Effexis Software

Achieve Planner User Manual

Getting Started with Achieve Planner

Table of Contents

1 Overview

Achieve Planner (AP for short) is a powerful time management and goal setting software system that helps you get organized, plan your projects, work more effectively, and make better use of your time.

This manual provides the basics that you need to get started quickly, and describes several best practices to help you get the most out of Achieve Planner.

The primary focus of this manual is on the time management aspects of the software: keeping track of what you need to do, creating a schedule, and using AP to help you get your work done.

Section 10 in the manual describes some of the main goal setting features in Achieve Planner.

The Achieve Planner Training center contains the latest version of this manual, plus other tutorials to help you get the most out of Achieve Planner.

http://www.effexis.com/achieve/training/

You can learn more about specific features and concepts related to Achieve Planner by visiting the Goals to Action blog...

www.goalstoaction.com/blog/category/achieve-planner/

You can find out more about the time management concepts, principles, and ideas behind AP by reading the articles in www.TimeThoughts.com.

This is not a comprehensive manual; it is designed to help you get up to speed quickly on the most commonly used features of Achieve Planner.

NOTE: This manual describes functionality that is available through the Achieve Productivity Suite edition of Achieve Planner. Other editions may not contain all the features described in this manual. Please refer to the feature comparison chart for the features that are available in each edition:

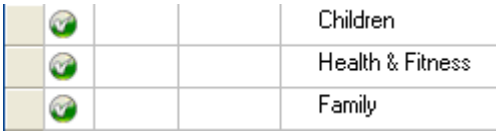
http://www.effexis.com/achieve/feature-comparison.htm

1.1 Achieve Planner Concepts

This section describes the basic time management concepts and terminology used in Achieve Planner.

Result Area ( ) – A result area represents a life dimension or role in your life. Examples include Health & Fitness, Finance, Romance, Children, Personal Development, Career, Work, etc.

Here are some examples of result areas in the master outline view.



Project ( ) – A project represents any high-level outcome that you want to track, whether it includes a single or multiple steps. Projects give you an overview of everything that you are working on at any given time.

Projects can be complex multi-step sequence of tasks, like developing a product, organizing an event or preparing a presentation, but they can also be something as simple as paying a bill, responding to an e-mail or taking the dog to the vet.

In general, if the item is an outcome you should enter it as a project (read this online article for a more detailed description of the difference between projects and tasks.)

Since the project list is hierarchical, each project can include sub-projects using as many nested levels as you need.

NS	**A1**	**All Around Routers, Inc.**
NS	A1	T1 Config Guide
NS	A2	E1 Config Guide
NS	**A2**	**Irish Mail, Inc.**
NS	A1	Quick Start Guide
NS	A2	User Manual
NS	A3	Help File
NS	**A3**	**Neighborhood Associates**
NS	A1	August Newsletter

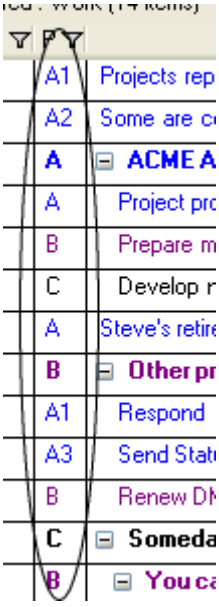
Task ( ) – Tasks are the action steps associated with a project.

Tasks are usually things like "Call Fred," "Read the file," or "Write outline for memo."

Tasks can have a hierarchical structure with tasks, sub-tasks and sub-sub-tasks. Although you can have Tasks directly under result areas, Achieve Planner works better if tasks are part of projects.

NS	A3	**Neighborhood Associates**	
NS	A1	**August Newsletter**	
NS	A1	**Inform contributors and advertisers of submission deadline**	
NS	A1	Review past contributors and advertisers list	
NS	A2	Prepare email and send	
NS	A3	Prepare postcard and send	
NS	A2	Follow up with contributors and advertisers	
NS	A3	Provide copy to advertisers for their approval	
NS	A4	Edit all documents and copy	

ABCD Priorities – Achieve Planner uses ABCD priorities throughout the software to help you categorize and rank various items based on their relative priority. Prioritization allows you to focus your time & energy on things that are important to you.

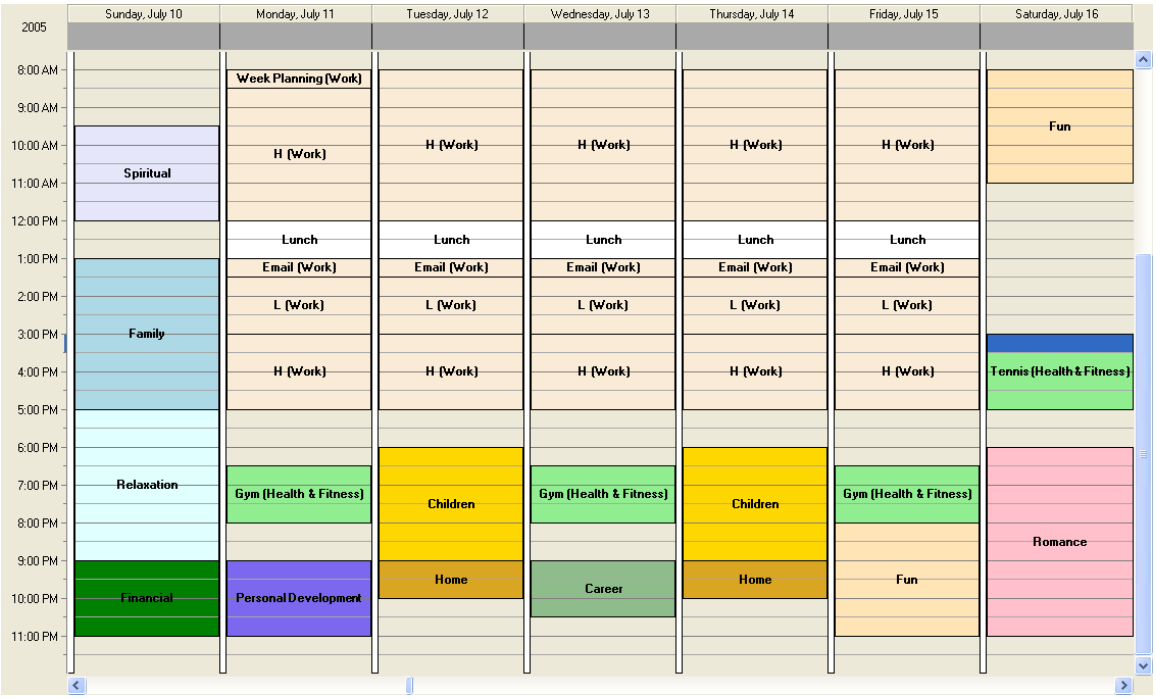


Achieve Planner uses priorities to sort your projects and tasks at each level in the hierarchy with respect to its siblings.

Priorities consist of a priority range (A, B, C, D) and an optional rank (1-2499.) Achieve planner ranks items with a priority range but no rank, e.g. "A" as opposed to "A1" or "A256," as though its priority is "A2500" and puts it at the bottom of the A's.

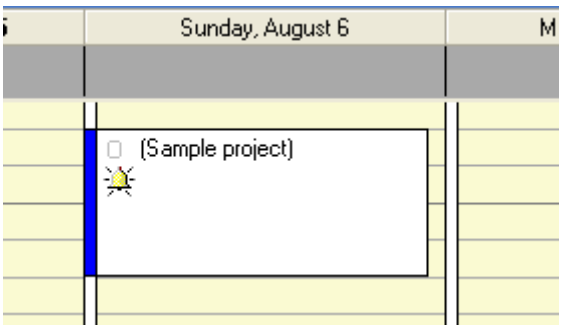
Time Chart – A time chart allows you to designate times in your weekly schedule for different types of activities like health, finances, or work. The weekly schedule displays time chart areas in the background behind your active appointments. Time charts serve as visual reminders to help you give focus and balance to your week.

Here is an example of a time chart shown in the background of the weekly schedule (without any appointments, which would appear on top of the time chart areas):

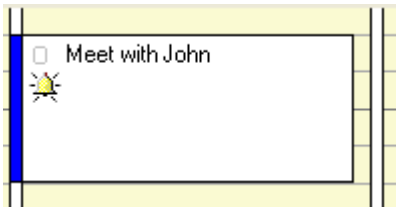


Project Block – A project block is a time block that you've committed to a specific project. You can think of it as an appointment with yourself to get your work done. Achieve Planner provides several tools to help you work with project blocks in your weekly schedule.

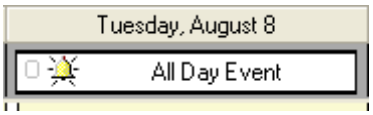
This is what a project block looks like in the weekly schedule. In this case, the name of the project is "Sample Project."



Appointment – An appointment represents time in your weekly schedule that you have allocated for a specific purpose. Examples include meetings, project blocks, and doctor ṡ visits.



All-Day Event – An all-day event is a special type of appointment that occurs on a given date, but not at a specific time.



Task Chooser – The task chooser (available via Go-> Task Chooser command) displays a list of your top-tasks across all your projects using a combination of priority and other factors to sort the items.

You can use various views to filter the tasks that you want to display in various ways.

For sorting tasks in the Task Chooser, sub-item priority ranks are relative to the parent. If you change the parent priority or rank, the Task Chooser automatically adjusts the importance of all its sub-items relative to other items in the list.

At every level in the hierarchy, when a parent becomes more important (higher priority), the children become more important as well. When a parent becomes less important (lower priority) its children are also considered less important.

Bonus ranking in the task chooser:

- Focus - Achieve Planner adds a priority "bonus" for any project or task with the "Focus" field checked.
- Deadline - Achieve Planner adds a priority bonus to items as their deadline approaches or becomes overdue.
- Start & End Time - Achieve Planner can also add a priority bonus as start and end dates approach.

These factors are configurable via the Task Chooser settings.

To learn more about the Task Chooser, please see chapter 8.

Next Action List – Achieve Planner supports the concept of a "Next Action List" in both the Outline and Task Chooser tabs. This is useful if you want to focus on just the actions that you can take right now across all your different projects.

Please see Tutorial 2.6 in chapter 2 for a detailed description and examples of how to use the Next Action list.

Getting Started

We suggest that you take your existing to do list and separate the outcomes from the actions required to make the outcomes occur. The main outcomes become your Projects and possibly sub-projects.

Then, prioritize the Projects first.

Prioritize any sub-projects after you have the structure and the Project prioritized.

Finally, add the tasks.

You can add any deadlines, start dates and end dates as you go or at the end.

Deciding Between Making an Item a Sub-project or a Task

In general, if an item:

1. Represents an outcome or result in and of itself

OR

2. It is something that you work on simultaneously with other projects/ subprojects.

It's typically better to make it a sub-project and not a task. You can always change it into a task (or convert a task into a sub-project) later if necessary.

Storing Detailed Information in Achieve Planner

When using Achieve Planner, you may sometimes feel like there is too much information to record about your projects and tasks. For example, the Project Information form allows you to record the purpose, objectives, vision, risks, issues, and other specific details of your project.

While it can be very useful to think about and capture these details when planning a large or complex project, it could be overkill for many smaller projects, where just the purpose and objectives is usually more than sufficient.

Just because you can record something in AP, doesn't necessarily mean that you need to. The key is whether adding the details is valuable or not. You can use the various fields and tabs as reminders so you can at least think about these things and consider whether capturing the details would be useful. If it is not useful, don't record it.

In the various grid views, you can easily customize which columns each view displays so you only see the information that you need and actually use.

1.2 Achieve Planner Main Tabs

This section describes the main tabs available in the Achieve Planner application. You can access all the tabs using the Go menu. If a tab is not already displayed, the Go menu will display it and navigate to it, otherwise it will just become the active tab.

Outline – The Outline tab provides a bird's eye view of the entire outline including Result Areas, Dreams, Goals, Projects, and Tasks.

Result Areas – The Result Areas tab displays a list of all your result areas sorted by priority. This tab gives you a quick overview of all the result areas you are tracking.

Projects – The Projects tab displays a list of all your projects sorted by priority. You can filter the list to only show projects for a particular result area, or grouped by all your result areas.

The Projects tab can also display goals and projects together.

Tasks – The Tasks tab displays a list of your tasks sorted by priority. You can focus on tasks for a specific project or on all your tasks across all your projects.

Weekly Schedule – The Weekly Schedule tab provides a multi-day calendar view where you can schedule project blocks, appointments, and all-day events.

Task Chooser – The Task Chooser tab presents a filtered list of your tasks across all your projects. The task chooser sorts this list according to an algorithm that gives each item a score based on several factors including its priority, deadline, and status.

Notes – The Notes tab provides a hierarchical outline where you can keep track of notes and general purpose information. Achieve Planner notes provide direct support for textual information only. While storing graphics and images is possible, doing so can cause performance degradation.

Contacts – The Contacts tab displays a list of your contacts using various views.

File Organizer – The File Organizer tab displays a list of records representing paper-based documents, notes, and other files. You can also use it to keep track of other items like your CD collection or books.

Resources – The Resources tab displays a list of all the resources that you can assign to your projects and tasks.

Time Charts – The Time Charts tab displays a list of all the time charts that you have defined.

Wish List – The Wish List tab displays a list of your wishes for a particular result area, or grouped across all result areas.

Goals – The Goals tab displays a list of your goals for a particular result area, or grouped across all your result areas. You can also group your goals based on their parent dream.

Metrics – The Metrics tab displays a list of the metrics that you have defined, either as stand alone, or as part of an existing dream/goal.

1.2.1 Working with Tabs

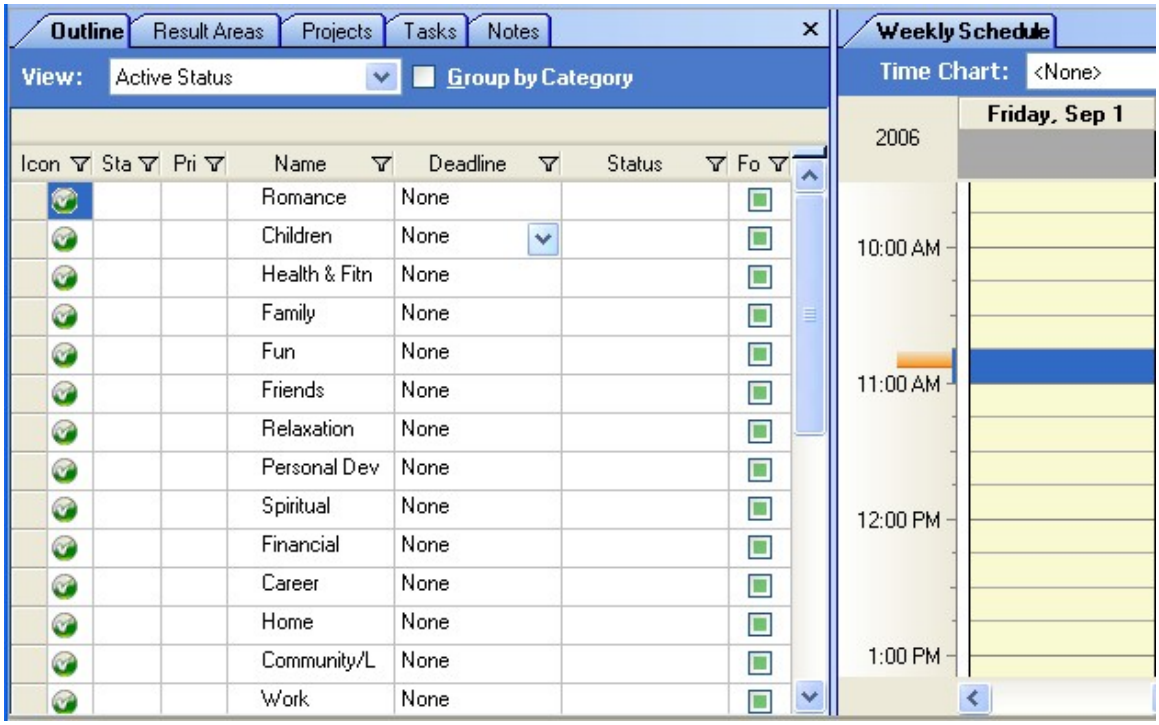
Achieve Planner uses a tabbed user interface where you can display and interact with multiple main tabs simultaneously.

You can rearrange the tabs using drag and drop. To close the active tab, use the "x" button at the far right of the tab display.

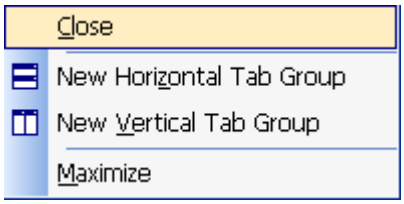
You can also close a tab using the Close command of the context menu when you right-click on the tab.

1.2.2 Splitting the Views

Achieve Planner supports split tab groups where you can have some tabs in a different tab group than other tabs.



You can accomplish this using the split commands available from the right-click context menu for the tabs.



The Maximize command will toggle the maximized state of the current tab group. When a tab group is maximized, the other tab groups are hidden and out of view.

You can also move tabs from one group to another using drag and drop.

1.2.3 Performance Issues with Multiple Tabs

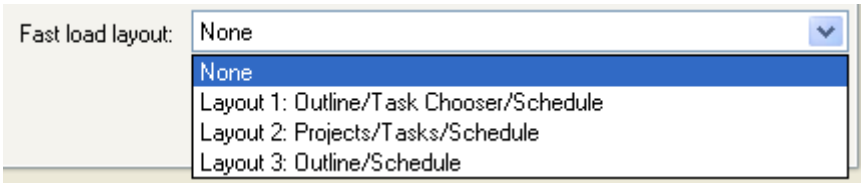
By default, Achieve Planner attempts to restore your layout of tabs and tab groups when you open a data file.

Depending on your system resources, having a large number of tabs open simultaneously could significantly increase the load time for a data file. Normal load time for Achieve Planner is between 8 and 15 seconds, even with multiple open tabs.

Some users have reported load times of 30+ seconds when restoring more than a few open tabs, and a drop to about 13 seconds with only one tab.

If you are experiencing long load times with multiple open tabs, you can use the following suggestions to improve load time:

1) Use one of the "Fast Load Layout" options available in the Display tab of the Tools->Options dialog.



Selecting None will restore your exact layout including all open tabs.

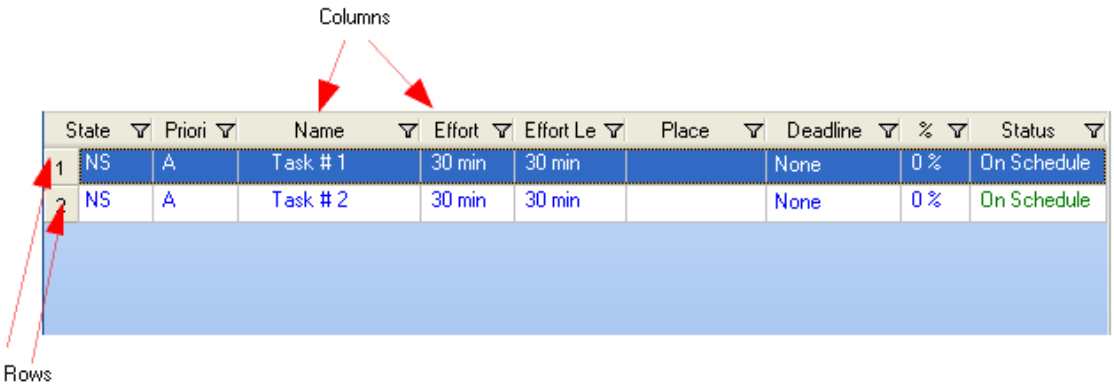
Selecting one of the other options will only restore the specified tabs (and only if they were open when the file was saved) and could improve load time.

2) Close all Tab windows before saving the data file and closing AP. You can close all open tabs using the Window->Close All Windows command.

1.3 Terminology

This section describes some of the terminology used in this manual and in the Achieve Planner documentation.

Grid – A grid refers to the spreadsheet-like interface used throughout Achieve Planner to display information using rows and columns.



Parent/Child – Achieve Planner supports hierarchical (tree-like) outlines where items can have sub-items associated with them. For example, a task can have sub-tasks. The main task is called the parent, and the sub-tasks are called the children.

	State	Priori	Name	Effort
1	**NS**	**A**	**Parent Task**	**30 min**
2	NS	A1	Child Task	0 h
3	NS	A	Task # 2	30 min

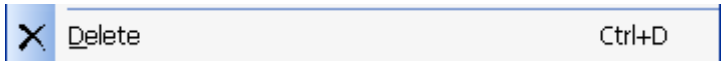
Menus - Achieve Planner uses menus extensively. This manual uses the -> symbol to represent following a menu and selecting a sub-item of that menu.

For example, Go->Outline represents selecting the Outline menu item of the Go menu.

1.4 Keyboard Shortcuts

Achieve Planner supports keyboard shortcuts associated with menu items and toolbar buttons. There are two types of shortcuts:

Regular shortcuts consist of a single key press combination. For example, the Edit->Delete command has the shortcut of Ctrl+D. This means you have to press the Ctrl key and, while holding it down, press the D key.



Another example is Ctrl+Alt+O for the Tools->Options command, where you need to press and hold the Ctrl and Alt keys and then press the O key.

Chord shortcuts consist of two consecutive set of key press combinations. For example, the Go->Outline command has the shortcut (Ctrl+G, L).

This means you have to press the Ctrl key and, while holding it down, press the G key. This is the first part of the chord. You will see in the status bar the following:

This means that Achieve Planner is waiting for you to enter the second part of the chord. In this case, you need to press the L key (without holding down the Ctrl or any other key) to complete the shortcut.

Some chord shortcuts require you to press a modified key (Ctrl, Alt, or Shift) on each of the two key press combinations. For example, the Edit->Drop Copy as Child command:

This shortcut requires Ctrl+Alt+Shift+V on the first part of the chord, and Shift+C on the second part.

2 Tutorials

This section provides several tutorials that demonstrate how you can use Achieve Planner to get organized, track projects and tasks, and schedule your time.

In the following tutorials, "Jane Smith" is a contract writer. She has several customers, multiple projects, and many, many tasks. Jane has decided to use Achieve Planner to help her keep track of her projects and stay on schedule.

For the purpose of this tutorial, Jane will list her customers as projects. She will then add subprojects representing the actual projects she is working on for each of these customers, and add any relevant tasks to these projects.

In addition, she will customize views, create project templates for reuse, and create a time chart to help her allocate work and personal time.

You can follow along with these tutorials using a blank file, or you can see the result in the tutorials sample file.

This is an excerpt from the projects/tasks section later in the manual (section 3):

"Projects and tasks replace the traditional "to-do" list used in other time management systems. They are a central concept in Achieve Planner.

A project represents a high-level outcome or result in your to-do list that you are tracking or actively working on. It could be a complex multi-step project like developing a product, organizing an event, or preparing a presentation, but it could also be something simple like paying a bill, responding to an email, or checking out a website.

In general, any to-do item that is not part of something larger should be stored as a project. Doing this will help you think and plan your time in terms of outcomes rather than just actions, which is an important step in becoming more results oriented.

You can keep track of your projects in the Outline & Projects tabs, where you can create hierarchical (multi-level) lists of your projects using as many levels as you need.

Achieve Planner separates the concepts of projects and tasks allowing you to view and track your high-level outcomes (projects) independently from your low-level actions (tasks.)

Your projects list will be shorter, easier to manage, and it will give you an overview of all the outcomes you are working on. You can store all the details as tasks and have easy access to them when you need them.

A task is something that you need to do as part of a project. All your to-do's should either be projects or tasks of a project. It is quite common for simple projects not to have any tasks, and for complex projects to have tens, or even hundreds, of tasks.

You can keep track of the tasks for each project in the Tasks tab, where you can create hierarchical (multi-level) task lists using as many levels as you need.

If you need to, you can easily convert tasks into projects (promote), or convert projects into tasks (demote).

You can learn more about the difference between projects and tasks as they are used in Achieve Planner in the following online articles:

http://www.timethoughts.com/timemanagement/effective-todo-list.htm

Achieve Planner has the following restrictions regarding parent/child relationships between result areas, dreams, goals, projects, and tasks:

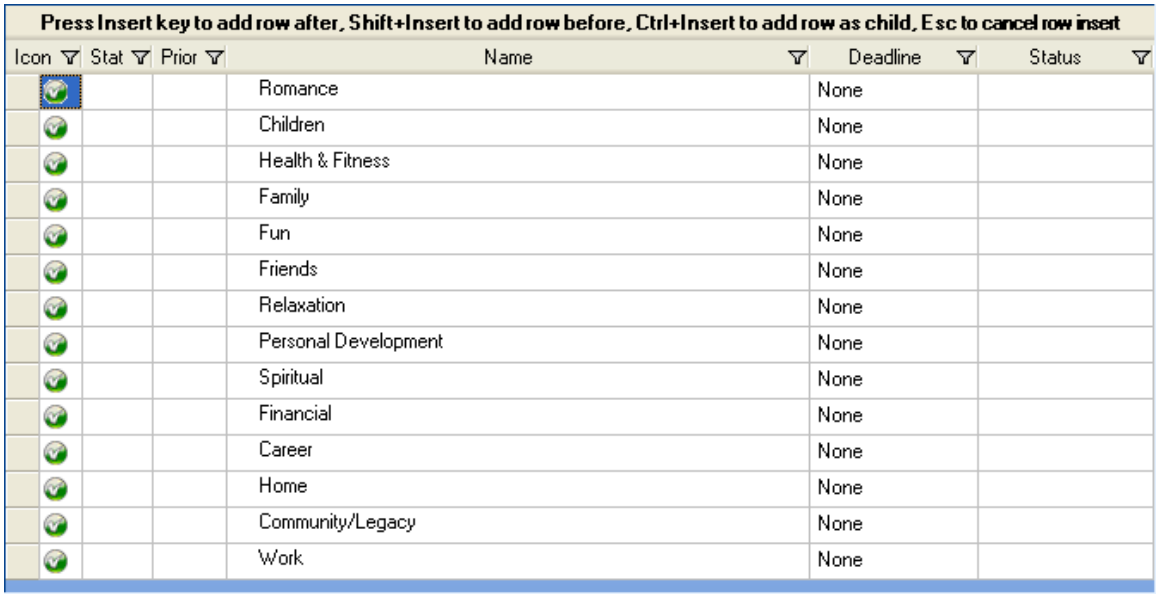
Record	Allowed Children
Result Area	Result Area, Dream, Goal, Project, Task
Dream or Goal	Dream, Goal, Project, Task
Project	Project, Task
Task	Task

Thus, a project can only have projects and tasks as children, and a task can only have other tasks as children.

2.1 Tutorial 1 - Capturing Projects in the Master Outline

The master outline provides an overview of all result areas (), projects (), and tasks (). In this tutorial, Jane uses the master outline to add three main projects and two subprojects to the Work result area. For more information on working with the master outline, see section 3.3.

This is what the grid of the master outline looks like when you first create a new data file.



Press Insert key to add row after, Shift+Insert to add row before, Ctrl+Insert to add row as child, Esc to cancel row insert

Icon	Stat	Prior	Name	Deadline	Status
			Romance	None	
			Children	None	
			Health & Fitness	None	
			Family	None	
			Fun	None	
			Friends	None	
			Relaxation	None	
			Personal Development	None	
			Spiritual	None	
			Financial	None	
			Career	None	
			Home	None	
			Community/Legacy	None	
			Work	None	

Complete the following steps to add three customers (Acme Routers, Inc.; Irish Mail, Inc.; and Neighborhood Associates).

1. Click the Outline tab in the main window. (If the tab is not visible, select the Go->Outline command.)

2. From the list of result area Names, highlight Work by clicking on the row header () at the start of the row.

3. Select Insert->Insert as Child command (or press Ctrl+INSERT keys). Alternatively, you can use the Insert as Child toolbar button.

4. Select Project from the "Select Child Type" dialog to indicate that you want to add a child project to the Work result area.

5. This will create a new Project row ( ) under the Work result area. Enter the name of the first customer, Acme Routers, Inc., and press ENTER key to add a new row at the same hierarchical level.

Note: Pressing ENTER after adding a row creates a new blank row at the same level immediately below it.

6. Enter the next customer, Irish Mail, Inc. and press ENTER.

7. Enter the name of the third customer, Neighborhood Associates.

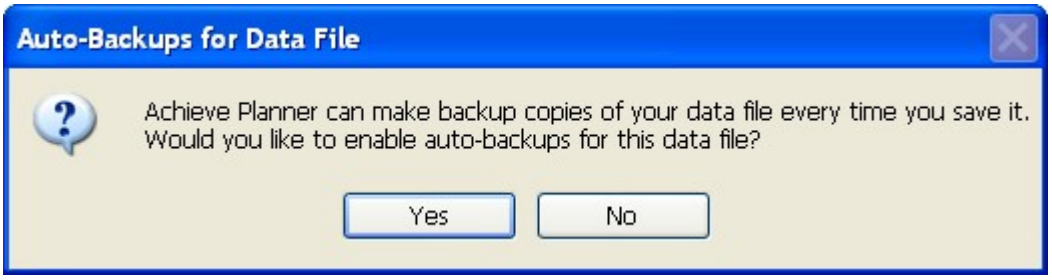
			Work
NS	A1		Acme Routers, Inc.
NS	A2		Irish Mail, Inc.
NS	A3		Neighborhood Associates

Note: If you pressed ENTER after Neighborhood Associates you will have a blank row. Remove the row by pressing the ESC key now, which will cancel the insert of the new row.

8. Save the file as Tutorial.ach using the File->Save command.

2.1.1 Making Automatic File Backups

The first time you save a data file, you will see the following dialog:



If you select Yes, Achieve Planner will make a backup copy of your data file every time you save it. The backups are stored in a subdirectory located in the same directory where you are storing your data file.

If you select No, Achieve Planner will not make backups of your data file.

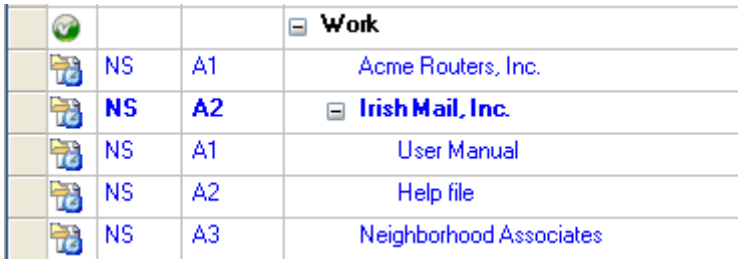
You can always change your auto-backup settings in the Options dialog (Tools->Options command.)

2.1.2 Adding Subprojects

Notice that the projects are assigned default priorities starting with A1, and increasing with each new row. You can learn more about priorities in section 4 (Using Priorities.)

Complete the following steps to add two subprojects (User Manual and Help File) to the Irish Mail project.

1. Highlight Irish Mail, Inc. project by clicking on the row header.
2. Select Insert->Insert as Child.
3. Select Project in the "Select Child Type" dialog to indicate that you want to add a child project to the Irish Mail, Inc. project
4. Type the project name, *User Manual,* for the new row.
5. Press ENTER for a new line at the same hierarchical level, and enter *Help File* as the name for the name project.
6. Save the file (File->Save)



			Work
	NS	A1	Acme Routers, Inc.
	NS	**A2**	**Irish Mail, Inc.**
	NS	A1	User Manual
	NS	A2	Help file
	NS	A3	Neighborhood Associates

2.2 Tutorial 2 - Adding Tasks to Projects

With the projects listed, it is time to add some tasks. There are several ways you can add Tasks to Projects. One way is very similar to the way you added the subprojects in Tutorial 1, except that you choose Task as the child type instead of Project.

For this exercise, you will focus on the User Manual subproject of Irish Mail, using the Tasks tab to enter tasks. For more information on adding tasks, see section 3.5.3.

Note: The Tasks tab only displays tasks and sub-tasks. While projects can be displayed as groups in the "All Projects" filter, if you want to see the entire project/task hierarchy, you should use the Outline tab

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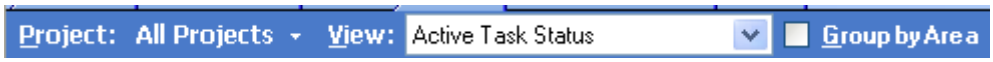
To add tasks follow these steps:

1. Click on the Tasks tab. If the tab is not visible, use the Go->Tasks command.

2. Select the Irish Mail, Inc./User Manual project by clicking on the Project dropdown in the Tasks tab view bar (which might say "All Projects.") This will filter the task list to only show Tasks associated with the selected project.



becomes

3. Press INSERT key to add a row for the first task, and enter G*et latest software*.

4. Press ENTER key for a new row at the same hierarchical level, and enter *Create menu tree*.

5. Press ENTER key for another row and enter *Create windows tree.* (Although more tasks are probably necessary for this project, you need only enter these.)

6. Save the file.

	State	Priorit	Name	Effort	Effort Le
1	NS		Get Latest Software	30 min	30 min
2	NS		Create menu tree	30 min	30 min
3	NS		Create windows tree	30 min	30 min

Now add some tasks to the Help File project. To add the tasks, follow these steps.

1. Use the Actions->Switch Project command (Ctrl+H). This will bring up the "Select Project" dialog. Select the Help File project from the list and press ENTER.

NOTE: This is equivalent to selecting the Help File project from the Project dropdown in the view bar.

2. The Task list should now display the Help File project's tasks. Since it doesn't have any, the list will be empty. Press INSERT to add a new top-level task for this project, and enter *Develop help outline*.

3. Press ENTER key for another row and enter *Fill help topics*.

4. Press ENTER key for another row and enter *Add diagrams to topics.* (Although more tasks are probably necessary for this project, you only need to enter these tasks.)

5. Save the file.

2.3 Tutorial 3 – Zooming In the Master Outline

The Outline tab provides zooming, also called hoisting, capabilities that allow you to see only a particular branch in the outline.

For example, if Jane only wants to see projects in the Work result area. She can use zooming to view this particular branch of the outline only.

1. Select the row of the outline where you want to zoom in by clicking on the row header. This row will be the new root of the hierarchy. In this case, select the Work result area row

2. Select the Outline->Zoom In command.

The outline should now be zoomed in on the Work result area, showing only its children. You can tell when the outline is zoomed because the caption of the outline grid displays the root of the zoom hierarchy.

If you want to see more of the hierarchy, you can use the Outline->Zoom Out and Outline->Clear Zoom commands.

- Zoom Out – This command zooms out by one increment to the parent of the current zoom root

- Clear Zoom – This command clears the zoom completely and returns the outline to its normal state

To continue:

1. Select the Outline->Clear Zoom command.

The normal outline should now be displayed once again.

You can zoom to a specific item in the Outline using the Outline -> Zoom to Item... command. This command displays a dialog box that lets you select the item that you want to use as the new zoom root in the Outline.

2.4 Tutorial 4 – Using the Projects Tab

This tutorial shows you how Jane can use the Projects tab to view an overview of all the projects for the Work result area. For more information on the Projects tab, see section 3.4.

Note:	Only projects and subprojects are displayed in the Projects tab. Tasks are created/displayed in the Tasks tab. If you want to see both projects and tasks together, use the Outline tab.

The following steps illustrate some of the Projects tab options.

1. If you are in the Tasks tab, you can navigate to the project for the current task in the Projects tab using the Actions->View Project command (Ctrl+Shift+J.) You can also view the Projects tab using the Go->Projects command.

2. If other result areas contained projects, they would also be visible in the "All Result Areas" filter of the Projects tab. To view only the Work result area and filter out the other areas, click the Result Area arrow on the left side of the filter bar and select Work from the list.

3. To add subprojects to the Acme Routers, Inc. project using the Projects tab.

    a. In the Projects tab, select the project named Acme Routers, Inc.

    b. Use the Insert->Insert as Child command (or press Ctrl+INSERT).

    c. Enter the subproject, *T1 Configuration Guide*.

    d. Press ENTER and enter the subproject *E1 Configuration Guide.*

    e. If you added an additional row by mistake, press ESC to cancel the new row.

4. To view only the tasks for the Acme Routers, Inc./T1 Configuration Guide project, select that project and use the Actions->View Tasks command (Ctrl+T). This will navigate to the Tasks tab and filter it for the active project.

5. Save the file.

Now Jane is going to prioritize her projects using the Priority field. To learn more about priorities and how they are used, please see section 4.

1. In the Priority field, assign an 'A' priority to the various customers (Acme Routers & Irish Mail). Click on the priority field for the project, and replace the current priority by typing the letter A.

Note: For projects, an 'A' priority indicates that it is an active project that you want to work on in the current week. A ranked priority (A1) indicates you want to focus on that project in the upcoming week.

---

2. Now assign 'A', 'B', or 'C' priorities to the various sub-projects for each customer. Sub-projects and tasks are prioritized based on how important they are relative to their immediate parent.

Note: For the purposes of this tutorial, the priority you assign doesn't make that much of a difference. Just note that items in the projects and tasks tabs are automatically sorted based on priority.

---

3. Now assign an 'A1' priority to one of the projects. Assigning a numeric rank to projects is a convenient way to designate they are your main focus for the week.

You can repeat a similar process to prioritize the tasks in the task lists.

2.5 Tutorial 5 – Using Project Templates

If you have certain project types that require the same set of common tasks, a project template can help you quickly create new project instances without having to manually enter all the same tasks each time.

For example, Jane Smith writes help files and always begins with the same common set of tasks. Therefore, creating a Help File Template is a sensible thing to do. Here are the steps:

1. In the Outline tab, under the Work result area, create a new project called *Templates*.
2. Set the priority to D to ensure that template projects are not scheduled.
3. Add a subproject named *Help File Template* as a child of *Templates*.
4. Enter the tasks that are performed each time as children of the *Help File Template* project:
   - Install latest software
   - Create menu tree (x-ref to window)
   - Create window tree (x-ref to menu)
   - Create outline

Once the template project is ready, you can create a new instance of a "help file" project using this template. For example, Jane needs to create a new project for the "Enterprise Help File" she is going to develop for Acme Routers, Inc.

You can do this by following these steps:

1. Ensure that you are in the Projects tab and Work result area is selected on the filter bar.
2. Press and hold down the left mouse button on the row header for the row corresponding to the *Help File Template*. (This highlights the whole row.)
3. While still pressing the left mouse button, press and hold down the Ctrl key and drag the *Help File Template* row to the *Acme Routers, Inc.* project row. As you drag the row, you will see the red arrow target indicator move accordingly.

Drop After à  Drop As Child à  Drop Before à 

Note: Holding down the Ctrl key during a drag operation performs a copy of the dragged row rather than a simple move

4. When the target indicator is over the *Acme Routers, Inc.* project indicating a child drop (red arrow is in the middle and slightly to the right of the target row), release the mouse to drop the template. Make sure that you hold down the Ctrl to ensure that you make a copy of the template.

5. A new copy subproject of the dragged template containing copies of the common tasks (and any other project details) has been created as a child of the target row. Edit the name and change it to *Enterprise Help File*.

6. Update the priority of the new project as needed (make it an A project.)

2.6 Tutorial 6 – Viewing Next Actions for Projects

Starting with version 1.7, Achieve Planner supports the concept of a Next Action List 'for projects in the master Outline and Task Chooser.

In this tutorial, Jane Smith is going to create and plan a project for a birthday party, and then use the Next Action List to focus in on the next actions for this project.

Here is what the birthday party project looks like in the Outline:

5				**Fun**
6		**NS**	**A1**	**Plan Party**
7		**NS**	**A1**	**Make Reservations**
8		NS	A1	Find location
9		NS	A2	Call to make reservations
10		**NS**	**A2**	**Order Cake**
11		NS	A1	Select from catalog
12		NS	A2	Call to order cake
13		NS	A3	Wait for cake order to complete
14		NS	A4	Pick up cake from baker
15		**NS**	**A3**	**Print Invitations**
16		NS	A1	Make invitation list
17		NS	A2	Print invitations
18		NS	A3	Send out invitations

The main 'Plan Party' project has three sub-projects, 'Make Reservations', 'Order Cake', and 'Print Invitations'.

The reason these are sub-projects is that they represent multi-step parts of the main project that are somewhat independent of each other, and Jane could conceivably make progress on them in parallel.

Depending on your preferences, and how you use Achieve Planner, you could also represent them as top-level tasks of the 'Plan Party' project instead of sub-projects.

2.6.1 Viewing the Next Action List in the Outline

You can toggle the display of the 'Next Action List' in the master outline using the Next Actions Only checkbox available in the Outline tab, or using the equivalent keyboard shortcut (Ctrl+Shift+8).

When the 'Next Action Only' mode is enabled, the outline is filtered so that only 'next action' tasks are displayed under each project.

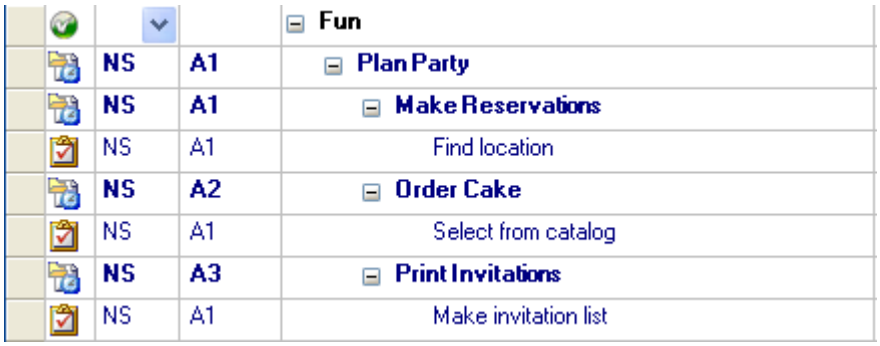
There are two versions of 'Next Actions', a simpler 'beginner's' version for new users, and an 'advanced' version for more experienced users who want more freedom in defining what a next action is.

You can change the definition of 'Next Action' used by Achieve Planner in the Next Actions tab of the Options Dialog (Tools -> Options) as I describe later in this tutorial.

2.6.2 Using the Basic 'Next Action' Definition

By default, 'Next Action' tasks are defined as the first task under each project in the Outline priority sort order.

This is what the 'Plan Party' project would look like with the Next Actions List filter turned on.



You'll notice that the Outline now only shows one task under each sub-project following the Outline priority sorting order.

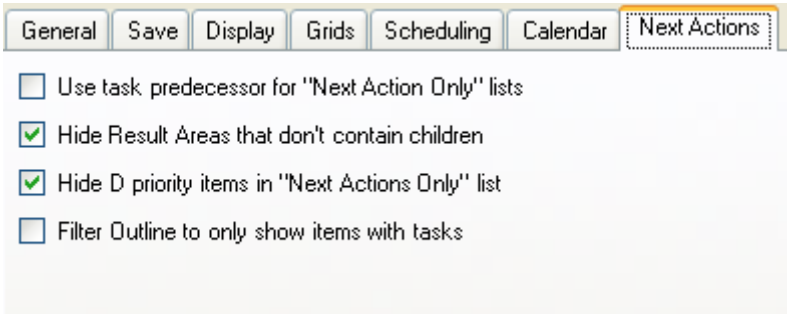
When you complete a task in any of these sub-projects, the next available task under that project is displayed. For example, this is what the outline looks like when you've completed the 'Find location' task of the Make Reservations project...

			Fun
	IP	A1	Plan Party
	IP	A1	Make Reservations
	IP	A2	Call to make reservations
	NS	A2	Order Cake
	NS	A1	Select from catalog
	NS	A3	Print Invitations
	NS	A1	Make invitation list

You can see the next action 'Call to make reservations' is now in the list.

2.6.3 Next Action Settings

The Options dialog (Tools -> Options) has some settings that control the display of the Next Action List in the Outline and Task Chooser.



'Use task predecessor for "Next Action Only" lists' controls whether to use the basic (unchecked) or advanced (checked) definition of 'Next Action.' It's set to basic definition by default.

'Hide Result Areas that don't contain children' controls whether to hide result areas that don't contain children when displaying the Next Action list in the master outline.

'Hide D priority items in "Next Actions Only" list' controls the display of D priority items (and their descendants) in the Next Action list of the master outline. If the box is checked, then D priority items and their descendants will not be included in the next actions list.

If 'Filter Outline to only show items with tasks' is checked, whenever the 'Next Actions Only' mode is turned on, the Outline tab will automatically be filtered in the Icon column so that only items containing tasks are included in the list.

The filter is automatically removed when 'Next Actions Only' mode is turned off. You can use this setting to control the display of projects/sub-projects that don't have any next actions available.

2.6.4 Using the Advanced 'Next Action' Definition

If you want more control over which tasks are 'Next Actions', you can use the advanced definition by enabling it from the Options dialog.

With the advanced definition, 'Next Action' tasks are defined as tasks that either don't have predecessor tasks defined or that only have completed predecessor tasks.

You can establish the task predecessor relationship between tasks using the 'Task Predecessor' field/column available in the Outline and Tasks tabs.

The Task Predecessor column is available in the 'Active Planning' view of the Outline. You can also add it to any of the other views using the 'View -> Customize Current View' command.

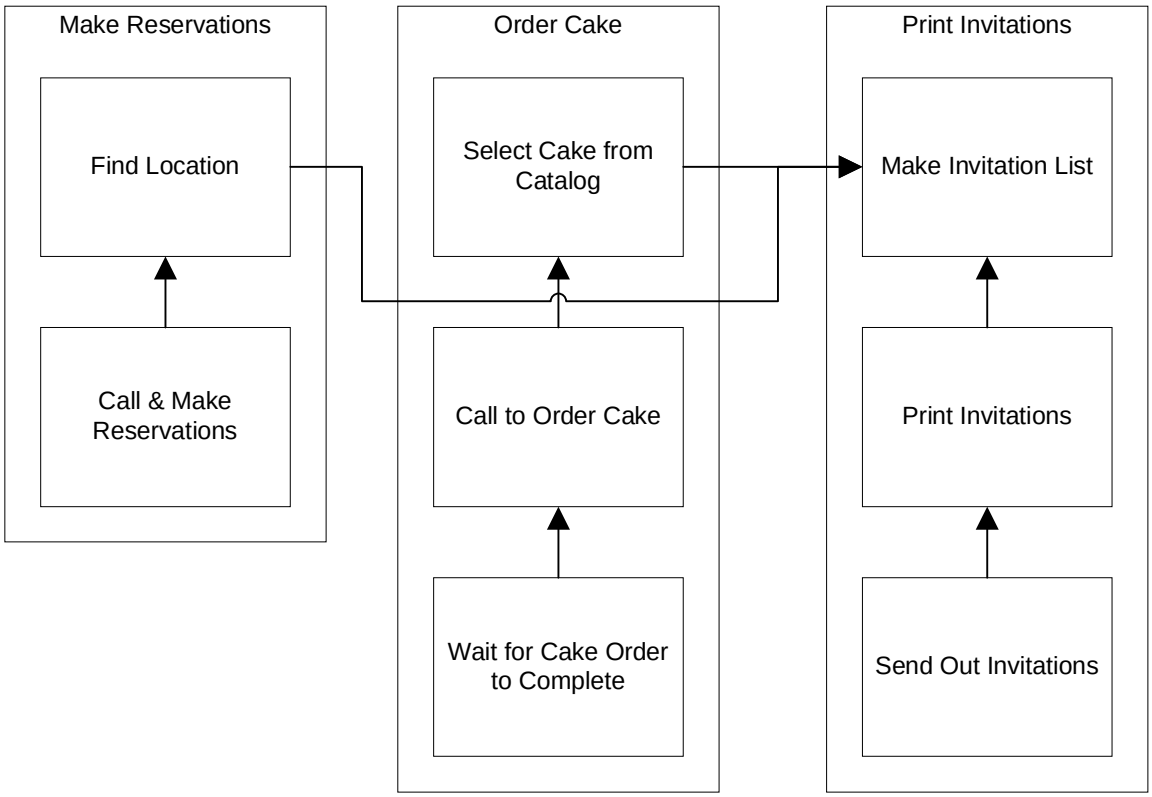
To establish a predecessor relationship between two tasks, you enter the Row Number (in the gray header at the start of each row) of the predecessor task in the Task Predecessor cell for the dependent task.

For example, if you have 'Task A' and 'Task B', and 'Task B' cannot start until 'Task A' is completed, then you would say that 'Task A' is a predecessor of 'Task B.'

The Actions -> Link Tasks command helps you establish this type of predecessor relationship based on the order of the tasks in the Outline. You need to select all the task rows that you want to link, and then use the Actions -> Link Tasks command to link them in the order they appear in the outline.

In the birthday party planning project example, let's say that the predecessor relationships between the various tasks look like this...

Planning Birthday Party Project



In this diagram, each box represents a task and the arrows point to the predecessor task. For example, before you can do the 'Print Invitations' task, you must do the 'Make Invitation List' task first. That's why 'Make Invitation List' is the predecessor.

As you can see, you can have predecessor tasks in a different project. In this example, 'Make Invitation List' is also a predecessor for 'Find Location', because you can't find a suitable location until you know how many people are invited.

This is how you would represent these predecessor relationships in the Active Planning view of the Outline.

	Icon	Sta	Prior	Name	Deadline	Predecessor
5				**Fun**	**None**	
6		**NS**	**A1**	**Plan Party**	**None**	
7		**NS**	**A1**	**Make Reservations**	**None**	
8		NS	A1	Find location	None	16
9		IP	A2	Call to make reservations	None	8
10		**NS**	**A2**	**Order Cake**	**None**	
11		NS	A1	Select from catalog	None	16
12		NS	A2	Call to order cake	None	11
13		NS	A3	Wait for cake order to complete	None	12
14		NS	A4	Pick up cake from baker	None	13
15		**NS**	**A3**	**Print Invitations**	**None**	
16		NS	A1	Make invitation list	None	
17		NS	A2	Print invitations	None	16
18		NS	A3	Send out invitations	None	17

You can see the relationships between the tasks in the Predecessor column. For example, you can see that 'Make invitation list' is a predecessor for 'Find location', 'Select from catalog' and 'Print invitations' because its task row number (#16) is in the predecessor column for these three tasks.

Here is what the list looks like when you turn the 'Next Actions Only' mode on.

1				**Fun**	**None**	
2		**NS**	**A1**	**Plan Party**	**None**	
3		NS	A1	Make Reservations	None	
4		NS	A2	Order Cake	None	
5		**NS**	**A3**	**Print Invitations**	**None**	
6		NS	A1	Make invitation list	None	

You can see that 'Make invitation list' is the only task shown. The list also includes sub-projects 'Make Reservations' and 'Order Cake' since they are sub-projects rather than tasks.

Having these 'empty' sub-projects in the list reminds you that there are parts of the Plan Party project that you can't advance because you don't have any available next actions.

NOTE: You can choose not to see these 'empty' sub-projects by changing some of the settings as I describe later in the tutorial.

Here's what the list looks like when you complete the 'Make invitation list' task.

	Icon	Stat	Priorit	Name	Deadline	Predeces
1				**Fun**	**None**	
2		**IP**	**A1**	**Plan Party**	**None**	
3		**NS**	**A1**	**Make Reservations**	**None**	
4		NS	A1	Find location	None	OOV
5		**NS**	**A2**	**Order Cake**	**None**	
6		NS	A1	Select from catalog	None	OOV
7		**IP**	**A3**	**Print Invitations**	**None**	
8		NS	A2	Print invitations	None	OOV

The previously dependent tasks are showing as next actions because their predecessor task is now completed.

The 'OOV' in the Predecessor field indicates an "out-of-view" predecessor that is not visible in the current view. In this case, this is the task you just completed that is not visible in the Active views.

2.6.5 Filtering 'Empty' Projects & Sub-Projects

To automatically hide empty projects and sub-projects from the Next Actions Only display, you need to enable the 'Filter Outline to only show items with tasks' setting in the Options dialog.

Here is what the original Next Action Only list (advanced NA definition) looks like when this setting is enabled.

	Icon	Stat	Priorit	Name	Deadline	Predeces
1				**Fun**	**None**	
2		**NS**	**A1**	**Plan Party**	**None**	
5		**NS**	**A3**	**Print Invitations**	**None**	
6		NS	A1	Make invitation list	None	

As you can see, the 'empty' sub-projects under the Plan Party project are now filtered out of the display. You can tell that the column filter is active because the funnel icon on the Icon column header is blue.

You can change or disable this filter manually by clicking on this funnel icon and selecting (All) from the dropdown.

2.6.6 Viewing Next Actions in Task Chooser

Starting in the 1.7.1 release, the Task Chooser can also be used to display a 'Next Actions Only' list by changing some of its task chooser settings for a view.

Checking the "Only show next action(s) for project" limits the display of tasks in the task chooser to next actions using the same interpretation used in the Outline with the following exceptions:

1) The task chooser next action setting can be overridden at the project level using a checkbox available in the Project Information form's general page

2) To produce the same next action list as the Outline when using the alternate definition of next action described below, you also need to check the "Use task priority order for next project actions" box in the settings.

2.7 Tutorial 7 - Creating a Time Chart

Time Charts serve as visual reminders to help you focus and balance your week. Rather than focusing on specific projects, the Time Chart allocates blocks of time in your weekly schedule for different types of activities, such as health, finances, work, and so forth. Each of these blocks is called a *time chart area*.

You can associate these time chart areas with specific Result Areas, or you can also create independent areas. For example, you could use an independent time chart area to represent a "break" period, or your lunch hour.

Showing a Time Chart in the background, behind active appointments in the Weekly Schedule, can help remind you that you intended to pursue a particular activity at a specific time. If you prefer, you can also display the weekly schedule without a Time Chart.

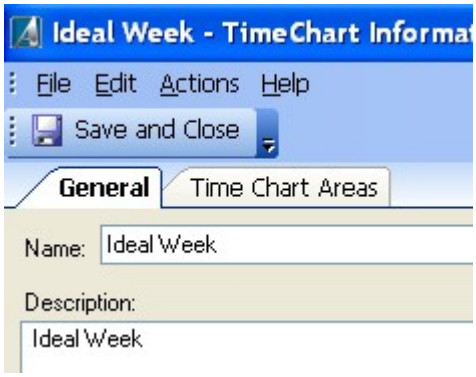
In this example, Jane is going to create a time chart to remind her that she would like to exercise three days a week and meet with friends once a week. For more information, see section 5.2.

Create a time chart called *Ideal Week* by following these steps:

1. Select the Go->Weekly Schedule command (or click the Weekly Schedule tab).

2. Click the New Time Chart button on the time chart bar.

3. In the General tab of the Time Chart Information form, enter the name *Ideal Week*.

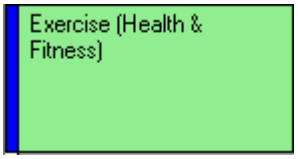


4. Click the Time Charts Areas tab, and select the Health & Fitness result area from the result area dropdown in the gray bar.

5. Select the time from 6:30 AM – 7:30 AM on Monday on the calendar (using the mouse or keyboard).

6. Select the Actions->New Time Chart Area command to add that time slot (Ctrl+N.) This will create a new time chart area associated with the *Health & Fitness* result area.

7. Click on the time chart area with the left mouse button to put it in edit mode, and enter *Exercise* as the name.



You'll often want to create repeated instances of the same time chart area in your time chart. You can do this using a *drag copy* operation as follows:

8. Hold down the Ctrl key and drag & drop the time area to Wednesday at 6:30 AM. This will create a copy of the time chart area at the drop location.

9. Repeat the process to create another copy of this time chart area on Friday at 6:30 AM.

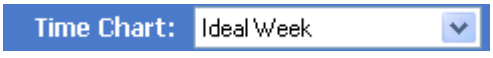
10. Now select the Friends result area from the dropdown in the grey tab.

11. Select the time 1:00 PM – 2:30 PM, Sunday.

12. Select the Actions->New Time Chart Area command, or press Ctrl+N.

13. Click the Save and Close button.

Note: To show this time chart in the background of your Weekly Schedule, select the *Ideal Week* time chart from the Time Chart box on the blue bar.



2.8 Tutorial 8 – Adding Effort Estimates to Tasks

In this tutorial, Jane is going to add effort estimates to the various tasks that she has entered into her projects.

If you plan to use automatic scheduling (see section 7), I would advise you to add effort values soon after entering the tasks. I often add them immediately after typing the name of the task.

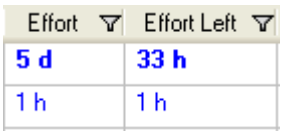
Achieve Planner maintains three types of effort values for projects and tasks:

- Expected Effort – The amount of effort you think it will take to complete the project/task. This is your best guess before you start working on the project/task.
- Effort Left – This is the amount of effort that is still required in order to complete the project/task. For items that have not been started, the effort left should be the same as expected effort. Once you've worked on a task, the effort left should go down appropriately based on how much work is left to do.
- Actual Effort – This is the actual amount of effort that you've spent on the given project/task to date.

To add effort estimates to tasks, Jane will be using the Tasks tab viewing it across all projects.

1. Go to the Tasks tab (select Go->Tasks command, or click on the tab)
2. Select the "All Projects" value in the Projects dropdown in the view bar. This will display a list of all tasks grouped by project.
3. Use the Effort column (which represents the expected effort) to set the effort value for each of the tasks. The actual values are not important for this tutorial. Just enter values ranging from 2 hours (2 h) to 3 days (3 d). For example, 5h, 4h, 1d, 12h, etc.

Note: Setting the expected effort for items that have not been started (State is NS) also sets the Effort Left to the same value. Once the item is in progress, changes to expected effort are no longer propagated to the Effort Left column.



2.9 Tutorial 9 – Using Project Blocks

Achieve Planner uses project blocks as one of the main tools for weekly and daily planning. Project blocks represent time blocks that you have committed to a certain project. You can think of them as appointments with yourself to get your important work done.

Although AP does support the use of task blocks, I recommend scheduling time blocks at the project level because project blocks make it easier to adjust your schedule as things change, or for example, if you run out of time before you complete the next task on your project's task list.

Project blocks also work better for automated scheduling purposes as described later.

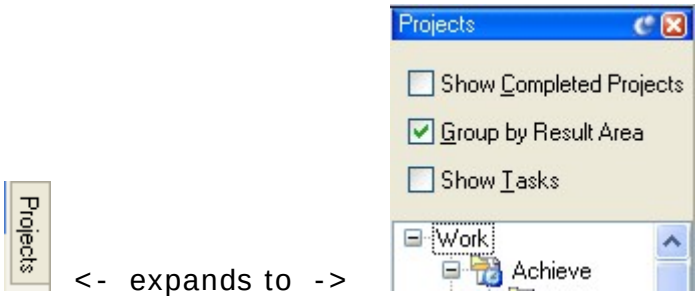
This tutorial shows you how you can create project blocks using the Weekly Schedule's Project pane as well as the Schedule Block command.

If you want to perform weekly planning, an even better way to schedule project blocks is to use the Weekly Planning Wizard described in section 9.

2.9.1 Using the Weekly Schedule Tab

To schedule a project block using the Weekly Schedule tab.

1. Navigate to the Weekly Schedule tab, or use the Go->Weekly Schedule command.
2. You should see the Project's pane hidden at the right edge of the screen. Hovering the mouse over the pane should display it.



Note: If you don't see the Projects pane, you can display it using the View->Project Explorer command.

3. Click on one of the Projects in the tree and, while holding down the left mouse button, drag it into the weekly schedule area.

4. As you drag the mouse over the weekly schedule area, you should see a "Project Block" for the project. Drag this block to the desired location on the weekly schedule and release the left mouse button to drop it.

You should now have a project block for the selected project in the weekly schedule.

2.9.2 Using the Master Outline, Projects, or Tasks Tab

To create one or more project/task blocks from the master outline tab:

1. Navigate to the Outline tab, or use the Go->Outline command.

2. Select a Project or Task for which you want to create a project block using the row header.

3. Select the Actions->Schedule Block command (or right-click on the project/task row and select Schedule Block from the context menu.)

4. The Weekly Schedule tab should become active and enter into drop mode. As you move the mouse around the screen, there should be a "project block" attached to it.

5. When you are ready to drop a project block, just click and release the left mouse button at the desired location. This will drop a block at the chosen location.

6. The weekly schedule will remain in "drop mode" allowing you to continue dropping more blocks on the schedule.

7. When you are finished dropping blocks, press the ESC key to get out of "drop mode."

Project blocks work just like appointments, so you can move them, edit them, and copy them just like other appointments. See section 5 to learn more about working with appointments in the Weekly Schedule.

2.9.3 Changing the Project Associated With an Appointment or Project Block

You can change the project associated with an appointment or project block as follows:

1. Right-click on an appointment or project block in the Weekly Schedule
2. Select Set Project from the context menu.
3. Chose the destination project from the tree
4. Press ENTER key or press OK button

The appointment should now be associated with the project that you selected. You can also accomplish the same thing from within the appointment information form, but the right-click method is often quicker.

2.10 Tutorial 10 – Copying Project Blocks

As your schedule changes, you'll often find it useful to rearrange your project blocks by moving or copying them.

To move project blocks, you can use standard drag & drop:

1. Click on the project block you want to move and, while holding down the left mouse button, move the block to its new location.

2. You should see a floating image of the block as you drag it.

3. When the block is over the desired date and time, release the left mouse button to complete the drop.

Alternatively, you can select the project block, select the Edit->Cut command, move the selection to the new time for the appointment, and select the Edit->Paste command.

To copy project blocks, you can use standard drag & copy drop:

1. Click on the project block you want to copy and, while holding down the left mouse button, move the block to its new location.

2. Press and hold down the CTRL key as you drag the block. You'll notice that the cursor changes to include a (+) sign indicating a copy of the block will be made, and the original project block is now in its previous location.

3. When the block is over the desired date and time, release the left mouse button (while still holding down the CTRL key) to complete the copy drop.

2.11 Tutorial 11 – Converting Between Projects and Tasks

You can easily convert a subproject into a task of the subproject's parent project, or convert a task into a subproject of the task's project.

To convert a subproject into a task from the Projects tab:

1. Select the subproject that you want to convert (using the row header.)
2. Select the Actions->Convert to Task command.

The subproject will become a task of the parent project. Any subprojects or tasks of the converted subproject become children of the newly created task.

Note: When you convert a project into a task, you may lose some project specific details like objectives, risks, issues, etc. that are available in the Project Information Form

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To convert a task into a subproject from the Tasks tab:

1. Select the task that you want to convert (using the row header)
2. Select the Actions->Convert to Project command.

The task will become a subproject of the original task's project.

Note: When you convert a task into a subproject, you may lose some task specific details like predecessors and resource assignments

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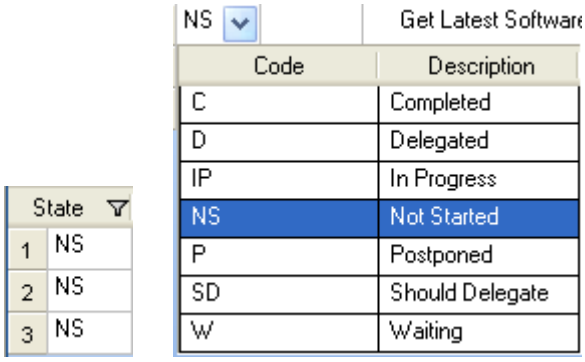
2.12 Tutorial 12 – Recording Work and Completing Projects/Tasks

Achieve Planner provides two convenient commands to help you record your work and complete projects/tasks.

2.12.1 Project/Task States

The state column denotes the current "state" of a project or task. You can use this column to change to state of the item or to mark it as completed (C). Click on the dropdown arrow to see the various state codes.



For a description of the various states, please refer to section 3.5.6.

2.12.2 Recording work for a task

When you have done some work on a task and are ready to move on to something else without fully completing the task, you can use the Actions-> Record Work/Expenses command.

1. Navigate to the Tasks tab and select a task for which you want to record some work

2. Select the Actions->Record Work/Expenses command. This will bring up the Work/Expense Record dialog.

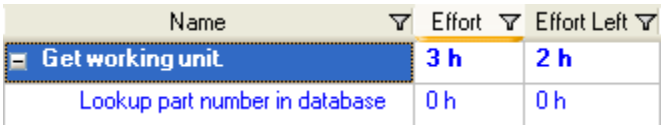
3. Enter 1h in the "Add Effort" box, 2h in the "Effort Left" box, and Lookup part number in database in the "Follow up action" box.
4. Press the *Add* button.

The Work/Expense Record dialog provides the following fields:

- Name – Name of the project/task for which you are recording work
- Expected effort – Your original estimate of the amount of effort it would take to complete the task
- Effort to Date – This is the "actual effort" for the task so far
- Add Effort – Enter the amount of work that you want to record (for example: 30m, 2h)
- Effort Left – Enter your estimate of the amount of work that is still needed to complete the task
- Expected cost – Your original estimate of the cost of the task
- Cost to Date – This is the "actual cost" for the task so far
- Add Cost – Enter the cost you want to add for this task (or leave blank)

- Follow up action – Allows you to add a "next action reminder task" as a child of the current task to serve as a reminder of where you left off

In the example above, after entering the above information, the task list for this project would contain:



Notice that the "Effort Left" field has been reduced from 3h to 2h because this is the amount entered into the Effort Left box of the dialog.

In addition, a new child task called "Lookup part number in the database" was added to the "Get working unit" task. This is a "next action reminder" task because its effort values are both set to 0h.

This tells Achieve Planner that it is not an actual task, but just a reminder of where you left off and what you need to do next when you continue working on the "Get working unit" task.

2.12.3 Completing a task

When you have completed a task or project, you can use the Actions-> Complete Task command to complete the task and record the work that you spent on it.

1. Navigate to the Tasks tab and select the task that you want to complete.
2. Select the Actions->Complete Task command (also available from context menu when you right-click on a task)

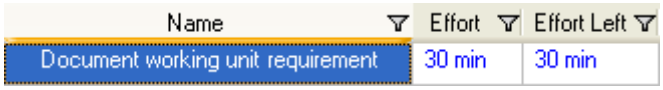
Note: You can also complete a project/task by changing its state to (C) Completed.

---

3. This will bring up the "Work/Expense Record to Complete" dialog.
4. Fill in the effort and cost that you want to add, and optionally provide the next task that you need to do for this project in the "follow up action" box.
5. Press the *Add* button to complete the task or *Cancel* to cancel the completion.

Notice that the "Effort Left" box is disabled because you are completing the task, so it won't have any effort left.

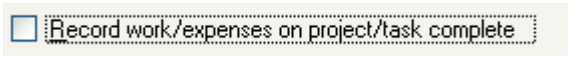
If you enter a task in the "Follow up action" box, it will be placed immediately after the task that you are completing in the task list.



In this case, the Effort and Effort Left fields are initialized to 30 min, which is the default value for new tasks. This indicates that the task is an actual task and not a next action reminder.

How to turn off the Work/Expense Record to Complete Dialog

If you would rather not record work/expenses when you complete a project or task, you can disable this dialog in the General tab of the Options dialog (Tools->Options)



Just uncheck the box and the dialog will no longer appear. Check the box to restore the dialog when you complete a project/task.

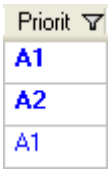
When you complete a project/task, the completion date is recorded in the "Date Completed" field.

2.13 Tutorial 13 - Working With Priorities

One of Achieve Planner's strengths is the widespread support of ABCD prioritization (learn more about using priorities in section 4.)

This tutorial will show you how to change priorities and use some of the prioritization tools in Achieve Planner.

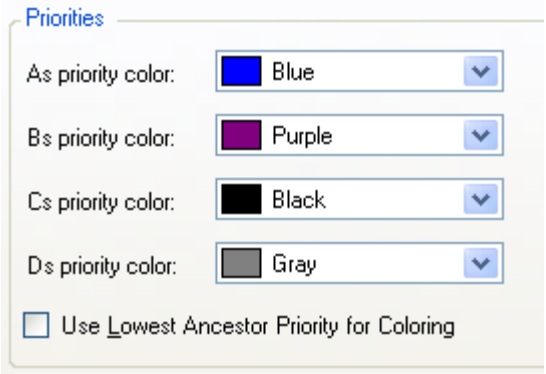
You can change priorities directly through the Priority column in the grids, or via the item's information form.



To change the priority value, simply select the cell you want to change (using mouse or keyboard) and type in the new value using either upper case or lower case letters (e.g., a1, b3, A2, A, b, etc.) Achieve Planner automatically converts all priorities to uppercase when displayed.

Achieve Planner supports both ranked (A1) and unranked (A) priority values. You can also leave items unprioritized by clearing the priority value (leaving it blank.)

Achieve Planner color-codes rows based on the priority value of the row. For example, the default color for A's is blue. You can change the colors associated with each priority range using the Tools->Options command (Display tab.)



For a full description of priority colors, please refer to section 4.2.

Achieve Planner provides two useful tools to help you prioritize.

The Outline->Reprioritize Unique () command shifts priority values so that the current row has a unique priority value (only for ranked priorities.) For example, this is a "before and after" shot of the reprioritize unique applied to the first row:

A1
A1
A2

ß becomes à

A1
A2
A3

Notice that the priority of the second row (A1) becomes A2, leaving the first row with a unique priority value (A1.) Also, the third row is shifted down so that its priority becomes A3.

The Outline->Remove Priority Gaps () command shifts priority values to remove any "gaps" between the ranked values.

Here is a "before and after" shot of the remove priority gaps command applied to a short priority list.

A4
A6
A9

ß becomes à

A1
A2
A3

Note that this command applies to ranked items in the current view, including items that are filtered using the column filters or collapsed. Items that are not part of the current view are not processed.

Automatically Remove Priority Gaps when Completing a Project or Task

Achieve Planner supports automatically removing priority gaps when completing a project or task. You can enable this behavior (off by default) from the Tools->Options->General Tab using the "Auto-remove priority gaps on project/task complete" checkbox.

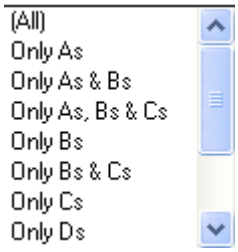
When enabled, Achieve Planner will remove priority gaps of the siblings of a project/task when it is completed via the grid.

2.13.1 Filtering Priority Values

You can use the column filters on the Priority column () to filter the current grid for specific priority values.

1. Click on the column filter icon () in the Priority column.

2. Select the filter you want to use from the dropdown:



The display should now be filtered based on the filter you selected.

To remove the priority filter, follow the same steps but select the (All) filter from the dropdown.

2.14 Tutorial 14 – Importing and Organizing Tasks from Outlook

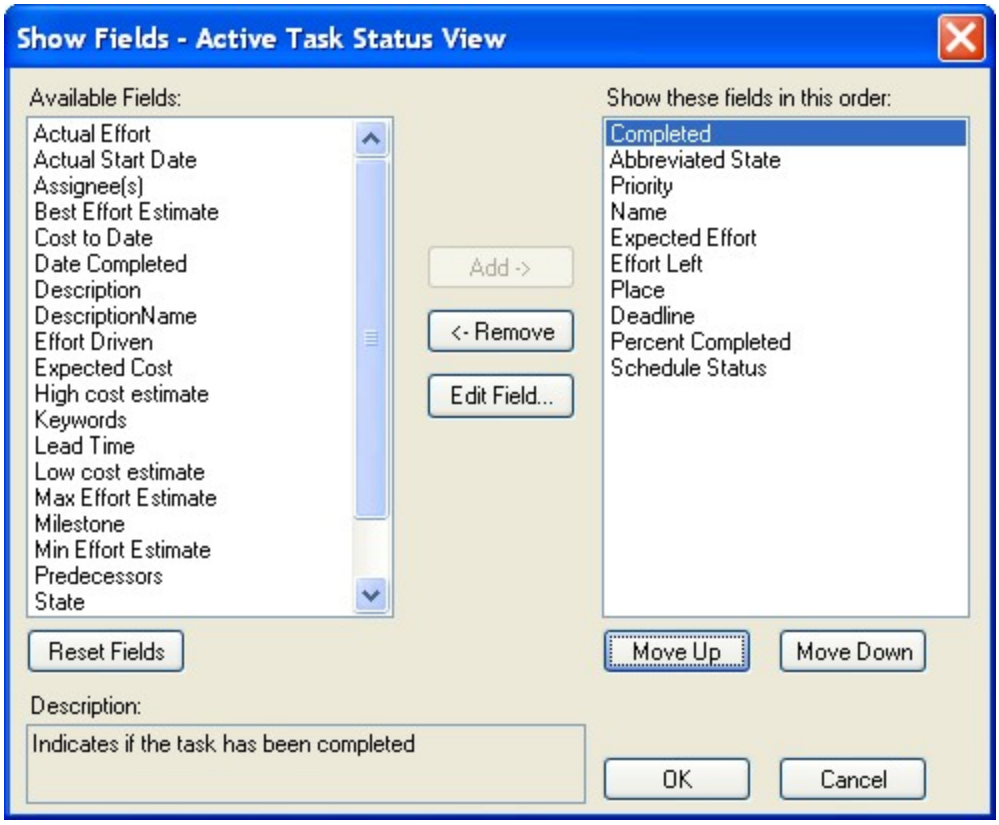
Rather than repeating the same information here, please see section 6 for a description of how to do this.

2.15 Tutorial 15 - Customizing Views

You can customize most of the main views in Achieve Planner. In this example, you will customize the Active Task Status Tasks view to include a "Completed" checkbox field in the view. For more information, see section 3.3.12.

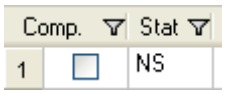
Be sure you are in the Tasks tab and that the View dropdown (in the filter bar) is Active Task Status.

1. Select the View->Customize Current View command.
2. In the left pane of the dialog (Available Fields), click Completed.
3. Click the Add button to move Completed field to the right pane (Show Fields).
4. Click the Move Up button until the Completed field is at the top of the list.



5. Click OK.

The view now shows a Completed checkbox in the first column.



2.15.1 Editing Fields

In some cases, you may want to edit some of the "shown" fields and change some of their settings. For example, you can change the column header label, or make a particular field multi-line.

To make the Name field of the Tasks tab multi-line:

Be sure you are in the Tasks tab and that the View dropdown (in the filter bar) is Active Task Status.

1. Select the View->Customize Current View command.
2. Select the Name field from the right-column in the dialog ("Show these fields in this order")
3. This should enable the "Edit Field..." button. Click on it.
4. This will display the "Edit Field" dialog

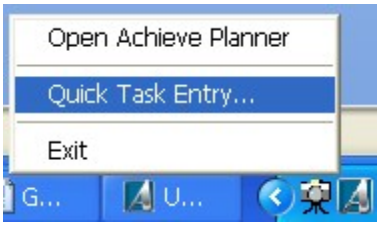
5. Click on the Multiline checkbox and click OK
6. Close the field selection dialog (Click on OK button)

The Name field should now be multiline.

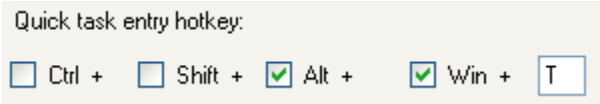
2.16 Tutorial 16 – Quick Task Entry

This tutorial shows you how to use the "Quick Task Entry" feature in Achieve Planner to add some quick tasks to your outline even if you are working on another application.

The Quick Task Entry form is available by right-clicking on the Achieve Planner icon in the system tray area and selecting the command from the menu.

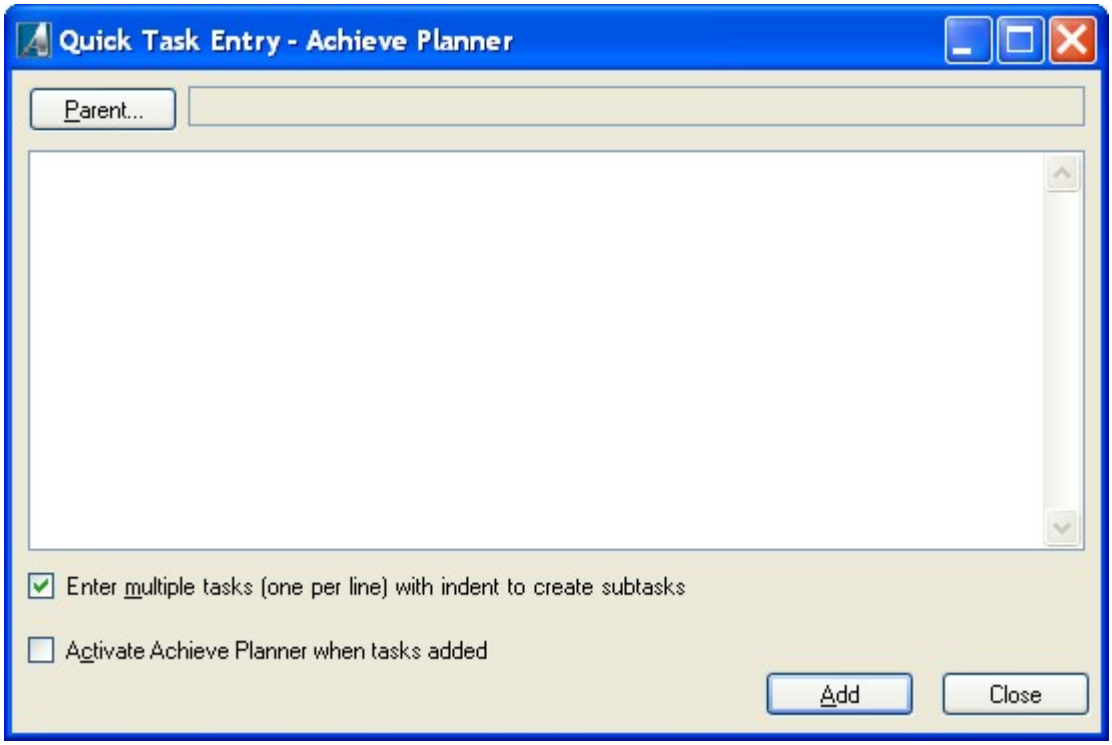


Alternatively, you can use the quick task entry HotKey defined in the general tab of the Options dialog (Tools ->Options). This HotKey is available even while working on other applications.



The default HotKey is Alt+Win+T key combination.

The following Quick Task Entry dialog appears when you use the HotKey or notify icon context menu.



If you check the Enter multiple tasks... checkbox, then you can enter multiple tasks (one per line) and use indentation (spaces) to create subtasks at any level. For example, if you enter the following tasks:

Task # 1

    Task # 2

    Task # 3

Task #2 and Task # 3 will be children of Task # 1.

By default, Achieve Planner inserts the new tasks into a top-level project called "<New Tasks>." You can also directly specify the parent for the new tasks using the *Parent* button.

Check the Activate Achieve Planner... box if you want to activate the main Achieve Planner window when you add the tasks. Leave it unchecked if you want to return to the application you were working on after you add the tasks.

You can add notes to the new tasks by using ## to separate the task name from the note text.

For example,

Task 1.1##These are the notes that will be associated with the task.

Note: The Quick Task Entry HotKey can only be associated with a single Achieve Planner main window. If you have multiple files open simultaneously, the HotKey will only work for one of them. If you find that the HotKey is not working once you close all other Achieve Planner windows, invoke the Quick Task Entry from the system tray icon context menu to "rehook" the hot key

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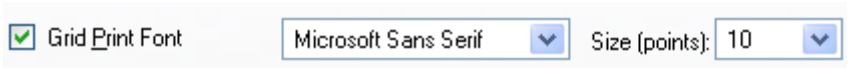
Please see the "Capturing & Organizing Projects and Tasks" tutorial for more ideas on how to organize tasks you've captured with the Quick Task Entry method.

2.17 Tutorial 17 – Printing the Grids

You can print most grids using the File->Print or File->Print Preview commands. These commands use the current layout and relative size of the current display grid when printing.

You can change the font/size used for printing in the Grids tab of the options dialog (Tools->Options).



Make sure to check the box if you want to override the default font.

Some people have noticed that reducing the size of the main Achieve Planner window has an effect on the printout. The reason for this is that AP uses the relative column sizes in the display when creating the printout, which is scaled to fit in a page.

Reducing the width of the main window also affects the width of the columns and the resulting printout. If your printout is too small even with larger font settings, try reducing the width of the main Achieve Planner window before printing. This may help reduce the scaling that takes place.

Use the Print Preview to get a better idea of what will be displayed before printing.

3 Working with Projects and Tasks

Projects and tasks replace the traditional "to-do" list used in other time management systems. They are a central concept in Achieve Planner.

A project represents a high-level outcome or result in your to-do list that you are tracking or actively working on. It could be a complex multi-step project like developing a product, organizing an event, or preparing a presentation, but it could also be something simple like paying a bill, responding to an email, or checking out a website.

In general, any to-do item that is not part of something larger should be stored as a project. Doing this will help you think and plan your time in terms of outcomes rather than just actions, which is an important step in becoming more results oriented.

You can keep track of your projects in the Projects tab, where you can create hierarchical (multi-level) lists of your projects using as many levels as you need.

Achieve Planner separates the concepts of projects and tasks allowing you to view and track your high-level outcomes (projects) independently from your low-level actions (tasks.)

Your projects list will be shorter, easier to manage, and it will give you an overview of all the outcomes you are working on. You can store all the details as tasks and have easy access to them when you need them.

A task is something that you need to do as part of a project. All your to-do's should either be projects or tasks of a project. It is quite common for simple projects not to have any tasks, and for complex projects to have tens, or even hundreds, of tasks.

You can keep track of the tasks for each project in the Tasks tab, where you can create hierarchical (multi-level) task lists using as many levels as you need.

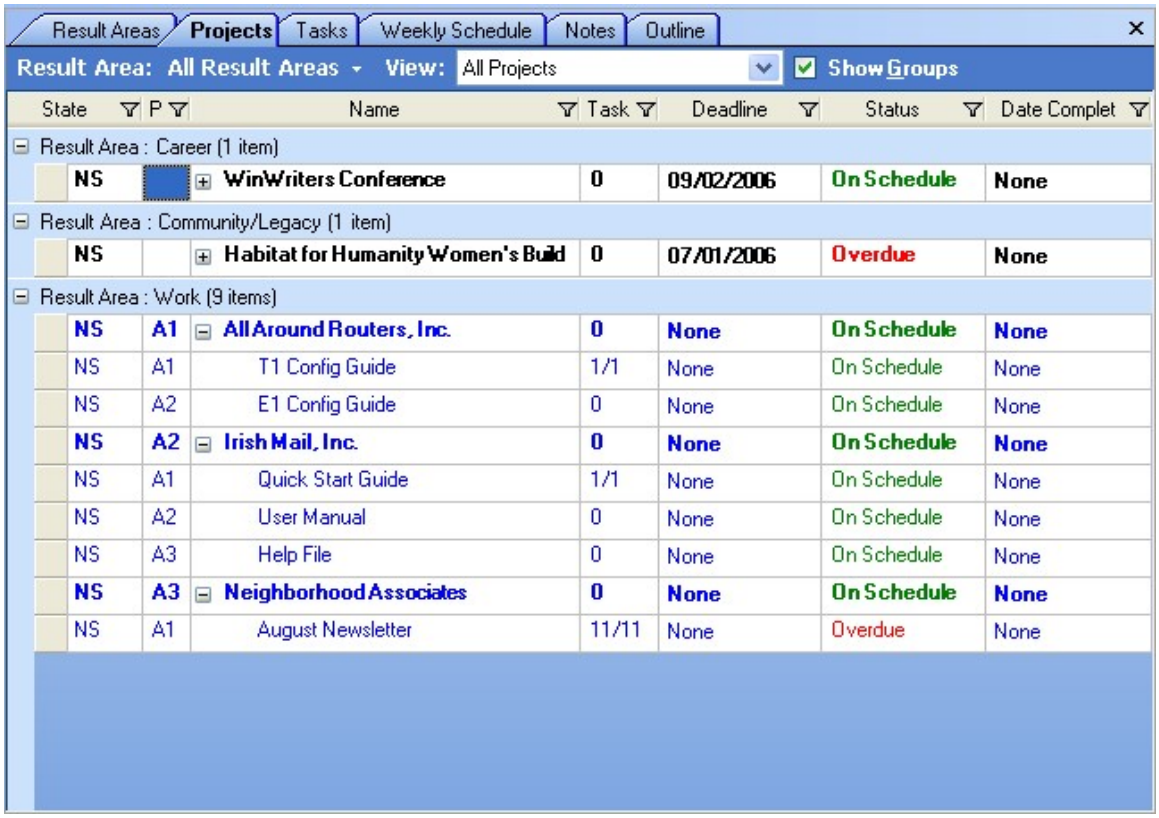
If you need to, you can easily convert tasks into projects (promote), or convert projects into tasks (demote).

This section will help you understand the Projects tab in Achieve Planner, and how to use it to keep track of and update your projects.

You can learn more about the difference between projects and tasks as they are used in Achieve Planner in the following online article:

http://www.timethoughts.com/timemanagement/effective-todo-list.htm

Here is an example of a potential Project list for "Jane Smith" from the tutorials.



3.1 Demo Data File

Achieve Planner includes a demo data file that you can use to see many of these concepts in action. You can select the File->Open Demo File command to open the sample data file in a new window.

3.2 Achieve Planner Grids

Achieve Planner uses grids extensively to display, edit and insert tabular information.

At the top of the grid is a "Help Tip," which is provided by default for all top-level views (grid must have the focus in order for the tip to be displayed). This tip displays the keyboard shortcuts for inserting rows into the grid.

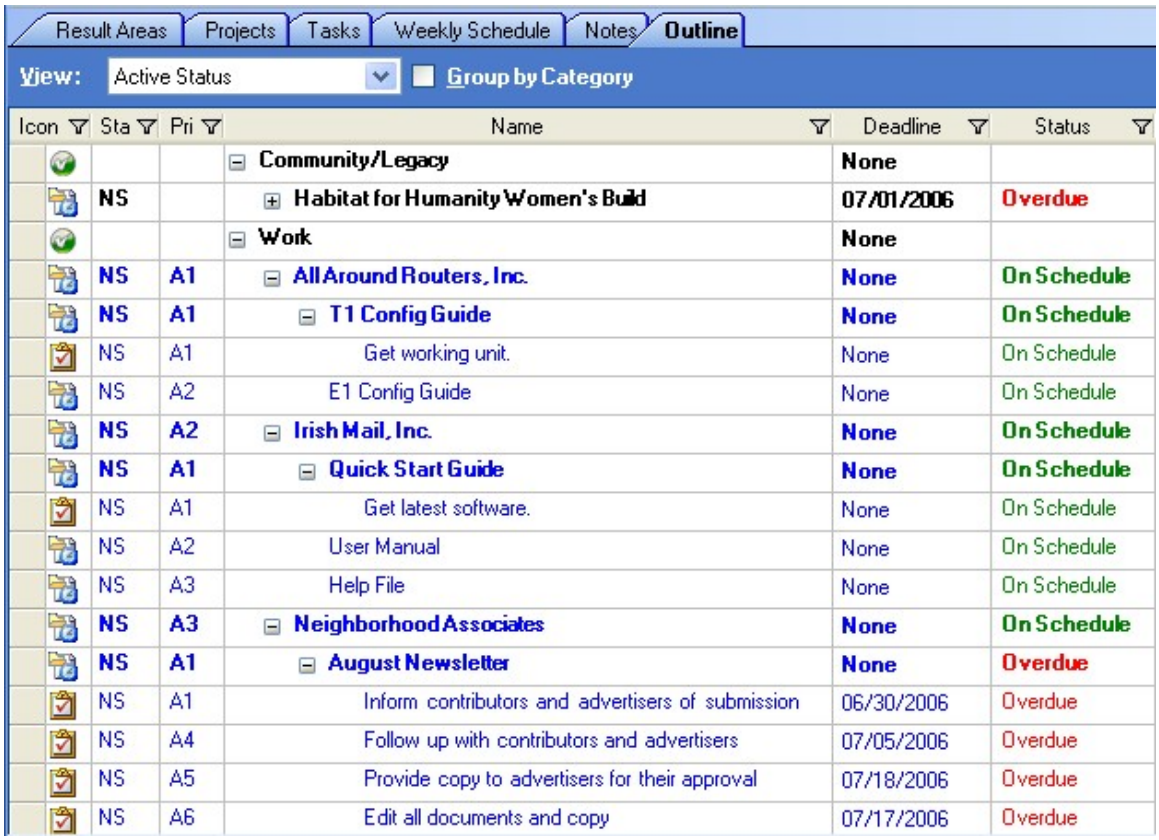
Press Insert key to add row after, Shift+Insert to add row before, Ctrl+Insert to add row as child, Esc to cancel row insert

You can toggle it on/off using the Help->Show Help Tips command.

A grid contains a number of rows and columns. A cell occurs at the intersection of a row/column. The active cell is highlighted and contains the focus rectangle (dotted line). The grid must have the focus in order for the active cell to be highlighted.

3.3 Working with the Master Outline

The master outline provides a bird's eye view of your entire hierarchy including Result Areas, Projects, and Tasks.



Icon	Sta	Pri	Name	Deadline	Status
			Community/Legacy	**None**	
	NS		**Habitat for Humanity Women's Build**	**07/01/2006**	**Overdue**
			Work	**None**	
	NS	**A1**	**AllAround Routers, Inc.**	**None**	**On Schedule**
	NS	**A1**	**T1 Config Guide**	**None**	**On Schedule**
	NS	A1	Get working unit.	None	On Schedule
	NS	A2	E1 Config Guide	None	On Schedule
	NS	**A2**	**Irish Mail, Inc.**	**None**	**On Schedule**
	NS	**A1**	**Quick Start Guide**	**None**	**On Schedule**
	NS	A1	Get latest software.	None	On Schedule
	NS	A2	User Manual	None	On Schedule
	NS	A3	Help File	None	On Schedule
	NS	**A3**	**Neighborhood Associates**	**None**	**On Schedule**
	NS	**A1**	**August Newsletter**	**None**	**Overdue**
	NS	A1	Inform contributors and advertisers of submission	06/30/2006	Overdue
	NS	A4	Follow up with contributors and advertisers	07/05/2006	Overdue
	NS	A5	Provide copy to advertisers for their approval	07/18/2006	Overdue
	NS	A6	Edit all documents and copy	07/17/2006	Overdue

Achieve Planner has the following restrictions regarding parent/child relationships between result areas, projects, and tasks:

Record	Allowed Children
Result Area	Result Area, Goal, Project, Task
Project	Project, Task
Task	Task

Thus, a project can only have projects and tasks as children, and a task can only have other tasks as children.

3.3.1 Inserting New Rows

To insert new rows into a grid you can use the Insert key in your keyboard or the appropriate item in the Insert menu (e.g., Insert After). Note: the grid must have the focus in order to use the keyboard shortcuts for the insert commands.

Some of the items in Achieve Planner like Projects, Tasks and Goals support prioritization (see section 4 Using Priorities) while others like File Items, Notes and Contacts do not.

Achieve Planner sorts items that support prioritization using their priority value (A1 before A2, A before B, and so on).

For grids supporting ordering, you can use the Insert->Insert Before (Shift+Insert) and Insert->Insert After (Insert) commands to insert the new row into the grid before/after the active row and automatically shift the priority of the other items.

Some of the items in Achieve also support a tree-like hierarchy of items (parent/child, task/subtask, etc.). For example, a task can have subtasks as children.

In these grids, you can also insert a new row as a child of the active row using the Insert->Insert as Child (Ctrl+Insert) command. For example, in the Demo file the "Project Proposal for New Joint Product" project is a child of the "ACME Account" project.

You can also use the Insert->Insert at Top-Level (Ctrl+Shift+Insert) command to insert a new top-level row (with no parents).

When you insert a row through any of the means described above, the grid will enter insertion mode and provide a blank row where you can enter your

data. Pressing the Enter key while in insertion mode saves changes to the current row and adds a new sibling row immediately below the current one.

If you've accidentally added a blank row to the grid, you can cancel the insert by pressing the Esc key, which will remove the blank row and return the grid to normal mode.

Once you change any cell in the new row you can no longer cancel the insert using the Esc key, but you can use the Delete item in the Edit menu to delete the row.

3.3.2 Moving the Active Cell

The active cell is either in edit mode (when you are actively editing cell contents) or in selected mode (highlighted).

When a cell is in selected mode, you can move the active cell in various directions using the cursor keys (left, right, top, bottom, page up, page down). You can also press the Home and End keys to move to the first/last cell in the row.

Use Ctrl+Home to move to the top row, and Ctrl+End to move to the last row in the grid.

The Tab key will move to the next cell and advance to the first cell of the next row when the last cell is reached, while Shift+Tab will move to the previous cell.

For grids supporting parent/child relationships (like projects and tasks), you can move to the parent row by pressing the Ctrl+Left keys (cell must not be in edit mode in order to move to parent row.) Pressing the Left key while the focus is on the leftmost cell in a row will also select the parent row.

When a cell is in edit mode, the cell's editor uses the cursor keys to move the caret. You can still move the active cell by using the Alt+Cursor Key combination to exit edit mode and move to an adjacent cell.

You can also use the Tab key to move to the next cell and the Enter key to move to the cell below the current cell. If you press Alt+Enter while editing a cell, the grid saves the value and moves the selection to the cell below without creating a new row.

Pressing the Shift key while moving the active cell using the cursor keys will select multiple cells (both columns and rows).

As you move the active cell, the Status Bar displays a brief description of the current column in the grid.

3.3.3 Editing Cell Values

To edit a cell's value, the cell needs to be in edit mode. You can enter edit mode in the following ways:

Press F2 to enter or exit edit mode for the active cell, click on a cell using the mouse, or start typing (if the cell accepts alphanumeric input) which replaces any existing value in the cell with the typed text.

In addition, some types of cells have shortcuts for setting their values:

- For cells with a dropdown (dates, lists) you can drop/raise the dropdown using the F4 key (and Spacebar key for lists).
- For cells with a checkbox, you can press the Spacebar key to toggle the checked state of the combo without entering edit mode.

Pressing the Esc key while in edit mode will cancel the edit operation and restore the original cell value.

3.3.4 Displaying the Information Form

In most grids, you can usually obtain a form with more details for the active row by doing one of the following:

- Double-clicking on a row
- Pressing Ctrl+Enter key combination
- For top-level grids, you can invoke the File->Open->Open Selected Items... command.

For the Master Outline grid, this will display the Information Form associated with the selected item.

3.3.5 Deleting Rows

You can delete the active and/or selected rows using the Edit->Delete command. Be aware that deleting a row will automatically delete all the children rows as well, and deleting a project will also delete any associated tasks for that project.

In most cases, you can undo a row deletion using the Edit->Undo command.

3.3.6 "Power Paste"

Achieve Planner's power paste feature is useful if you want to change multiple cell values at the same time.

For example, you might want to change the status, deadline, or priorities of multiple tasks to the same value. A "power paste" lets you do this in one step rather than having to repeat the same action on each row.

To use the power paste:

1) Change the cell value of the one of the rows you want to change to the new value that you want to propagate down to other cells below it.

2) Select the cell containing the new value and copy its value to the clipboard using the Edit -> Copy command (Ctrl+C)

3) Select all the cells that you want to change to the new value. You don't need to include the cell you modified in step 1. You can hold down the Ctrl key while clicking on additional cells to extend the selection.

4) Invoke the Edit -> Paste command to paste the value from the clipboard to all the selected cells in one step. This is why it's called "power paste."

3.3.7 Changing Parent/Child

For grids supporting parent/child hierarchies like projects and tasks, you can arrange rows in several ways.

3.3.7.1 Drag & Drop

You can drag one or more selected rows through their row selector (small rectangle at the start of the row) and drop them on a target row. As you drag the rows, a drop target indicator will show you the target row and position using red arrows.

Depending on the position of the mouse relative to the target row, the drop target indicator is above (drop before), center and slightly to the right (drop as child), or below the target row (drop after.)

Drop After à 

Drop As Child à 

Drop Before à 

Note: Holding down the Ctrl key during a drag operation performs a copy of the dragged row rather than a simple move

To drop a set of rows as a child of the target row, simply drop the rows when the drop arrows are centered and to the right (indicating a child drop) of the desired target row.

To drag and drop multiple rows, the entire row must be selected by clicking on the selector (hold Ctrl key while clicking on the selector to make multiple selections).

3.3.7.2 Using Pickup & Drop Commands

The Edit->Pickup Row(s) command "marks" all the rows with selected cells. You can tell which rows are marked because their selector is highlighted.

Once you have one or more rows picked up, you can use the drop commands in the Edit menu to drop them on the active row (containing active cell):

- Drop at Same Level - Drop picked up rows at the same level as the target row and reprioritize rows
- Drop as Child - Drop picked up rows as children of the target row

You can also drop copies of the picked up rows instead of the originals using the appropriate command.

3.3.7.3 Indenting and Outdenting

The Outline->Outdent command outdents all the rows with selected cells. Outdenting a row moves it to the same level as its current parent.

The Outline->Indent command indents the active row. Indenting makes a row a child of its immediate predecessor.

3.3.7.4 Expansion Indicator

The expansion indicator associated with each parent row expands or collapses the view of the item's children.

You can toggle the expansion state of the active cell using the Spacebar key when the cell is NOT in edit mode (move the cell to the parent row cell with the expansion indicator and press Spacebar). You can also use commands in the Outline menu to change the outline level.

3.3.8 Copying Rows

You can copy one or more rows using one of the following methods:

- Drag & Drop - While dragging one or more rows, press the Ctrl key to drop copies onto the target row. Note that copying a parent row will automatically copy all of its children.

- Pickup and Drop Commands - You can use the Edit | Drop Copy at Same Level and Drop Copy as Child commands to drop copies of picked up rows onto the target row.

3.3.9 Grouping

Some of the grids in Achieve support grouping the information by one or more values. For example, when the "All Result Areas" value is selected from the Result Areas dropdown in the Projects tab, the project list is grouped by Result Area. You can collapse/expand individual groups using the expansion button (+/-) or with the keyboard (left to collapse, right to expand).

The Outline->Group->Expand All Groups and Collapse All Groups commands can be used to expand or collapse all the groups simultaneously.

3.3.10 Outline Levels

For grids supporting parent/child hierarchies, you can expand/collapse individual rows using the expansion button (+/-) for the row. You can also press the Spacebar key to toggle the expansion/collapse of the row when the cell with the expansion button is the active cell.

The Outline menu contains several commands you can use to expand all the children of a row or expand/collapse all the rows to a certain outline level.

3.3.11 Rearranging Columns

You can change the size and positions of the columns in the grid using the mouse.

To change the position of a column, you simply drag it by the column header (you must select it first and then drag it once selected) and drop it in its new location.

To change the size of a column you click between the two headers (after the cursor has changed to a resize shape) and drag to the new size.

3.3.12 Changing the Fields Displayed in the Current View

All the main grids support customizing the displayed columns using the field customization dialog.

To customize the fields for the current view, use the View->Customize Current View command. This command will bring up the View Customization Dialog for the current view.

Using this dialog you can add, remove, and change the position of fields associated with the current view.

For example, to add a Completed checkbox field to the Active Item Status view of the outline, follow these steps:

1. Select the "Active Item Status" view in the Outline tab.
2. Invoke the View->Customize Current View command.
3. Select the Completed field in the "Available Fields" list on the left-hand side of the dialog.
4. Click on the "Add ->" button to move the Completed field into the right-hand side list containing fields being shown in the view. Alternatively, you can double click on the field to move it to the shown fields list.
5. Adjust the desired position of the field using the "Move Up" and "Move Down" buttons.

To remove a field from the view, select it from the "shown fields" list and click on the "<- Remove" button.

Editing Field Properties. You can also edit individual field properties of the fields being shown in the view by selecting the field in the "shown fields" list and clicking the "Edit Field" button.

3.3.13 Navigating to the Outline Tab

The Outline->View in Outline command is a convenient tool to navigate to the Outline tab from any of the other detail tabs like Projects or Tasks.

The active item in the detail tab is displayed and selected in the Outline tab.

3.3.14 Viewing Item Details

While working in the Outline tab, you can navigate to the detailed view for the active row using the Actions->View Details command.

For example, if the active row is a project row, the View Details command will navigate to the Projects tab and display the active project in that tab.

This is a convenient facility for navigating back/forth between the detail tab and the Outline tab.

3.3.15 Zooming in the Outline Tab

The Outline tab support zooming functionality to focus on a particular branch of the outline. For example, if you only want to see the sub-projects and tasks for a particular project, you can zoom to the project so that only this particular branch of the outline is displayed.

The Outline->Zoom In command will "zoom" the outline so that only the branch rooted at the active row is displayed.

When the outline is zoomed in on a particular branch, the grid caption displays the name of the zoom root node.

The Outline->Zoom Out command zooms out a single step in the outline to the parent of the current zoom root.

For example, if the outline has the following hierarchy A -> B -> C -> D and is zoomed on node C, zooming out a single step will zoom the outline on node B, which is the parent of C.

The Outline->Clear Zoom command clears the zooming from the outline and displays all the top-level items.

3.3.16 Actions

The Actions menu contains several commands that may be available for some of the items in the outline, but not for others.

For example, the Complete Item(s) command is available for project and task items, but not for Result Area items that cannot be completed.

3.4 Working with the Projects Tab

This section describes how to work in the Projects tab with more detail. The Projects tab gives you a good overview of all the different outcomes that you are pursuing.

3.4.1 Filtering Projects for Different Result Areas

You can use the result area dropdown in the Project tab view bar to filter the project list and only show projects for a particular result area. For example, if you only want to see projects in the "Work" result area, just pick that result area from the dropdown.

Select "All Result Areas" if you want to see all of the projects for all the result areas in the same list.

The Show Groups checkbox toggles the grouping of projects by result area on/off. The Show Groups checkbox is only enabled when you use the "All Result Areas" filter.

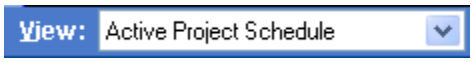
3.4.2 Moving a Project to a Different Result Area

There may be times when you want to move a project to a different result area. You can easily do this using the Actions->Move to Result Area command.

Just select the desired result area from the dialog and click OK.

3.4.3 Working with Project Views

The Projects tab supports multiple different views that show you your projects list from a different perspective. You can change the view using the view selector dropdown in the Projects tab view bar.



You can also use the commands in the View menu (available when the Projects tab is active.)

Here is a brief description of each view:

- Active Project Status – General status of active (non-completed) projects
- Active Project Schedule – Scheduling details of active projects
- Active Project Status (Place) – Also includes place column
- Active Project Description – Includes the project description
- Active Project Delegation – Includes Assignee(s) column
- Completed Projects – Only shows completed projects
- All Projects – Shows all projects, including active and completed

- Active Project Recurrence – Includes lead time for recurring project scheduling

3.5 Working with a Project's Tasks

Tasks represent the action steps associated with a particular project. You can use the Tasks tab in Achieve Planner to see all of your tasks, or to focus in on the tasks of a particular project.

Note: If you want to see the entire hierarchy of a project, including tasks as well as subprojects and their tasks, the master outline is a better way to view this.

3.5.1 Viewing the Tasks of a Project

To view the tasks of a specific project, you can use the Project dropdown in the Tasks tab view bar. Just select the project you want to filter from the list.

Select the "All Projects" filter to view tasks for all projects grouped by project.

A convenient way to view tasks of a different project is to use the Actions-> Switch Project command. This command brings up a project selection dialog that you can use to filter the task list on a different project.

Just select the project you want to view from the list and click OK.

3.5.2 Navigating Between Projects and Tasks Tabs

You can navigate between the Projects tab and the Tasks tab using commands in the Actions menu.

On the Projects tab:

- Use the Actions->View Tasks command to view the tasks associated with the active project row

On the Tasks tab:

- Use the Actions->View Project command to view the project associated with the active task row

3.5.3 Adding Tasks to a Project

You can add tasks to a project using the Outline tab or via the Tasks tab. Please refer to Tutorial 2.2 for details.

3.5.3.1 Choosing between Sub-Projects and Tasks

Achieve Planner allows you to add two different type of children to Projects: sub-projects and tasks.

One common question is how to choose between a sub-project and a task. In general, use sub-projects when:

- It represents a well-defined outcome/result in and of itself, or
- It is something that you will work on in parallel with other projects/sub-projects.

If the items are all part of the parent project (not really outcomes) and you are planning to work on them sequentially, it might be better to do the breakdown in the task list rather than using sub-projects.

For example, if you want to break down a development project into several iterations, and then break each iteration into several phases (like planning, design, implementation, and testing), you may want to represent these in the task list rather than using sub-projects.

- Iteration 1
    - Planning
        - Planning Task 1
        - Planning Task 2
    - Design
        - Design task
        - ...
    - Implementation
    - Testing

The reason for this is that the various items don t represent independent outcomes, and they are being done sequentially and not in parallel.

You may argue about whether iterations should be tasks or sub-projects. Fortunately, you don't have to get it perfect the first time. You can easily convert a summary task in the task list into a sub-project, and you can convert a sub-project into a task using simple built-in commands.

From the Tasks tab, you can convert a task into a sub-project using the Actions->Convert to Project command.

From the Projects tab, you can convert a sub-project into a task of the parent project using the Actions->Convert to Task command.

NOTE: These commands are also available in the Outline tab (from the Actions menu)

You can read more about converting between projects and tasks in Tutorial 2.11.

3.5.3.2 Handling Single-Step To-Dos

If you have single-step items like "Pick-up dry cleaning" or "Take Rover to vet" you can track them as either top-level projects or as tasks.

One reason to track these items as projects is that they don't belong to a higher level outcome, they are the outcome. Keeping them in your master project list allows you to see them along with all your other outcomes and avoid losing track of them as you plan your projects.

You could also create a "Miscellaneous" or "Errands" project to capture all these items as tasks, but I personally prefer to keep them in the master project list. That way, your master project list always gives you an idea of all the outcomes in your plate at any given time regardless of their size.

It really depends on how many of these items you have to deal with. If your master project list starts to become cluttered with too many of these small projects, converting them into tasks of a grouping project like "Errands" might be the best alternative.

3.5.4 Working with Task Views

The Tasks tab supports multiple different views that show you your tasks from a different perspective. You can change the view using the view selector dropdown in the Tasks tab view bar.

Brief description of each view:

- Active Task Status – General status of active (non-completed) tasks
- Active Task Schedule – Scheduling details of active tasks
- Active Task Description – Also includes description field in the grid
- Active Task Schedule Details – Includes schedule details like assignee and predecessor
- Active Task Estimation – Includes effort estimation columns
- Active Task Budget – Includes budgeting columns
- All Tasks – Shows all tasks, including active and completed
- All Tasks Schedule – Scheduling information for all tasks (including completed)
- Active Task Recurrence – Includes lead time for recurring task scheduling

3.5.5 Converting Tasks into Projects and Projects into Tasks

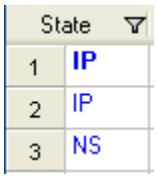
Please see Tutorial 2.11 for more details of converting between projects and tasks.

3.5.6 Quick Task Entry

Please see section 2.16 for a description of quick task entry.

3.6 Project/Task State Values

Projects and Tasks can be in one of several states as indicated in the State column.



The following states are supported:

(C) Completed - Project/Task is marked as completed and will not appear in Active views.

(Cn) Cancelled – Project/Task is marked as cancelled and will not appear in Active views. You can only see Cancelled items in the All Items 'views.

(D) Delegated – Project/Task is marked as delegated. This is just a reminder that you've delegated the task, but nothing else changes about the task.

(IP) In Progress – The project/task is in progress. You can enter into this state by changing the state directly or by recording work associated with the item.

(NS) Not Started – You haven't started work on this project/task. This is the default state for new items.

(P) Postponed – You've decided to postpone work on the item.

(PR) Proposed – A project/task that is only proposed at this time.

(SD) Should Delegate – This is just a reminder flag indicating that you should delegate this item instead of doing it yourself. It is different from (D) delegated in that you haven't actually delegated it yet.

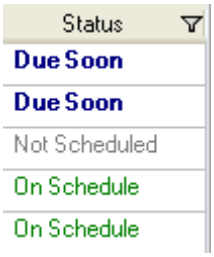
(W) Waiting – This is a reminder that you are waiting for something associated with this item and can't proceed until you get it.

3.7 Completing Projects & Tasks

Please see section 2.12.3 for a description of how to complete a project or task.

3.8 Schedule Status Values

The schedule status values appear in the Status columns for Projects and Tasks.



This section describes the various status values and how they are determined.

Some of the definitions below only apply to "active" task, which for schedule status purposes means a task that:

- Has an ancestor priority range value other than "D"
- Is not Postponed or Completed
- Is not a "next action reminder" task

The following schedule status values are used:

Completed – Reserved for projects/tasks that have been completed.

Overdue – The overdue status is only used for non-completed items with deadlines. It occurs if the deadline is in the past (before Today's date.)

Note: The overdue status propagates up the hierarchy from child to parent. If a child is overdue, the parent is also marked as overdue.

Behind Schedule – The behind schedule status value can occur for various reasons on non-completed items:

- The item has a deadline and a target end date, and the target end date goes past the deadline. This is a warning that the current target end date would have you completing the task after the deadline. This criteria only applies to tasks that are not postponed.
- For active items that have not been started (in NS state) with a target start date set, if the target start date occurs before Today's date.
- For active items that have been started (not in NS state) with a target end date set, if the target end date occurs before Today's date.

Note: The behind schedule status propagates up the hierarchy from child to parent. If a child is behind schedule, the parent may also have a status behind schedule.

Close to Deadline – As the name implies, the close to deadline status value indicates that the item is getting close to a deadline but has not exceeded it yet.

This status value only occurs for non-completed items with deadlines when Today's date is within one day of the deadline.

Note: The close to deadline status propagates up the hierarchy from child to parent. If a child is close to deadline, the parent may also have a status close to deadline.

No Slack – A "no slack" status value indicates that the target end date is close to the deadline, meaning that you haven't provided much spare or slack for moving the target end date without running into the deadline.

This status value only occurs for non-completed, non-postponed items with deadlines when the target end date is within one day of the deadline.

Note: The "no slack" status may propagate up the hierarchy from child to parent.

Due Soon – A "due soon" status value indicates that the deadline or target end date for this item occurs within the next 5 days in the following circumstances:

- A non-completed item with a deadline occurring less than 5 days from Today's date.
- An active item that has been started and has a target end date occurring less than 5 days from Today's date.

Note: The "due soon" status may propagate up the hierarchy from child to parent.

Postponed – An item with a "postponed" (P) state that doesn't have one of the schedule values already described above.

Need to Start – An active task not yet started with a target start date of Today. This is an item scheduled to start today.

Waiting – Status for an item in the "Waiting" (W) state that doesn't have any of the other schedule status values already described.

Ongoing – Status for an item that has been started, is not in the "Waiting" state, and either doesn't have a target end date or the target end date is more than 5 days in the future.

Not Scheduled – Status value for items not yet started that are not ancestor scheduled.

A task is not ancestor scheduled if it or any of its ancestors:

- Has a priority range of D (including ranked D's)
- Is a "next action reminder" task
- Is not effort driven

Note: Some of the schedule status values like Overdue and Behind Schedule and Close to Deadline override Not Scheduled for items with deadlines.

A task that is not associated with a Project will also have a Not Scheduled status value since only Project tasks are scheduled as part of the automated scheduling feature.

On Schedule – Status value for items that are generally on schedule and don't fit any of the other status values described above.

3.9 Project/Task Recurrence

Projects and tasks can be marked as recurring. A recurring project or task generates a new instance of itself whenever the current instance is marked as completed.

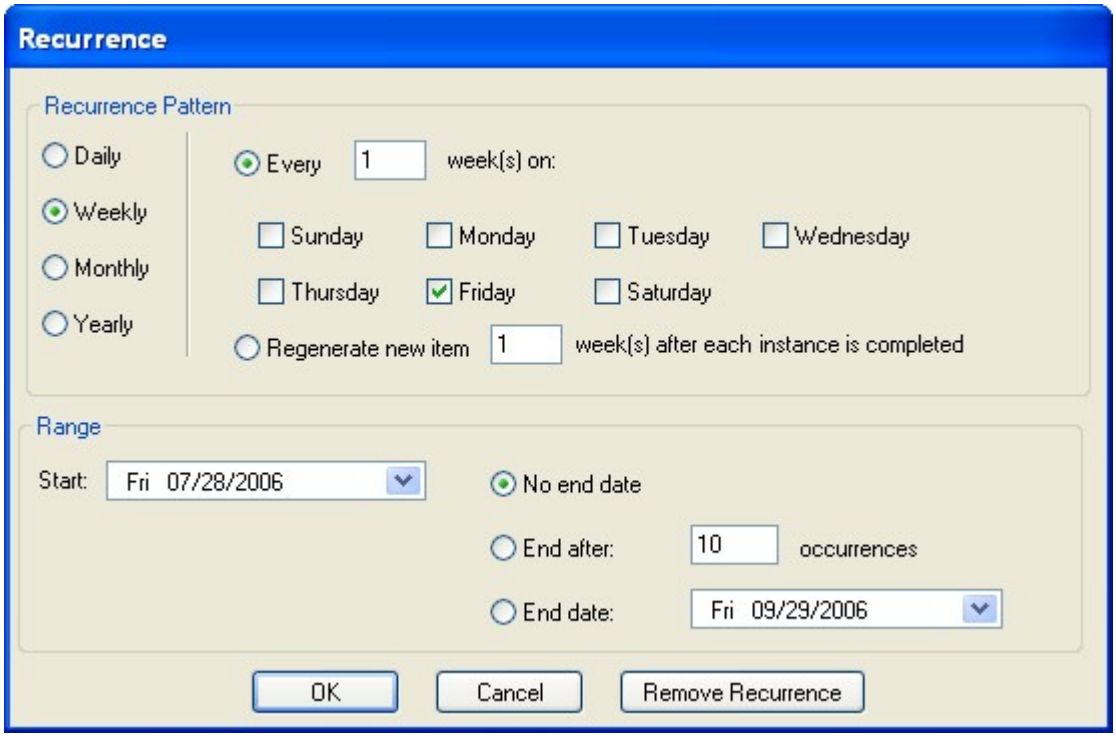
Note: Recurring projects/tasks create a new instance immediately after the current instance is completed. The new instance includes copies of all children of the original regenerated instance, initialized to the Not Started (NS) state.

Date values are only set for items that have deadlines established. If the recurring project or task doesn't have a deadline, a new instance is still generated, but none of its date values are set.

The "recurrence pattern" is used to determine deadline values associated with the newly created instance.

3.9.1 Recurrence Patterns

Project/task recurrence supports two types of recurrence patterns: date based and regeneration based.



Date recurrence patterns are similar to recurring appointments and follow a fixed pattern of dates. For example, you can set the date recurrence pattern to occur every 2 weeks on Friday. The occurrences follow a fixed pattern.

Regeneration recurrence patterns don t have set dates to follow because they are based on the date when the current instance is completed. For example, you can set the item to regenerate 5 days after completing the item. The date of the next occurrence is not fixed. It depends on when current instance is completed.

3.9.2 Making a Project/Task Recurring

To make a project or task recurring, you can use the Actions->Set Recurrence command, use the "Set Recurrence" toolbar button, or use the "Recurrence" toolbar button in the Project/Task's information form.

This will bring up the recurrence pattern dialog described above where you can specify the type, pattern, and range of the recurrence.

You can identify recurring projects/tasks in the various grids using the recurrence icon (🔁) on the item's row.

3.9.3 Removing Recurrence

To remove the recurrence of a project/task, use the Actions->Set Recurrence command, use the "Set Recurrence" toolbar button, or use the "Recurrence" toolbar button in the Project/Task's information form.

Once the dialog is displayed, click on the *Remove Recurrence* button.

This removes the recurrence from the item.

3.9.4 Skipping a Recurrence

In some cases, you may want to skip a recurrence instance instead of completing the current item. You can do this using the Actions->Skip Recurrence command.

This command advances the date values on the current item and its children just as if you had completed it, but it does not actually create a new instance of the item or its children.

Note: When skipping a recurrence instance, the completed child items of the item skipping the recurrence will not be "uncompleted" like they are when a new instance is generated.

3.9.5 Recurrence Item Lead Times

The "Lead Time" field for projects and tasks controls how the "Target Start Date" field is initialized for newly created recurring instances.

You can set the "Lead Time" field using the Project Information Form (General Tab), or the Task Information Form (Schedule Tab). You can also use the "Active Task Recurrence" or "Active Project Recurrence" views in the Tasks tab and Projects tab respectively.

If the lead time is set to any value other than none and the recurring project/task also has a deadline, the target start date is initialized to "lead time" days before the new deadline value in the recurring instance.

For example, if the lead time is set to 5 days, the new task instance will have a deadline set to follow the recurrence pattern, and a target start date set to 5 days before the new deadline value.

Note: Lead times are also used as part of Lead Time based scheduling for non-recurring projects & tasks. See section 7 for details.

3.9.6 Deadlines/Lead Times for a Recurring Item's Children

When a new recurring instance is created, the deadline dates of the children of the new instance are also updated based on the new recurrence date. This only happens for children (either projects or tasks) that already have a deadline value defined when the new instance is created.

Achieve Planner updates the deadline values of child items so that the same date interval that currently exists between the child deadline and the parent deadline is maintained in the new instance.

For example, lets say you have the following setup, where the deadline is the date in parenthesis:

- Recurring Project (11/25/06)
    - Task 1 (11/23/06)
    - Task 2 (11/24/06)

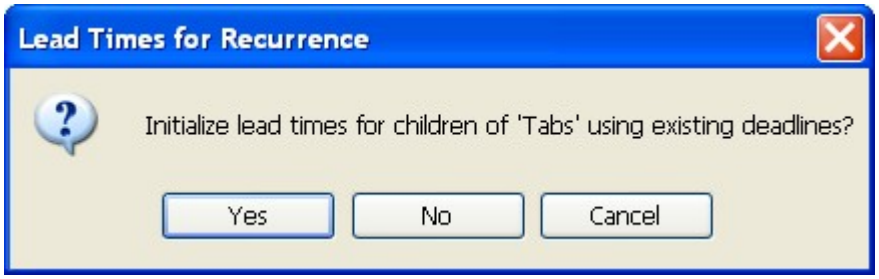
When you create a new recurring instance for this project for the next month, the deadline values are updated as follows:

- Recurring Project (12/25/06)
    - Task 1 (12/23/06)
    - Task 2 (12/24/06)

Notice that the deadlines of the tasks (Task 1 & Task 2) are the same relative to the new project deadline as they were in the previous instance.

3.9.7 Initializing Lead Time Values for Child Items

When you first create a recurring project or task, the following dialog is displayed to help you initialize the lead times for its children.



If you select *Yes*, the lead time for all child items with existing deadlines will be set based on the date interval between the current Target Start Date and the Deadline of the child item.

This will preserve the same pattern of Target Start Date and Deadline in future instances of the child items when a new instance of the parent is created.

If you select *No*, then the lead time values are not modified.

Selecting *Cancel* stops the recurrence and leaves the parent item unchanged.

3.10 Focus Field

Projects and tasks support a "focus" field which can either be set (checked) or unset. Checking this field marks the project or task as part of your current focus.

The focus field primarily affects the positioning of the project/task in the Task Chooser, but it can also be used for filtering in the various grid views.

You can add the Focus field to any of the Projects, Tasks, or Outline views using the View -> Customize Current View command.

You can also set/unset the focus field through the Project Information form or Task Information form.

4 Using Priorities

Achieve Planner uses the ABCD prioritization system, which is a simple tool that helps you prioritize projects and tasks based on their importance and urgency.

With this method, you go through each item in your list and assign it one of four labels:

A – The A's are assigned to projects and tasks that are important or valuable, or that need to be completed right away because of an impending deadline.

B – The B's are assigned to projects and tasks that are "under review" because they are not as important as any of the A's, but they are still worth considering. You may need/want to do them at some future point, but you haven't committed to them just yet.

C – The C's are assigned to projects and tasks that you may want to do at some future time, but you are not even considering doing them right now because they are not important or valuable enough compared to everything else on your plate.

D – The D's are assigned to projects and tasks that you are not planning to do at all. They are not worth your time and energy.

It may seem strange to leave the C/D projects and tasks in your lists, but if they made it there, it's because at some point you thought you might need or want to do them.

Rather than loose track of them, just keep these items in your list in case they pop up again, or you change your mind and decide that you would like to work on them.

By default, most of Achieve Planner's grids sort using priority values. Sorting takes place at each parent/child level in the hierarchy. Only the siblings of a particular row affect its sorting.

4.1 Entering Priority Values

You can enter priority values directly into the grid (in the Priority column) in text format. Achieve Planner supports both uppercase and lowercase formats and automatically adjusts them to uppercase for display.

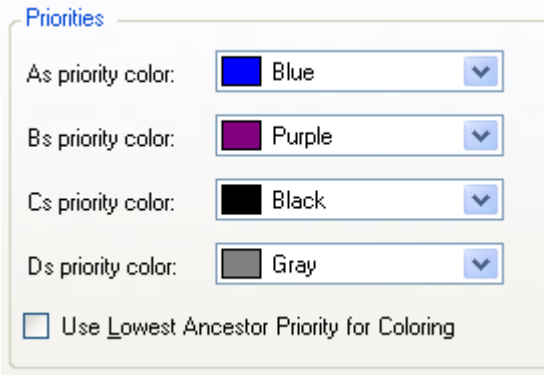
Each priority value consists of a range and an optional rank. The range is the label (A/B/C/D) while the rank is a numeric value from 1 to 2499.

The rank is an optional numeric value from 1 to 2499 with smaller values having higher priority than larger values (A1 is a higher priority than A2). You can also leave the rank off with only the letter as the priority (for example 'A'). Unranked priority values are placed after ranked priority values: A2499 is a higher priority than A.

As a special shortcut, you can use the value ‘aa’ (without the quotes) to represent A1.

4.2 Priority Colors

Achieve Planner color-codes rows based on the priority value of the row. For example, the default color for A’s is blue. You can change the colors associated with each priority range using the Tools->Options command (Display tab.)



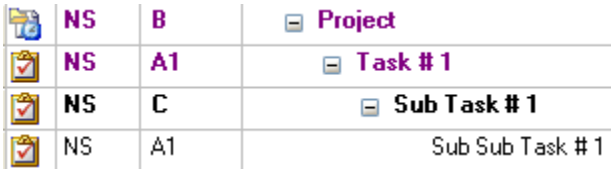
When coloring rows, Achieve Planner will either use the priority of the row directly, or it can use the “lowest ancestor priority” of the item in the current view to perform the coloring.

The Use Lowest Ancestor Priority for Coloring checkbox controls which style is used when coloring rows.

This figure illustrates the difference between the two approaches on a sample grid:

ß Standard priority coloring

Lowest ancestor priority coloring à



Notice how the 'Task # 1 'row is colored in purple in the second case (even though the priority is A) because the parent is a B. Similarly, 'Sub Sub Task # 1 'is colored black because its parent is a C.

Lowest ancestor priority coloring is more resource intensive than standard coloring. If you notice performance problems, try turning it off and see if it improves the performance.

4.3 Prioritization Tools

Achieve Planner provides several tools to help you work with priorities and prioritized lists. The Insert Before/Insert After commands automatically shift priorities of existing records to make room for the new items.

You can reprioritize existing records using Drag & Drop. Simply drag the row from the row selector and drop it on the target row. Depending on the position of the mouse relative to the target row, the drop arrows will either be placed above (drop before), center and slightly right (drop as child) or slightly below (drop after) the target row. The dragged row will assume the appropriate priority based on the target row. AP automatically shifts the priority of all other sibling rows accordingly.

You can also use drag & drop to rearrange the order of unranked rows of the same priority.

You can also use the Edit->Pickup rows(s) and Edit->Drop at Same Level commands to perform the drop operation using the keyboard. In this case, the drop is always considered to be a drop before the target row.

The Outline->Move Up and Outline->Move Down commands also reprioritize rows when used in a prioritized list.

The Outline->Remove Priority Gaps command will reprioritize the records to remove any gaps between priority values. For example, assume you have 5 records with priorities A4, A7, A, B4 and B7. After removing the priority gaps, the record priorities would be A1, A2, A, B1 and B2.

The Outline->Reprioritize Unique command will reprioritize the selected record so that it is the only one with the given priority value and shift the priority of other records accordingly.

For example, assume that you've changed the priority of a record from A5 to A1 and now there are two records with A1 priority, but you want the new A1 to be the only record with an A1 priority. Invoking the Reprioritize Unique command while the record is selected will shift the priority of the other A1 record to A2 and shift all the other A records accordingly.

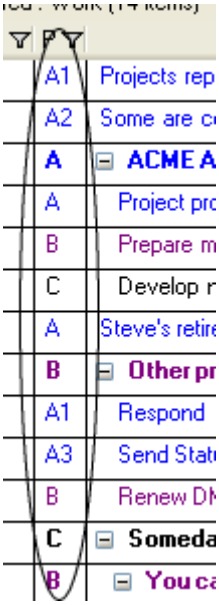
Automatically Remove Priority Gaps when Completing a Project or Task

Achieve Planner supports automatically removing priority gaps when completing a project or task. You can enable this behavior (off by default) from the Tools->Options->General Tab using the "Auto-remove priority gaps on project/task complete" checkbox.

When enabled, Achieve Planner will remove priority gaps of the siblings of a project/task when it is completed via the grid.

4.4 Prioritize Your Projects

You should start by prioritizing your projects (which represent your outcomes) based on their importance.



I normally assign an A priority to ongoing projects that I'm actively working on, as well as important long-term projects that I want to continue moving forward by committing time to them this upcoming week.

Your A projects represent outcomes that you have decided are important enough to commit time to on a regular basis.

I then use ranking to add an element of focus to my projects. Those that are both important and urgent get a high rank (A1, A2, A3, etc.) For me, priority ranking identifies the items that I'm currently focusing on. These projects will get the bulk of my time during the week, but I'll still reserve some time for other A projects.

I leave the rest of the projects with an unranked priority (A) to remind me that they are important, but not my top focus for this upcoming week.

The Weekly Planning section describes a simple mechanism you can use to allocate some time to projects with long-term importance each week. You would be surprised at how much progress you can make by giving even a small amount of time to your important long-term projects on a regular basis.

I assign a priority of B to projects that are "under review." They may very well be worth moving forward, but they are not important enough to devote time to them this upcoming week. You can then revisit your decision during your next weekly planning process.

One common mistake while prioritizing is to automatically assign an A priority to urgent things, and to push back important long-term projects to B or even C status.

If a long-term project truly is important, you should make it an A and commit time to it on a regular basis, even if it is only 30 minutes per week.

I usually leave urgent but non-important projects/tasks as either B's or C's, which helps me to productively procrastinate on them until I can truly determine if they are worth doing. Since I review them regularly, I don't have to worry about them falling through cracks or becoming a crisis.

The C priority category represents projects that I may want to do at some point in the future, but definitely not right now. Once I've decided that a project is a C, I won't even consider committing any time to it during the upcoming week.

Finally, I reserve the D priority for projects and tasks that I'm not planning to do at all. They are simply not worth my time.

4.5 Review Your Priorities Weekly

One of the dangers of using priority values, especially for projects, is that you will never make progress on any of your B or C projects and tasks because there will always be more important A's.

Most of the time, this is actually beneficial because of productive procrastination, but only if your projects are prioritized properly. That is why the weekly priority review as part of your planning routine is very important.

Think about priorities in terms of your commitment to the project. Your A projects should be projects that you are willing to commit time to on a regular basis to either complete them right away, or at the very least to keep them moving forward.

Pay special attention to your B projects, which are the ones "under review" that you haven't yet decided to commit to. If you neglect a B project long enough, it could turn into the latest crisis.

Only you can know whether that B project is worth doing or not. If it is not worth doing right now, it should remain a B (or even a C.)

4.6 Prioritize Your Tasks

Prioritizing tasks is slightly different than prioritizing projects. In general, projects are things that you are going to work in parallel during the week, so the project priorities help you decide which projects to work on, as well as how much time to devote to them.

On the other hand, you normally work on tasks for a given project sequentially. You work on the most important thing first until completed, and then you move on to the next most important thing, and so on. Task priorities help you decide the ordering of tasks within a given project.

While prioritizing tasks, sub-tasks, and even sub-projects, you should assign priorities based only on how important the item is relative to its parent.

Let's say you have a project with four tasks. Three of them are important for the project and one is not that important. I would assign an A priority to the three important tasks irrespective of the priority of the project (i.e., even if the project is a B or C) and a B to the remaining task.

You don't need to worry about any other projects or tasks you may have, just consider how important the item is relative to its parent. Achieve Planner automatically considers the parent priority when comparing child items.

The same holds true for sub-tasks: prioritize them based only on their importance relative to the parent task.

When prioritizing tasks, I usually start by categorizing them into one of the ABCD labels without providing a rank. I use A's for tasks which must be done, B's for tasks that should be done if time permits, C's for tasks that would be nice to have but are not really necessary, and D's for tasks that I'm not planning to do at all.

4.6.1 Ranking the Items

Once I have assigned a priority label to all tasks, I focus on the A's and assign individual priority rank values to the top five to ten items: A1 for the most important, A2 for the next most important, and so on.

You can usually tell which of two items is more important just by looking at them. If you are having trouble deciding, just ask yourself: "If I could only complete one of these but not both, which one would I choose?" Your choice represents the more important task.

If you think two tasks are equally important, just assign the same priority value to both of them.

If you have more than ten items at any given level, you don't have to assign rank numbers to all of them. Just rank the top five to ten items and leave the others with their general priority labels (A, B, etc.)

One important benefit of prioritizing is that it allows you to focus on your most important tasks without getting overwhelmed by everything that you need to do.

That's why I suggest you only rank five to ten items: it allows you to focus on a small number of tasks at any given time. If you still find your large task list overwhelming or distracting, simply move more of your tasks to B or even C status.

Since Achieve Planner color-codes tasks based on priority, I often don't even notice the B's or C's when I'm focused on the A's. Using Achieve Planner, you can even filter the task list based on priority to help you stay focused on your top tasks.

4.7 Updating Priority Values

When you complete all your ranked tasks (A1, A2, A3, etc.) for a project, you can choose the next five to ten most important items from your A's and rank them appropriately.

I usually like to quickly review my B's and C's whenever I complete all my ranked tasks, just to make sure that they are all in their rightful categories. You can use this quick review to upgrade any tasks that have gained importance into A status.

When you run out of A tasks, just go through your B's, and either choose the next set of A's, or delay working on them if they are not important enough for you to do right now. This may be an indication that you need to lower the priority of the project to avoid falling into perfectionism or gold plating.

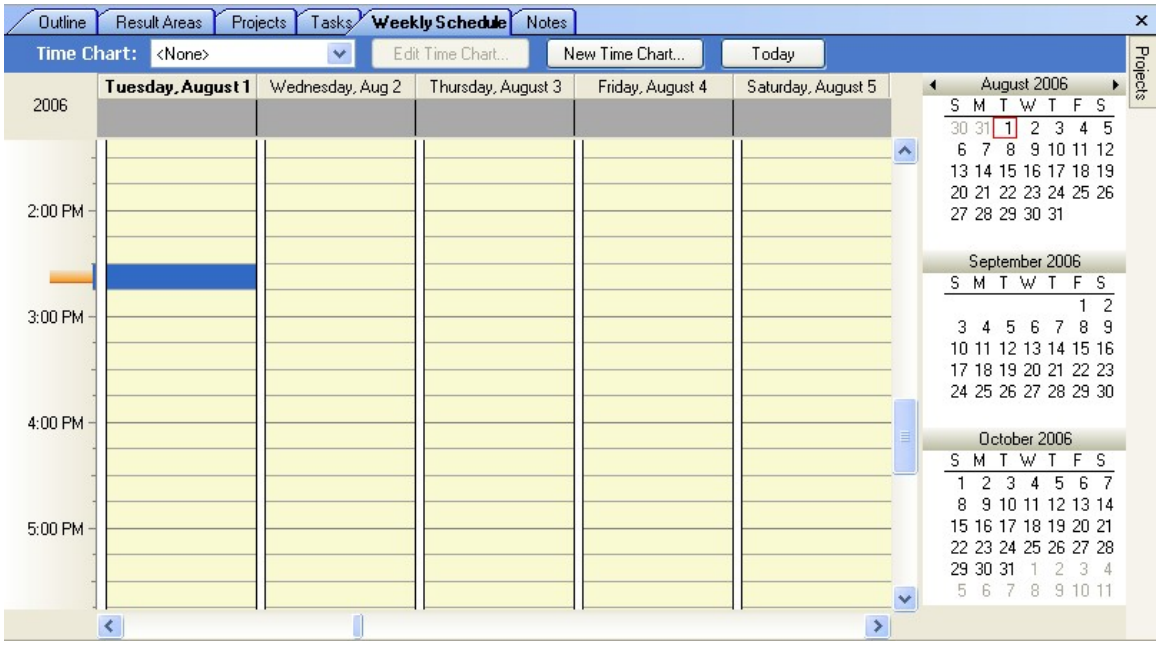
5 Weekly Schedule

This section describes the Weekly Schedule and provides instructions for using it. The Weekly Schedule is a powerful tool to help you organize your schedule and manage your time effectively. You can use the tool in several ways:

- Use Time Charts to set aside blocks of times for certain activities and show these times in the Weekly Schedule background *(see section 5.2 Working with Time Charts).*
- Enter appointments and all-day events directly into the Weekly Schedule *(see section 5.3 Working with Appointments and Events).*
- Add blocks of time which are allocated for working on a specific project or task *(see section 5.4 Working with Project and Task Blocks)*.

5.1 Setting Weekly Schedule View Preferences

You can set up the Weekly Schedule view in many ways, so that it works best for you. For example, by default, the Weekly Schedule uses a 15-minute resolution, and a five-day week. However, you can change these, and other, settings.



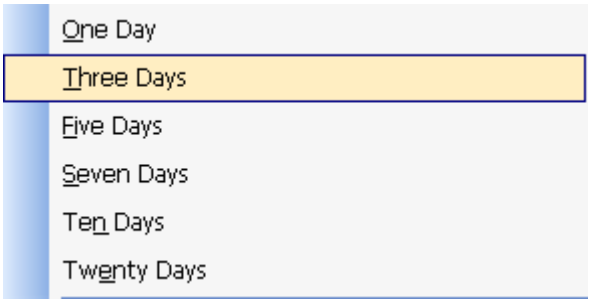
5.1.1 Changing the Time Display Resolution

To change the resolution of the weekly schedule time display, follow these steps:

1. Right-click an empty cell on the Weekly Schedule.
2. Select the number of minutes you want for each hour increment. Choose either 5, 6, 10, 15, 30 or 60 minutes.

5.1.2 Changing the Number of Days Displayed

To change the number of days displayed (that is, the number of columns) in the weekly schedule, select One, Three, Five, Seven, Ten, or Twenty Days from the View menu.



5.1.3 Viewing Reminders

To view any active reminders when the Reminders Window is closed, select View->Reminders Window command.

5.1.4 Setting the Week Mode

The Weekly Schedule can be viewed as a five-day work week (Monday through Friday) or the traditional seven-day week.

You can toggle between the two views by selecting View->Work Week Mode command. (A check mark next to Work Week Mode indicates the five-day work-week is selected.)

Note: The work-week mode setting works independently of the date selection. You can use work-week mode while viewing more than five days.

If there are any appointments or events during a weekend while in work week mode, you will see a red indicator on the date header between the Friday and Monday dates.

5.1.5 Using Monthly Calendars

When selected, Monthly Calendars display to the far-right of the Weekly Schedule. Use the calendars to advance to an upcoming date by clicking the right arrowhead next to the name of the month. To return to a previous month, click the left arrowhead.

Double clicking on a date in the monthly calendar will scroll the weekly schedule display to that date.

To turn the monthly calendar display on and off, toggle the View->View Monthly Calendars option.

5.1.6 Changing the Date Display

You can change the date displayed in the weekly schedule using various methods.

In addition to the horizontal scroll bar, you can use the Go->Go to Date command to pick a date that you want to display.

You can also scroll the display to Today's date using either the Go->Today command, or the Today button in the time chart bar of the weekly schedule display.

5.2 Working with Time Charts

Time Charts serve as visual reminders to help you focus and balance your week. Rather than focusing on specific projects, the Time Chart allocates blocks of time in your weekly schedule for different types of activities, such

as health, finances, work, and so forth. Each of these blocks is called a *time chart area*.

You can associate these time chart areas with specific Result Areas, or you can also create independent areas. For example, you could use an independent time chart area to represent a "break" period, or your lunch hour.

Showing a Time Chart in the background, behind active appointments in the Weekly Schedule, can help remind you that you intended to pursue a particular activity at a specific time. If you prefer, you can also display the weekly schedule without a Time Chart.

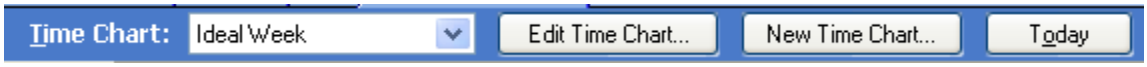
See section 5.2.2 Displaying a Time Chart in the Background for additional details.

You can create as many different time charts as you need and easily switch between then in your weekly schedule display. By doing this, you can change your focus from one week to another. For example, in one week you may focus on your finances and career, while the next week you focus more on relaxation and recreation activities.

5.2.1 Using the Time Chart Information Form

Use the Time Chart Information form to create and edit Time Chart areas (time slots). This information form provides two tabs: General and Time Chart Areas. Use the General tab to enter a name and a description for the Time Chart. Use the Time Chart Areas tab to define and edit Time Chart areas.

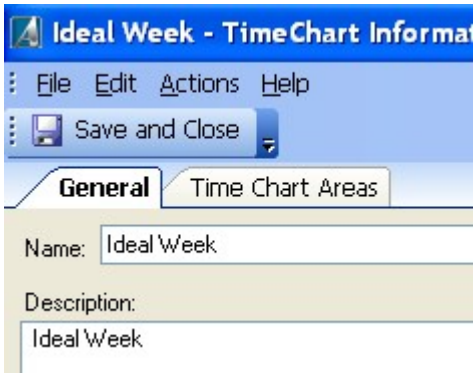
To open the information form, click either the Edit Time Chart or New Time Chart button from the time chart bar of the Weekly Schedule.



5.2.1.1 Creating a Time Chart Area

To create a new Time Chart area follow these steps:

1. Click the New Time Chart button on the Weekly Schedule's time chart bar.
2. In the General tab of the Time Chart Information form, enter a name and description for the Time Chart.



3. Click the Time Charts Areas tab.

4. At the top of the Time Chart Areas tab, on the gray bar, select the appropriate Result Area.

Note: All new Time Chart Areas are color coded and labeled according to the last Result Area selected. If you do not want to associate a Time Chart Area with a Result Area, select None as the Result Area type.

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5. Highlight the desired time slot either by dragging the mouse over the time slot or by holding down the SHIFT key while pressing the appropriate arrow keys.

6. Select Actions->New Time Chart Area to add a time slot.

7. If you choose, you can enter explanatory text into the time slot by clicking the time slot and entering text. If this time slot is associated with a Results Area, the text precedes the Results Area name—which is now in parentheses.

8. When you are finished with this Time Chart, click the Save and Close button.

5.2.1.2 Editing a Time Chart Area

To edit the Time Chart Area using the Time Chart Area Information form, follow these steps:

1. In the Time Chart box at the top of the Weekly Schedule, select the Time Chart to edit.

2. Click the Edit Time Chart button on the Weekly Schedule time chart bar.

Note: You can also access the Time Chart Area Information form by selecting the Go->Time Charts command. From the list of Time Charts, double-click the one you want to change.

3. When the Time Chart Area Information form opens, make the necessary changes *(see Table 1 Editing Time Charts, on page 94)*.

4. When you are through making changes, select the Save and Close option from the File menu.

Table 1 Editing Time Charts

To change this...	Do this...
Name	Type over the existing name.
Result Areas type	1. Click the Result Areas arrow to see the names from which you can choose. 2. Select the new Result Areas type.
Day, Time, and Duration of the Time Chart Area	1. Click the Day, Time, and Duration arrows to see the other options from which you can choose. 2. Select the new options.
Label	1. Ensure the Label check box is selected in the Time Chart Information form. 2. Click the Edit button. 3. To change the caption (text) color, select a new color from Fore Color. 4. To change the label (background) color, select a new color from Back Color. 5. To add a hatch pattern to the label, check the Hatch box and select a pattern from the Style box. (You can see the style in the Preview box.) 6. Click OK.
Description	Enter or edit text in the description box.

5.2.1.3 Deleting a Time Chart Area

To delete existing Time Chart Areas, follow these steps:

1. In the Time Charts tab, select the Time Chart containing the area to delete. If the Time Charts tab is not displayed, use the Go->Time Charts command to display it.
2. In the Time Chart Information form, right-click the Time Chart area to delete and select Delete.
3. Click the Save and Close button.

Note: If you unintentionally delete a Time Chart Area, you can restore the area by selecting Undo Delete from the Edit menu of the Time Chart Information form.

5.2.2 Displaying a Time Chart in the Background

Viewing a Time Chart in the background can help you recognize time set aside for certain activities. To view a Time Chart in the background, follow these steps:

1. In the Weekly Schedule, click the Time Chart arrow and select the Time Chart you want to display in the background.
2. Select None if you do not want to display a time chart.

5.3 Working with Appointments and Events

The Weekly Schedule lets you record appointments and events without using a Time Chart. Appointments have a start and end time; events are considered to last the entire day (or days). You add details about an appointment or event using the Appointment or Event Information form.

5.3.1 Creating a New Appointment or Event

To create a new appointment, follow these steps:

1. In the Weekly Schedule, select a time period.
2. Right-click and select New Appointment (you can also select the Actions->New Appointment command).
3. Complete the Appointment Information form.

4. Click Save and Close when you are done.

To create a new event, follow these steps:

1. In the Weekly Schedule, click the gray bar beneath the day(s) for which the event is scheduled.
2. Right-click and select New All Day Event (you can also select the Actions->New All Day Event command).
3. Complete the Event Information form.
4. Click Save and Close when you are done.

Note: To duplicate an existing appointment or event, hold down the CTRL key and drag the existing appointment or event to the new location.

5.3.1.1 Opening Appointment and Event Information Forms

You can open the information forms in several ways:

- Double-click the appointment or event.
- Select the appointment or event and press ENTER.
- Select the appointment or event, and from the File menu, select Open, and Open Selected Item(s).

5.3.1.2 Setting a Recurring Appointment or Event

To set a recurring appointment, follow these steps:

1. Open the Appointment or Event Information form. (Double-click an existing appointment or event.)
2. At the top of the form, just below the menu bar, click Recurrence.
3. In the Appointment Recurrence window, select the Recurrence Pattern.
4. Select the Range (start and stop dates).
5. Click OK.
6. Click Save and Close when you are done.

5.3.1.3 Setting an Appointment or Event Reminder

To set a reminder, follow these steps:

1. Open the Appointment or Event Information form. (Double-click an existing appointment or event.)
2. Select the Reminder check box.
3. From the Reminder list of times, select the amount of time needed for the reminder. Times range from five minutes to two weeks.
4. Click Save and Close when you are done.

5.3.1.4 Setting the "Show time as" Feature

You can show appointment or event times as Free, Busy, Tentative, or Out of Office. To do this, follow these steps:

1. Open the Appointment or Event Information form. (Double-click an existing appointment or event.)
2. Click the arrow in the Show time as box.
3. Select the appropriate option from the list.
4. Click Save and Close when you are done.

5.3.1.5 Labeling an Appointment or Event

You can label appointments and events with color-coded descriptions such as Anniversary, Business, Must Attend, and so forth. To label an appointment or event, follow these steps:

1. Open the Appointment or Event Information form. (Double-click an existing appointment or event.)
2. Click the arrow in the Label box.
3. Select the appropriate label from the list.
4. Click Save and Close when you are done.

5.3.1.6 Assigning a Priority to an Appointment or Event

You can assign a priority to appointments and events by entering the priority into the Priority box of the Appointment or Event Information form. (Double-click the appointment or event to open the form.) For more information on priorities, see section 4.

5.3.1.7 Assigning an Appointment or Event to a Project

You can assign an appointment or event to a project by selecting a project from the list that appears when you click the Project button of the Appointment or Event Information form. (Double-click the appointment or event to open the form.) For more information on projects, see Working with Projects and Tasks.

5.3.1.8 Adding Notes and Details to Appointments and Events

You can add additional information about appointments and events by entering text in the text box at the bottom of the Appointment or Event Information form. (Double-click the appointment or event to open the form.)

5.3.2 Editing an Appointment or Event Using the Weekly Schedule

After you have created an appointment or event, you can easily change subject, date, time, and duration through the Weekly Schedule—instead of opening the information forms. You can also duplicate the appointment or event and drag it to a new location.

- Subject - To change the subject, click in the appointment or event and enter the new text.
- Time or Date - To change the time or date, drag the appointment or event and drop it on the new time or date. To move multiple appointments or events, hold down the CTRL key and select them with the mouse. Then drag and drop them as a group at the new location.
- Appointment Duration - To change the duration of an appointment, position the pointer at the top or bottom edge of the current allotment of time (the pointer changes to a vertical double-arrow). Drag the appointment to its new time duration.
- Event Duration - To change the duration of an event, position the pointer at the left or right edge of the current allotment of time (pointer changes to a horizontal double-arrow). Drag the event to its new time duration.
- Duplicating an Appointment or Event – To create a copy of an existing appointment or event and place it in a new location, hold down the CTRL key and drag the appointment or event to the new location. Release the mouse to drop the appointment or event in place.

5.3.3 Deleting an Appointment or Event

To delete an appointment or event, right-click the appointment or event and select Delete.

5.4 Working with Project and Task Blocks

Achieve Planner supports the concepts of project and task blocks, which are blocks of time that you allocate to work on a specific project or task. These blocks are central components of weekly planning. They represent appointments that you have made with yourself to get your important work done.

The most common way to add project blocks to the Weekly Schedule is to use the Weekly Planning wizard (see section 9, Weekly Planning Wizard). However, you can also add project and task blocks manually to the Weekly Schedule.

5.4.1 Manually Adding Project or Task Blocks

You can manually add project or task blocks to the Weekly Schedule using the Project Explorer, the Projects and Tasks tabs, and an existing appointment.

5.4.1.1 Using the Project Explorer to Schedule Blocks

To open and use the Project Explorer, follow these steps:

1. Ensure that you are in the Weekly Schedule.
2. Select the View->Project Explorer command.

Note: Depending on how you last used Project Explorer, it may open as a small tab to the right of the calendars (if they are turned on) or it may open in its own pane. To auto-hide the pane, click the symbol. To keep the Project Explorer open, click the push-pin symbol ( ).

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3. If you want to add a task block, check the Show Tasks box in Project Explorer. (If you are only adding a project block, skip this step.)
4. To add a project or task to the Weekly Schedule as a block, select, drag, and drop the project or task onto the Weekly Schedule. You can reposition this block by dragging and dropping it at a new location.

5.4.1.2 Using Projects or Tasks Tabs to Schedule Blocks

To add a project or task block using the Projects or Tasks tabs, follow these steps:

1. From either the Projects or Tasks tabs, select a project or task.
2. Right-click, and select Schedule Block. (Alternatively, you can select Actions->Schedule Block command.)
3. Drop the project or task onto the Weekly Schedule.
4. When you are through placing the block(s), press ESC to close the block.

5.4.1.3 Using an Existing Appointment to Schedule Blocks

You can link existing appointments to project or task blocks, as follows:

1. In the Weekly Schedule, select an appointment.
2. Right-click, and select Set Project. (Alternatively, you can select Actions->Set Project command.)
3. Select a project or task (check the Show Tasks box) from the list.
4. Click OK.

5.4.2 Editing a Project or Task Block

Achieve Planner provides many ways to edit project and task blocks.

- To change the project and task links, right-click and select Set Project. (You can also use the Actions->Set Project command.)
- To copy a block to a new location, hold down the CTRL key and drag the block to the new location. (You can also the Copy and Paste commands from the Edit menu.)
- To move blocks to a new time or date, simply drag and drop the blocks at the new time and dates.
- To add additional text directly into the block, click and type.
- To change the appointment information, use the Appointment Information form. *See section 5.3.1.1., Opening Appointment and Event Information Forms.*

5.4.3 Deleting a Project or Task Block

To delete a project or task block, right-click and select Delete. You can also select Edit->Delete command.

5.4.4 Viewing Tasks in a Project Block

To view the tasks associated with a project block, right-click the project block and select View Tasks. You can also select Actions->View Tasks command.

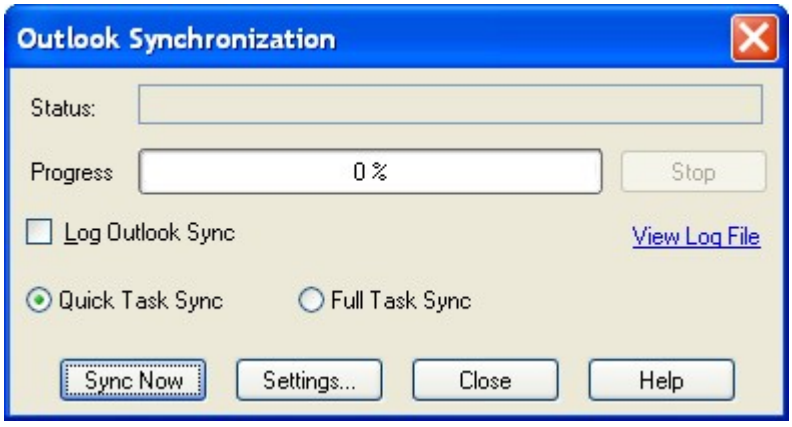
6 Importing Data from Outlook

Achieve Planner supports synchronization of task, appointment, and contact data with Outlook. In addition, you can import email messages as Achieve Planner tasks to help you keep better track of them.

By default, Outlook synchronization only imports data from Outlook, but does not make any changes to Outlook. If you want to perform a 2-way synchronization or to export Achieve Planner data to Outlook, you will need to change the synchronization settings.

6.1 Performing a Synchronization

To perform an Outlook synchronization, select the Tools->Outlook Synchronization command. This will bring up the Outlook Synchronization Dialog.



When you are ready to perform the synchronization, click on the *Sync Now* button. If you need to change the settings before starting the synchronization, click on the *Settings...* button.

You can get specific help for the synchronization dialog by clicking the *Help* button, or pressing F1.

6.2 Importing Your Data from Outlook

If you use Outlook, you'll probably want to import your tasks, appointments, and contacts from Outlook to populate your Achieve Planner data.

The default sync settings only import data from Outlook without making any changes to the Outlook data. If you would like to propagate changes you

make in Achieve Planner back to Outlook, or export any other items that you've created in Achieve Planner to Outlook, you'll have to adjust the settings as described below.

The rest of this section describes how to import your tasks into Achieve Planner and how to organize them after you've imported them.

Note: To avoid synchronization problems, please make sure that Outlook is running before starting the sync operation

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1. Use the Tools->Outlook Synchronization command to bring up the synchronization dialog.

2. The default settings import email, tasks, appointments, and contacts from Outlook. Since this is what you want, you don't have to make any changes to the settings.

Note: By default, completed tasks in Outlook are NOT imported into Achieve Planner. If you want to import completed Outlook items, you need to adjust the settings as described below.

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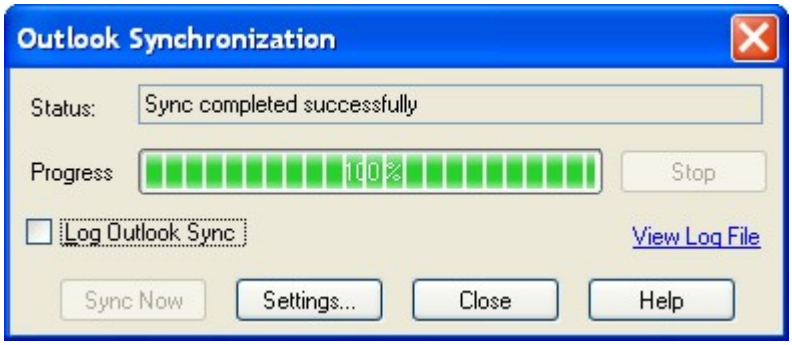
3. Click on the *Sync Now...* button to begin the sync process.

4. After the sync is completed, click on the *Close* button.



When the sync is completed, any new Outlook tasks that have been imported into Achieve Planner are stored as tasks of a top-level project called <New Outlook Tasks>.

This is how four newly imported Outlook tasks look like in the Outline tab. Notice that the <New Outlook Tasks> project is not assigned to any result area.

	NS		<New Outlook Tasks>	None	On Schedule
	NS	B	Outlook Task # 1	None	On Schedule
	NS	B	Outlook Task # 2	None	On Schedule
	NS	B	Outlook Task # 3	None	On Schedule
	NS	B	Outlook Task # 4	08/18/2006	On Schedule

You can see that these tasks have a priority value based on their existing Outlook priority (High priority maps to A, Normal priority maps to B, Low priority maps to C.)

Any due dates in the tasks are stored as the Deadline of the item.

6.2.1 Organizing Imported Outlook Tasks

To organize your newly imported Outlook tasks, you'll want to separate them into projects and tasks.

Step 1 – Identify Outlook Tasks that Should be Projects

The first thing you should do is identify any of your tasks that should be projects instead of tasks. This is easiest done from the Outline view.

When you find such a task:

1. Select the task's row using the row header.
2. Select the Actions->Convert into Project command to convert the given task into a project (Ctrl+Shift+C, P)

When you do this, the task is converted into a sub-project of the <New Outlook Tasks> project. For example, if you do this for "Outlook Task # 2" in the example above, the result is:

	NS		<New Outlook Tasks>
	NS	B	Outlook Task # 2
	NS	B	Outlook Task # 1
	NS	B	Outlook Task # 3
	NS	B	Outlook Task # 4

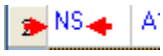
Notice that the icon for "Outlook task # 2" has been changed into a project icon, and that it is now sorted above all the other tasks.

3. Repeat this process for all the other imported Outlook tasks that should be projects.

Step 2 – Move New Projects to Appropriate Result Areas

Using the master outline, drag and drop your newly created projects from the <New Outlook Tasks> project and drop them as children of the appropriate result area. For example, work related projects can go into the Work result area.

Make sure that the red drop arrow is in the middle and slightly to the right of the result area where you want to drop them (this indicates a child drop.)

Drop As Child à 

If you have a large number of projects that you want to drop into the same result area, you can select multiple rows via the row header by holding down the Ctrl key as you make your selections before starting the drag.

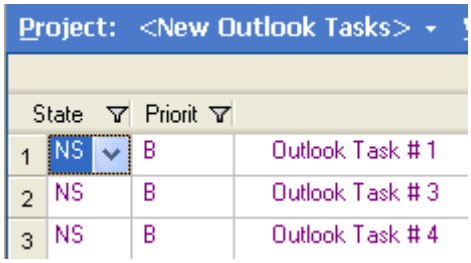
You can also use the Pickup & Drop commands in the Edit menu to do this (see section 3.3.7.2 for details.)

Step 3 – Add Any Missing Projects to the Appropriate Result Areas

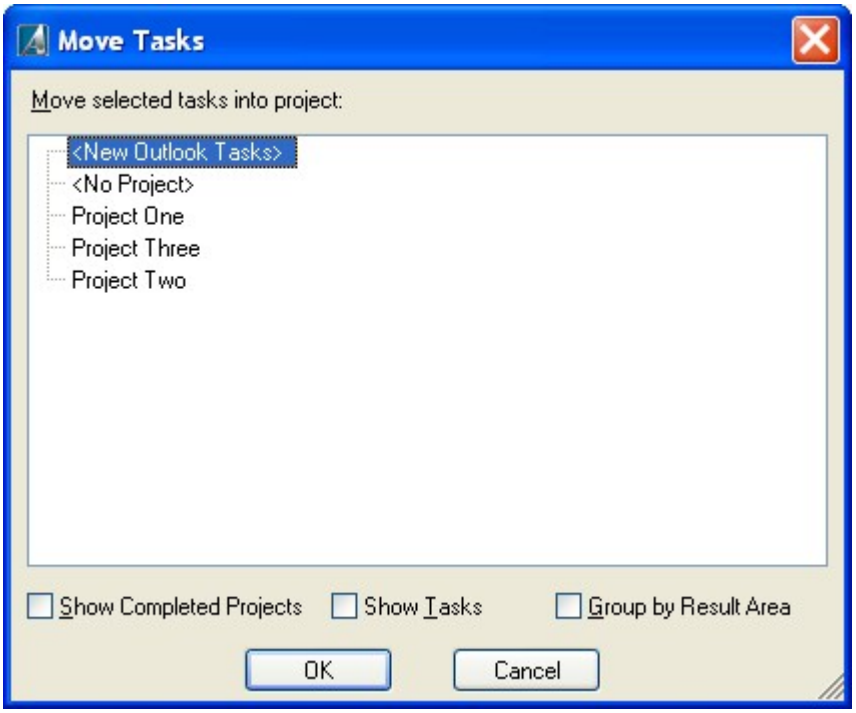
If there are any other projects that you would like to include, you can add them directly from the Outline tab. See section 2.1 for an example.

Step 4 – Move Remaining Tasks to the Appropriate Projects

This last step is easier to do from within the Tasks tab, so navigate to the Tasks tab (Go->Tasks command) and filter it to show tasks for the <New Outlook Tasks> project.



Now select one or more tasks that you want to move into another project, and invoke the Actions->Move to Project command. This will display the "move to project" dialog where you can select the project where you want to move the tasks.



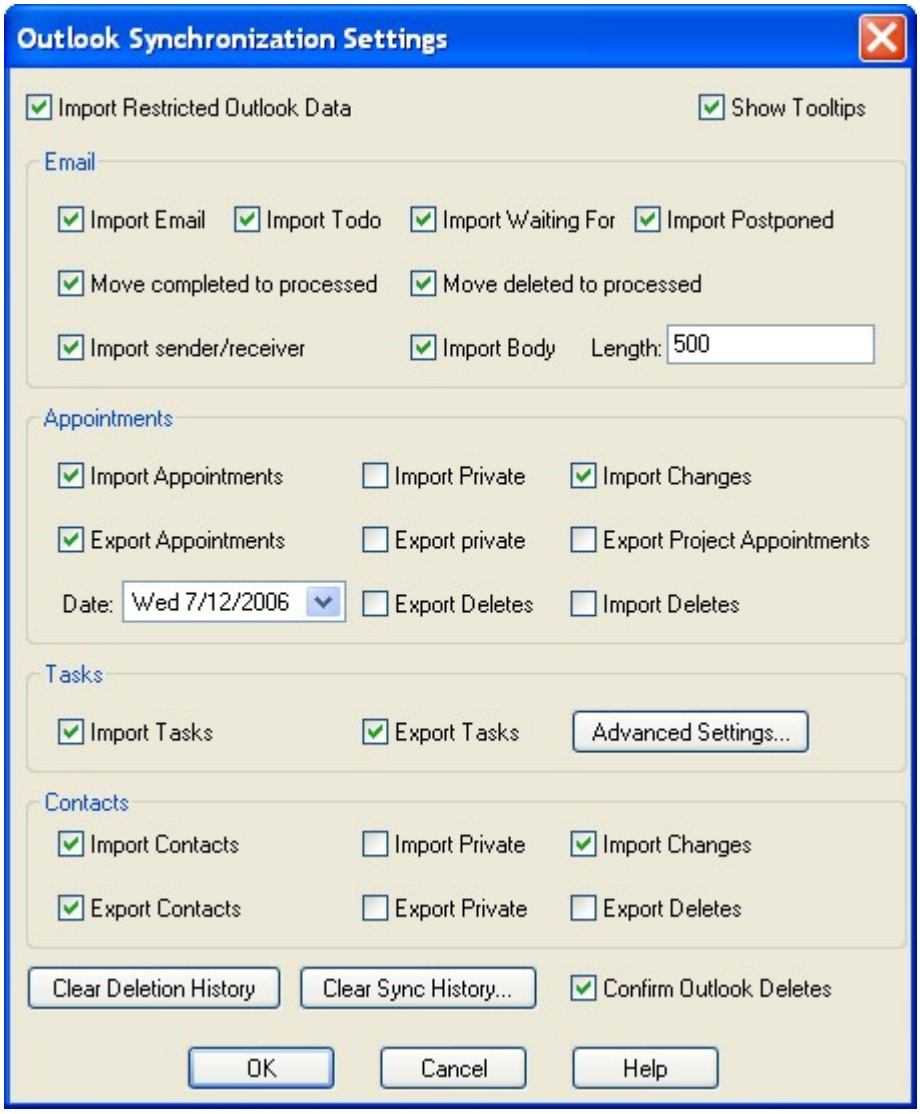
This will move all the selected tasks into the chosen project.

Just repeat this process until you've assigned projects to all your Outlook tasks.

6.3 Performing 2-way Synchronizations

By default, the Outlook sync settings are setup to only import data from Outlook without making any changes in Outlook.

If you want to perform a 2-way sync so that changes you make in Achieve Planner get propagated to Outlook and vice versa, you need to change the settings.



The various Import/Export checkboxes control the direction of data exchange between Achieve Planner and Outlook for the various items (like Appointments, Tasks, and Contacts).

Checking the Import checkboxes means that data is imported from Outlook into Achieve Planner.

Checking the Export checkboxes means that data is exported from Achieve Planner to Outlook.

Checking both the Import and Export checkboxes performs 2-way sync of data between Achieve Planner and Outlook.

To learn more about the various options, please refer to the help file for this dialog (click the *Help* button or press F1.)

6.4 Advanced Task Settings

The advanced task settings allow you to control various aspects of task synchronization including the Outlook task folder, encoding of priority and task information in exported task subjects, and other details.

Please refer to the help file section of this dialog for a detailed description of each option.

6.5 Conflict Resolution

A conflict occurs when there are changes to both Achieve Planner and Outlook data since the last time a sync was performed.

For example, if you change a task's subject in both Achieve Planner and in Outlook.

For appointments and contacts, Achieve Planner uses automatic conflict resolution based on where the item came from originally. If the item was imported from Outlook, then Outlook data is overwrites AP data in a conflict. If the item was exported from Achieve Planner to Outlook, the AP data is used in a conflict.

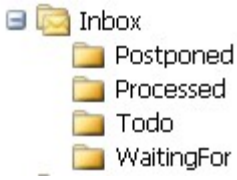
For tasks, you can specify different types of conflict resolution (in the advanced task settings) including always use Achieve Planner data, always use Outlook data, flag the AP task and continue without changes, or manual resolution to allow you to choose how to handle each case.

Please see the help file section on the advanced task settings for a description of how to change the conflict resolution.

6.6 Importing Email

If you use Microsoft Outlook® (XP/2003), you can track action-oriented emails as projects/tasks in your schedule. Here's how it works.

During the first Outlook synchronization, Achieve Planner adds a couple of folders under your Inbox: Todo, Postponed, and WaitingFor. When you receive an email message you want to track, simply move it to one of these folders.



During the next Outlook synchronization, Achieve Planner will create a task for each new email in these folders and set its status accordingly. The task will remain linked to the email message so you can easily view it even if you move it out of the Todo folder.

NOTE: In order to import emails from Outlook, you must set the Outlook settings to Import Email AND select the folders from which you want to import (Import Todo, Import Postponed, Import WaitingFor). Both of the checkboxes must be checked.

All new emails are imported under a project called "<New Email Tasks> " visible from the master outline. You can move this project under a result area for new imports.

If you rename this project, a new one will be created in its place.

7 Automated Scheduling

Achieve Planner can help you estimate when you can expect to complete your various projects & tasks based on your effort estimates, your prioritization, and your weekly schedule.

This process is called "automated scheduling" because Achieve Planner determines the target start/end dates of your "active" projects and tasks based on information that you provide.

Achieve Planner performs project/task scheduling for active projects and tasks that are not completed, postponed or in the D priority category when you invoke the Actions->Reschedule command. This section describes the process that Achieve Planner uses when scheduling projects and tasks.

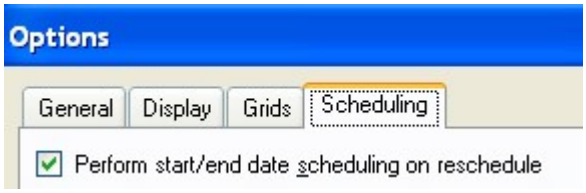
Some benefits of automated scheduling include:

- Get a quick estimate of when you'll be able to complete your various projects & tasks via the target end date, which is based on your own effort estimates, priorities, and project blocks.
- Determine ahead of time if you might be unable to meet a deadline. The schedule status will warn you (with a Behind Schedule status) so that you can take corrective actions such as increasing the priority of a project/task, or delaying work on non-essential projects.
- Determine if you are trying to do too much at the same time based on the target end dates for your various projects.

Only tasks that are children of projects are included in the automated scheduling. Tasks that don't have a parent project (e.g., that are direct children of result areas) are not included.

7.1 Turning Off Automated Scheduling

If you would like to perform all start/end date scheduling yourself, you can disable the automated scheduling feature of Achieve Planner from the Tools ->Options dialog.



You can still use lead based scheduling if you would like by checking the Always use lead time scheduling... box.

7.2 How Automated Scheduling Works

You supply the level of effort, dependencies, resources, and project block scheduling and Achieve Planner will calculate the target start and end dates for the tasks and associated projects. Each task within a project has the following scheduling values:

- Target start date - The target start date for the task
- Target end date - Estimated end date for the task
- Effort Left - Amount of effort that is still required to complete the task (this is effort and not calendar duration.) This is the value that is used for scheduling.
- Resource Assignments - Resources that are assigned to work on the task. If you leave this blank, the default resource for the project and/or result area is used instead (see below.)
- Dependencies - Specify when a task can start in relation to other tasks. By default, priorities are used as an implicit dependency in the sense that higher priority tasks are scheduled ahead of lower priority tasks. Most of the time, you don t need to add explicit dependencies.
- Constraints - Place limits on when a task can start/end.

Achieve Planner only schedules projects and tasks that are marked as "Effort Driven" (which is the default.)

Non-effort driven projects will use the date and effort values manually set for their tasks but will not automatically compute them based on resource availability or effort values.

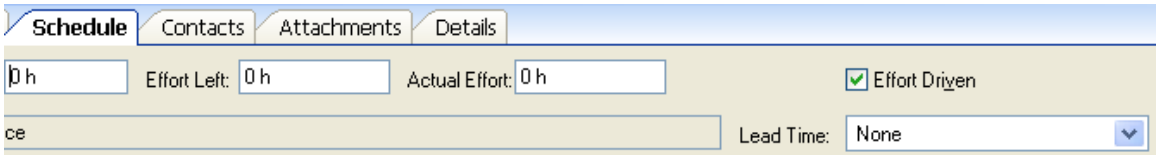
You can set the Effort Driven flag in the Project Information Form or Task Information Form or via one of the "Active Recurrence" views.

7.2.1 Lead Time Based Scheduling

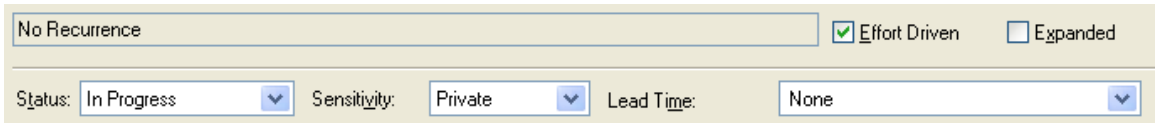
Lead time based scheduling provides a convenient way to schedule the target start date for projects/tasks with deadlines.

The "Lead Time" field value (available through the project/task information forms and/or scheduling views) specifies the number of days prior to the project/task deadline when you want to start the project/task.

Here is the lead time in the task information form:



As well as in the project information form's General tab:



It is also available as a default column in the following views (you can always add it yourself to any of the other views):

- Active Project Recurrence
- Active Task Lead Time
- Active Task Recurrence

For example, if you set the lead time to 10 days, the target start date is set to 10 days before the deadline. You could do this, for example, to set the start date for your "Thanksgiving Dinner" project to 20 days before the big date.

Lead time based scheduling only applies to items with deadlines. Projects/tasks without deadlines will not be affected by the lead time values.

The Tools->Options dialog contains a setting that controls whether to always use lead time based scheduling for items with deadlines (and valid lead times) irrespective of whether they are effort driven or not, or whether to only do this for projects/tasks that are not effort driven. Please refer to the help file for more details on this setting.

The target end date is not affected by the lead time. Depending on whether the item is effort driven or not, Achieve Planner will either automatically compute the target end date based on effort estimates as part of automated scheduling (effort driven), or it will have to be set manually.

7.2.2 Project Start

You can set the target start date for the project manually or leave it blank. If you leave it blank, it will automatically be set to Today during scheduling. You can use the Project Start value to specify that a project will begin sometime in the future rather than now. If you've previously specified a project start date, but now want the project start to be adjusted when projects are rescheduled, you need to clear the existing value (clear using backspace key on Target Start Date cell) before issuing the reschedule command.

7.2.3 Effort Values

Achieve Planner uses level of effort values to measure the amount of work needed to complete a task. The level of effort is the amount of work that it would take an average person in your team to complete the task if they spent 100% of their time on it.

It is not the same as the calendar duration of the task, which depends on factors such as resource assignments, holidays/vacations, weekends, etc.

With the effort measure, you can compare one task against another irrespective of what else was going on during that time. The level of effort is the same whether you can devote one hundred percent or only fifty percent of a resource's time to the task.

You can use the following units when setting effort values:

Minutes (m or min)	5 m
Hours (h)	20.5 h or 20:30 h (20 hours 30 minutes)
Days (d)	2 d (a day is considered to be 8 hours)
Weeks (w)	1 w (a week is considered to be 40 hours)

When a project has no tasks associated with it, it is treated for scheduling purposes as if it had a single task with no dependencies/constraints and with the same target start and effort left as the project.

You can specify the target start date for a project, which will be used to schedule all tasks for that project.

7.2.4 Default Task Scheduling Order

The scheduling algorithm processes tasks in order of project & task priority (A1 tasks before A2 tasks, etc) using the specified resource allocation until the task is completed.

If multiple projects/tasks share the same resource, projects/tasks with higher priority take precedence over projects with lower priority as follows:

"A" priority tasks of all "A" priority projects (ordered by project/task priority)

"B" priority tasks of all "A" priority projects (ordered by project/task priority)

"A" priority tasks of all "B" priority projects (ordered by project/task priority)

"B" priority tasks of all "B" priority projects (ordered by project/task priority)

"C" priority tasks of all "A" priority projects (ordered by project/task priority)

"C" priority tasks of all "B" priority projects (ordered by project/task priority)

All tasks of "C" priority projects (ordered by project/task priority)

D priority projects/tasks are not scheduled.

You can also use project or task resource assignments to limit the amount of a resource that is available for a particular project/task therefore making part of the resource available to spend some of his/her time in other projects/tasks with lower priority.

Note: Project block scheduling, described in a later section, can alter the order in which projects and/or tasks are scheduled for a particular day

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7.2.5 Next Action Reminder Tasks

A task with an expected and effort left values of 0 (0 h) is considered a ‘next action reminder ”task and is not scheduled.

NOTE: This is not the same as a Next Action Only ’list as used in the Outline.

These tasks are useful if you just want a reminder of where you left off, or just want to add a quick sub-note to a task without including it in the scheduling.

When you add a new child task to an existing task that has already been started or to a "next action reminder" task, Achieve Planner automatically initializes the effort values of new tasks to 0, thus making it a "next action reminder" task as well.

Otherwise, new tasks are initialized with an effort of 30 minutes.

7.2.6 Summary Tasks

A task with scheduled children is considered a summary task for scheduling purposes and does not contribute directly to the level of effort for tasks. All the scheduling information for the children is used to calculate the values for the summary task.

The only meaningful fields are:

Dependencies - Dependencies placed at the summary task level affect all children

Resource Assignments - Any resource assignments at the summary task level are used by default by any child tasks that don't have explicit assignments

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Note: If a parent task only has "next action reminder" tasks as children, then it is NOT considered a summary task and will be scheduled

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7.2.7 Project Block Scheduling

When using project block scheduling, Achieve Planner's scheduling algorithm proceeds in two stages:

The scheduling algorithm proceeds in two stages:

- Stage 1 uses ONLY the project/task blocks in the weekly schedule (up to a user defined date) to determine how much time is available for different projects and/or tasks
- Stage 2 uses the project/task priorities and resource assignments to determine in what order to schedule the projects and how much time is available for each one.

Because AP can't know when stage 1 should end and stage 2 begin, it relies on user settings to distinguish between them.

Whenever you perform a Reschedule operation (Actions->Reschedule), the following dialog is displayed (unless you've explicitly turned it off by checking the "Don't ask again" checkbox.)

In this dialog, select "Don't use project blocks for scheduling" if you would like to perform default priority based scheduling (Stage 2 only) while bypassing stage 1 and not considering your weekly schedule project blocks.

Select the "Use project blocks for scheduling until the following date" option and provide an end date if you would like to consider your weekly schedule projects blocks (Stage 1) until the given date. Normally, this is the end of the current week.

Any tasks scheduled beyond the end of the date range will revert to the default priority-based scheduling algorithm (stage 2.)

You can also use the Tools->Project Block Scheduling Options command to modify the settings and uncheck the "Don't ask again" box.

Stage 2 Resources

Achieve Planner creates two default resources to represent your personal and work time. These resources are "Me(p)" for personal, and "Me(w)" for work.

Short Name	Description
Me(p)	Resource representing my time for personal projects
Me(w)	Resource representing my time for work-related projects

For tasks assigned to your personal and/or work resources, which is the default when there is no assignment at the task or project level, you can specify the amount of effort available on a given date based on the project blocks scheduled in the Weekly Schedule view on that date.

For example, if you have project blocks on Monday representing 5h of time for "Project A" and 1h for "Project B," then this is how much time will be scheduled for these projects on this date. Any other projects will be scheduled as if there is no available time on this date.

Taking advantage of project block scheduling allows you to use weekly planning and account for interruptions and meetings when scheduling your tasks for the week.

If you only schedule 4 hours of project blocks for a given day, Achieve Planner will only assume that you have 4 hours to work on your projects and the rest is taken up with interruptions, meetings, or other unscheduled activities.

Only project/task blocks contribute to the automated scheduling. The time chart areas (which appear in the background of your weekly schedule) are not used during scheduling and do not influence the scheduling of projects and tasks.

8 Working with the Task Chooser

This section describes the Task Chooser and provides instructions for getting the most from it. To open the Task Chooser, select it from the Go menu.

The Task Chooser helps you choose what task to work on next by displaying a list of leaf tasks (and task-less projects) across all your projects sorted using a scoring formula that is intended to display the "best" tasks to work on based on priorities, deadlines, and other factors. It helps you choose the next task to work on and answer the question "What is the best use of my time right now?"

The Task Chooser uses a numeric score value to sort the items. It also provides several filters to include or exclude certain items in the list.

For sorting tasks in the Task Chooser, sub-item priority ranks are relative to the parent. If you change the parent priority or rank, the Task Chooser automatically adjusts the importance of all its sub-items relative to other items in the list.

At every level in the hierarchy, when a parent becomes more important (higher priority), the children become more important as well. When a parent becomes less important (lower priority,) its children are also considered less important.

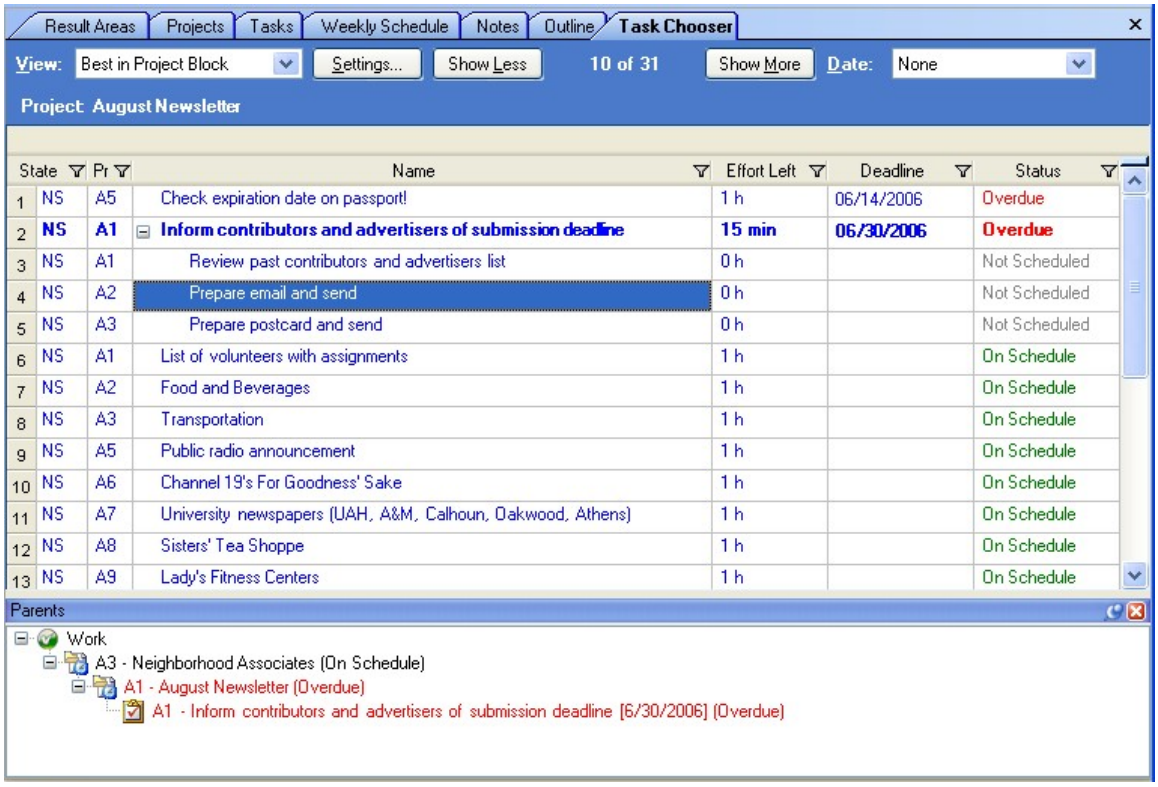
Bonus ranking in the task chooser:

- Focus - Achieve Planner adds a priority "bonus" for any item with the "Focus" field checked.
- Deadline - Achieve Planner adds a priority bonus to items as their deadline approaches or becomes overdue.
- Start & End Time - Achieve Planner can also add a priority bonus as start and end dates approach.

These factors are configurable via the Task Chooser settings.

8.1 Understanding the Task Chooser Window

You have a lot of control over the look and behavior of the Task Chooser. For example, you can select the columns displayed and you can change numeric settings and filtering that result in the displayed list. The main task chooser window is shown below. The *Task Chooser Window Description* table identifies the areas and behaviors of the main Task Chooser controls.



Task Chooser Window Description

Name / Action	Description
Selection Bar	• View button - selects the current view that affects the scoring and filtering of the tasks displayed in the chooser. • Settings button - changes the scoring/filtering settings for the current view. • Show Less / Show More buttons - control the number of items displayed in the list. • Date dropdown – change the date filtering for the current view. • Project - displays the name of the project associated with the current selected item.
Grid	Displays the items in the list sorted by their score.
Parents Docking Panel	Displays the parents of the selected item in the outline.

Name / Action	Description
Double-click or (CTRL+ENTER) any row item	Navigates to the item's row in the corresponding Project or Task List.
File > Open > Open Selected or (CTRL+O)	Opens the Information form associated with the item (Task Information or Project Information).

8.1.1 Changing the Task Chooser View

Achieve Planner currently supports the following task chooser views:

- Best Overall – Best tasks across all your projects regardless of result area.
- Best in Project Block – Displays the best tasks in the current project block (weekly schedule) for the current time. If there is no current project block, displays best overall instead.
- Best work-related – Displays the best tasks across all projects belonging to work result areas (in the Work category.)
- Best personal – Displays the best tasks across all projects belonging to personal result areas (in the Personal category.)
- Urgent – Displays urgent tasks across all projects. Has different scoring values for dates.
- Deadlines – Displays tasks with deadlines across all projects. Has different scoring criteria for deadlines.

Note: The Task Chooser uses a scoring formula to decide what "best" means in each view. It is a combination of the weighted priority score, taking into account the priority of the item and all its ancestors, its deadline, and the target start and end dates. The meaning of "best" is configurable by changing the Task Chooser settings for each of the views (see section 8.2.).

To change the view, click the View arrow on the Selection Bar and select the new view.

8.1.2 Changing the Number of Visible Tasks

You can adjust the number of visible tasks by clicking the Show More and Show Less buttons on the Selection Bar. The label in the middle indicates how many tasks are displayed and how many total tasks are available in the view.

In this case, only 10 of 31 total tasks are displayed in the task chooser list.

8.1.3 Filtering Tasks by Dates

To change the date filter, click the Date arrow on the Selection Bar and select the new date filter.

The following date filtering values are supported:

- None – No date filtering is performed
- Current – Shows started tasks with "In Progress" (IP) or "Should Delegate" (SD) states, or non-started tasks with a Target Start Date of Today or earlier (or no start date established), or with an ancestor deadline on or before Today.
- Overdue – Shows tasks with an ancestor deadline before today.
- Behind Schedule – Shows tasks with a target end date before today or an ancestor deadline before today.
- Due Soon – Shows tasks with a target end date or ancestor deadline that is due soon.
- Next Seven Days – Shows tasks with a target start date, target end date, or ancestor deadline occurring in the next seven days or earlier.
- Next 14 Days – Shows tasks with a target start date, target end date, or ancestor deadline occurring in the next 14 days or earlier.
- Next 30 Days – Shows tasks with a target start date, target end date, or ancestor deadline occurring in the next 14 days or earlier.

The date filter only affects which tasks are displayed in the task chooser list, but does not affect the scoring of the tasks.

8.2 Changing Task Chooser Settings

You can adjust the settings used to score items in the current view. When you change settings, the new settings will only apply to items in the current view. Other views will retain their own unique settings.

To change the settings, click the Settings button on the Selection Bar.

8.2.1 Scoring Formula

The task chooser scoring formula uses the priority value of each item (and all its ancestors) to determine the "priority multiplier" of the item, which is a number between 0 and 1.

To compute the priority multiplier, each priority value in the item's outline hierarchy is converted into a number between 0 and 1 (based on the priority's A/B/C/D category as well as the rank). The value is then adjusted based on the depth of the item in the outline. The deeper the item, the less its priority affects the overall multiplier.

For result areas in the outline, either the result area importance or its priority is used to compute the multiplier depending on the settings.

All the priority values for the item and its ancestors are then multiplied together to determine the overall priority multiplier.

For example, assume that your outline looks something like this, with the individual priority multiplier for each item shown in parenthesis:

- Project A (1.0)
    - Task # 1 (0.9)
        - SubTask #1 (0.9)

In this case, the overall priority multiplier for subtask#1, would be obtained by multiplying the priority multiplier values of it and all its ancestors: 1.0 * 0.9 * 0.9 = 0.81

Once the priority multiplier is determined, each item is awarded a number of points for things like importance, item status (overdue/behind schedule, etc.), how close the item is to its deadline or end date, and the target start date. These points are then added together to obtain the total number of points for the item.

The overall score of the item is the product of the priority multiplier and the total points. Both the points and the overall priority multiplier of the item are used to determine the score.

Tasks in the chooser are sorted according to the overall score of each item.

8.2.2 Item Filtering

In addition to the sorting of items in the list based on their individual scores, the task chooser also performs filtering of items to limit the number of items displayed.

The following factors affect the filtering in different views:

» Whether the item has active children

» The project associated with the item

» The amount of time remaining in the current project block

» The result area category for the item

» The position of the item in the list (filter by number of items)

» The schedule status of the item (behind schedule/overdue)

» Target Start Date and/or Deadline of the item (for date filtering)

How are items included in the list?

1) Only active (not completed) items are shown in the list.

2) If the list is filtered by result area category, only items belonging to the selected category appear in the list.

3) If the list is filtered by current project/task block, only items belonging to the current project or task appear in the list.

3a) You can choose to allow overdue and behind schedule items to override the project block filtering. If that is the case, the items will be shown in the list if they are overdue or behind schedule respectively.

This is useful if you want to be aware of overdue items regardless of project or project block.

4) If the list is filtered to fit in the current project block, only items that can be worked on within the current block (based on effort left) appear in the list.

For example, if the current project block has 45 minutes of time remaining, and the task list has items of 15 minutes, 2 hours, and 30 minutes ordered based on their score, only the 15 minute and 2 hour tasks are shown.

5) Only items that don't have children, or whose children are all completed are shown.

An exception is made for tasks with incomplete "next action" reminders, in which case the parent task and all the reminders are shown in outline form.

Note that this rule will also allow active projects to appear in the list if they have no tasks or sub-projects, or if all their children have been completed but the projects themselves have not been marked as completed.

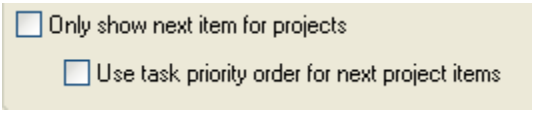
6) If the list is filtered to a certain number of items, any items over the limit that were not filtered by any of the previous rules will not be shown.

The Show More/Show Less buttons in the task chooser extend the limits of the filtering to change the number of items shown.

In general, show more will extend the "fit in project block" rule to allow more items in the current project block to be shown, as well as extending the total number of items shown. Show less has the opposite effect.

8.3 Only Show Next Item for Project

In some cases, you may want to view only the next task for each project in the Task Chooser list, rather than all available tasks across projects. This can greatly reduce the number of displayed tasks and can make it easier to select the best task to work on next.



The task chooser supports this filtering logic using two flags in the Task Chooser settings dialog (can be set independently for each view.)

Only show next item for project enables or disables the filtering of the task chooser list to only show one item per project.

Use task priority order for next project items controls which task associated with each project is displayed in the Task Chooser list.

If this flag is checked, then the task displayed is based on the priority order in the project ś task list.

If the flag is unchecked, then the task displayed is the highest scoring task for the project in the task chooser list (taking into account deadlines, and other scoring criteria), which may not necessarily be the topmost task in the project's task list.

8.4 Task Chooser Settings

Each view has its own set of settings, which can be different from other views. This means that one view can score items in a completely different way than another view.

For a detailed description of the task chooser settings, please refer to the help file or press F1 in the Task Chooser Settings dialog.

8.5 Focus Projects/Tasks

Projects and tasks have a field called "Focus" that you can use to tag projects and tasks that represent your current focus. The focus field is available in several of the standard project/task views, but you can easily add it to any of the others.

The focus field affects the scoring of projects & tasks in the task chooser by adding a "bonus" to any item that has its focus field checked, or that has a parent with the focus field checked.

The bonus value is configurable through the task chooser settings.

For example, if you focus tag a project, all its tasks receive the focus bonus. If you only tag a particular task, only that task (and any of its children) get the focus bonus.

The focus bonus is an easy way to make certain projects & tasks appear higher in the task chooser than they would otherwise based only on their natural score.

9 Weekly Planning Wizard

Achieve Planner Pro & Productivity Suite editions contain a weekly planning wizard that supports the weekly planning process.

I typically use the wizard as my first task Monday mornings just after doing a quick scan on my email to identify anything important that may affect how I plan the week.

I also do a quick review and reprioritization of projects before invoking the wizard since it is often easier to do this from the Projects tab or the Outline tab.

The wizard consists of five steps that pretty much follow the steps outlined in these articles.

9.1 Step 1

This step in the wizard combines the review of your result areas and main projects for each area.

Result areas represent your major life dimensions or roles. Examples could be health & fitness, work, finances, career, and personal development.

Your weekly planning routine is a perfect opportunity to give a quick review to your mission statements for each area, just to get in touch with the general direction you want your life to take.

Doing this on a weekly basis allows you to take a longer-term perspective into account during your short-term weekly planning sessions.

For now, just keep in mind that weekly planning helps you to connect your longer-term perspective and goals with your short-term planning efforts.

In this step, you can also review your main projects for each area.

The purpose of this review is to make sure that all your projects are getting the time and attention they deserve, and that the priorities that you've assigned to them are still valid for this upcoming week.

I recommend that you review all your active projects, not just the ones for this week; by doing this, you can easily catch projects that you've been neglecting or that you may have forgotten about.

If you notice that the priorities for one or more projects are not reflecting what is most important in your life right now, or you have some new projects that need to be prioritized, reprioritize them now before continuing.

You may also want to think about any new projects, work, action items, commitments, or anything else that you need to get done that is not already in your master project list.

9.1.1 Focus Areas

During your review, you should also begin to think about the areas you want to focus on this week.

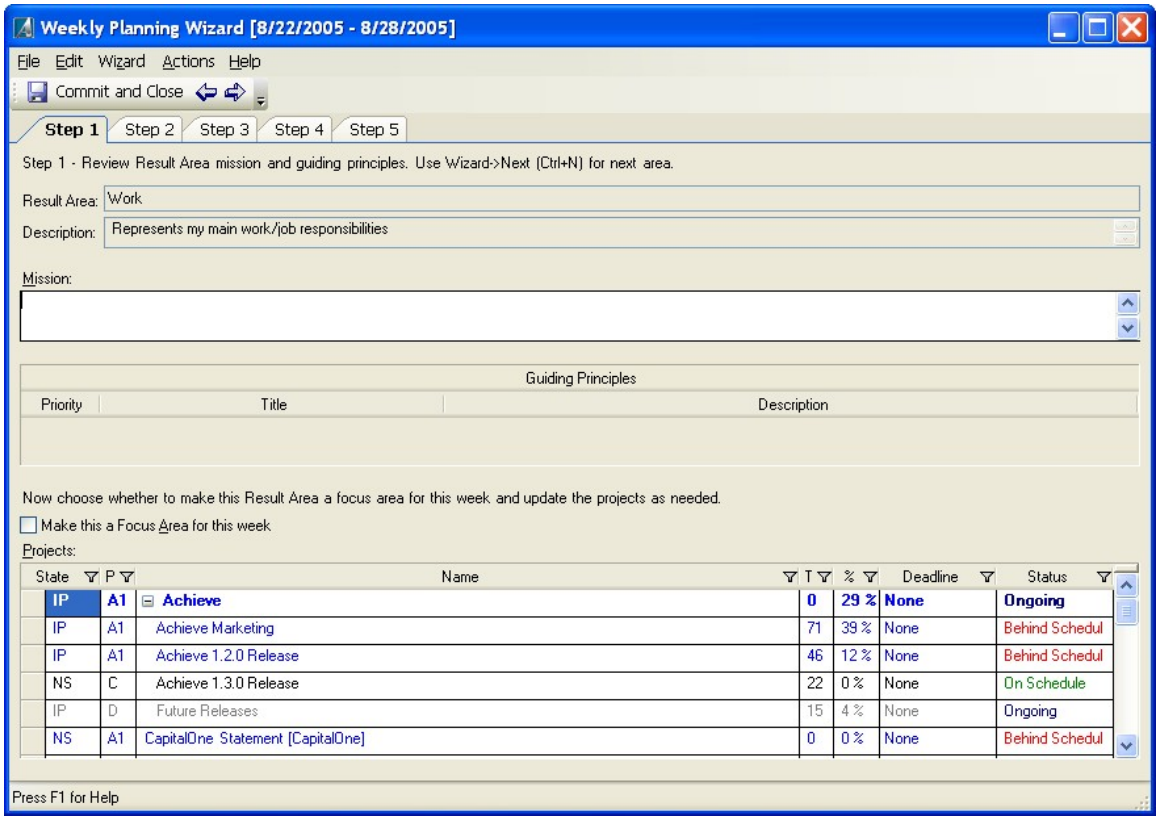
A week is often too small of a period to cram all the different types of activities that are part of your life.

Rather than try to do a little bit of everything each week, you may want to give each week a focus, and concentrate more deeply on a smaller number of areas. Most people do very well with three main focus areas each week, although you can add more if you need to.

This doesn t mean that you should ignore all the other areas, it just allows you to focus more on some of them for this particular week.

You can then vary the focus from week to week to add more balance over time.

This approach allows you to give a meaningful amount of time to each area, while at the same time creating long-term balance and variety over a period of several weeks.



You can review the mission statement and guiding principles for each area, designate whether you want to make it a focus area for the week, and review your projects.

This is also a good place to add projects for the result area, or update your project priority values as necessary.

9.2 Step 2

In this step, you can rewrite your major dreams and goals, which you can define with the Achieve Planner Productivity Suite edition.

Rewriting your dreams and goals during the weekly planning process brings them into focus and ensures that you at least think about them during your short-term planning.

9.3 Step 3

In this step, you can select your ideal week time chart based on the focus areas you chose in step 1. You can also block out any meetings or appointments that you have for the week so that you won't use them during the project block scheduling.

9.4 Step 4

This step is where you decide the amount of time that you want to commit to your various projects this week.

Achieve Planner automatically creates two resources for you when you create a new file. One represents your work related time, while the other represents your time for personal projects.

The time commitments you make in this step are used in the next step to determine how many project blocks to create for each project.

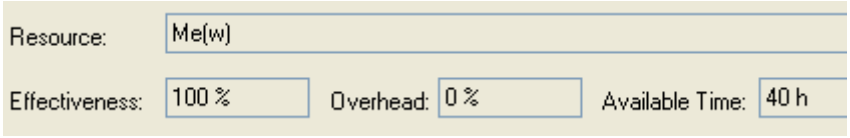
Time Commitment	Time %
0 h	**0 %**
7 h	18 %
25 h	63 %
0 h	0 %

As I mentioned before, you probably should not schedule 100% of your time using big rock project blocks unless you have a structured work environment. You need to leave some free time to deal with unexpected events.

You can use the "% left" field to guide you in your decision of how much time to leave unscheduled.

By default, Achieve Planner creates two default resources for you. The first resource ("Me(w)") represents your work time, while ("Me(p)") represents your personal time.

In Step 4, you will see the following information for each of these resources:



The values are based on the Resource information for the two default resources. You can change the available time and other resource details using the Resource Information form. Navigate to the Resources tab (Go-> Resources) and double click on the resource that you want to change.

9.5 Step 5

In the final step, you use drag and drop to create project blocks for each of your big rock projects identified in step 4.

This step helps you put your big rock projects into your schedule first, and allows you to make time for important long-term projects that may not yet be urgent.

The project blocks are ordered based on the priority of the items and whether you selected them as MVPs in step 4 (MVPs go first.)

You can use the controls in the form to change the project block size and the collision resolution.

10 Using Achieve Planner for Goal Setting & Achievement

Achieve Planner Productivity Suite edition contains several features to help you identify, set, plan, track, manage and achieve your goals.

This section describes some of the main goal setting features and shows you how to use them; however, describing the goal setting and achievement process that the software is based on is beyond the scope of this manual.

For more information about the process of setting and achieving goals, including how to use these various tools, please visit www.GoalsToAction.com.

10.1 The Master Outline

The master outline tab (Go -> Outline menu item) provides a bird ś eye view of all your result areas, dreams, goals, projects and tasks.

It ś one of the primary ways to view the relationships between result areas, which represent your life dimensions or roles, your dreams/goals, which represent targets that you are aiming for, and projects/tasks that are used to move toward these targets.

Achieve Planner ś dreams & goals are treated as a special kind of project in the sense that you can have a goal at any point in the hierarchy that you would have a project.

NOTE: Even though you technically can have goals as children of projects, we recommend against this practice.

To add a dream or goal in the master outline, simply insert a new record, for example, as a child of a result area, and select dream or goal as the record type.

10.2 Life Plan Tab

The Life Plan tab is accessible through the Go menu (Go -> Life Plan) and provides a free form note editor where you can store your strategic life plan.

The details of developing a strategic life plan are beyond the scope of this guide, so please visit www.GoalsToAction.com for more information.

10.3 Result Area Information Form

Result areas represent your top-level life dimensions or roles. You can view them as part of the Outline tab or through the Result Areas tab, both of which are accessible through the Go menu.

The result area information form allows you to plan and store more details about each of your result areas.

You can access the form by double-clicking on a result area row, pressing Ctrl+Enter, or using the File -> Open -> Open Selected Item menu item.

These are the main components of the form:

General Tab

- Name – Name of the result area
- Category – Main category for the result area (personal or work)
- Priority – ABCD priority for the result area. It ś used for sorting the result areas and, depending on the settings, can be used in the task chooser scoring formula as well
- Description – Description of the result area
- Importance – Importance of the result area relative to other areas. A value from 0 to 100 that is used in the task chooser
- Label – The label is used for blocks associated with this result area in time charts
- Default Resource – Default resource to use for projects/tasks in this result area. If left blank, the default resource for the result area category (work/personal) is used instead
- Reason – The reason why this result area is important, or not as important as other areas

Mission Tab

The mission tab is where you capture your mission statement and guiding principles specific to this result area.

Vision Tab

Capture your ideal outer (what you'll experience on the outside) and inner (what you'll feel and think on the inside) vision for this result area.

You can also associate one or more images with this result area using the "Images..." button.

Wish List Tab

Capture the wish list for the result area. NOTE: You can also capture the wish list using the Wish Brainstorming Wizard.

SWOT Tab

Perform your SWOT (strengths, weaknesses, opportunities, threats) analysis for this result area.

10.4 Goal Information Form

The goal information form helps you plan and store more detailed information about each of your goals.

You can access it by opening the goal rows from the Outline or Goal tabs (double click, Ctrl+Enter, or File -> Open -> Open Selected Item menu).

A detailed description of what each available item in this form means and how to use it to achieve your goals is beyond the scope of this manual.

Our Goals to Action courses cover this in much greater detail (www.GoalsToAction.com)

General Tab

- Title – This is a short description of the goal that you can use to recognize and distinguish this from other goals (Example: Reach 170 pounds by the end of 2008)
- Result Area – The result area that the goal belongs to. You can change it here or through the master outline.
- Range – Range of the goal (month, quarter, year, etc.)
- Priority – Priority of the goal compared to other sibling goals of the same parent
- Status – Status of the goal (Not Started, In Progress, etc.)

- Dream – Checked if this is a dream, unchecked if it's a regular goal
- Deadline – Deadline for the goal
- Planned Start – Planned start for the goal (if it has one)
- Values – Values that the goal contributes to. These are available during the daily goal review
- Question – A question that helps you think about the goal and the actions you can take to make progress
- Affirmation – A statement affirming the goal or a key belief associated with the goal
- Definition – More detailed definition of the goal
- Purpose – Purpose or main reason why this goal is important

Benefits Tab

A list of the benefits associated with this goal. Listing benefits is a way to uncover the real reasons behind the goal and provide additional motivation and reasons why it's important to complete it.

Vision Tab

- Vision – A more detailed vision of the outcome associated with the goal and what things will be like when it is completed
- Images – Link images in your PC with this goal
- Review – Review images associated with this goal
- Kind of Person – The kind of person you will need to be (or become) to complete this goal successfully
- Personal Changes – Specific personal changes you will need to make to complete this goal

Obstacles Tab

- Baseline – The baseline is the starting point or current state of your goal
- Limiting factor – The limiting factor is the single biggest bottleneck that is most preventing you from making progress
- Obstacles – List of obstacles associated with the goal. Uncovering obstacles (and figuring out how to overcome them) is a great way to develop a winning strategy

Strategy Tab

- Strategy – A description of the strategy you are planning to use to achieve this goal. This is your high-level plan.
- Actions – Actions refer to ongoing actions or activities that you will take on a regular basis as part of your goal, as opposed to one-time steps or projects that you need to complete.

NOTE: If you prefer, you can also capture actions as recurring projects or tasks associated with your goal.

Beliefs Tab

- Empowering beliefs – These are beliefs that you want to have about your goal to counteract any negative or limiting beliefs that you may have developed.

Resources/Environment Tab

- Resources – Resources that you have at your disposal to help you complete this goal
- Environment – Changes that you can make to your environment or lifestyle to support you in completing and maintaining this goal. You can include developing these as part of your strategy.

Team Tab

A list of people who can help you achieve your goal.

Rewards Tab

List of rewards associated with the goal and the conditions for getting them.

Progress Tab

- Goal Progress Reviews – Determine whether the goal is included in the goal progress tracking feature and with what frequency.
- Goal Progress – List your numeric goal progress scores for different dates
- Goal Wins – List one time "wins," "milestones," or accomplishments for your goal

Metrics Tab

List of all the metrics directly associated with this goal

Notes Tab

Freestyle notes for this goal

10.5 Goal & Result Area Images

Achieve Planner allows you to link one or more images with result areas, dreams, and goals.

Keep in mind that these are only links to already existing images on your PC and they are not stored within the Achieve Planner data file itself. Achieve Planner uses the directory and filename to find and display these images, so if you move them in your hard drive, Achieve Planner will not be able to find them.

That's why we recommend creating a special folder in your hard drive where you can store all images that you plan to associate with result areas or goals. For example, c:\GoalImages

10.5.1 Associate Images with Result Areas

To associate images with result areas, click on the 'Images...' button on the Vision tab of the result area information form. You can add, edit or remove images from the dialog.

You can also review existing images by clicking the 'Review...' button on the same tab.

10.5.2 Associate Images with Goals

To associate images with goals, click on the 'Images...' button on the Vision tab of the goal information form. You can add, edit or remove images from the dialog.

You can also review existing images by clicking the 'Review...' button on the same tab.

10.5.3 Reviewing Images

You can use the Tools -> Motivational Images... menu item to review all your motivational images.

If you use this menu item from the result area or goals tab, you can choose to display only the images associated with the select result area(s) or goal(s) by ensuring the 'Selected items only' box is checked.

Otherwise, you can check the 'All Result Areas,' 'Active Goals' and 'Completed Goals' to select which images you want to view.

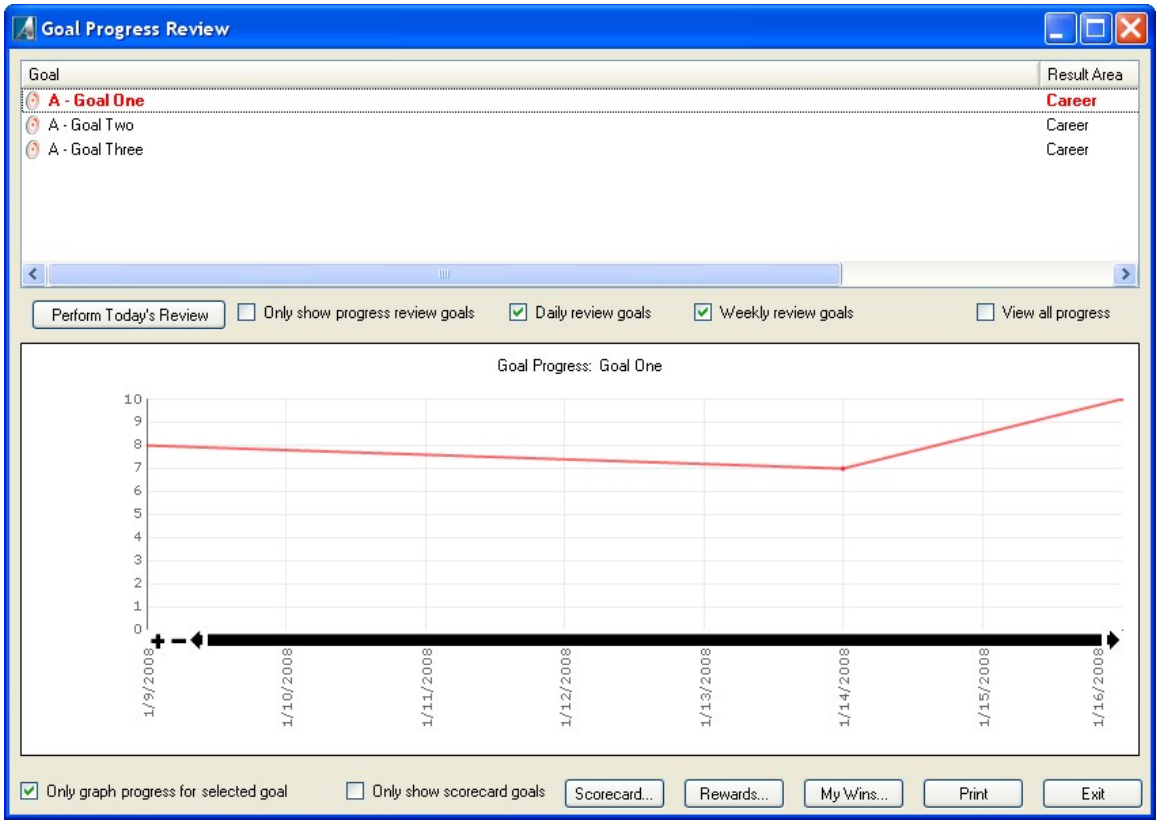
In addition, you can also select to view motivational images from a particular folder in your hard drive by selecting it in this dialog.

10.6 Goal Progress Tracking

This feature helps you track your progress for different goals by assigning a numeric score between 1 and 10, where 1 represents very little progress while 10 represents good progress for this goal.

You can choose whether to enable goal progress tracking and how frequently to track the progress for each goal, in the Progress tab of the goal information form.

The main goal progress tracking functionality is available from the Tools -> Goal Progress Tracking menu item.



The top list displays a list of goals filtered based on the checkboxes below the list:

- Only show progress review goals – Check to only show goals that have daily or weekly progress review
- Daily review goals – Show daily review goals
- Weekly review goals – Show weekly review goals

Below the list is a graph displaying the progress scores for the selected goal over time. By default, the graph only displays progress over the last 30 days, but you can view all the progress scores for the goal by checking the View all progress checkbox.

By default, only the progress for the currently selected goal in the list is displayed in the graph. You can view progress for multiple goals simultaneously by unchecking the Only graph progress for selected goal checkbox.

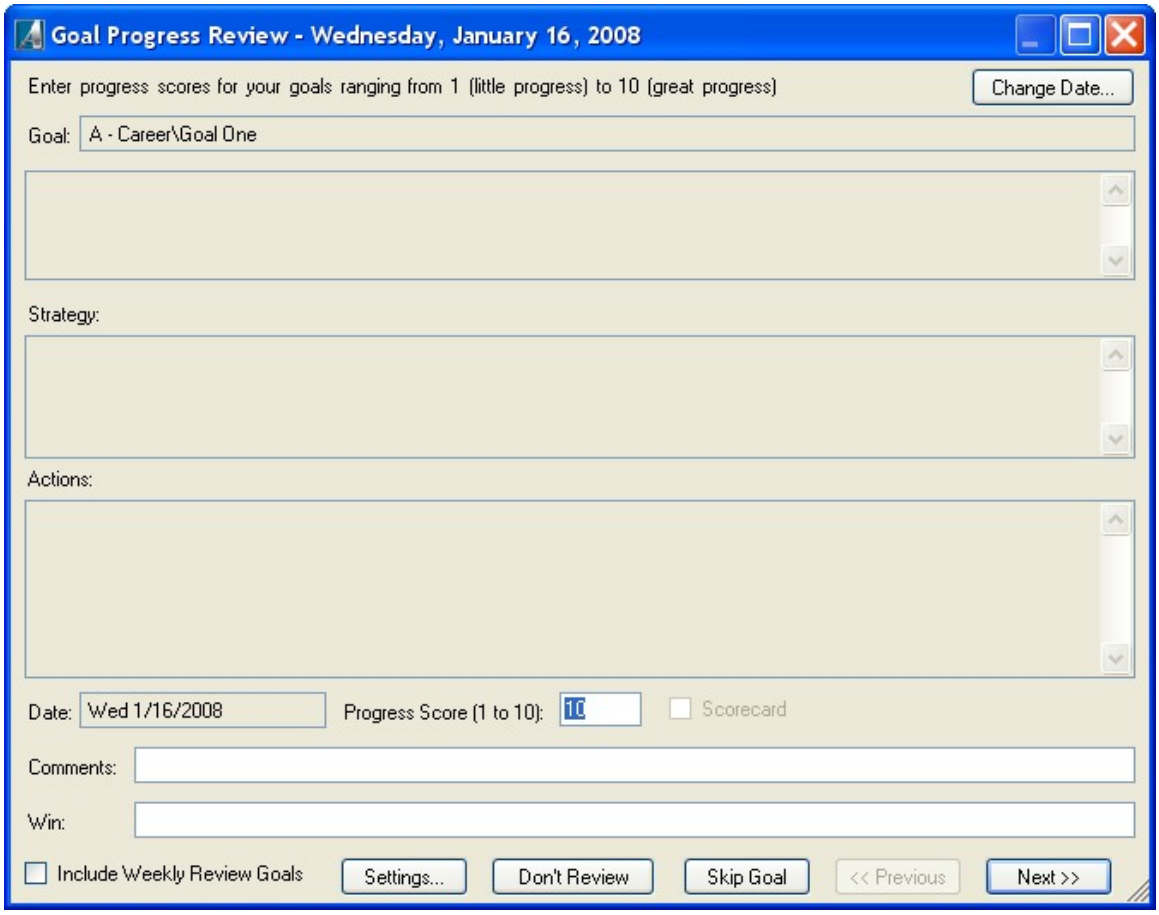
Here are some of the other options for this dialog:

- Only show scorecard goals – Limit the display to goals that have the "scorecard" checkbox checked in their Progress tab
- Rewards... button – Review rewards associated with various goals
- My Wins... button – Review wins associated with various goals
- Print button – Print the graph
- Exit – Exit the dialog
- Scorecard... button – Export goal progress/scorecard information to Excel in comma-separated value format

10.6.1 Goal Progress Reviews

The goal progress tracking feature also helps you perform a daily or weekly review to help you keep track of progress.

You can perform the review by clicking on the Perform Today's Review button.



The dialog goes through all your goals that have progress review enabled and allows you to enter a progress score from 1 (no progress) to 10 (great progress) for the goal.

You can add a comment to help you remember why you entered a particular score on a given day, special challenges that you faced, or ideas to help you do better in the future.

You can also include a win for the day if you hit a particular milestone or achieved something significant.

Once you've entered the score, click on the Next button (or press Enter key) to move to the next goal on the list.

You can also click the Skip Goal button to advance to the next goal on the list without entering a progress score for the current goal.

The Don't Review button not only skips the current goal, but also disables the goal progress tracking feature for that goal.

Include Weekly Goals checkbox determines whether goals that are flagged for weekly review (as opposed to daily review) are also included.

The Settings... button allows you to schedule an automatic reminder time for performing the daily goal progress review. You can also set or change the goal progress review settings from the Tools->Options menu item.

For more information about the process of setting and achieving your goals, please visit www.GoalsToAction.com

11 Appendix: Advanced Automated Scheduling Settings

This section describes some more advanced details of the automated scheduling capabilities of Achieve Planners. You don t need to review this section unless you are planning to use some of the advanced features.

11.1 Resources

Resources represent potential for work associated with one or more people. Typically, each resource represents a single person working on one or more projects.

11.1.1 Project Resource Assignments

Project resource assignments can help you improve the accuracy of your target end dates beyond the upcoming week. Because the default scheduling algorithm uses priorities to determine the scheduling order of tasks beyond the current week, it can give too much time to some of your projects and too little to others.

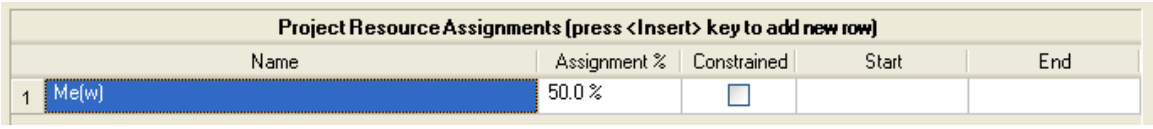
To improve your estimates, you can limit the amount of work that you are planning to do on a given project by using a project resource assignment.

For example, if you know that you won't be spending more than 50% of your time on a given project, the resource assignment will ensure that this is the maximum time scheduled for this project on any given week.

Note: If you are using Project Block scheduling on a given week, the project blocks override the resource assignment settings for that particular week.

Each project can also be given a default resource which is used by default for tasks that have no assignment at the task level (none of the task's ancestors have an assignment).

You can specify the project resource assignments for each project in the Team tab of the project information form.



This assignment indicates that you ("Me(w)" is your work resource) are only planning to spend 50% of your time on this project.

Constrained refers to whether this is an ongoing assignment (unchecked), or constrained to a certain time period only (checked).

You should only have to enter these types of resource assignments for long-term projects if you are concerned about getting a very accurate estimate for the expected end date of the project.

For most projects, the default settings should work well and give you a good indication of the changes you need to make to priorities to meet your deadlines.

11.1.2 Task Resource Assignments

You can explicitly assign the resources assigned to each task using a task resource assignment (using the "Assignee(s)" field in the "Active Task Schedule Details" view or in the Task Information Form).

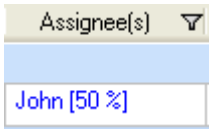
Any assignments applied to summary tasks will be used by default for all children that don't have explicit assignments.

Each resource assignment takes the following form:

resource_name[optional assignment]

where the resource name is the name of a defined resource and the optional assignment is a percentage value indicating the percentage of the resource available for the task.

For example, the following assignment says that "John" can only work 50% of his time available for the project on this task.



By default, all resources without the optional assignment use a "variable" assignment, which means that the resource works on tasks in order of priority devoting 100% of their available effort on top-priority tasks until completed, and are shared equally among tasks with the same priority.

You can combine multiple assignments by separating them with commas: JoeSmith, JackRiley[45%]

Task assignments are combined with the project level assignments, if any. For example if a task assignment for Task A is JSmith[50%] and resource JSmith is already constrained to 50% availability at the project level, JSmith is only 25% available for Task A.

If a task doesn t have an explicit resource assignment, the default resource assignment for the task is determined as follows:

- Use the resource assignment of the closest parent task with an explicit assignment
- Use the default resource for the project (if it has one)
- Use the default resource for the project's result area (if it has one)
- Use the default resource for the result area category (if there is one)
- Use the standard default resource

By default, Achieve Planner uses the resources representing your own time ("Me(w) " and "Me(p) ") when there is no explicit assignment based on the result area category (work vs. personal.)

