PlanPlus Online
Planner Edition User Guide

PlanPlus Online Account Setup

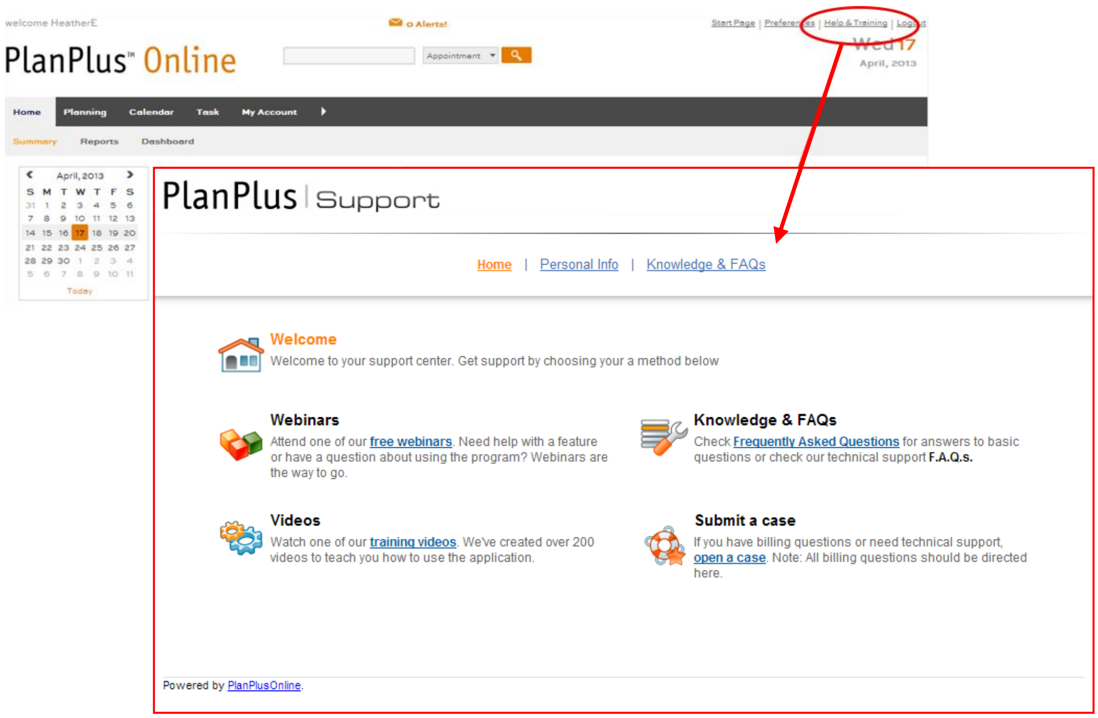
Unit Objectives:

- Help & Training Resources
- Setup your **Auto Login**
- Complete the **Personal Preferences Setup Wizard**.
- Complete the **Calendar/Task Setup Wizard**
- Create your **Mission Statement**

Lesson 1: Help & Training Resources

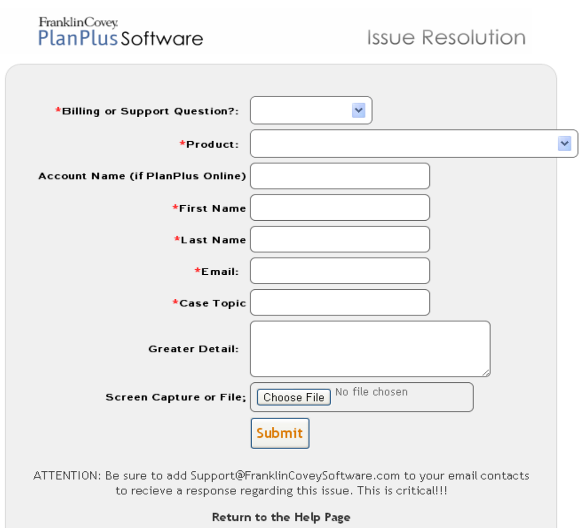
In addition to your User Manual we have many additional Help & Training Resources available to help you utilize your PlanPlus account to its fullest capacity.

You can access the Help & Training resources through the link in the Top Right corner of your screen.



1. Click on **Submit a Ticket**.

   PlanPlus Online Displays the **Issue Resolution** Screen

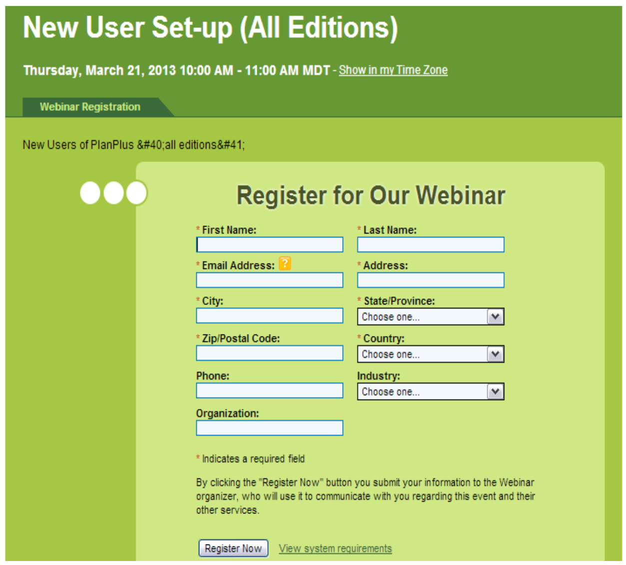


- ✪ If you ever run into a problem while using PlanPlus online you can click on **Submit a Ticket** to submit a case to our Technical support team. This will help you keep track of any issues you have submitted and make sure they get resolved quickly.
- ✪ You'll need to make sure you unblock or white-list our email address support@franklincoveysoftware.com to ensure that you receive our response.

2. Click On **Drop into our live, regularly scheduled Webinars**

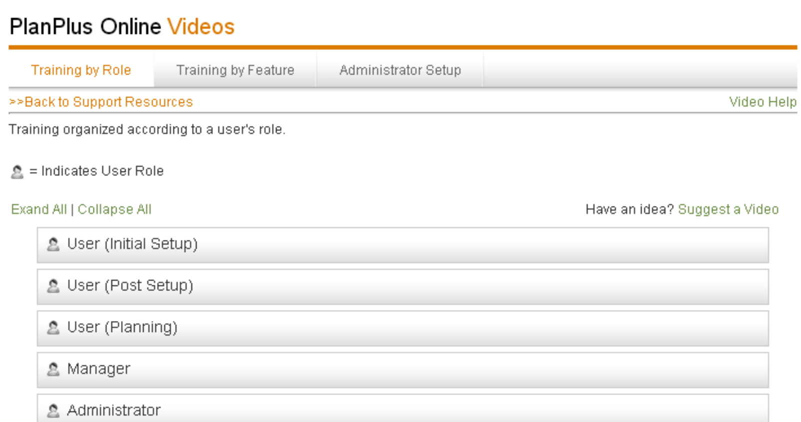
   PlanPlus Online Displays a schedule of upcoming webinars. Select the webinar you would like to attend.

   PlanPlus Online Displays the **Webinar Registration** page.



3. Click on **Video Training**

   PlanPlus Online Displays the **Video Training** screen.



- ✪ This will provide you with a self paced training that you can focus on the features that are most important to you as a user.

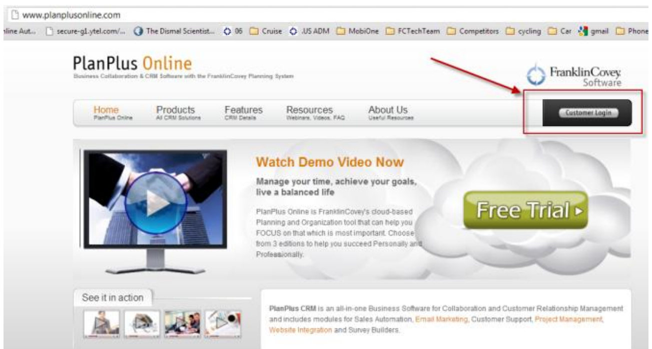
Lesson 2: Setup your Auto Login

PlanPlus Online is designed as your daily planner, all your task and appointments are available on your home screen. The Auto Login feature allows you to you will want to be able to easily and quickly log into your PlanPlus Online account.

To setup your **Auto Login**, use the following steps:

1. Open the PlanPlus Online web site, if necessary, by entering **www.planplusonline.com** in the **Address** bar of your browser and pressing the **Enter** key.

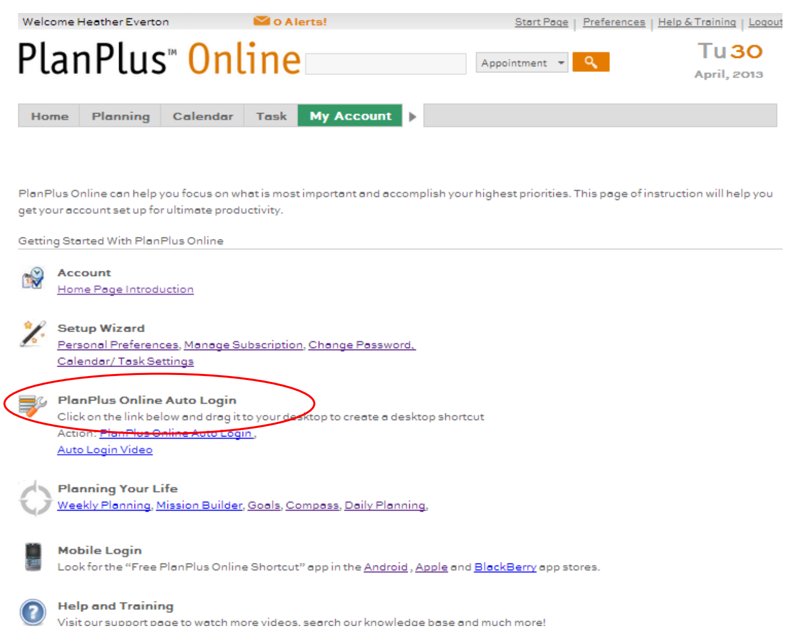
   PlanPlus Online displays the login page.



2. Enter your login information in the **Account**, **User Name**, and **Password** fields and click on **go**.

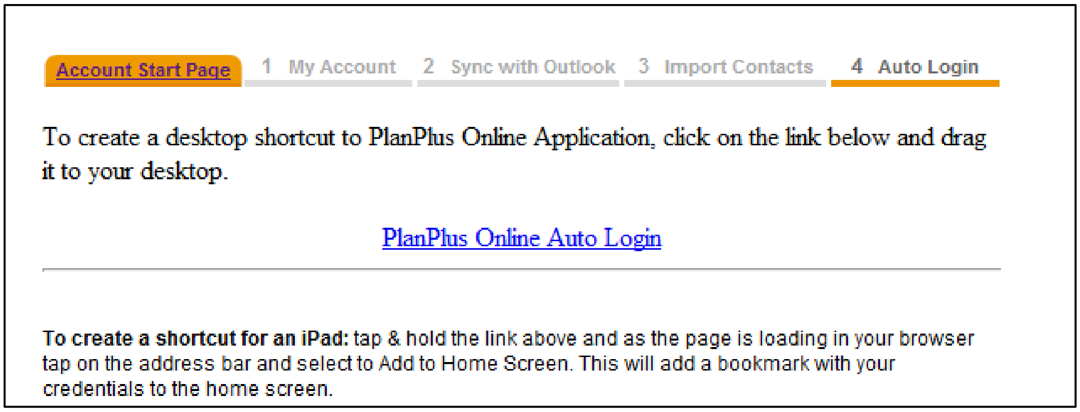
   Remember, passwords are case sensitive.

   PlanPlus Online displays the **Start Page**



3. Click on the **PlanPlus Online Auto Login** link from the start page.

   PlanPlus Online Displays the **Auto Login Setup** page.



4. Drag and drop the **PlanPlus Online Auto Login** link to your Desktop.

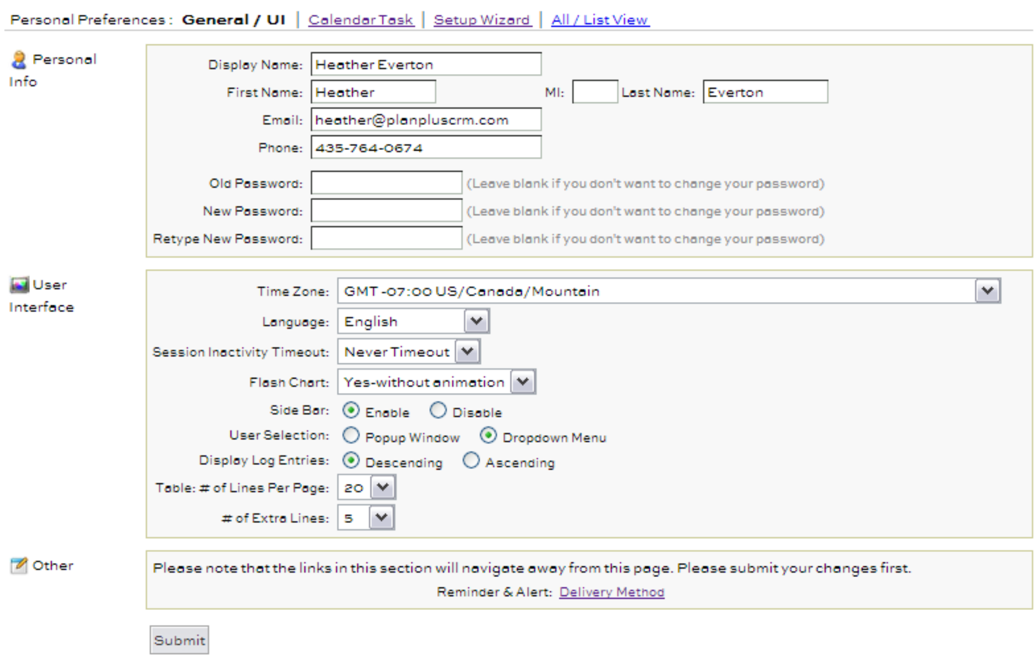
   - This will create an icon on your desktop that will automatically login to your PlanPlus Online account. You will not be asked to enter your Account Name, Username or Password to access your account.
   - If you change your password you will be required to set up a new Auto Login.

Lesson 3: Personal Preferences Setup Wizard

The **Account Setup Wizard** allows users to configure their default settings for the application.

To complete the **Account Setup Wizard**, use the following steps:

1. Navigate to the Start Page then Select **Personal Preferences from the Setup Wizard**



✪ If PlanPlus Online displays an announcement page, click on the **Continue** button at the bottom of the page to access the **Account Setup Wizard**.

2. To edit any of your personal information, update fields in the **Personal Info** section.

3. To change your Display Name, enter a new username in the **Display Name** field.

4. To change your password, enter a new password in the **New Password** and **Retype New Password** fields.

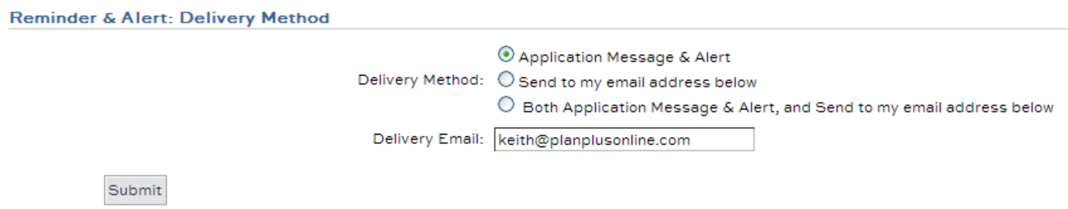
5. Make any necessary changes to the **USER INTERFACE**.

6. When you are finished, click on **Submit**

7. After you have submitted your changes you can click on the Delivery Method Link for Reminders and Alerts.

✪ This link will Navigate you away from the Preferences Wizard.

8. Select the radio button corresponding with the type of alerts you would like to receive. You can choose **Application Message & Alert**, **Send to my email address below**, or **Both Application message & alert, and Send to my email address below**



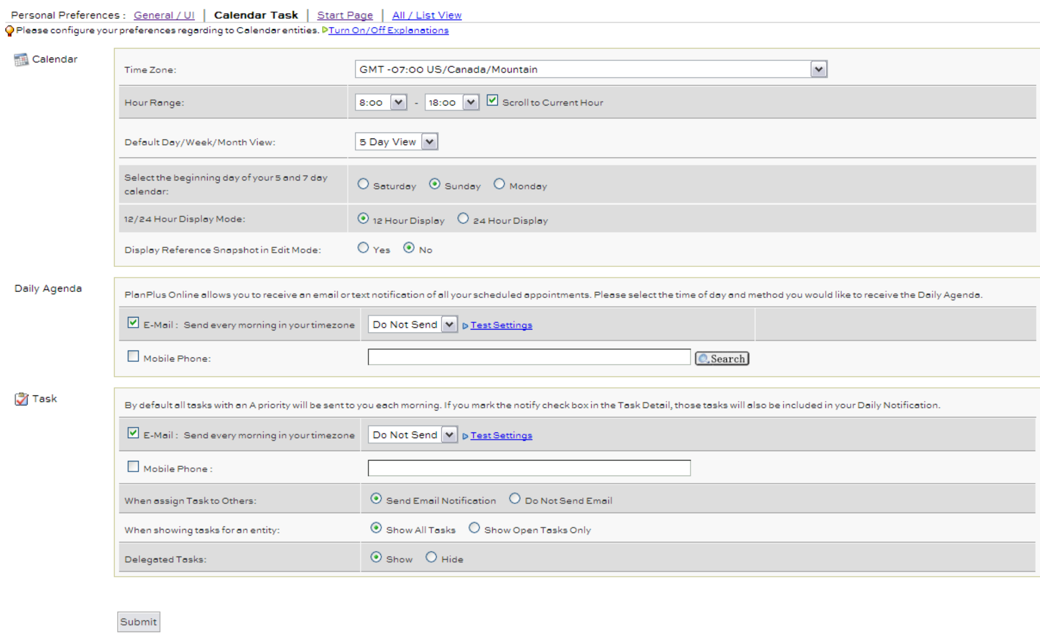
9. Enter your email address if you selected email Alerts.

10. Click Submit- Plan Plus will save your changes and return to the Preferences Wizard.

Lesson 4: Calendar Task Setup Wizard

1. Navigate to the Calendar Task Link.

   PlanPlus Online displays the **My Profile** page of the **Account Setup Wizard**.



   ✪ This is the page where you will configure your calendar defaults and your daily agenda and task notification preferences. These settings affect your account only - other users in your organization are not affected by the changes you make here.

2. Configure your default calendar settings by choosing your **Time Zone**, **Hour Range**, **Default Calendar View**, **Default View,** and **12/24 Hour Display Mode**.

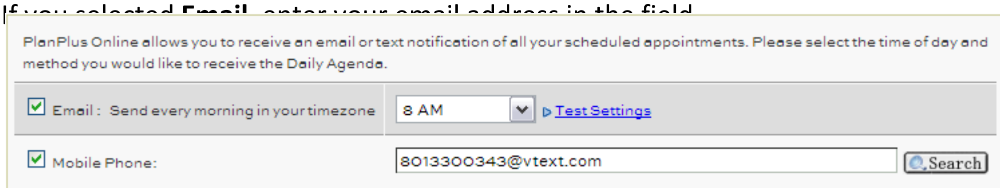
   ✪ PlanPlus Online can notify you of your scheduled appointments each day by delivering an application message, an email, or a text message to your mobile phone.

3. To configure the **Daily Agenda** notification settings, click on the **Send every morning in your timezone** drop-down menu and click on the time of day you would like to receive the notification.

   ✪ If you do not want to receive a notification, leave the setting as **Do Not Send**.

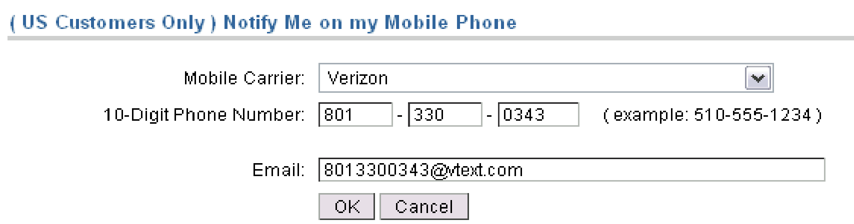
4. Select the check box for the method(s) you would like to use to receive the notification.

5. If you selected **Email**, enter your email address in the field.



6. If you selected **Mobile Phone**, click on the **Search** button for the **Mobile Phone** field.

   PlanPlus Online displays the **Notify Me on my Mobile Phone** page.



7. Click on the **Mobile Carrier** drop-down menu and choose your mobile provider from the list.

8. Enter your mobile number in the **10-Digit Phone Number** field.

9. Enter your email address in the **Email** field.

10. When you are finished, click on the **OK** button.

    PlanPlus Online returns you to the **My Profile** page of the **Account Setup Wizard**.

    ✪ PlanPlus Online can also notify you of all tasks with an **A** priority each day. You can also select the **Notify** check box in any **Task Detail** to include that task in your daily notification.

11. Repeat steps 7-14 to specify the time and delivery method for the task notification, if necessary.

    ✪ In addition to the notification settings, you can also set several other default task settings.

12. By default, PlanPlus Online sends an email to another user when you assign him or her a task. If you do not want to send this email, click on the **Do Not Send Email** option for the **When assign Task to others** field.

13. By default, PlanPlus Online shows delegated tasks in your **Daily Tasks** list. If you do not want to show delegated tasks, select the **Hide** option for the **Delegated Tasks** field.

Lesson 5: Create a Mission Statement

You have a purpose in life. You know in your heart what's most important to you. In fact, your mission and values are expressed every day by how you live- you just may not realize it. We're here to help you find the right words to put that mission down on paper.

Our Mission Builder exercise can help to add focus, direction, and a sense of purpose to your daily decisions. The wizard will take you step-by-step through the process of creating a unique, personalized Mission Statement to guide your life

Personal Mission Statement

This introspective path to creating your mission statement asks thought-provoking questions that help you uncover your core values and highest Goals

Family Mission Statement

This process will help unite your family around a common sense of purpose and mission. You'll strengthen your children and family members in a turbulent world.

Team Mission Statement

Follow this guide to create a mission statement for your team. A clear mission statement can build unity, purpose commitment, and clarity of vision- all of which are vital to your team's success.

Discover your Values

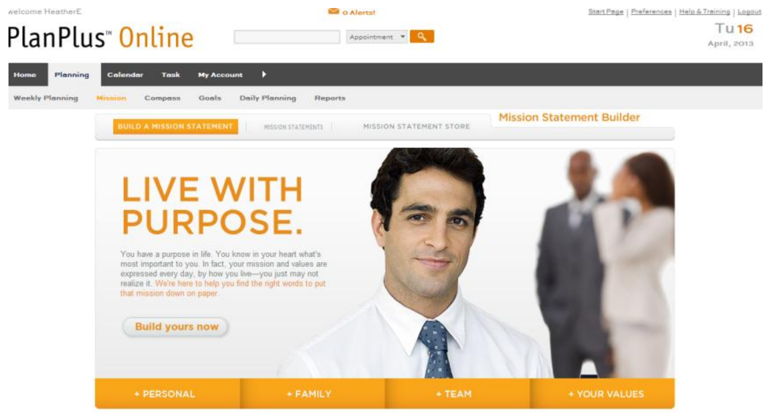
We have provided a quick exercise to help you discover your values and principles. You'll type the first response that comes to mind and create a list of what your values are.

To Create your **Mission Statement** use the following steps:

1. Navigate to the Planning Tab.

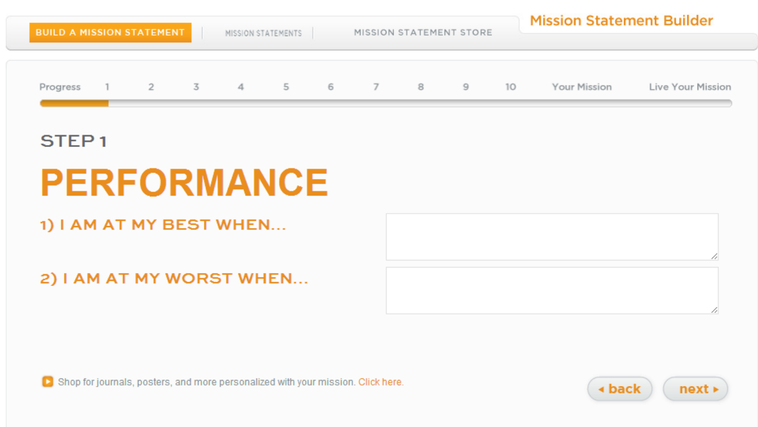
2. Select Mission From the sub menu

   PlanPlus Online displays the **Mission Builder** page.



3. Click on Build yours now and select Personal, Family, Team or Your values.

   PlanPlus Online displays the **Mission Builder** page.

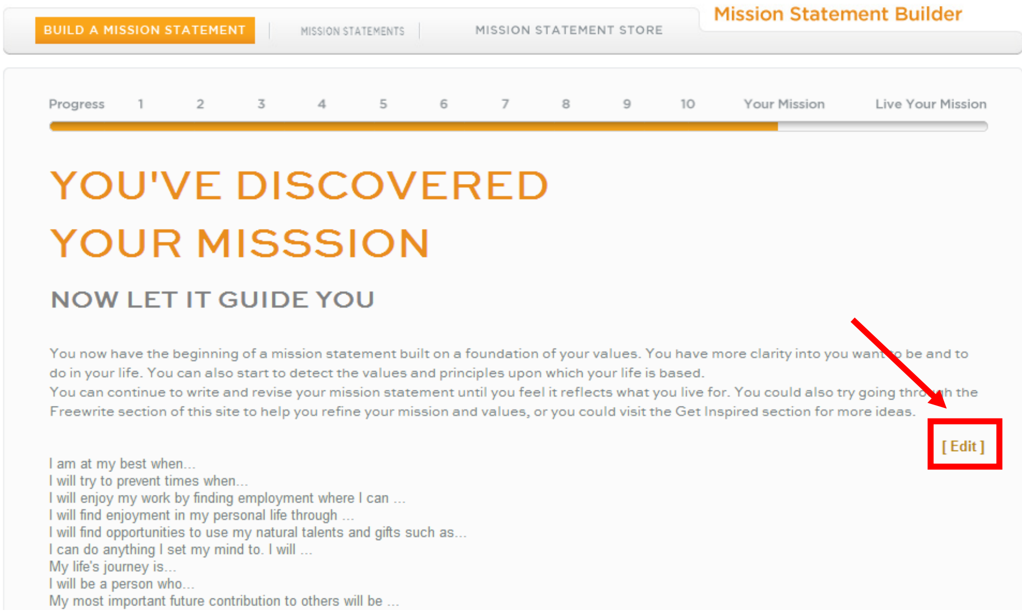


4. Answering the questions to build your Mission Statement. When you have completed each question click **Next** to move to the next question.

   ✪ Once you have completed all of the questions in the mission builder you will have the beginnings of a mission statement.

5. Click on **Edit** to continue to revise your mission statement until you feel it reflects what you live for.

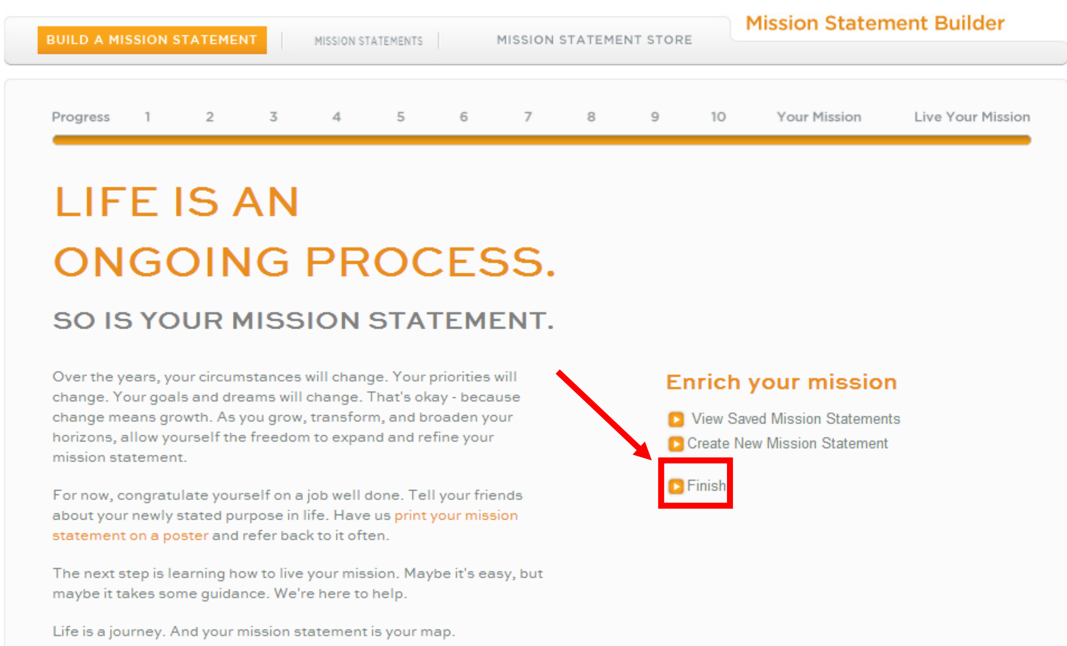
   PlanPlus Online displays the **Your Mission**.



6. When you are finished click **Save** then click **Next**

   PlanPlus Online displays the **Live Your Mission** page

7. Click on Finish to Save your Mission Statement



PlanPlus Online
Core Actions: Make it a Habit

Unit Objectives:

- Weekly Planning
- Schedule Calendar Appointments
- Create Tasks

The PlanPlus Online Core Actions are the fundamental navigation basics for any user to start using their PlanPlus Online account. Once you have mastered these Core Actions using PlanPlus Online will be simple.

Lesson 1: Weekly Planning

The Key to the ability to change is a changeless sense of who you are, what you are about and what you value. – Stephen R Covey

Over the years, your circumstances will change. Your priorities will change. Your goals and dreams will change. That's okay - because change means growth. As you grow, transform, and broaden your horizons, allow yourself the freedom to expand and refine your mission statement.
You will want to review your mission statement on weekly basis as part of your Weekly Planning. Life is a journey. And your mission statement is your map.

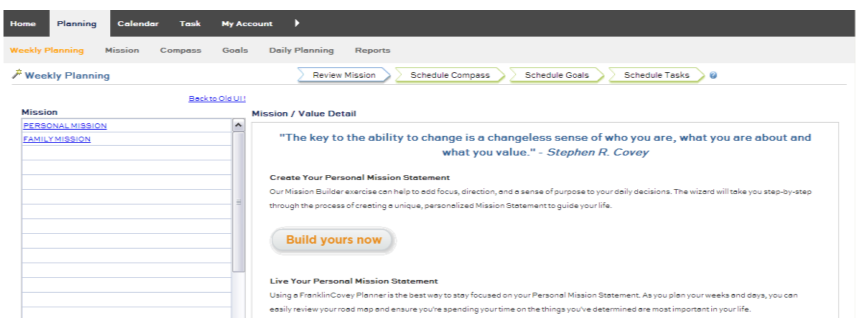
Review Your Mission Statement

To Review your **Mission Statement** use the following steps:

1. Navigate to the Planning Tab.

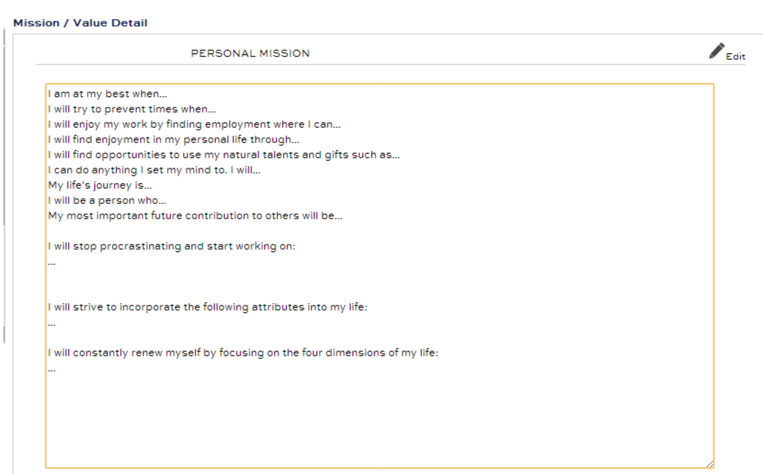
2. Select Weekly Planning From the sub menu

   PlanPlus Online displays the **Review Missions** page.



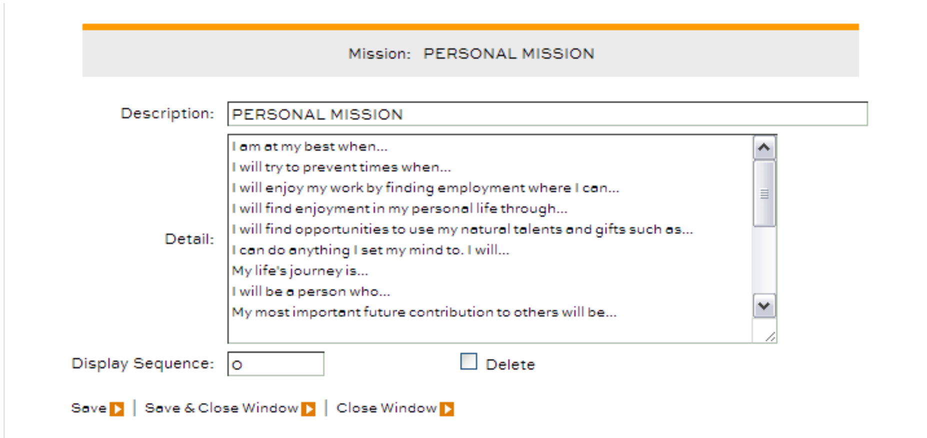
3. Click on the mission you would like to review

   PlanPlus Online displays Y**our Mission Detail** page.



4. Click on Edit to revise your Mission Statement.

   PlanPlus Online Displays a Pop-up window **Mission Statement Editor**



5. Make any changes needed then click **Save & Close Window.**

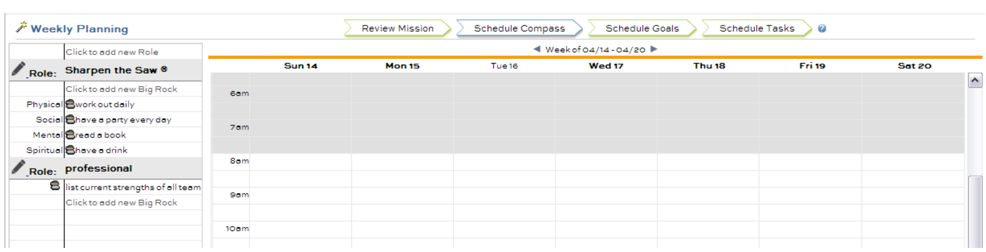
Schedule Your Compass

When you have finished reviewing your Mission Statements You can Schedule your Compass.

The Compass is an important part of your weekly planning, it is a place you can outline you're significant roles in life, and the most important thing we plan to accomplish within those roles each week.

1. Click on the Schedule Compass Link.

   PlanPlus Online Displays the **Compass** Page



2. Fill in the "Sharpen The Saw" section at the top. Record an activity for Physical, Social, Mental, and Spiritual to help you

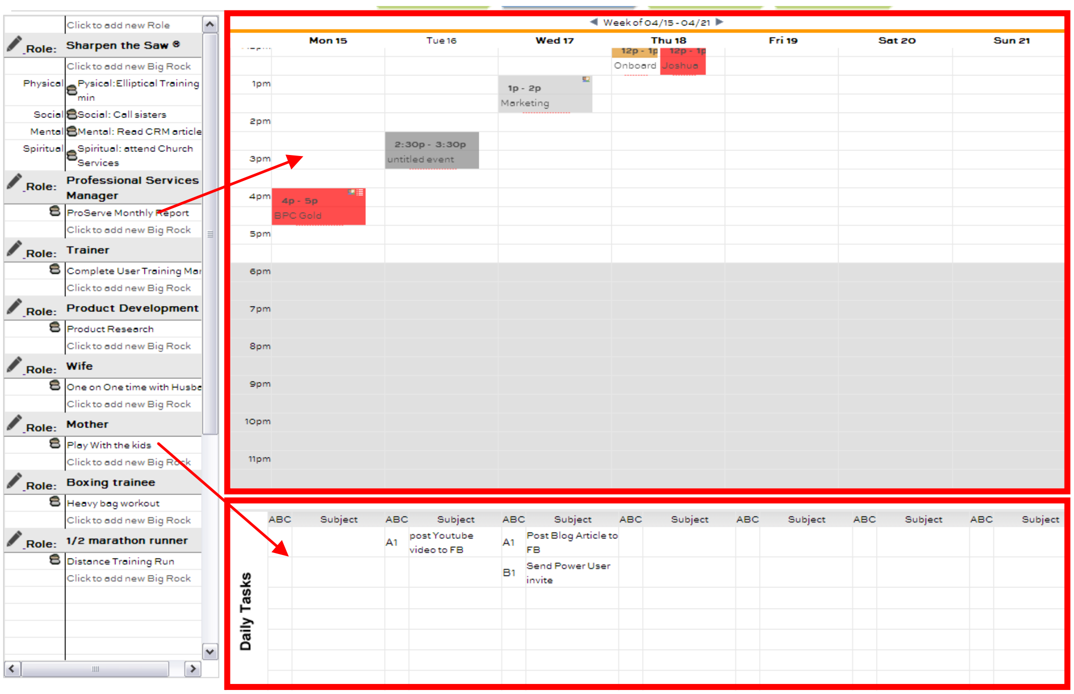
3. Identify your important roles in life and list each as a separate role in your Compass

4. Ask yourself "What is the most important thing I can do this week in this Role?"

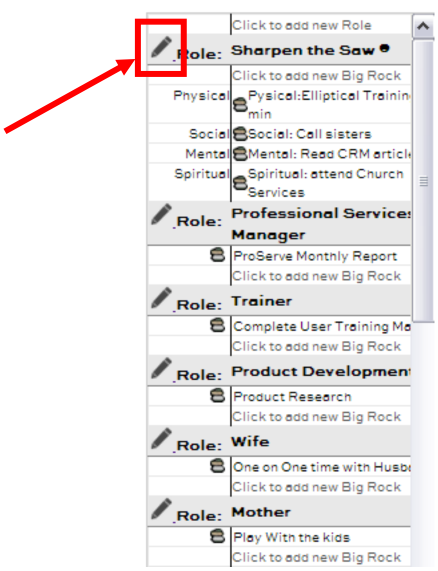
5. List your answer as your Big Rocks for each of your roles.

6. Once you have defined your roles and Big Rocks you need to create appointments and tasks on your weekly calendar for each Big Rock.

   Drag & Drop your big rocks to your calendar to create an appointment or to your Daily task list to create a task.



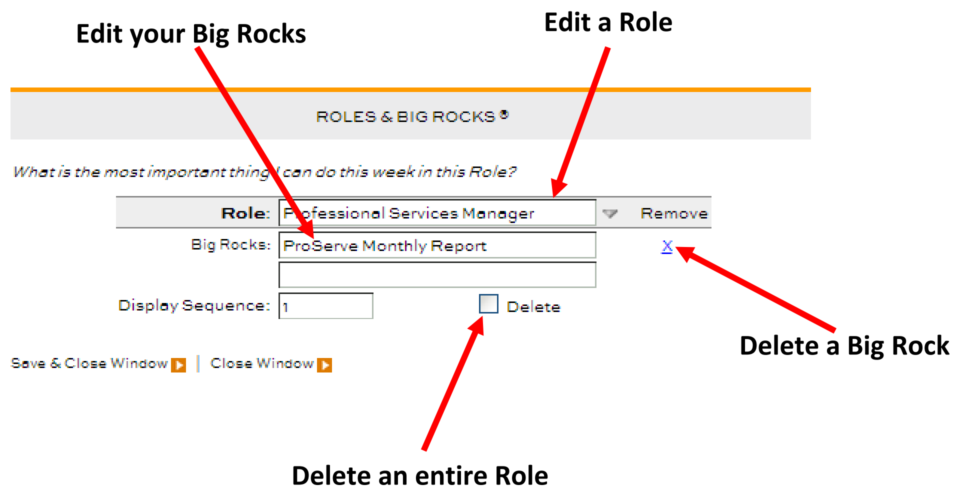
1. To edit or remove a Role or a Big Rock you can click on the edit Pencil icon next to the role.



2. **Plan**Plus Online displays the **Edit Roles** page.

3. To edit a Role you can change the text in the text box next to role.

4. To edit a Big Rock you can change the text in the text box next to Big Rocks.



5. Click the X next to the big rock you would like to remove

6. Check the **Delete** box to delete an entire role

   ✪ Remember that deleting a Role will delete all of the Big Rocks associated with that role.

Schedule Your Goals

When you have finished scheduling your Compass you can schedule your Goals.

1. Click on the Schedule Goals Link.

   PlanPlus Online Displays the **Goals** Page

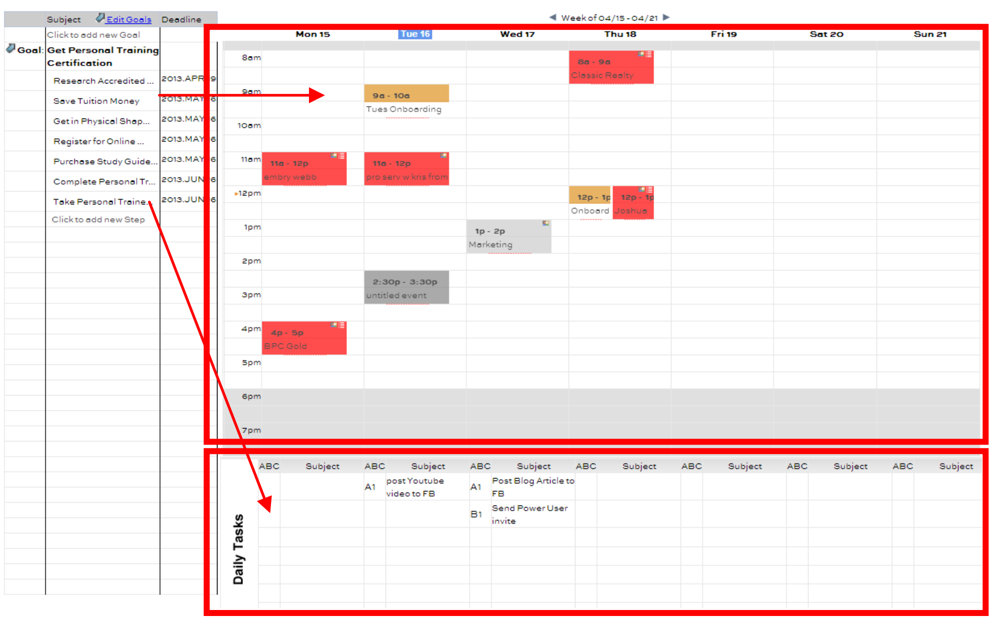
2. Identify your goals that align with your Mission Statements and Compass.

3. Define the steps you will need to take to accomplish your goals.

4. Assign deadline for each goal step to make sure you stay on track to accomplish your goal.

5. Once you have defined your Steps for your Goals you need to create appointments and tasks on your weekly calendar for the steps you need to accomplish this week..

   Drag & Drop your Goal Steps to your calendar to create an appointment or to your Daily task list to create a task.



Lesson 2: Utilizing the Calendar Appointment

Access the **Home** page and point out Monthly calendar, Task Pane & Appointment

Create an **Appointment** named **Weekly Sales Meeting** . With the following Information:

Date: **Thursday** of this week.

Start Time: **2:00**

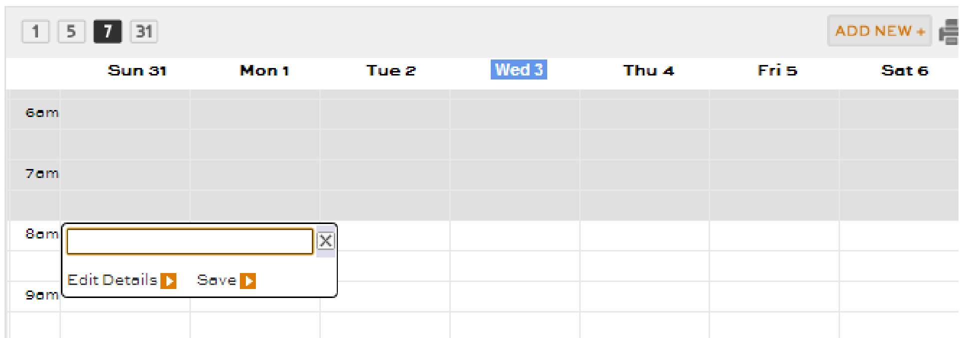
End Time: **3:00**

Recurrence: **Weekly** for **12 weeks**

PlanPlus Online is designed as your daily planner. Your home page displays all of your tasks and appointments. By utilizing the calendar and planning your day you will become more effective and save yourself a lot of time.

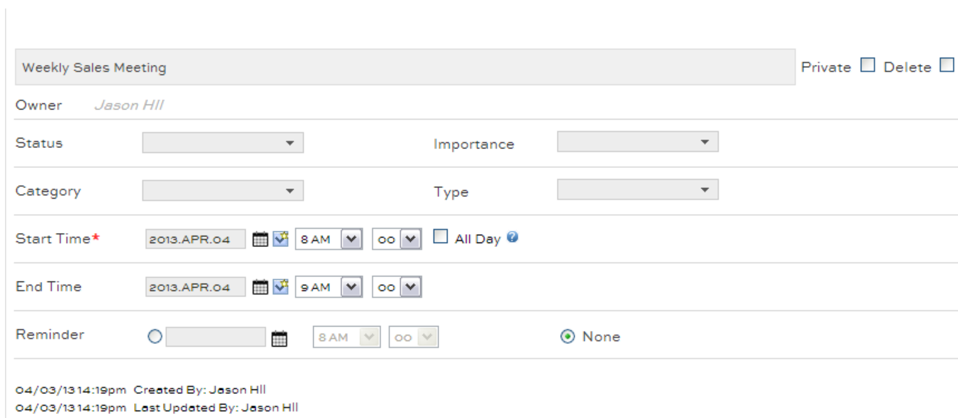
1. Click on the **Calendar** where you would schedule your Appt.

   PlanPlus displays an entry form to quickly enter the name of your appointment.

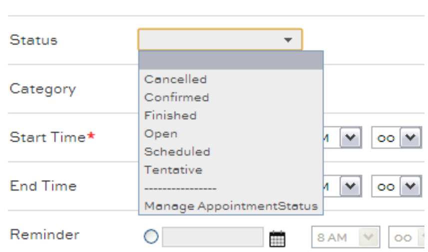


2. If your entry is complete and you don't wish to add details you can click **Save**. If you would like to add details to your appointment click **Edit Details.**

   PlanPlus Online displays the **Appointment Detail Page**



3. Select a **Status** of the appointment from the drop down list



4. Select the **Manage Appointment Status** from the drop down list to customize the options here
   PlanPlus Online displays the **Setup Option Values** Page for Status

Setup Option Values

*Key	*Display Name	Closed Status	Inactive
FINISHED	Finished	☑	☐
CONFIRMED	Confirmed	☐	☐
CANCELLED	Cancelled	☑	☐
TENTATIVE	Tentative	☐	☐
OPEN	Open	☐	☐
SCHEDULED	Scheduled	☐	☐
		☐	☐
		☐	☐
		☐	☐
		☐	☐
		☐	☐

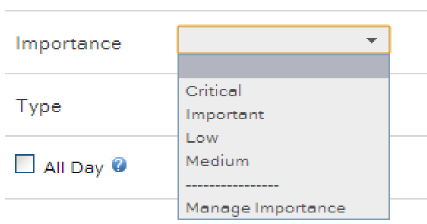
update

5. Enter the name of the Status you would like to add in the Key Field and the Display Name.

6. To inactivate or delete a Status check the box for the corresponding Status level in the Inactive column

   If this status is a Closed Status check the box for the corresponding Status level in the Closed Status column

7. Select the **Importance** of the appointment from the drop down list



8. Select the **Manage Importance** from the drop down list to customize the options here

   PlanPlus Online displays the **Setup Option Values** Page for Importance.

Setup Option Values

You are viewing/updating the possible selection values for **Appointment Importance (Calendar)**.

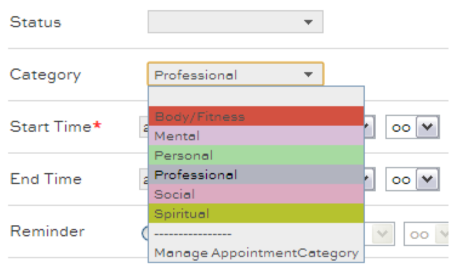
*Key	*Display Name	Description	Inactive
CRITICAL	Critical		☐
IMPORTANT	Important		☐
LOW	Low		☐
MEDIUM	Medium		☐
			☐
			☐
			☐
			☐
			☐

Submit

9. Enter the name of the Importance level you would like to add in the Key Field and the Display Name.

10. To inactivate or delete an Importance level check the box for the corresponding Importance level in the Inactive column

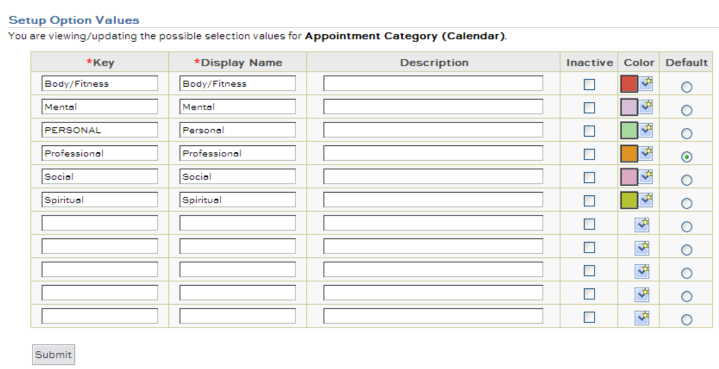
11. Select the **Category** of the appointment from the drop down list



✪ This will change the display color of the appointment on your calendar

12. Select the **Manage Appointment Category** from the drop down list to customize the options here.

PlanPlus Online displays the **Setup Option Values** Page for Appointment Category



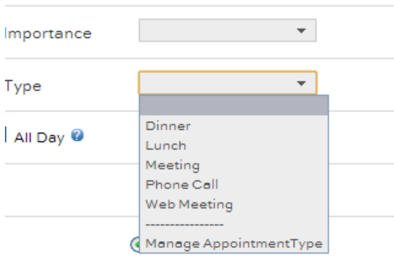
13. Enter the name of the Category you would like to add in the Key Field and the Display Name.

14. Select a Color to assign to your category.

15. Select a default category using the radio button on the Right side.

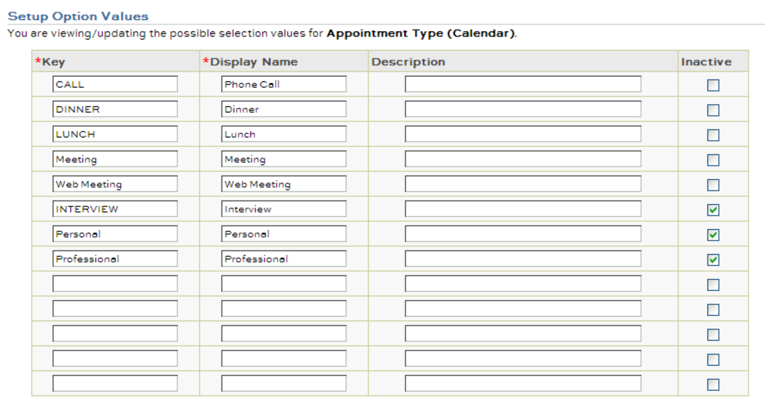
16. To inactivate or delete a category check the box for the corresponding Category in the Inactive column

17. Select the **Type** of the appointment from the drop down list



18. Select the **Manage Appointment Type** from the drop down list to customize the options here

    PlanPlus Online displays the **Setup Option Values** Page for Appointment Type.



Setup Option Values

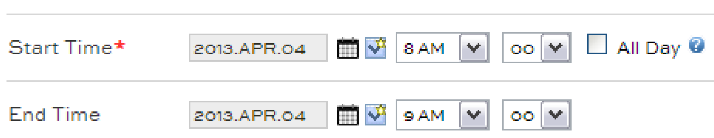
You are viewing/updating the possible selection values for **Appointment Type (Calendar).**

*Key	*Display Name	Description	Inactive
CALL	Phone Call		☐
DINNER	Dinner		☐
LUNCH	Lunch		☐
Meeting	Meeting		☐
Web Meeting	Web Meeting		☐
INTERVIEW	Interview		☑
Personal	Personal		☑
Professional	Professional		☑
			☐
			☐
			☐
			☐
			☐

19. Enter the name of the Appointment Type you would like to add in the Key Field and the Display Name.

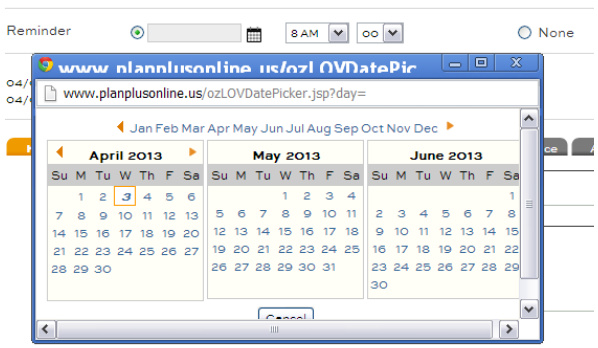
20. To inactivate or delete an Appointment Type check the box for the corresponding Appointment Type in the Inactive column

21. Select the **Start Time** and **End Time** for the appointments

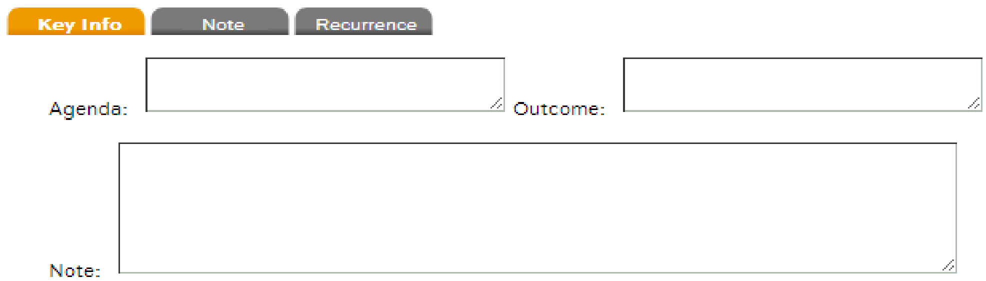


- ✪ You can also set the appointment to be an All Day appointment

22. You can set a specific **reminder** date and time

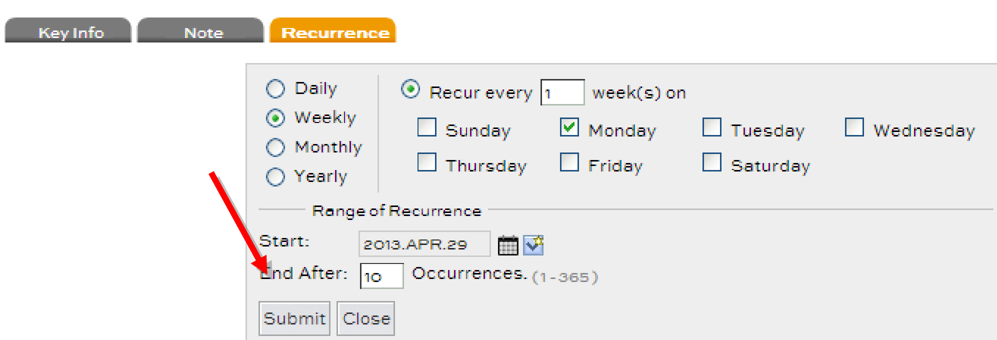


23. In the **Key Info** tab you can keep notes about the appointment or document an agenda or the outcome of the appointment.

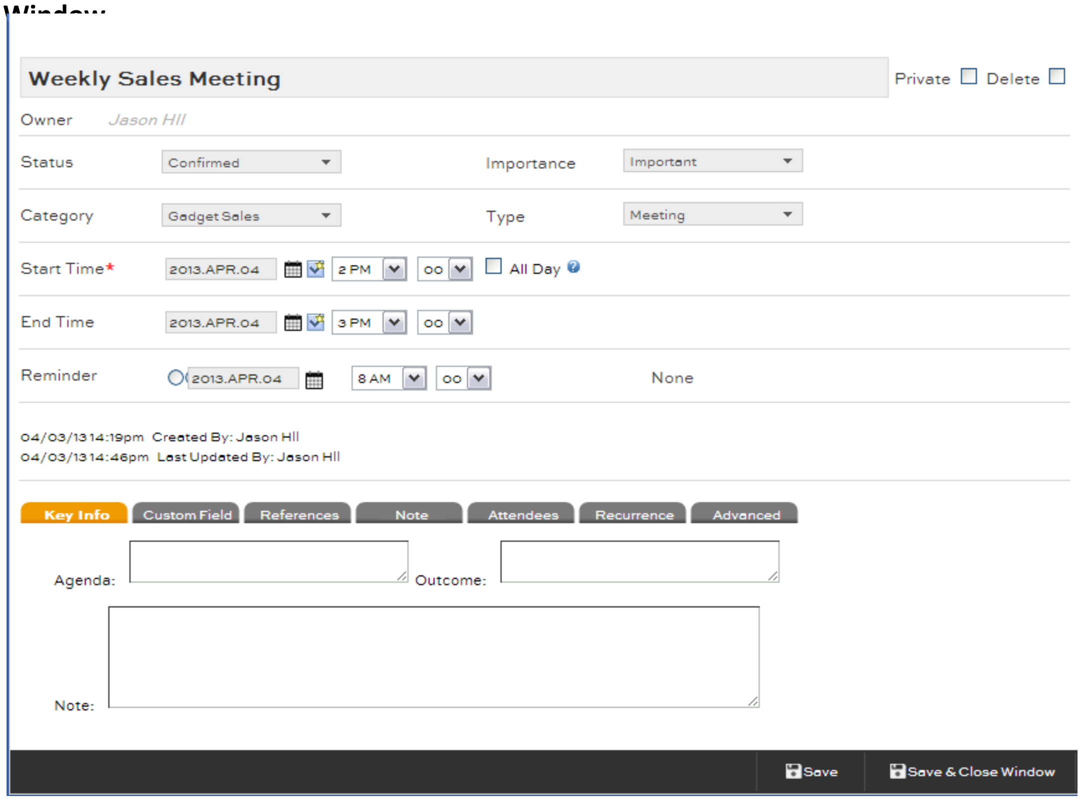


24. In the **Notes** tab you can add individual notes and attach files to the appointment.

25. In the **Recurrence** tab you can set up the appointment to reoccur daily, weekly or monthly for a set # of times.
    Select the desired Recurrence information and click on **Submit**



26. Once you have added all of the details that are needed click on **Save & Close Window**



Create the following tasks:

Follow Up Call to John Doe – A1 Priority

Do Weekly Planning– A2 Priority

Review Training Docs. – B1 Priority

Create Project For New Site . – C1 Priority

Recurrence: **Weekly** for **12 weeks**

Lesson 3: Creating a Task

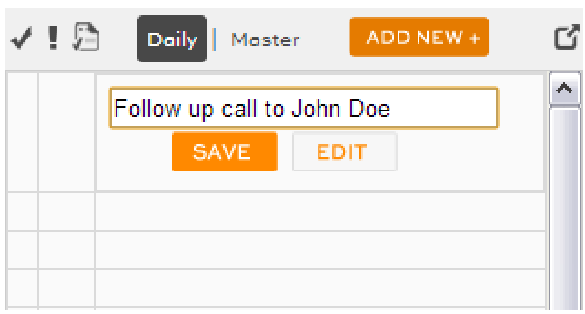
Creating a Task

Knowing what Tasks are most important will increase your productivity. Spend less time sorting through long lists of TO-DOs or paper checklists and more time accomplishing important objectives. PlanPlus Online makes it easy to keep track of all your Tasks and prioritize them using the A,B,C,1,2,3 system. The Quick Prioritize Wizard provides a useful interface for drag & drop Task Management based on day and importance.

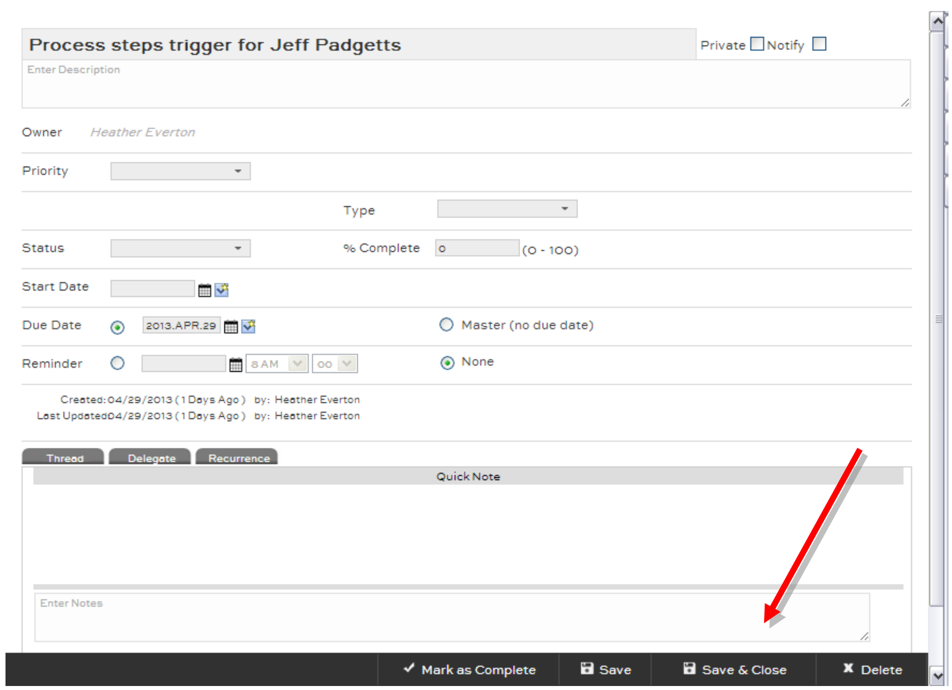
Delegated Tasks are delivered via email to the recipient and all updates are tracked in your PlanPlus Online account. No account is required for a recipient of a delegated Task.

Follow the steps below to create & prioritize your tasks.

1. Click on the **add new daily task+** and type in your task name

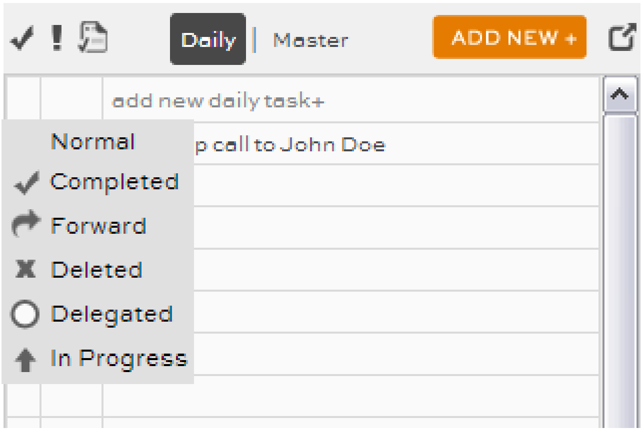


2. Click **Save** if your task is complete or click **Edit** to add details to your task.

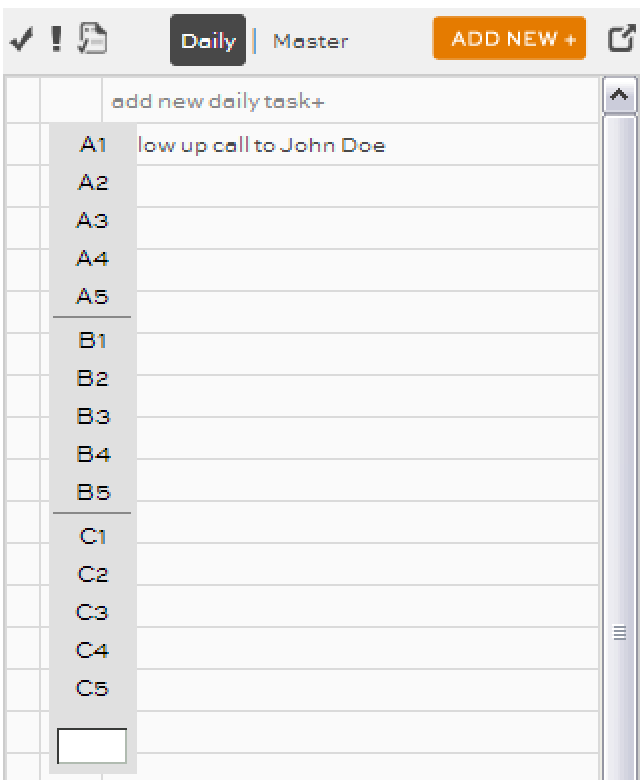


When you have added the details needed click **Save & Close**.

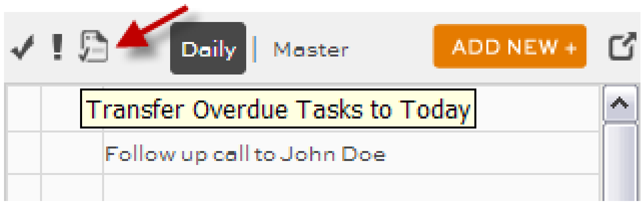
3. You can mark tasks as Normal, Completed, Forward, Deleted, Delegated, or In Progress from the **Task Pane** on your **Home** page.



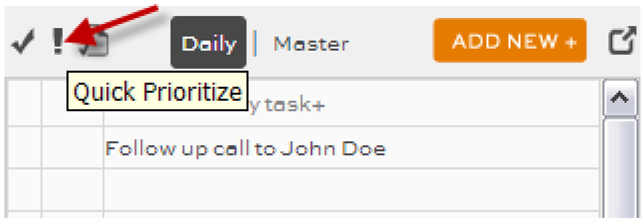
4. You can set the priority of tasks using the ABC123 method from the **Task Pane** on your **Home** page.



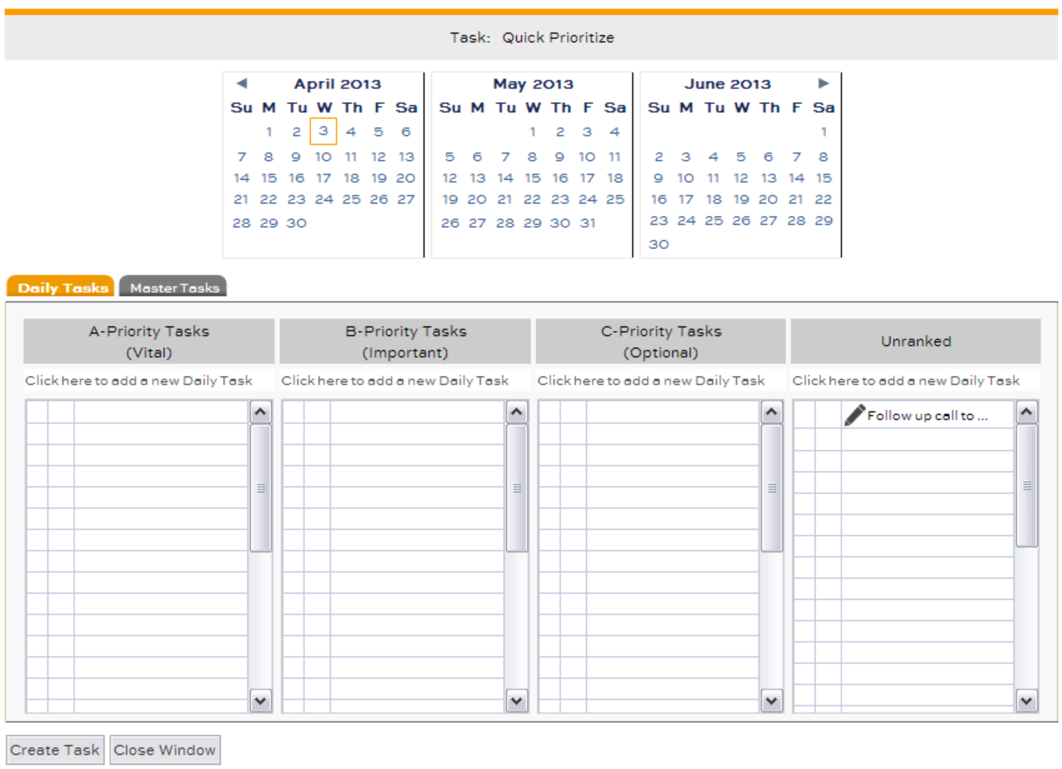
5. You can transfer overdue tasks to today by clicking the **transfer** icon



6. You can Open up the Quick Prioritize window by clicking the **Quick Prioritize** Icon



PlanPlus Online displays the **Quick Prioritize** page.



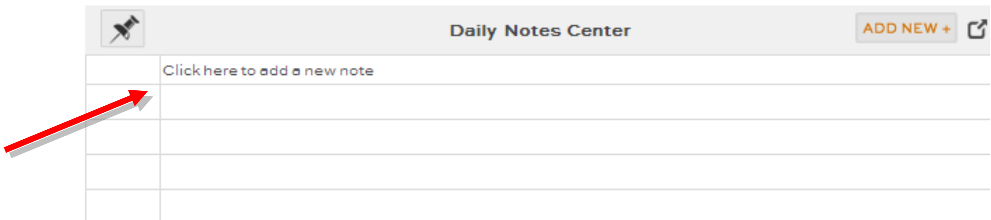
From this page you can drag and drop tasks into their Priority "buckets" or to the calendar above to assign them to another date. When you are finished click **Close Window**.

Lesson 4: Creating Notes

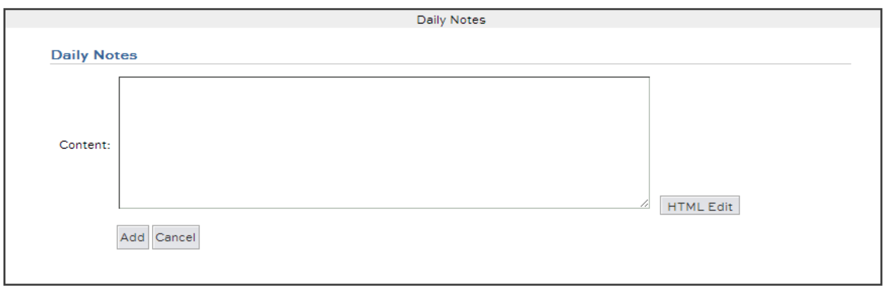
PlanPlus Online allows you to create Daily Notes right on your home screen to help you stay more organized.

Follow the steps below to create & prioritize your tasks.

1. To add a note Click on the **Click Here to add a new note** link

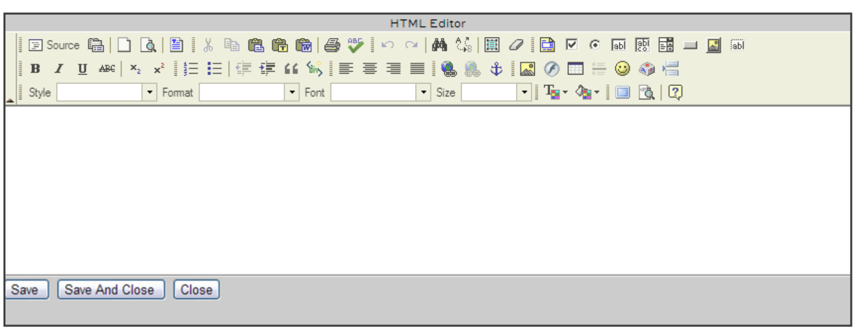


2. PlanPlus will open a new window with a text box to enter your daily note in.

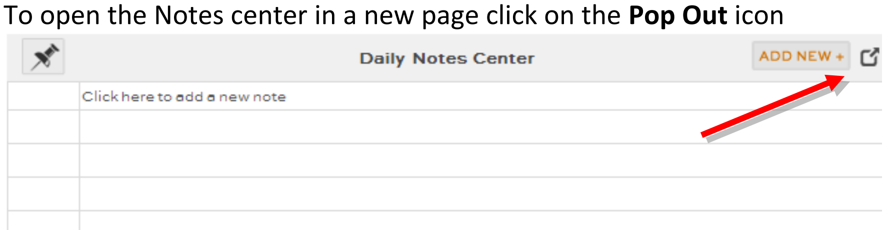


3. If you would like to add bullet points fonts or Pictures to your note click on the **HTML Edit** Link.

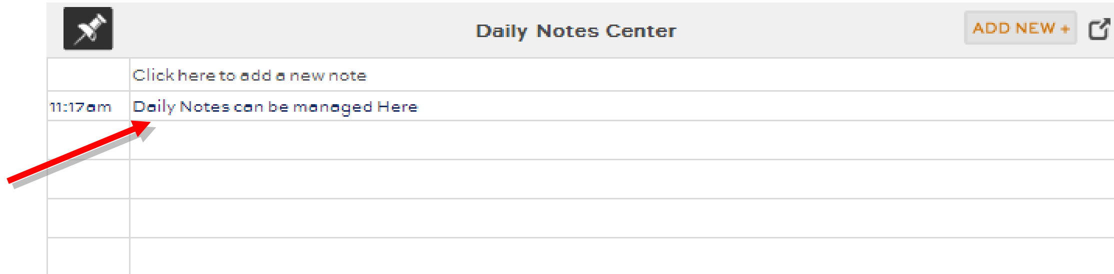
4. Plan Plus opens the **HTML Editor** to allow you to create your HTML note.



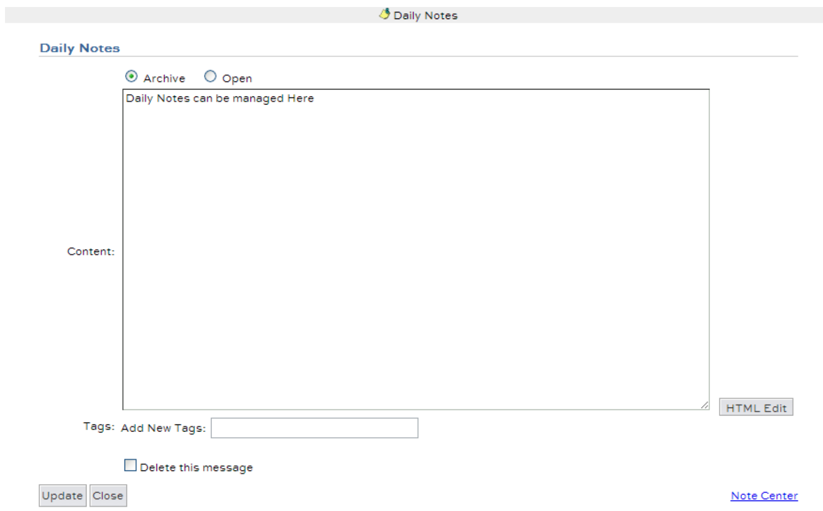
5. To open the Notes center in a new page click on the **Pop Out** icon



6. To edit a daily note click on the note its self.



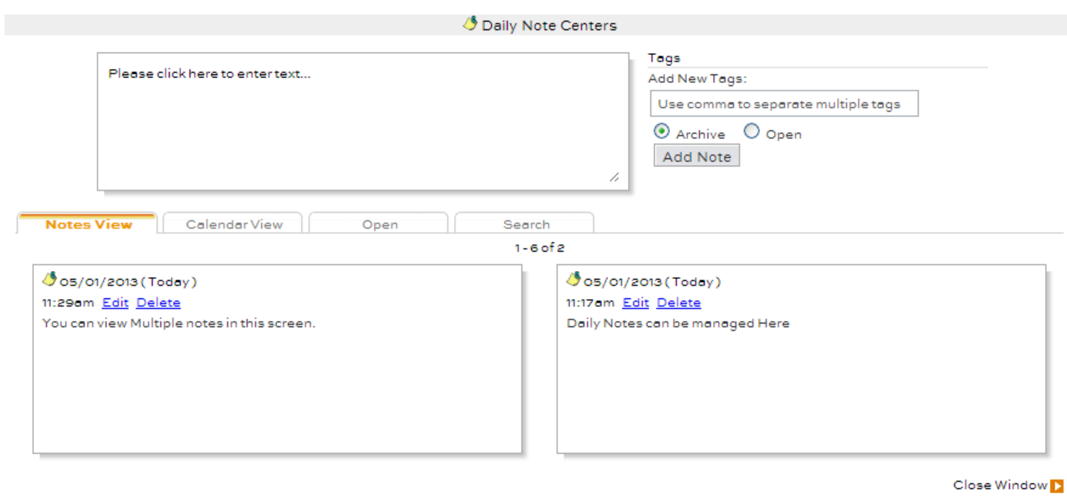
7. PlanPlus will open the **Note Editor**. From here you can edit the notes content



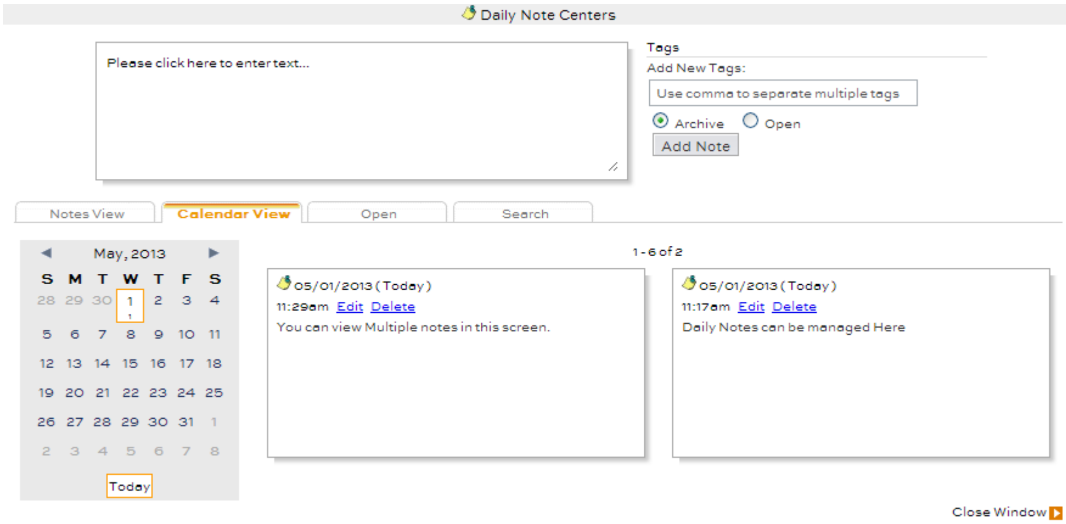
8. When you have finished editing your note click on **Update**.

9. If you want to view your Notes Center click on the **Note Center** link in the **Note Editor** page.

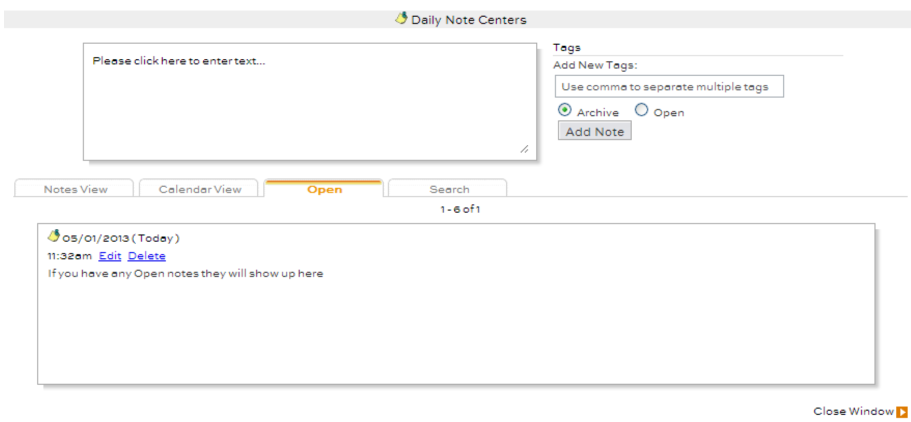
10. The Note Center allows you to see multiple notes at a time.



11. You can select **Calendar View** to notes from a specific day.



12. In the **Open** tab you will see only your Open notes none of your archived notes.



13. In the **Search** tab you can search your notes for a specific word or phrase.