

Effexis Software

Achieve Planner Quick Start

Overview of Achieve Planner

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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 quick start guide provides a few of the basics that you need to get started quickly.

The Achieve Planner user manual contains more tutorials and a much more detailed description of the topics covered here.

You can access the User Manual through the help menu (Help-> User Manual)

The Achieve Planner Training center contains the latest versions of the User Manual, plus other tutorials to help you get the most out of Achieve Planner.

<http://www.fffexis.com/achieve/training/>

NOTE: This guide 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 guide. Please refer to the feature comparison chart for the features that are available in each edition:




<http://www.fffexis.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.

		Children
		Health & Fitness
		Family

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	[-] AllAround 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.

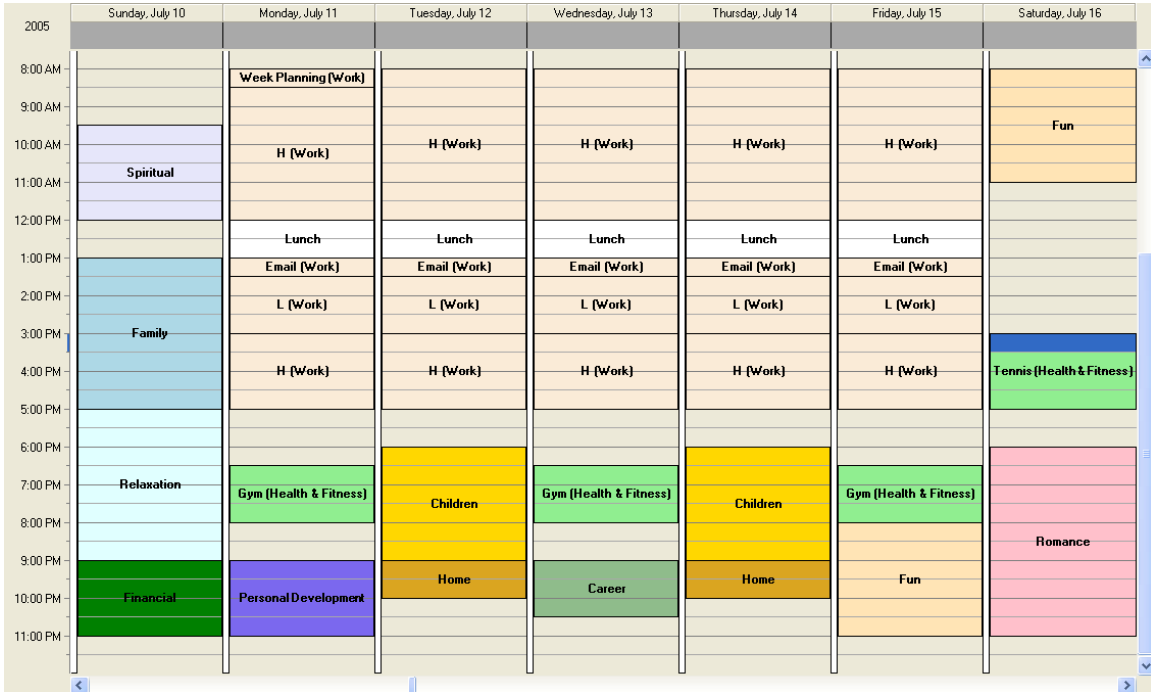
Priority	Task
A1	Projects rep
A2	Some are ci
A	ACME A
A	Project pro
B	Prepare m
C	Develop r
A	Steve's retire
B	Other pr
A1	Respond
A3	Send Stat
B	Renew Dt
C	Someda
B	Youca

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.

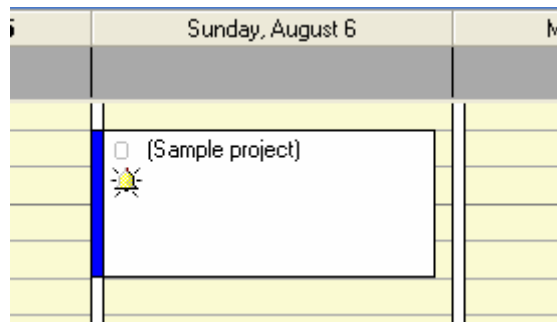
Time Chart – A time chart allows you to designate times in your weekly schedule for different types of activities like health, finances, or work. The weekly schedule displays time chart areas in the background behind your active appointments. Time charts serve as visual reminders to help you give focus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

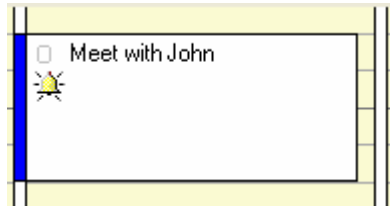


Project Block – A project block is a time block that you’ve committed to a specific project. You can think of it as an appointment with yourself to get your work done. Achieve Planner provides several tools to help you work with project blocks in your weekly schedule.

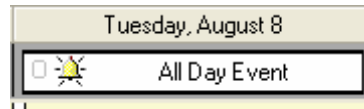
This is what a project block looks like in the weekly schedule. In this case, the name of the project is “Sample Project.”



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

To learn more about the Task Chooser, please see chapter Error! Reference source not found..

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.

Once you are happy with the list of tasks generated in the Task Chooser, you can experiment with different scoring settings, if necessary.

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, Projects, and Tasks. At this time, the outline does not include the goal setting components of Achieve Planner.

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.

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.

Dreams – The Dreams tab displays a list of your dreams for a particular result area, or grouped across all your 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.

1.3 Terminology

This section describes some of the terminology used in this guide 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.

	State ▾	Priori ▾	Name ▾	Effort ▾	Effort Le ▾	Place ▾	Deadline ▾	% ▾	Status ▾
1	NS	A	Task # 1	30 min	30 min		None	0 %	On Schedule
2	NS	A	Task # 2	30 min	30 min		None	0 %	On Schedule

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.

2 Tutorials

This section provides a few tutorials that demonstrate how you can use Achieve Planner to get organized, track projects and tasks, and create a time chart.

The full Getting Started Guide contains more tutorials covering some of the other features in Achieve Planner.

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.

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

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

Record	Allowed Children
Result Area	Result Area, 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 refer to the full Getting Started Guide.

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 the full Getting Started Guide.

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

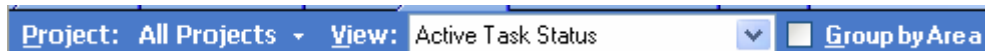
With the projects listed, it is time to add some tasks. There are several ways you can add Tasks to Projects. One way is very similar to the way you added the subprojects in Tutorial 1, except that you choose Task as the child type instead of Project.

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 the full Getting Started Guide.

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

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 *Get 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 6 - 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*.

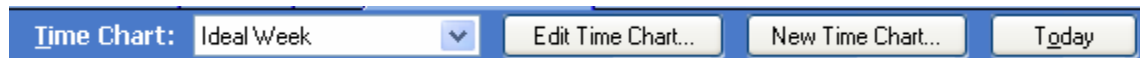
You can associate these time chart areas with specific Result Areas, or you can also create independent areas. For example, you could use an independent time chart area to represent a “break” period, or your lunch hour.

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 the full Getting Started Guide.

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.



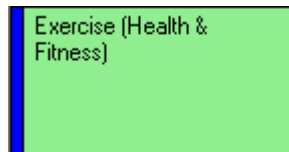
3. In the General tab of the Time Chart Information form, enter the name *Ideal Week*.



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

Result Area: Health & Fitness ▾

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

- 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.
- Repeat the process to create another copy of this time chart area on Friday at 6:30 AM.
- Now select the Friends result area from the dropdown in the grey tab.
- Select the time 1:00 PM – 2:30 PM, Sunday.
- Select the Actions->New Time Chart Area command, or press Ctrl+N.
- 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.

Time Chart: Ideal Week ▾

2.4 Tutorial 11 – Completing Projects/Tasks

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

2.4.1 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.

NS		Get Latest Software
Code	Description	
C	Completed	
D	Delegated	
IP	In Progress	
NS	Not Started	
P	Postponed	
SD	Should Delegate	
W	Waiting	

State	
1	NS
2	NS
3	NS

For a description of the various states, please see the full Getting Started Guide.

2.4.2 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.

Name	Effort	Effort Left
Document working unit requirement	30 min	30 min

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)

 Record work/expenses on project/task complete

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



For more information, please invoke the Help->User Manual command in Achieve Planner or visit the training center <http://www.effexis.com/achieve/training/>.