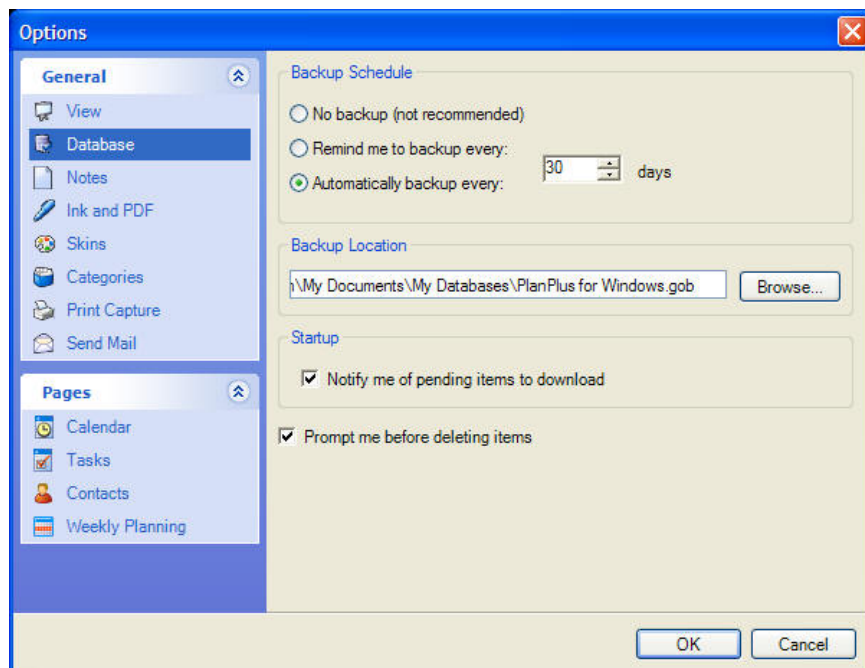
Backup files are stored in the My Documents directory in the My Databases folder, as PlanPlus.gob.

To Specify Backup Settings

You can specify your backup settings through Options.

1. From the menu, select **Tools | Options**.
2. Select the **Database** option from the list.

The **Database Backup Configuration** window appears.



Select the desired options and click **OK** to close Options and save your changes.

Setting a Backup Schedule

You may select

- **No backup** (not recommended)
- **Scheduled backup reminders at intervals you specify**
- **Scheduled automatic backups at intervals you specify** (30 days is the default setting)

Selecting a Backup Location

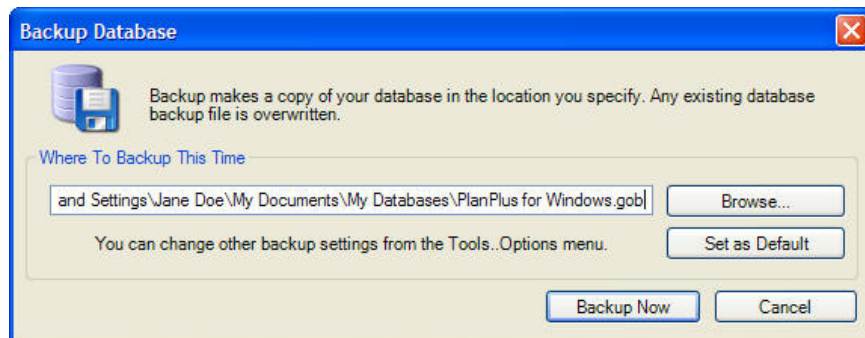
If you wish to change the location of your backup file, click Browse, and navigate to the desired location, such as another folder on your hard drive, a flash drive, or even a network drive.

You may also select to be notified of pending items available for download, and to be prompted before deleting items.

To Create a Backup

1. From the menu, select **File | Backup**.

PlanPlus displays the Backup Database window:



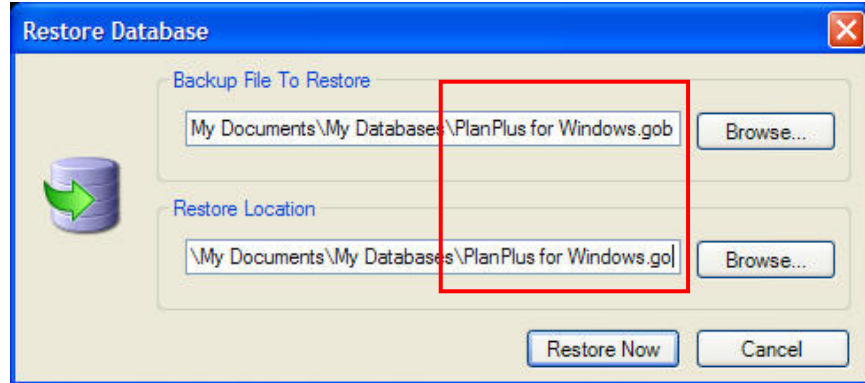
2. Accept the Where to Backup file location, or Browse to select a different location, such as another folder on your hard drive, a flash drive, or even a network drive.
3. Click **OK** to save your settings and close the dialog, or **Backup Now** to perform a backup now.

Note: Anytime you load a different PlanPlus database, PlanPlus will automatically perform a backup of the current database before loading the new database.

To Restore Your PlanPlus Files

1. From the menu, select **File | Restore**.

PlanPlus displays the Restore Database window:

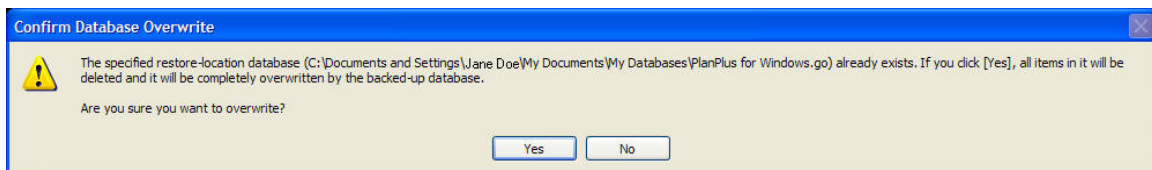


The **Backup File to Restore** should be set to the backup file by default. If you need to change it, **Browse** to locate the backup file (by default, this file is named PlanPlus for Windows.gob, although you may have chosen a different name for it).

You will need to define the **File Location to Restore**. **Browse** to find the database file you wish to replace (by default, this file is named PlanPlus for Windows.go, although you may have chosen a different name for it), or enter a new filename of your choice.

2. Verify the information is correct, and click **Restore Now** to continue.

If you have chosen to replace the current database with the new database, you will be prompted to confirm the database overwrite.



3. Click **Yes** to continue.
4. The database will be restored, and PlanPlus will automatically reload and refresh the screen to show the new database content.

Using PlanPlus for Windows Data Files

PlanPlus data files are stored in the **My Documents | My Databases** folder on your hard drive. PlanPlus creates the following types of files:

- **.go files** – contain the entire database. .go files can be useful for archiving an entire database, giving you another option beyond the backup feature.
- **.gob files** – used to backup and restore your database.
- **.go files** – not stored in this folder by default, but may be stored in this or any other folder on your computer. .go files are designed for sharing with others, or to archive information, such as a project that has been completed and want to remove from your active PlanPlus for Windows database. (For more information about using .go files, see the sections on *Exporting and Sharing Notes via E-mail* in previous chapters)

Opening a PlanPlus Database

1. From the menu bar, select **File | Open | PlanPlus Database**.
2. Navigate to the directory containing your file, select the file, and choose **Open**.
3. PlanPlus will automatically reload and refresh the screen using the new database content.

Note: If you close PlanPlus while using the database you just opened, the next time you launch FranklinCovey, it will launch using this database.

Creating a New PlanPlus Data File

1. From the menu bar, select **File | PlanPlus Database**.
2. Enter the file name and location for the new data file and choose **Save**.
PlanPlus will automatically reload and refresh the screen using the new database.

Understanding PlanPlus Security

PlanPlus allows you to use passwords to protect your information. If you set a password for your PlanPlus database, you will be required to enter that password each time you launch PlanPlus and use that database.

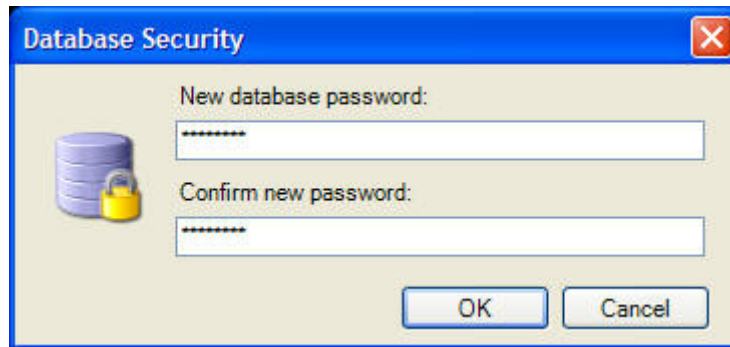
WARNING: *If you forget your password, there is no method within PlanPlus™ v.5 for Windows® XP to recover it.*

If you forget your password and wish to continue working in PlanPlus, you will have to create a new database and repopulate it from scratch.

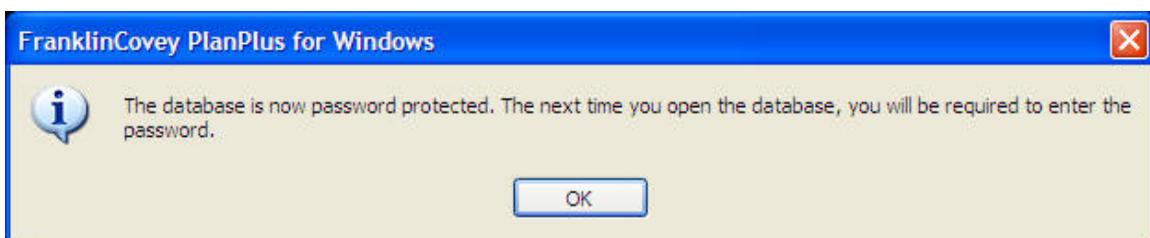
To Set a PlanPlus for Windows Password

Use the following steps to set a password for opening a PlanPlus database.

1. From the PlanPlus menu, select **File | Security**.
2. The **Database Security** window will appear.



3. Enter the **Password** for this database.
4. Enter your **Password** a second time (in the second field) to confirm.
5. Click **OK**.



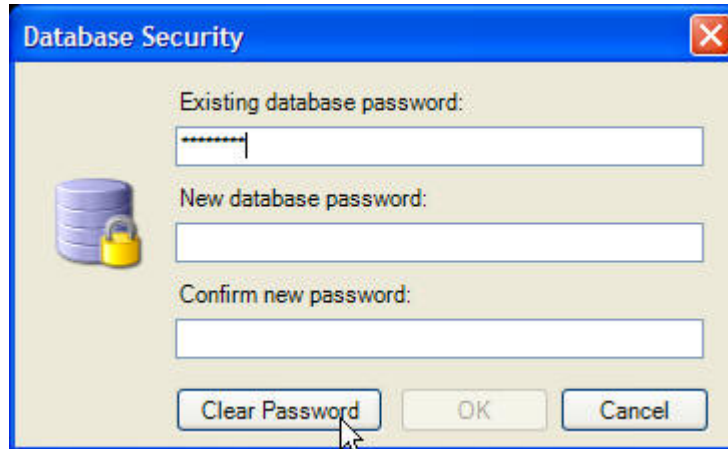
The following message will be displayed:

The next time you start PlanPlus, you will be prompted for the password.

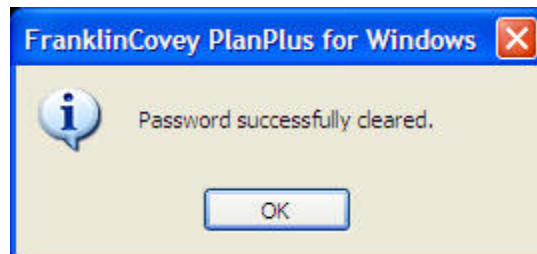
To Change or Remove a PlanPlus for Windows Password

The steps for changing or removing a password are very similar to those for initially creating one.

1. From the PlanPlus menu, select **File | Security**.
2. The **Database Security** window will appear.



3. Enter the **Password** for this database.
4. If you wish **to change the password**, enter the new password in the fields provided and click **OK**. A confirmation message will appear, letting you know that your password has been changed.
5. If you wish **to remove the password**, leave the new password fields blank and click the **Clear Password** button. A confirmation message will appear, letting you know that the password has been removed.



When you open the database after this, you will not need to enter a password.

Support Information

PlanPlus Updates

To manually check to see if there is a new update to PlanPlus, select **Help | Check for Updates**. PlanPlus will check with the update server to see if there is a new version. If there is, you will have an option to install the latest update.

Technical Support Options

If you encounter any problem with your copy of PlanPlus, the following resources are available to you:

Online Support

From the PlanPlus menu, select **Help | Contact Support**. This will connect you to the PlanPlus online support forum. Web support and live chat support are also available online. Go to <http://www.franklincovey.com/support>.

E-mail Support

E-mail support is available at Support@FranklinCovey.com.

Submit Feedback

To submit feedback, from the PlanPlus menu, select **Help | Product Suggestions**. This will connect you to an online form where you may submit feedback or suggestions for future versions of PlanPlus.

Websites

For more information about PlanPlus please visit our website at: <http://franklincovey.com/planplus/xp>.

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