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## 2. Introduction

**PlanDeer 10** is a simpler, lighter and faster planning tool that is designed for you to create intuitive plans that you can track on a daily basis or weekly basis or both. This is designed in such a way so as to enable you to track your tasks and activities **easily, spending minimal time and effort in maintaining the plan**. The following sections provide a description of how you can achieve intuitive and easy task management, be it for your projects or to-do’s at office or for managing personal tasks or a combination of these, thereby achieving a significant productivity enhancement.

**This tool is designed in such a way that the plan can be used in two scenarios.**

- i. For planning and tracking fixed period projects with a start date and end date
- ii. While working on continuous timeline projects - The “**Extend Plan**” feature provides a facility where the end date of the project can be constantly extended for a specified period regularly.

### 3. Pre-requisites

- a. **Microsoft Excel 2010 [or later version] (32-Bit)** on Windows Operating System (32-Bit or 64-Bit)
- b. **A PDF Viewer (like Adobe® Reader®)** for viewing the help file. (Adobe® Reader® is freely downloadable)

**Note 1:** In case you install PlanDeer on a computer that has Excel 2007, some of the functionalities may not be available or may not work.

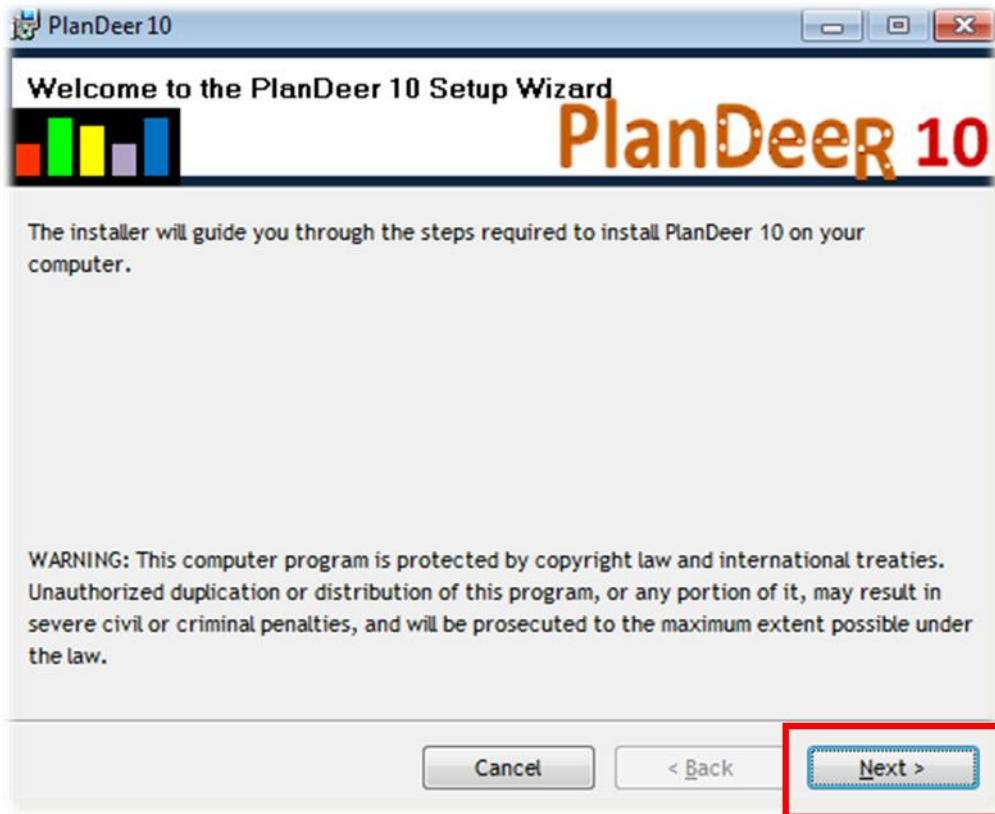
**Note 2:** This version is **not** compatible with MS Office 2010 (or later version) - **64-Bit**.

### 4. Installation

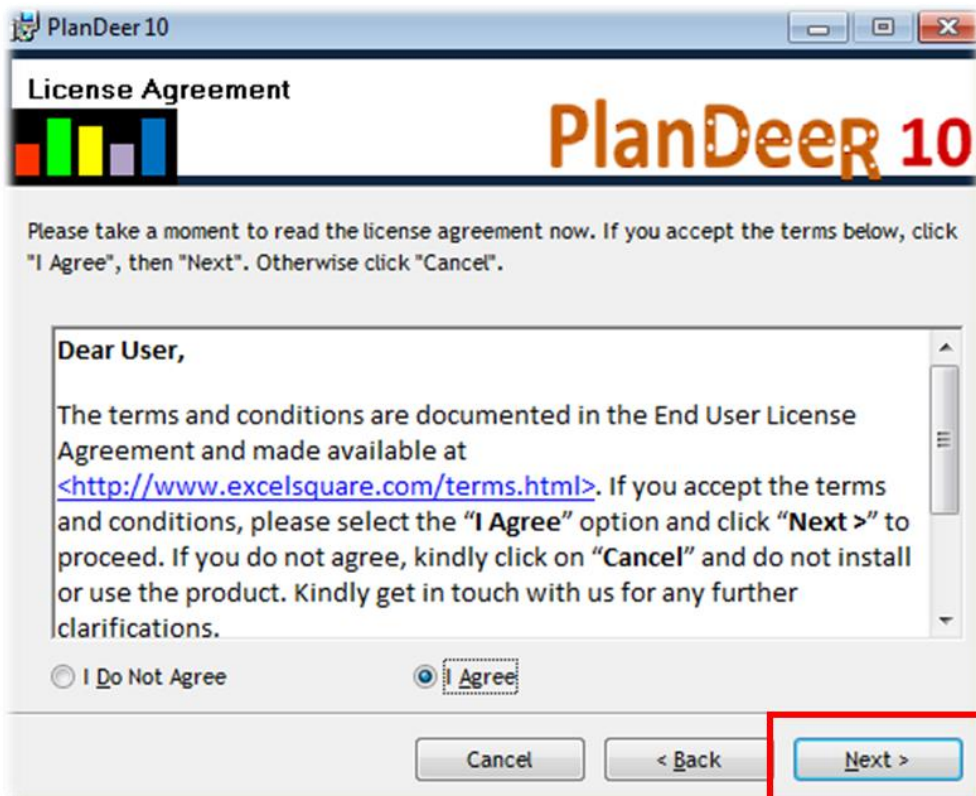
After you have downloaded the file **PlanDeer10\_v20\_1\_032\_Installer.zip**, extract the contents of this compressed file into a folder of your choice. (You can extract this by using Windows Explorer in some versions of Windows OS or WinZip or any other compatible application).

In the extracted folder, you would find **PlanDeer10\_v20\_1\_032\_Installer.msi**. Open the .msi file and follow the installation steps as the installer guides you through.

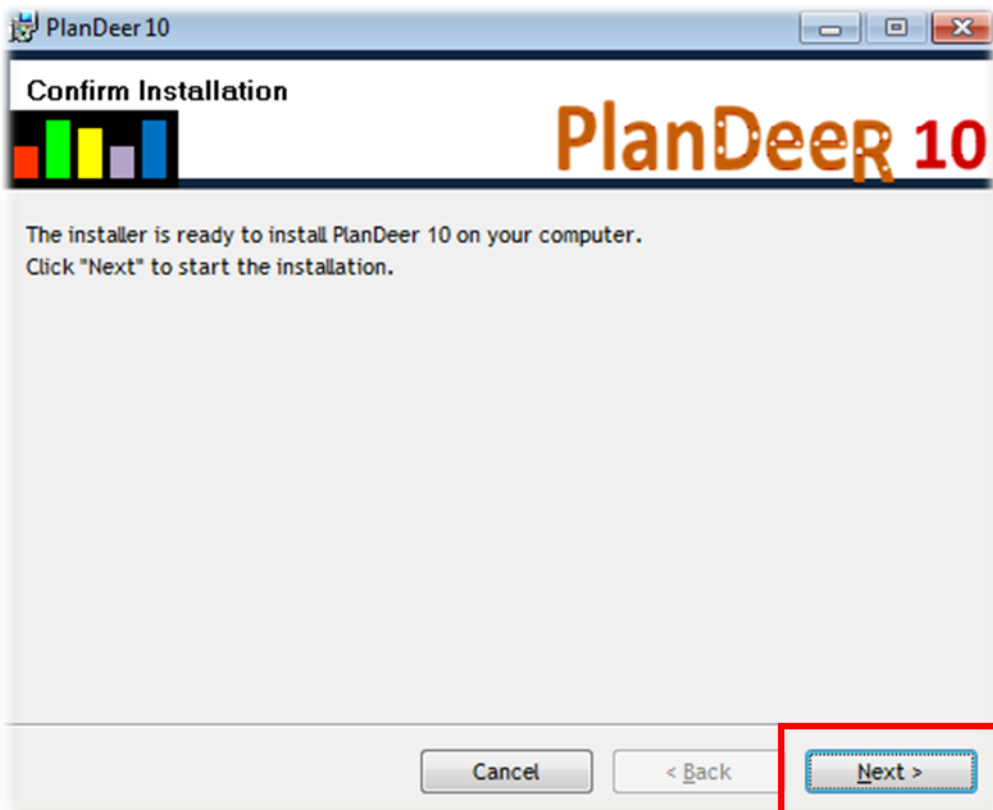
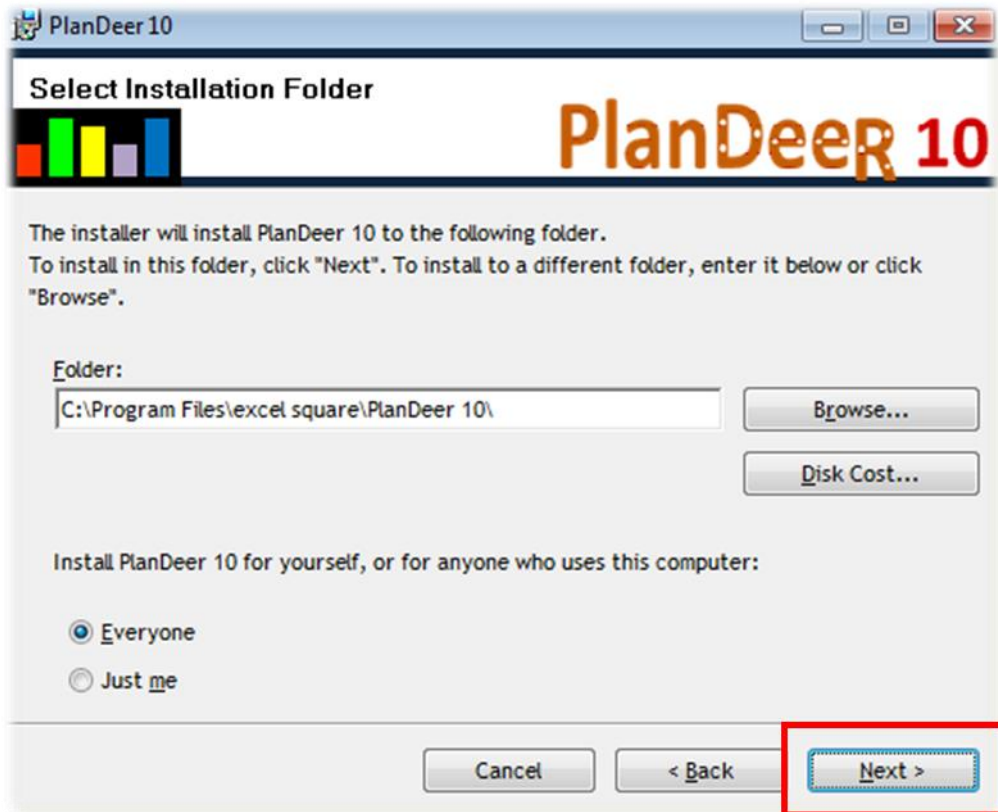
**Note:** In case the installer requests for any permission to run the application, you would need to provide the permission for the Installer to continue.



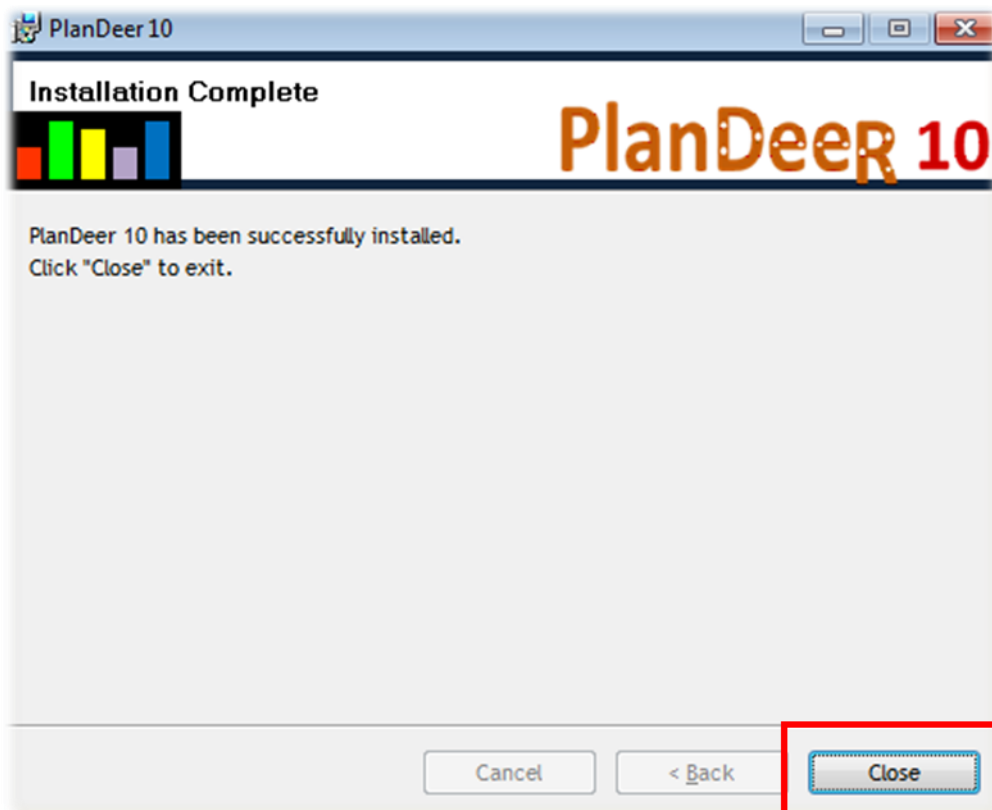
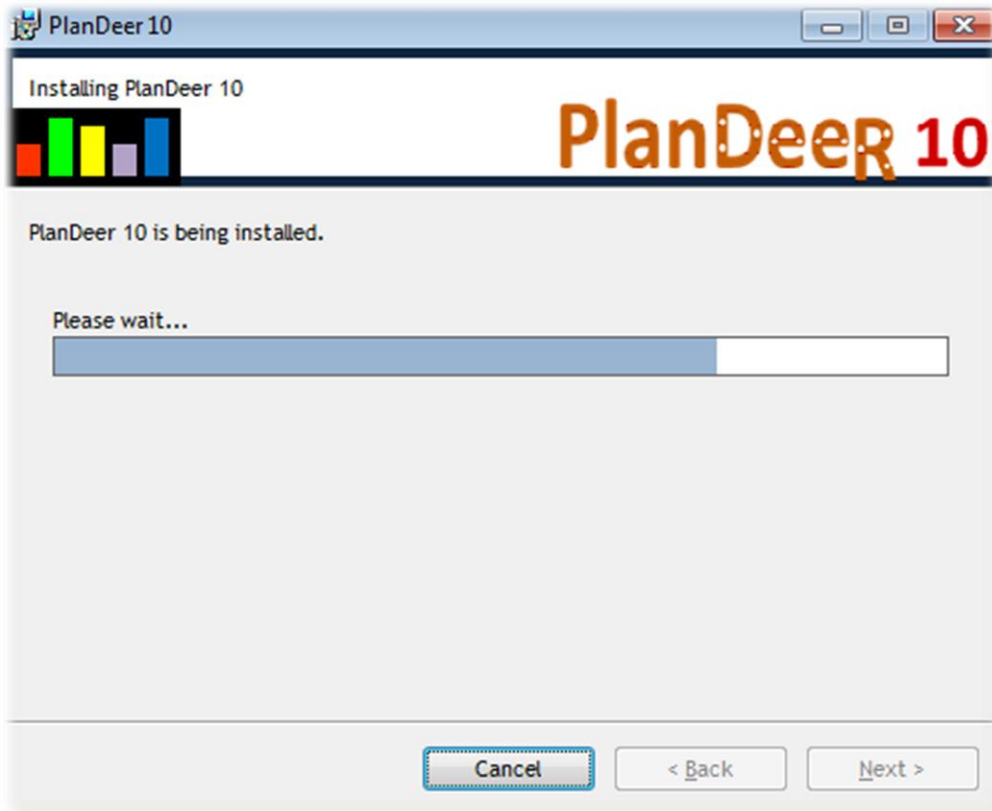
You would see the welcome screen with the navigation buttons. Select “Next” and go through the License agreement details carefully. Once you are ready to proceed, click on “I Agree” button and then click “Next”.



After you agree to the terms and conditions, you will get a final confirmation screen to proceed with the installation of PlanDeer. Click "Next" to start the installation.



On completion of the installation, you will get the installation success message. Now, you are ready to use **PlanDeer**. In case you get an error message while installing, please abort and try installing again. If the problem persists, contact **PlanDeer** support team.



Once the installation is complete, **PlanDeer** files would be placed inside the “**My Documents**” folder (or equivalent folder name, depending on the version of the Windows operating system on the machine) under the folder name “**PlanDeer**”. To access PlanDeer through the menu, go to “**Start->All Programs->PlanDeer->Create New Plan [from Read-Only Template]**” (or “**...PlanDeer->Create New Plan [from Read-Only Template]**” under equivalent Programs menu). Click this menu item to open the tool for creating a new plan. For accessing the plan through Windows Explorer, you can go to “**My Documents\PlanDeer**” folder under which you will see **PlanDeer\_ReadOnly\_PlanTemplate\_doSaveAs.xlsm**.

#### a. Uninstalling PlanDeer

If you want to uninstall “PlanDeer 10”, go to **Control Panel** in Windows (through Windows Start button) and select “**Uninstall a program**” (in Windows Vista) or “**Add or Remove Programs**” (in Windows XP) or the equivalent menu depending on the Windows operating system version. In the installed programs list, you will find the entry “**PlanDeer 10**”. Select this program and click “**Remove**” or “**Uninstall**” (or the equivalent menu) as the case may be. The program will be uninstalled from the system. You can reinstall the program using the normal installation procedure.

## 5. Getting Started

#### a. Location of PlanDeer menu

Select “**Start->All Programs->PlanDeer->Create New Plan [from Read-Only Template]**” (or “**...PlanDeer->Create New Plan [from Read-Only Template]**” under equivalent Programs menu) to open **PlanDeer**. When opened through this menu, the application opens a read-only file which can then be saved as a new PlanDeer file with a user preferred name. This way, a new plan can be created on need basis. You can create separate plan files for tracking different projects and manage them on the same computer. For opening of the already created plans, user can open Excel and through Excel’s File->Open menu navigate to the plan file that is already created and open it, or go to the windows folder where the file is saved and open it directly from there.



**Note 1:** Accessing PlanDeer through “**Create New Plan [from Read-Only Template]**” menu will always create a new plan file. Existing plan files can be directly accessed through Windows Explorer or through Excel’s File->Open menu.

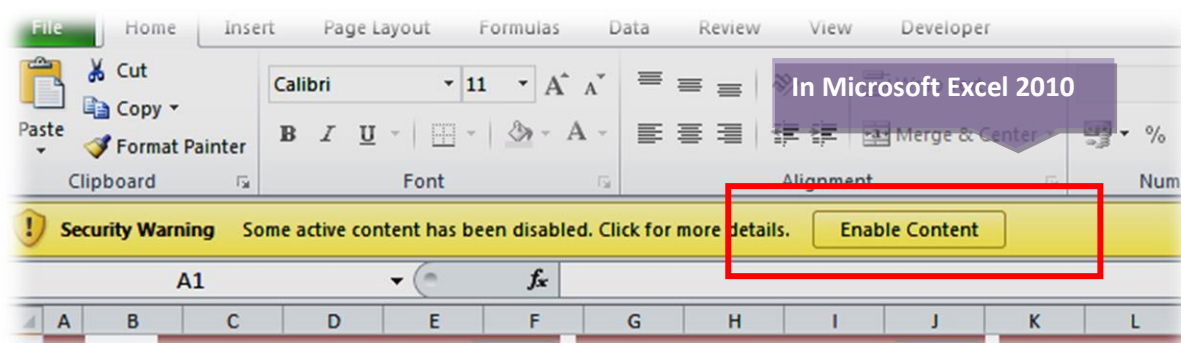


**Note 2:** You can also find the menu “Start->All Programs->PlanDeer->Sample Plan” through which you can open a sample PlanDeer file that can be used to get acquainted with the Product. You can also do a SaveAs of this file and create your plan if needed.

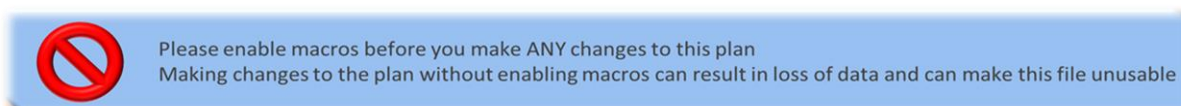
#### b. Enabling Macros

For PlanDeer functionalities to work properly, you would need to enable macros when you open the excel workbook that PlanDeer creates. If the macros are not enabled, then some of the functionalities will not work.

When you open PlanDeer file in Microsoft Excel 2010 (or later version), if the macros are not enabled, you would see an “**Enable Content**” button as shown in the picture below. You need to click this and enable macros.



PlanDeer also displays a message box inside the worksheet stating that the macros are not enabled when the PlanDeer file is opened without enabling the macros or the macros are not yet enabled.



**Note:** Microsoft Excel 2010 (or later) also has features to remember the selection (Enable or Disable macros) and apply the same when the same workbook is opened subsequently.

#### c. Activation of License

Once you install **PlanDeer**, you need to activate the license on that computer by entering the activation code (this needs to be done before the end of trial period to have uninterrupted access to the workbook). To get the activation code, go to “**About\_PlanDeer**” sheet. For easy processing, fill up the “**Email ID**” (Email id from which you made the purchase) and “**Transaction ID**” (Either the “**Receipt No**” or the “**Transaction ID**” that you see in the PayPal receipt) fields.

Click on “**Request Activation Code**” button. This will open a new email (on your default mail client like Microsoft Outlook, Outlook Express...) with automatically prefilled information containing the “To” address, “Subject” and the **Product Version, Email id, Transaction ID** and the **Computer Code**. In case you had not entered the Email ID and Transaction ID (as explained above) in the “**About\_PlanDeer**” sheet, you **should** fill up the information in the email and then send the email. You will receive the activation code as a response to this email within the time period as specified in the corresponding page on the website. (You can also [visit this page](#) on our website to see the details of activation process).

**Note:** In case no mail client is configured, you will have to manually enter the **Product Version, Email id, Transaction Id** and the **Computer Code** (or copy the table that contains the above information as shown below) and send the email (as explained in the [How to Activate](#) page)

Product and Activation Information	
Product Name	<b>PlanDeer 10</b>
Product Code	PC_ESPL_PLANDEER10-100032_CUST_REF
Product Versior	<b>10.1.032 (32-Bit)</b>
Computer Code	<b>EF69-B90E-C617-348B</b>
Email ID	(Type here: Email ID that you used while purchasing the license for this product)
Transaction ID	(Type here: Transaction ID as in the PayPal receipt if you have purchased a
Activation Code	(After you get the activation code, you can store it here for reference)

Request Activation Code

Click on "Request Activation Code" to compose a new email containing information required for generating activation code

Contact Information	
Company	Excel Square Tech Private Limited
email	<a href="mailto:support@excelsquare.com">support@excelsquare.com</a>
Website	<a href="http://www.excelsquare.com">www.excelsquare.com</a>

excelsquare  
more simplicity, more productivity

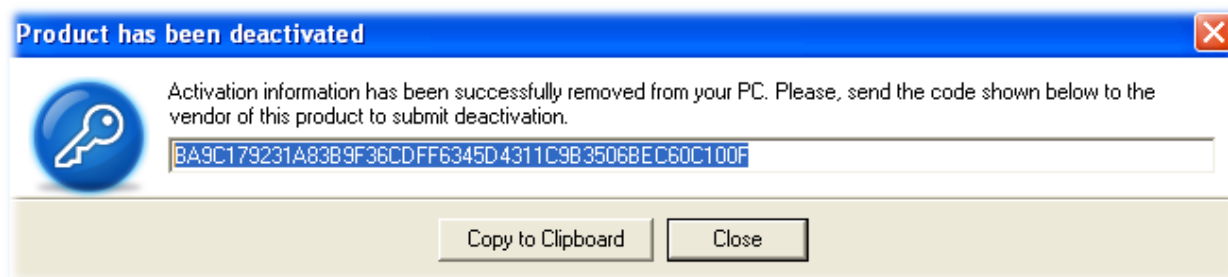
Once you receive the activation code, you can go to the activation screen using the “**Activate**” menu item under the menu “**PlanDeer10**”. Or, if the trial period has ended, the activation screen will appear automatically while the file is being opened. You can enter the activation code that you have received in the appropriate field to activate the product. This activation code may be stored in the “Product and Activation Information” table in the “**About\_PlanDeer**” sheet, for your reference.




### Deactivating the License

For the purpose of moving the license from one computer to another or for any other related reasons, you may deactivate the license on your current computer by selecting “**Deactivate Product**” menu item under “**PlanDeer10**” menu. (The “Deactivate Product” menu will be visible only after the license has been activated).

After you confirm to deactivate the product, **PlanDeer** will display a deactivation code that you can copy using the “**Copy to Clipboard**” button. You would need to send this code to the support team for confirming the deactivation.



#### d. Home Page

**PlanDeer** provides a most convenient way of accessing the various worksheets through its easily accessible “Home Page”. The “**Home**” tab provides links to all the other worksheets and in turn each worksheet has a link to the “Home Page” where you see this icon - 



The picture shows the layout of the “Home Page” with quick direct access links to various worksheets.

#### e. Creation of plan document

Open **PlanDeer** as explained in the earlier section. You would now see the workbook template. Use “Save As” and save the workbook with a filename and in a location that you desire (When you try to save, the document forces a SaveAs so that the original form of the workbook is always maintained to be able to create new plans). The newly created workbook would be the base document for your plan. Once the plan document is created using this menu, later on the plan can be opened as usual from inside Microsoft Excel or through Windows Explorer from the location in which you saved the file. You can create additional plans with the original template by accessing **PlanDeer** through the menu again.

**Note 1:** The workbook will always be saved in “.xlsx” format.

**Note 2:** You can maintain as many separate **PlanDeer** plan documents for different projects as you wish at any point in time.

#### f. Setting up the Plan (Basic Information)

Setting up of the plan involves providing the basic information required so that you can start using the plan. These are:

- ✓ Project name (the name by which you would want to identify this plan. This is displayed in the Home Page once the plan is open)
- ✓ Start date for the plan - which is common to both daily plan and weekly plan.
- ✓ End date (Daily Plan) - If you want to use daily plan, set the required end date for the daily plan

- ✓ End date (Weekly plan) - If you want to use weekly plan, set the required end date for the weekly plan

**Steps:**

- Go to "FirstSteps" worksheet
- Enter the name (Plan name or project name) with which you would want to identify this plan
- Enter the start date, i.e. the date from which you would want to start the planning activity. **Make sure that you manually change the start date by over writing the default date that is shown in the plan.** The default date is formula driven and hence needs to be over written manually.

**Plan Information** (You can edit data in the cells with [this](#) background)

<b>Project Name</b>	PlanDeer - My Easy Planner	
<b>Project Start Date*</b> <i>(Common for Daily and Weekly Plans)</i>	<a href="#">(m-d-yy)</a>	5-16-20
<b>Daily Plan &gt;&gt;</b>		Start      End
Daily Plan Schedule (m-d-yy)	5-16-20	7-16-20
<b>Weekly Plan &gt;&gt;</b>		Start      End
Weekly Plan Schedule (m-d-yy)	5-16-20	8-17-20
Week Nos. & Start Day of Week	CW20 (5-11)	CW34 (8-17)

\*PlanDeer can be used for fixed schedule projects as well as projects of continuous nature by

Clear sample data in DailyPlan

Clear sample data in WeeklyPlan

*You can clear the sample task list in the Daily clicking these respective buttons. Please note the UserSpace will also get cleared.*

*Please make sure that you don't click on these*

**Plan Information** (You can edit data in the cells with [this](#) background)

<b>Project Name</b>	PlanDeer - My Easy Planner	
<b>Project Start Date*</b> <i>(Common for Daily and Weekly Plans)</i>	<a href="#">(m-d-yy)</a>	5-16-20
<b>Daily Plan &gt;&gt;</b>		Start      End
Daily Plan Schedule (m-d-yy)	5-16-20	7-16-20
<b>Weekly Plan &gt;&gt;</b>		Start      End
Weekly Plan Schedule (m-d-yy)	5-16-20	8-17-20
Week Nos. & Start Day of Week	CW20 (5-11)	CW34 (8-17)

\*PlanDeer can be used for fixed schedule projects as well as projects of continuous nature by

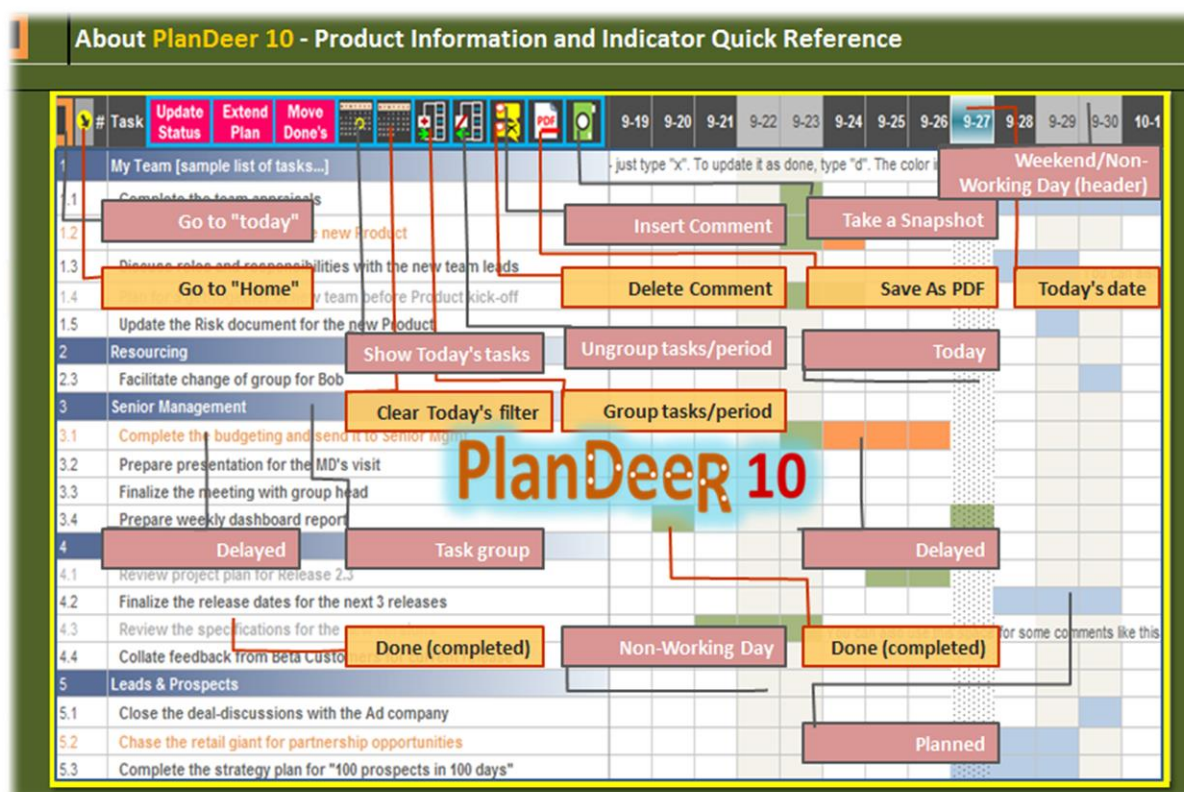
- By default, daily plan schedule would be for a period of about 5 weeks and weekly plan schedule would be for a period of 15 weeks. Based on the timeline of the project or assignment that you want to plan for, you can set the start date and modify the end dates for Daily Plan and Weekly Plan. Based on the end dates provided, the planning calendar in daily plan and weekly plan gets updated accordingly.

**Note 1:** The editable fields are highlighted for more intuitive editing.

- If you are already familiar with the functionality and want to clear the sample data
  - Click “Clear sample data in daily plan” button (and respond to the confirmations appropriately)
  - Click “Clear sample data in weekly plan” button (and respond to the confirmations appropriately)
- As the next step, if you want to plan the daily tasks, go to “DailyPlan” worksheet. If you want to plan weekly tasks then go to “WeeklyPlan” worksheet

g. A quick reference of the features of PlanDeer

A quick reference chart explaining the indicators and icons



## 6. Daily Plan Functions

### a. Creation of daily plan schedule

Before starting to add activities to the daily plan, ensure that the start and end date for the daily plan are defined as per your requirement. See section, “Setting up the Plan (Basic Information)” for details.

Once the schedule is defined in the “**FirstSteps**” worksheet, go to “**DailyPlan**” worksheet

Each row in the plan can be used to create either a task or a task group header (i.e. a group header to create several tasks under that). When you enter the serial number in the first column (marked with header #), the serial numbers like 1, 2, 3...10, 20...100... (i.e. integers) are treated as task group headers. The tasks with serial numbers having a decimal like, 1.1, 1.2...2.1, 2.2...10.1, 10.2... etc are treated as normal tasks. For the task group headers, a band would appear **automatically** on the serial number cell and the task description cell, as soon as the serial number is entered. For example, if you have given serial number 1 for a group called "Product Release", then that treats it as a task group header. You can enter the tasks that you want to plan under that with serial numbers 1.1, 1.2, 1.3, etc. The serial numbers can be multi-levelled like 1.2.1, 1.4.5, 10.1.1, etc., and they need to be numeric (meaning, alphabetical characters cannot be used). Depending on the level of the serial number, the corresponding task description cell gets indented automatically.

1	<b>Product Release</b>
1.1	Review project plan for Release 2.3
1.2	<b>Finalize the release dates for the next 3 releases</b>
1.2.1	<b>Review the specifications for the new versions</b>
1.3	<b>Collate feedback from Beta Customers for the current</b>

Users can either use the task group header just as a group header (i.e. not put any plan against that) or can maintain a schedule for the task group header as well, just like it is done for a task. In which case, it can be tracked with different status values like any other task in the plan.

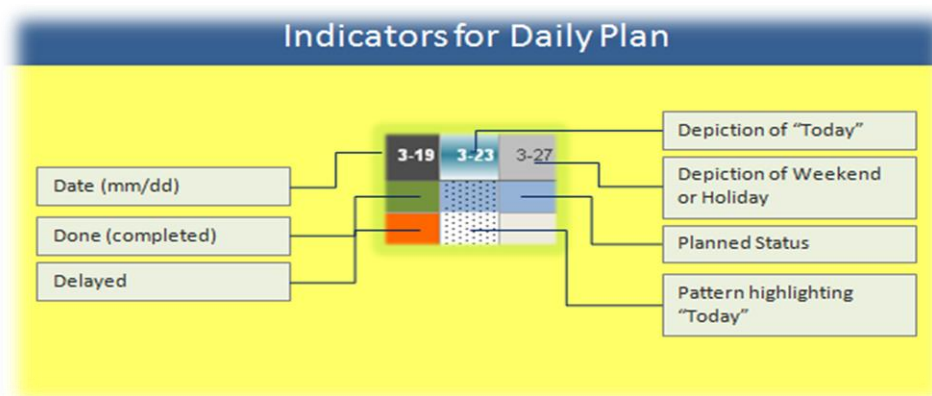
**Note 1** - When User enters a serial number like 1.10, 1.20, etc. (multiple of 10 in the decimal region), Microsoft Excel converts that to numbers like 1.1, 1.2..., by default (it drops the zeros at the end). So, to enter a decimal number like 1.10, 1.20, etc, you will need to type '1.10, '1.20 (i.e. number, starting with an apostrophe)

**Note 2** - You can also use the number format 1,1.....1,2.....1,3 (using commas instead of using the decimals like 1.1... 1.2.....1.3)

- Now, go ahead and enter the tasks.
- As you enter the tasks, depending on the date/dates on which you want to plan that activity or task, all you have to do is just type the letter "x" (or "X") into the cell under the corresponding date column and for that task row. This automatically brings up an indicator for that cell depending on the timeline of the plan. If you want to plan an activity for say, 5 days consecutively, then just type "x" on all those days - as simple as that! For instance, if

you plan to finish an e-learning course in the span of 5 days starting say, Monday, you would enter "x" for the 5 days starting that Monday.

- When you want to update a day's plan as being done or completed, just type letter "d" (or "D") for that day, for that task.
- Whenever you want to update "x" or "d" for multiple days, instead of entering "x" or "d" that many times, you can alternatively select those days, enter "x" or "d" as applicable and then press Ctrl-Enter.
- Refer the picture below to understand the significance of each indicator.



- Continue until you have created the tasks that you want to plan for. It is not mandatory to create a task group header for all the tasks. However, it would be a good idea to group the related tasks so that it is more intuitive to track at the group level.

**Tip:** Tasks under no specific group can be put under "Others" or "Miscellaneous".

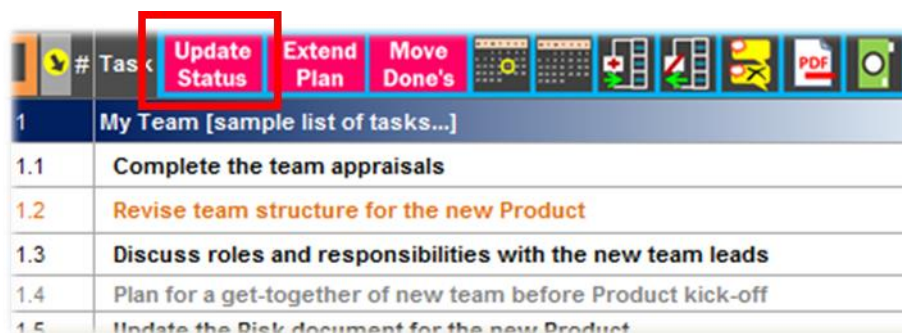
AP	AQ	AR	AS	AT	AU	AV	AW	AX
Status	Short Notes	Category	Party	Location	MyInfo-1	MyInfo-2	Effort (hrs)	Priority
Group		Group	Group	Group				Group
In Progress		People Mgmt	Team	Office				32 High
Planned		People Mgmt	Self	Office				3 High

- For each of the tasks, you can (but, not mandatory) enter various other attributes like, **Category** of the task (like electronics, travel, finance, etc), **Party** (team member or person responsible to do the task), **Location** where the task needs to be done (like home, office, customer site, etc), or **Priority** of the task. The tracking efficiency can be boosted by utilizing the reports that are specifically designed to provide status information based on these attributes. Additionally, few more columns are provided (with default name **MyInfo-1** and **MyInfo-2** and **Effort (hrs)**). Users can change these attribute names directly in the plan sheet as needed and store other related information. For e.g. if one wants to maintain the source of the task, **MyInfo-1** can be changed to **Source** and the corresponding attribute of each task can be filled in.



**Note:** You can customize some of the column names and their corresponding dashboard report names. Please see the section on "[Customization](#)" for details.

- Now you are ready to see the **Power of 2 Letters** - "x" and "d" - Click "**Update Status**" button (please pay attention to the message that pops up and respond appropriately). Based on the planning schedule for each task and the updates you have done using "x" and "d", the tool will analyze and update the status of each of the tasks. Each task will obtain one of the following status values and will be displayed in the status column:



#	Task
1	My Team [sample list of tasks...]
1.1	Complete the team appraisals
1.2	Revise team structure for the new Product
1.3	Discuss roles and responsibilities with the new team leads
1.4	Plan for a get-together of new team before Product kick-off
1.5	Update the Risk document for the new Product

**Planned:** When a task has a schedule that is yet to start (so the schedule would either start "today" or later, but cannot be in the past)

**Delayed:** When a task has a schedule that is overdue either partially or fully (i.e. still having "x" or "X" in its schedule on a day that is earlier than "today")

**Done:** When a task has all the planned days flagged as completed (with "d" or "D")

**In Progress:** When a task is partially completed and does not have any part of the plan that is overdue.

**Group:** When a task group header is entered with no scheduling entry done for it.

**Not Planned:** When a task (and not a task group header) is entered, but not planned against any dates

#### b. Entering Holidays, Leaves and other non-working days

To indicate the days on which you have holidays, leaves or any other non-working days, a provision is provided to enter these days in the "Non-Working Days" in "**Customize**" worksheet. You can find more details on this under "[Customization](#)" section. These non-working days are marked with a gray background in Daily Plan, similar to weekends, to indicate that these are non-working days. However, if you require so, you can still go ahead and plan for activities on this day.

#### c. Tracking and updating Daily Plan

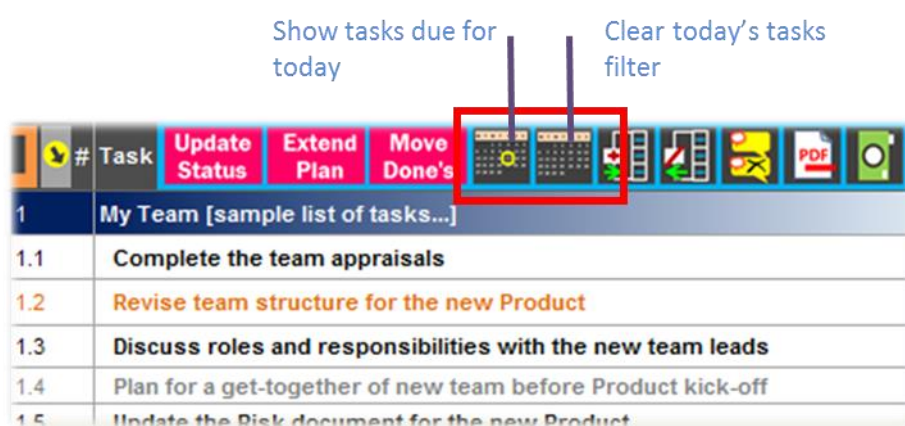
The visual indicators provided in the plans communicate instantly the status of the tasks. For instance, the tasks with reddish font and cells marked with reddish color convey the message that they need attention since they are overdue, while the greens communicate that the tasks are on track [see picture under 'Creation of daily plan' for understanding the indicators]. In addition to these visual indicators, the "Grouping" feature and "AutoFilter" feature can also be effectively used for tracking the tasks.

3	<b>Senior Management</b>	
3.1	<b>Complete the budgeting and send it to Senior Mgmt</b>	Red
3.2	<b>Prepare presentation for the MD's visit</b>	
3.3	<b>Finalize the meeting with group head</b>	
3.4	<b>Prepare weekly dashboard report</b>	Green
4	<b>Product Release</b>	
4.1	Review project plan for Release 2.3	Green
4.2	<b>Finalize the release dates for the next 3 releases</b>	
4.3	Review the specifications for the new versions	

#### - What are my tasks for today?

One of the most important questions that one needs to answer while tracking their tasks on a daily basis is - "What are my tasks for today?"

To enable you to take a quick look at the pending tasks for the day (including delayed ones), a facility to filter the list of tasks that are either overdue or need to be attended to "today" is provided. As shown in the picture below, the "Show tasks due for today" button will enable you to see this list with a single click of a mouse.



**Note:** It is important to update the status before using this feature. Otherwise, view generated may not be accurate.

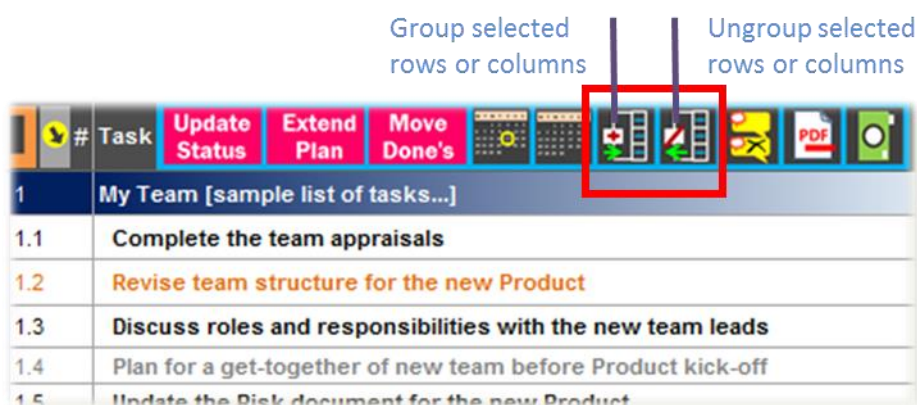
To clear this filter, click the "Clear today's tasks filter" button.

- One can also filter by selecting only the task attributes that are of specific interest at that point in time. For example, if you want to see only the "High" and "Very High" priority tasks,

you can click on the “**Priority**” dropdown and select only “**High**” and “**Very High**”. This will bring up only those tasks that have these priorities.

**Note:** You can customize some of the attribute names and their corresponding dashboard report names. Please see the section on “[Customization](#)” for details.

#### d. Using Grouping Feature



A facility where you can group the tasks or the calendar days or the task attributes, are provided using Group and Ungroup buttons (shown in the picture). Whenever you want to group related tasks, for example, a group of tasks under a specific task group header, you can select all the required tasks (full row selection) and click on “**Group selected rows or columns**” button. An indicator would appear to the left of the rows that are grouped. The “-” and “+” signs can be used to toggle the collapsing and expansion of these grouped tasks. Similarly, you can select the required days or the attributes (full column selection) and use the grouping button. In this case, the indicator would appear above the column header. When you want to remove any of the grouped tasks or period or grouped attributes, or remove a subset of the group, select the required rows or columns to be ungrouped and click on “**Ungroup selected rows or columns**” button.

When grouping is done, at the top-left corner of the worksheet you can see numbers like 1, 2 (or more depending on the level of grouping done) within small boxes (just above the intersection of the excel header row and column). When you click on 1, the groups are collapsed to level 1 and if you click on 2, the grouping is collapsed to 2<sup>nd</sup> level and so on. One can collapse or expand each group individually by clicking on the '+' and '-' button that is seen to the left of row headers of grouped rows or above the column header of the grouped columns.

The grouping feature also has options to display the summary level either above or below the grouped rows and to the left or right of the grouped columns. This setting is available in the Customization feature. Please see the section on “[Customization](#)” for details.

#### e. Plan Extension - Daily Plan

In DailyPlan, a button "Extend Plan" is provided to extend the end date of the plan. Typically this is useful when you are working on a continuous project and you would like to be able to extend the plan for a fixed interval often. The number of days to extend when "Extend Plan" is clicked depends on the setting done in the "Customization" sheet. By default, this value is set to 15 days. For example, if 3/23 (mm/dd) is the end date before extending the plan, after "Extend Plan" is clicked it moves the end date further by 15 days (unless the setting has been changed) and creates an extension through 04/07 (mm/dd). You could extend the plan as many times required, subject to the number of columns limited by Microsoft Excel.

When you click "Extend Plan" button, a message stating that "These changes cannot be undone. Please select "Cancel" to go back and save, or select "OK" to proceed with the changes" comes up. On selecting the "OK" button, the daily plan gets extended by the number of days set in Customization.

**Note 1:** To ensure that you can go back to the version of the plan before the update (if needed), please make sure that you have Saved the workbook before extending the plan. For some reason, if you decide that you do not want the extension that you just did, then you can close the workbook without saving it. The other option to reset the end date back to the original date (date before the extension was done) is to go to the "FirstSteps" sheet and modify the end date of daily plan accordingly.

**Note 2:** This action will also create a similar extension in the "Done\_Daily" worksheet so that the two sheets (DailyPlan and Done\_Daily) are in synchronized state.

#### f. Moving completed tasks from Daily Plan

When the number of tasks and activities grow, it might become a little tedious to track the plan. Hence "Move Done's" feature is provided where, on click of a button, the tasks that are completed (meaning, whose status is "Done") can be moved out of the active plan and stored in a separate history sheet.

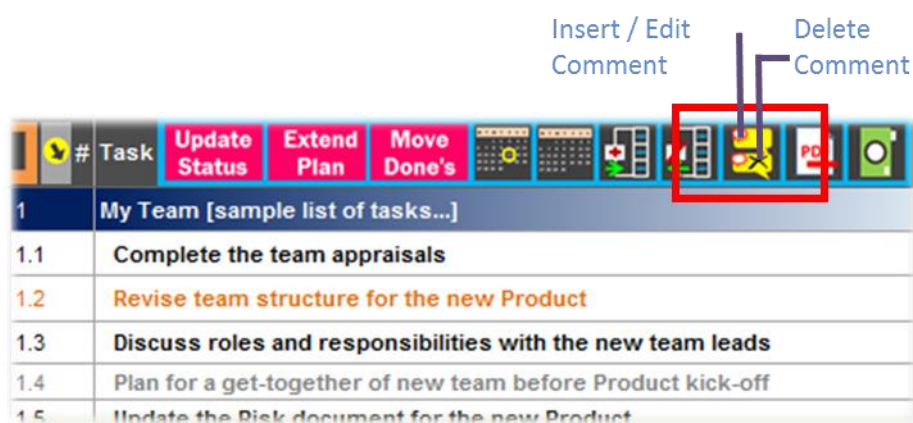
When you want to move the completed tasks, go to the "DailyPlan" Worksheet. If you want to move only a few tasks, say for example, the completed tasks from a specific task group, select the corresponding rows and click on "Move Done's". If you want to move all the completed tasks in the plan, ensure that multiple cells are **not** selected and click on "Move Done's" button.

A message stating "Are you sure the current status is updated? If so, select "Yes" to proceed. If not, select "No" and then select the "Update Status" option" comes up. This is to ensure that the status is up-to-date before doing this purging activity. If you are not sure whether you have done the status update after any of your earlier changes, please select "No" and then click on "Update Status" and complete the status update action. Select "Move Done's" button again. Select "Yes" for the message when you want to proceed with the moving of tasks. On selection of "Yes", another confirmation message comes up to ensure that you can go back to the version of the plan before moving the completed items. Select "Yes" or "No" accordingly. On

selecting "Yes" for the confirmation, the tasks that are completed (i.e. Status = "Done") will be moved out of the "DailyPlan" sheet and will be positioned within "Done\_Daily" sheet sorted in ascending order based on the serial number of the moved tasks. After successful moving of data, a message is displayed with the total number of tasks moved.

#### g. Inserting and Deleting Comments

You can insert comments into the cell using the Insert Comment icon as shown in the picture below. Since Microsoft Excel disables inserting comment if the sheet is protected, **PlanDeer** provides an alternate and easy way to handle inserting comments into a cell. While the tool encourages adding comments directly into the cells wherever possible, in cases where user wants to insert the comment along with the plan for that day, the same can be achieved by clicking on the Insert Comment Icon. The comment can be modified by again clicking on the same icon which will bring up the comment for editing. When a comment needs to be deleted, the corresponding cell with comment can be selected and Delete Comment icon can be clicked.

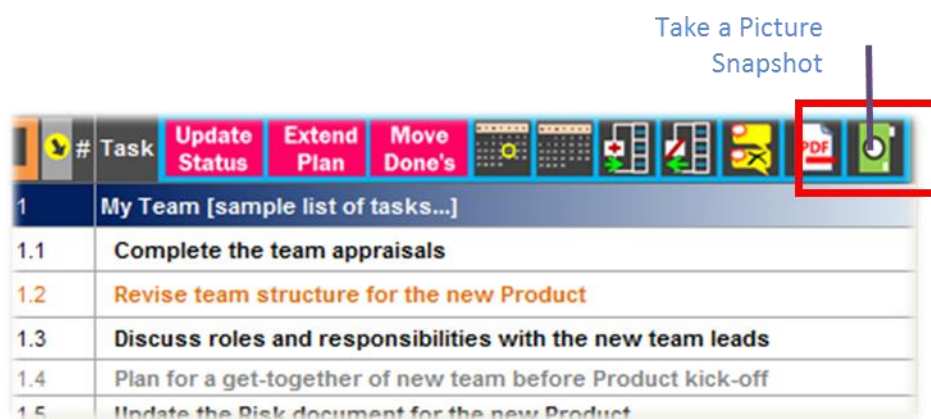


#### h. Exporting the daily plan

You can use the Export to PDF option to export the daily plan into a PDF document as explained in detail in the section "[Export Function](#)".

#### i. Taking a picture snapshot

PlanDeer also allows you to select a particular area of the worksheet and then export a picture snapshot of it. This would help in situations like, you want to take the list of things to be done for the day, along with you, even after you are away from the computer (say on your mobile phone). To achieve this you can filter on today's tasks in the daily plan, select the tasks and click on "**Take a snapshot**" icon. This would create a picture of the selected tasks and save it as a .gif file in the same folder as the plan document. You can then take this picture and transfer it to your mobile or smartphone for referring it later in the day.



Sample showing the exported picture of today's pending tasks

You can set the option to display or not to display the picture when the snapshot is taken through Customization feature, as detailed in the section "[Customization](#)".

j. Customizing the task attributes

You can customize the attribute names Category, Party, Location and Priority, as detailed in the section "[Customization](#)".

## 7. Weekly Plan Functions

### a. Creation of weekly plan schedule

Before starting to add activities to the weekly plan, ensure that the start and end date for the weekly plan are defined as per your requirement. See section, "Setting up the Plan (Basic Information)" for details.

Once the schedule is defined in the "FirstSteps" worksheet, go to "WeeklyPlan" worksheet

Each row in the plan can be used to create either a task or a task group header (i.e. a group header to create several tasks under that). When you enter the serial number in the first column (marked with header #), the serial numbers like 1, 2, 3...10, 20...100... (i.e. integers) are treated as task group headers. The tasks with serial numbers having a decimal like, 1.1, 1.2...2.1, 2.2...10.1, 10.2..., etc. are treated as normal tasks. For the task group headers, a band would appear **automatically** on the serial number cell and the task description cell, as

soon as the serial number is entered. For example, if you have given serial number 1 for a group called "Product Release", then that treats it as a task group header. You can enter the tasks that you want to plan under that with serial numbers 1.1, 1.2, 1.3, etc. The serial numbers can be multi-levelled like 1.2.1, 1.4.5, 10.1.1, etc., and they need to be numeric (meaning, alphabetical characters cannot be used). Depending on the level of the serial number, the corresponding task description cell gets indented automatically.

1	<b>Product Release</b>
1.1	Review project plan for Release 2.3
1.2	<b>Finalize the release dates for the next 3 releases</b>
1.2.1	<b>Review the specifications for the new versions</b>
1.3	<b>Collate feedback from Beta Customers for the current</b>

Users can either use the task group header just as a group header (i.e. not put any plan against that) or can maintain a schedule for the task group header as well, just like it is done for a task. In which case, it can be tracked with different status values like any other task in the plan.

**Note 1** - When User enters a serial number like 1.10, 1.20, etc. (multiple of 10 in the decimal region), Microsoft Excel converts that to numbers like 1.1, 1.2... by default (it drops the zeros at the end). So, to enter a decimal number like 1.10, 1.20, etc., you will need to type '1.10, '1.20 (i.e. number, starting with an apostrophe)

**Note 2** - You can also use the number format 1,1.....1,2.....1,3 (instead of using the decimals like 1.1... 1.2.....1.3)

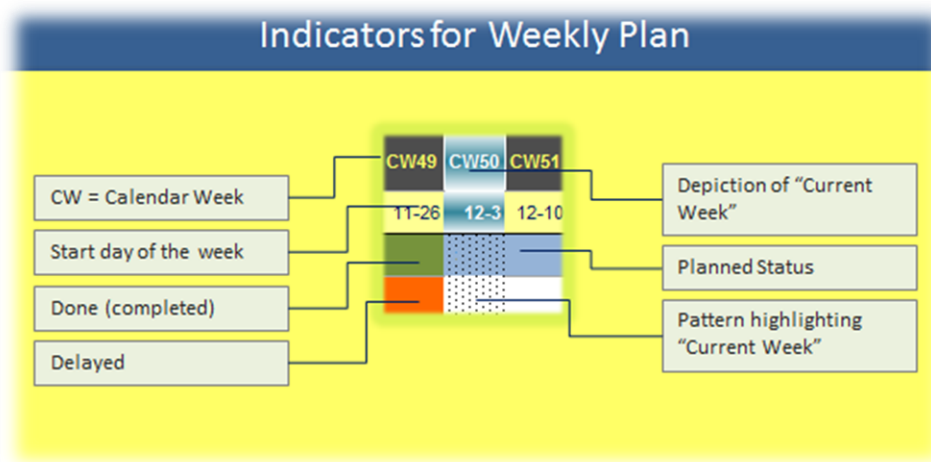
CW41	CW42	CW43	CW44	CW45	CW46	CW47	CW48	CW49	CW50	CW51	CW52	CW53	CW54	CW1
10-1	10-8	10-15	10-22	10-29	11-5	11-12	11-19	11-26	12-3	12-10	12-17	12-24	12-31	1-7

The weekly plan has two header lines. One where the weeks are in the form of CW01, CW02..., that is, Calendar Week 01, Calendar Week 02, etc. The calendar week number calculations (like, what calendar week does a day belong to, what is the start day of the calendar week, etc) would be derived from the calendar week calculations in Microsoft Excel. The second line in the header shows the start date for the week. For example, if let's say, Calendar Week 41 (CW41) begins on Monday, the 1<sup>st</sup> of October, the header shows 10-1. If the weekend setting is customized (See Section 12.c), that setting will also have an impact on which day is shown as the start date for the week. For example, if the weekend is set as "Friday & Saturday", the begin date for the Calendar Week 41 (CW41), would be shown as 9-30 (which would be Sunday).

- Now, go ahead and enter the tasks.
- As you enter the tasks, depending on the week/weeks on which you want to plan that activity or task, all you have to do is just type the letter "x" (or "X") into the cell under the corresponding week column and for that task row. This automatically brings up an indicator

for that cell depending on the timeline of the plan. If you want to plan an activity for say, 5 weeks consecutively, then just type "x" on all those weeks - as simple as that! For instance, if you plan to finish writing a technical paper in the span of 5 weeks starting say, CW13, you would enter "x" for the 5 weeks starting that week.

- When you want to update a week's plan as being done or completed, just type letter "d" (or "D") for that week, for that task.
- Whenever you want to update "x" or "d" for multiple days, instead of entering "x" or "d" that many times, you can alternatively select those days, enter "x" or "d" as applicable and press Ctrl-Enter.
- Refer the picture below to understand the significance of each indicator.



- Continue until you have created the tasks that you want to plan for. It is not mandatory to create a task group header for all the tasks. However, it would be a good idea to group the related tasks so that it is more intuitive to track at the group level. Tasks under no specific group can be put under "Others" or "Miscellaneous".

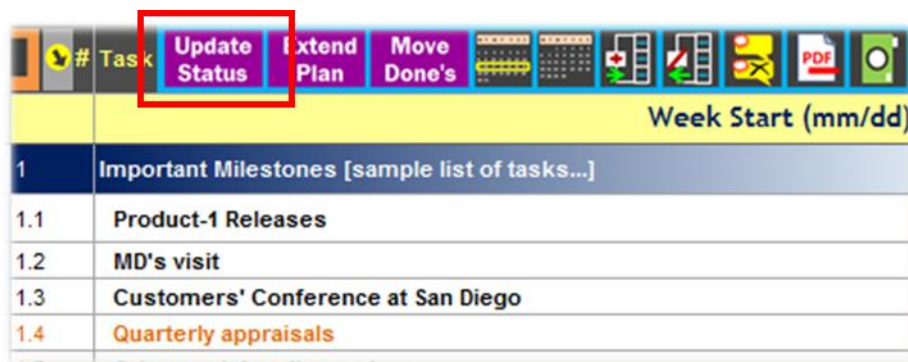
Status	Short Notes	Category	Party	Location	MyInfo-1	MyInfo-2	Effort (hrs)	Priority
Group		Group	Group	Group				Group
In Progress		Milestone	NA	Office				High

- For each of the tasks, you can (but, not mandatory) enter various other attributes like, **Category** of the task (like electronics, travel, finance, etc), **Party** (team member or person responsible to do the task), **Location** where the task needs to be done (like home, office, customer site, etc.), or **Priority** of the task. The tracking efficiency can be boosted by utilizing the reports that are specifically designed to provide status information based on these attributes. Additionally, few more columns are provided (with default name **MyInfo-1** and **MyInfo-2** and **Effort (hrs)**). Users can change these attribute names directly in the plan sheet as needed and store other related information. For e.g. if one wants to maintain the source of the task, **MyInfo-1** can be changed to **Source** and the corresponding attribute of each task can be filled in.

**Note:** You can customize some of the column names and their corresponding dashboard report names. Please see the section on "[Customization](#)" for the details.



- Now you are ready to see the **Power of 2 Letters** - “x” and “d” - Click “**Update Status**” button (please pay attention to the message that pops up and respond appropriately). Based on the planning schedule for each task and the updates you have done using “x” and “d”, the tool will analyze and update the status of each of the tasks. Each task will obtain one of the following status values and will be displayed in the status column:



Week Start (mm/dd)	
1	Important Milestones [sample list of tasks...]
1.1	Product-1 Releases
1.2	MD's visit
1.3	Customers' Conference at San Diego
1.4	Quarterly appraisals

**Planned:** When a task has a schedule that is yet to start (so the schedule would either start in the current week or later, but cannot be in the past)

**Delayed:** When a task has a schedule that is overdue either partially or fully (i.e. still having “x” or “X” in its schedule on a week that is earlier than current week)

**Done:** When a task has all the planned weeks flagged as completed (with “d” or “D”)

**In Progress:** When a task is partially completed and does not have any part of the plan that is overdue.

**Group:** When a task group header is entered with no scheduling entry done for it.

**Not Planned:** When a task (and not a task group header) is entered, but not planned against any weeks

#### b. Tracking and updating Weekly Plan

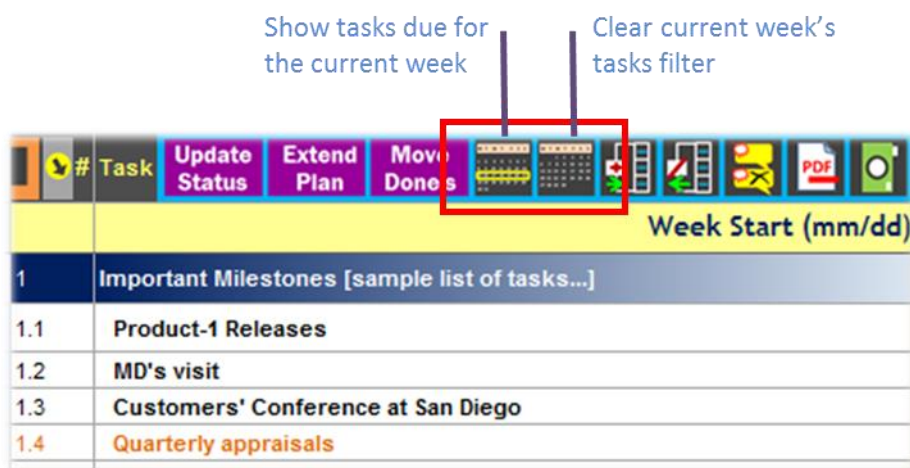
The visual indicators provided in the plans communicate instantly the status of the tasks. For instance, the tasks with reddish font and cells marked with reddish color convey the message that they need attention since they are overdue, while the greens communicate that the tasks are on track [see picture under ‘Creation of weekly plan’ for understanding the indicators]. In addition to these visual indicators, the “Grouping” feature and “AutoFilter” feature can also be effectively used for tracking the tasks.

1	Important Milestones [sample list of tasks...]				
1.1	Product-1 Releases				
1.2	MD's visit				
1.3	Customers' Conference at San Diego				
1.4	Quarterly appraisals				
1.5	Salary revision discussions				

#### - What are my tasks for this week?

One of the most important questions that one needs to answer while tracking their weekly tasks is - "What are my tasks for this week?"

To enable you to take a quick look at the pending tasks for the week, a facility to filter the list of tasks that are either overdue or need to be attended to in the current week is provided. As shown in the picture below, the "Show tasks due for current week" button will enable you to see this list with a single click of a mouse.



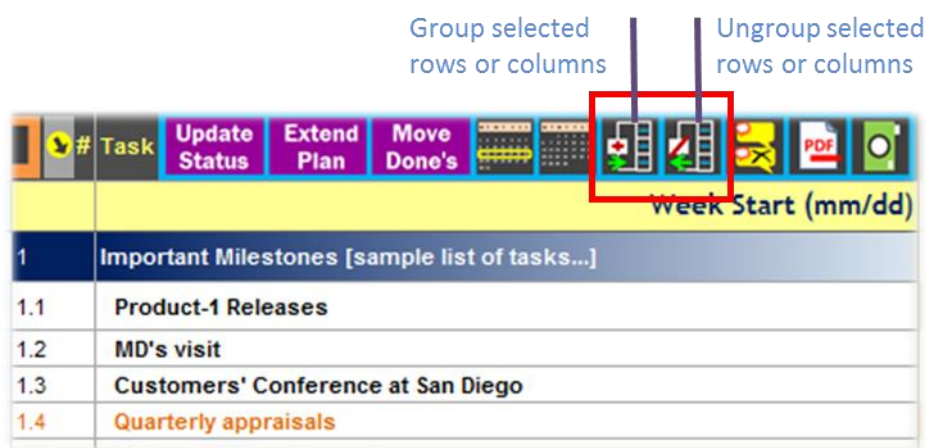
**Note:** It is important to update the status before using this feature. Otherwise, view generated may not be accurate.

To clear this filter, click the "Clear current week's tasks filter" button.

- One can also filter by selecting only the task attributes that are of specific interest at that point in time. For example, if you want to see only the "High" and "Very High" priority tasks, you can click on the "Priority" dropdown and select only "High" and "Very High". This will bring up only those tasks that have these priorities.

**Note:** You can customize some of the attribute names and their corresponding dashboard report names. Please see the section on "[Customization](#)" for the details.

#### c. Using Grouping Feature



A facility where you can group the tasks or the calendar weeks or the task attributes, are provided using Group and Ungroup buttons (as shown in the picture). Whenever you want to group related tasks, for example, a group of tasks under a specific task group header, you can select all the required tasks (full row selection) and click on “**Group selected rows or columns**” button. An indicator would appear to the left of the rows that are grouped. The “-” and “+” signs can be used to toggle the collapsing and expansion of these grouped tasks. Similarly, you can select the required weeks or the attributes (full column selection) and use the grouping button. In this case, the indicator would appear above the column header. When you want to remove any of the grouped tasks or period or grouped attributes, or remove a subset of the group, select the required rows or columns to be ungrouped and click on “**Ungroup selected rows or columns**” button.

When grouping is done, at the top-left corner of the worksheet you can see numbers like 1, 2 (or more depending on the level of grouping done) within small boxes (just above the intersection of the excel header row and column). When you click on 1, the groups are collapsed to level 1 and if you click on 2, the grouping is collapsed to 2<sup>nd</sup> level and so on. One can collapse or expand each group individually by clicking on the '+' and '-' button that is seen to the left of row headers of grouped rows or above the column header of the grouped columns.

The grouping feature also has options to display the summary level either above or below the grouped rows and to the left or right of the grouped columns. This setting is available in the Customization feature. Please see the section on "[Customization](#)" for details.

#### d. Plan Extension - Weekly Plan

In **WeeklyPlan**, a button "**Extend Plan**" is provided to extend the end date of the plan. Typically this is useful when you are working on a continuous project and you would like to be able to extend the plan for a fixed interval often. The number of weeks to extend when “Extend Plan”

is clicked depends on the setting done in the “Customization” sheet. By default this value is set to 4 weeks. For example, if CW26 was the last scheduled week, clicking on “Extend Plan” will extend it by 4 weeks and creates an extension through CW30. You could extend the plan as many times required, subject to the number of columns limited by Microsoft Excel.

When you click “Extend Plan” button, a message stating that “These changes cannot be undone. Please select “Cancel” to go back and save, or select “OK” to proceed with the changes” comes up. On selecting the “OK” button, the weekly plan gets extended by the number of weeks set in Customization.

**Note 1:** To ensure that you can go back to the version of the plan before the update (if needed), please make sure that you have **Saved** the workbook before extending the plan. For some reason, if you decide that you do not want the extension that you just did, then you can close the workbook **without saving it**. The other option to reset the end date back to the original date (date before the extension was done) is to go to the “FirstSteps” sheet and modify the end date of weekly plan accordingly.

**Note 2:** This action will also create a similar extension in the “Done\_Weekly” worksheet so that the two are in synchronized state.

#### e. Moving completed tasks from Weekly Plan

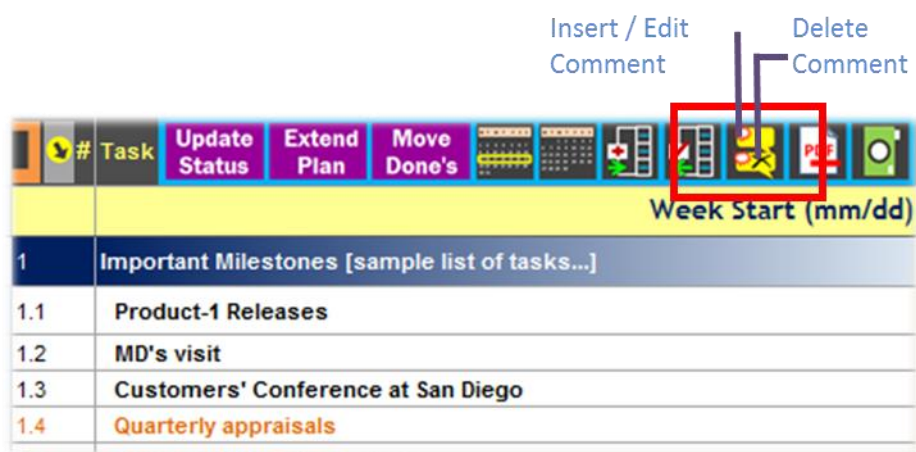
When the number of tasks and activities grow, it might become a little tedious to track the plan. Hence “Move Done's” feature is provided where, on click of a button, the tasks that are completed (meaning, whose status is “Done”) can be moved out of the active plan and stored in a separate history sheet.

When you want to move the completed tasks, go to the “WeeklyPlan” Worksheet. If you want to move only a few tasks, say for example, the completed tasks from a specific task group, select the corresponding rows and click on “Move Done’s”. If you want to move all the completed tasks in the plan, ensure that multiple cells are **not** selected and click on “Move Done's” button.

A message stating “Are you sure the current status is updated? If so, select “Yes” to proceed. If not, select “No” and then select the “Update Status” option” comes up. This is to ensure that the status is up-to-date before doing this purging activity. If you are not sure whether you have done the status update after any of your earlier changes, please select “No” and then click on “Update Status” and complete the status update action. Select “Move Done's” button again. Select “Yes” for the message when you want to proceed with the moving of tasks. On selection of “Yes”, another confirmation message comes up to ensure that you can go back to the version of the plan before moving the completed items. Select “Yes” or “No” accordingly. On selecting “Yes” for the confirmation, the tasks that are completed (i.e. Status = “Done”) will be moved out of the “WeeklyPlan” sheet and will be positioned within “Done\_Weekly” sheet sorted in ascending order based on the serial number of the moved tasks. After successful moving of data, a message is displayed with the total number of tasks moved.

#### f. Inserting and Deleting Comments

You can insert comments into the cell using the Insert Comment icon as shown in the picture below. Since Microsoft Excel disables inserting comment if the sheet is protected, **PlanDeer** provides an alternate and easy way to handle inserting comments into a cell. While the tool encourages adding comments directly into the cells wherever possible, in cases where user wants to insert the comment along with the plan for that week, the same can be achieved by clicking on the Insert Comment Icon. The comment can be modified by again clicking on the same icon which will bring up the comment for editing. When a comment needs to be deleted, the corresponding cell with comment can be selected and Delete Comment icon can be clicked.

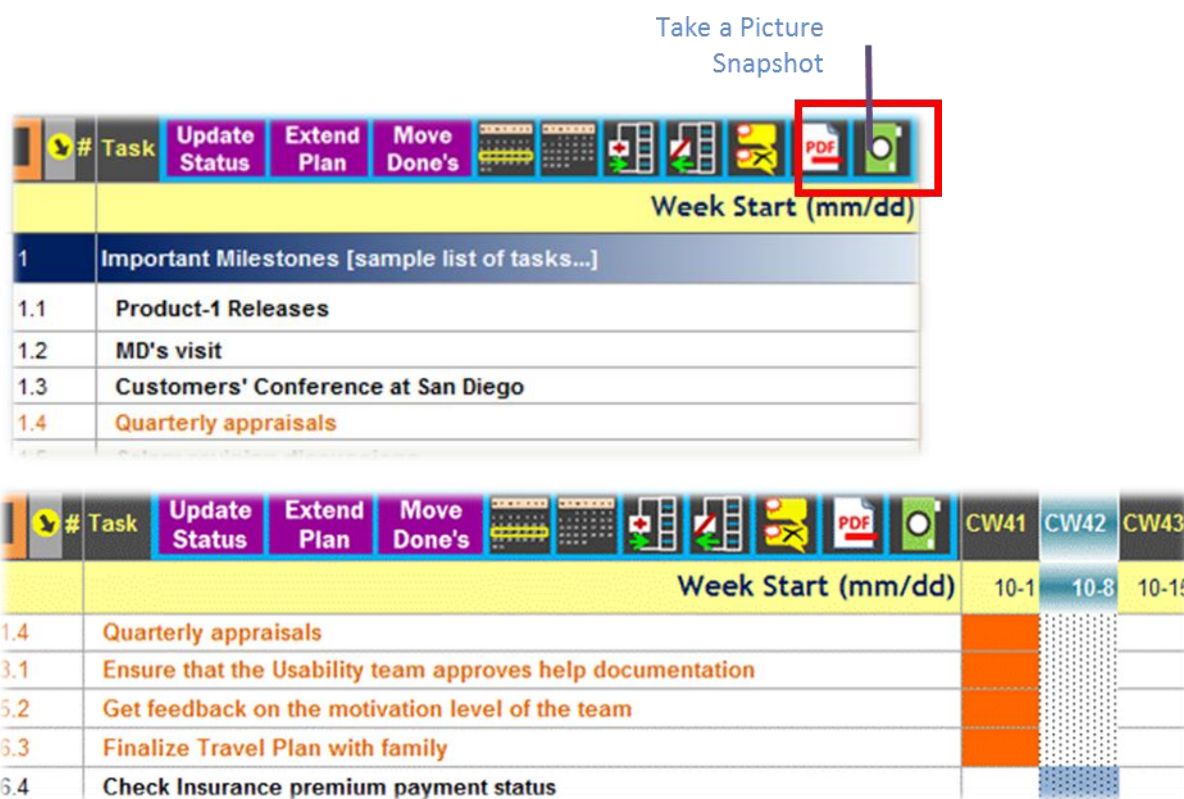


#### g. Exporting the weekly plan

You can use the Export to PDF option to export the weekly plan into a PDF document as explained in detail in the section "[Export Function](#)".

#### h. Taking a picture snapshot

PlanDeer also allows you to select a particular area of the worksheet and then export a picture snapshot of it. This would help in situations like, you want to take the list of things to be done for the week, along with you, even after you are away from the computer (say on your mobile phone). To achieve this you can filter on current week's tasks in the weekly plan, select the tasks and click on "Take a snapshot" icon. This would create a picture of the selected tasks and save it as a .gif file in the same folder as the plan document. You can then take this picture and transfer it to your mobile or smartphone for referring it later in the day.



Sample showing the exported picture of current week's pending tasks

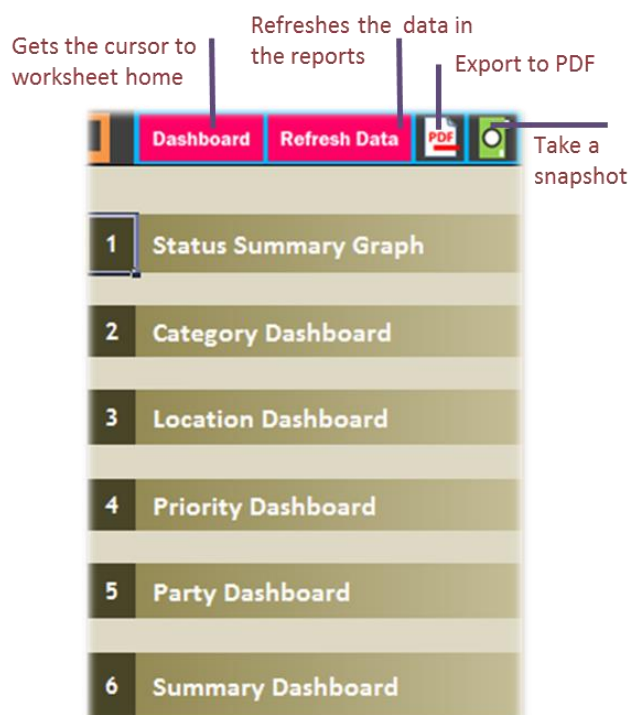
You can set the option to display or not to display the picture when the snapshot is taken through Customization feature, as detailed in the section "[Customization](#)".

i. [Customizing the task attributes](#)

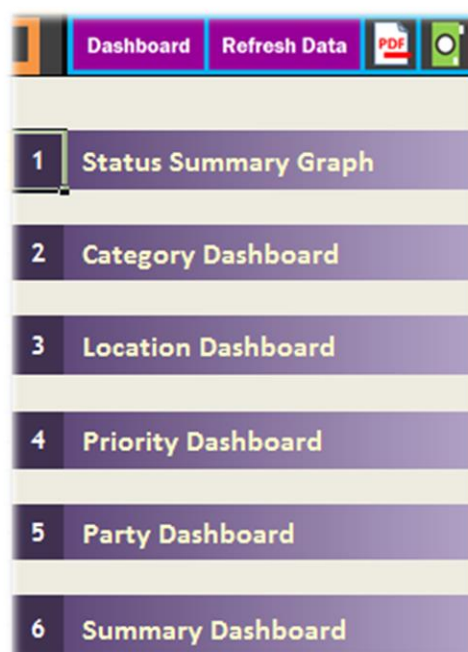
You can customize the attribute names Category, Party, Location and Priority as detailed in the section "[Customization](#)".

## 8. Dashboards

The concept of Dashboard and Tracking of plans using the dashboard is the same for both daily plan and weekly plan. The reference below applies to the "DailyPlanDashboard" as well as "WeeklyPlanDashboard". You will find the dashboard of "DailyPlan" in "DailyPlanDashboard" worksheet, and the dashboard of "WeeklyPlan" in "WeeklyPlanDashboard" worksheet."



A view of Daily Plan Dashboard Menu



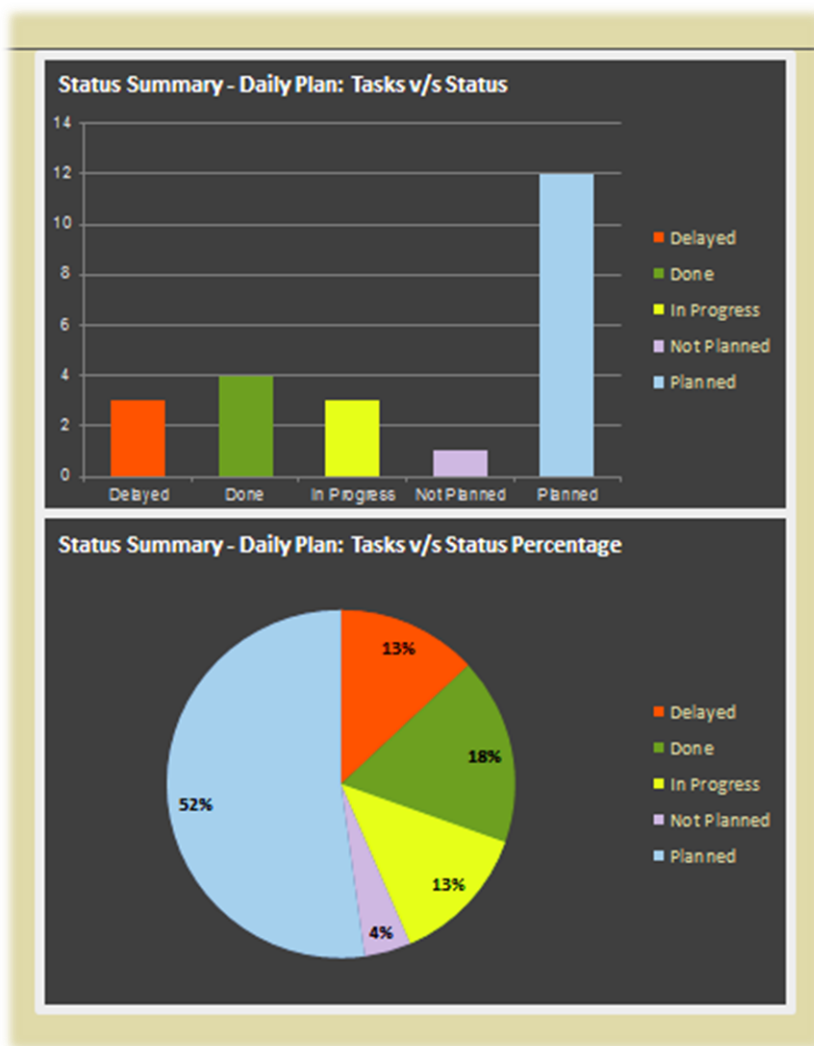
A view of Weekly Plan Dashboard Menu

There are various reports that are provided in each dashboard to enable a very quick grasp of the activities that need attention and to help understand the overall status. All of these reports are created automatically using the **Power of 2 Letters - "x" and "d"**! The dashboard also provides quantified numbers for status of the tasks, from the perspectives of the attributes like Category, Priority, etc. For example, how many "High Priority" tasks are delayed, how many are done, how many are yet to be started, can be seen and assimilated within a few seconds, thereby helping you to re-plan if necessary. The dashboard concept is implemented in a similar manner for both daily and weekly plans.

The various reports and features in the dashboard are -

#### a. Status Summary Graph

This provides status information in the form of a graph. The bar chart in its default state depicts how many tasks are in **Done**, **In-Progress**, **Planned**, **Non-Planned** and **Delayed** status. In addition it provides the information in terms of the percentage of tasks in each of these statuses.



b. Category Dashboard

(Default name - Category Dashboard; you can customize the name if required)

This dashboard provides the status information for each category of tasks that are planned. The categories will be the user defined categories. For e.g. Business Development, Travel, Product Development, Support, etc.

Category Dashboard - Daily Plan						
Category of Tasks - Pending & Done	Status					
Categories	Done	In Progress	Planned	Delayed	Not Planned	Grand Total
Biz Dev			2	1		3
Docs & Ppt's		1	1	1		3
Meetings			1			1
People Mgmt	1	1	7	1		10
Prod Mgmt	2		1		1	4
Support	1	1				2
<b>Grand Total</b>	<b>4</b>	<b>3</b>	<b>12</b>	<b>3</b>	<b>1</b>	<b>23</b>



You can however change the “Category” attribute name to any other desired attribute by changing the column name in the **DailyPlan** (or **WeeklyPlan**) as explained under “[Customization](#)” section here.

#### c. Location Dashboard

(Default name - Location Dashboard; you can customize the name if required)

This dashboard provides the list of tasks pending at each location. This enables to plan for completing the activities together at once, while at that 'Location' without missing on any of the activities that are still due. For e.g. If the location is say, Online, then you could refer to all the pending activities under Online and attend to them at once thereby enhancing the productivity.

You can however change the “Location” attribute name to any other desired attribute by changing the column name in the **DailyPlan** (or **WeeklyPlan**) as explained under “[Customization](#)” section here.

#### d. Priority Dashboard

(Default name - Priority Dashboard; you can customize the name if required)

This dashboard provides the status information priority-wise. This enables concentrating on higher priority tasks that are Delayed or yet to be completed.

You can however change the “Priority” attribute name to any other desired attribute by changing the column name in the **DailyPlan** (or **WeeklyPlan**) as explained under “[Customization](#)” section here.

#### e. Party Dashboard

(Default name - Party Dashboard; you can customize the name if required)

This dashboard provides the status information party-wise. This enables the user to view tasks that are connected to a specific person or party so that they can be dealt together as far as possible thereby enhancing the productivity.

You can however change the “Party” attribute name to any other desired attribute by changing the column name in the **DailyPlan** (or **WeeklyPlan**) as explained under “[Customization](#)” section here.

#### f. Summary Dashboard

This dashboard provides top level information across tasks - like, how many tasks are already completed, how many are delayed, how many in progress, etc at the plan level

Summary Dashboard - Daily Plan	
Status Summary - Daily Plan	# of Tasks
Done	4
In Progress	3
Planned	12
Delayed	3
Not Planned	1
<b>Grand Total</b>	<b>23</b>

#### g. Exporting the dashboard reports

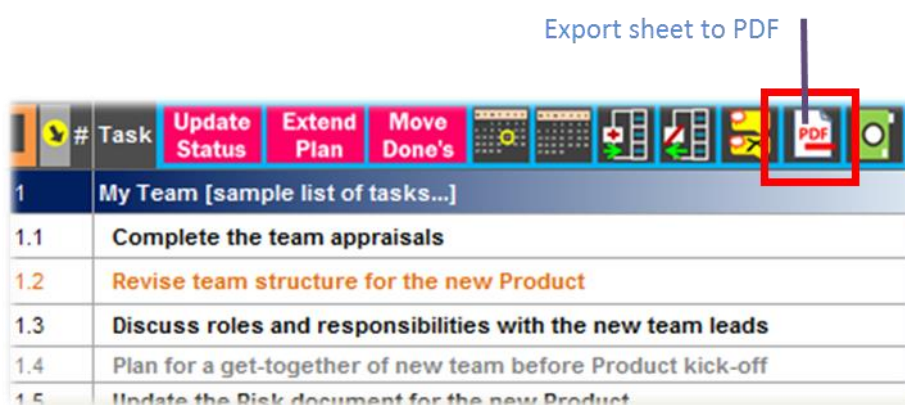
You can use the Export to PDF option to export the dashboard report into a PDF document as explained in detail in the section "[Export Function](#)".

#### h. Taking a picture snapshot

As explained in the Daily Plan and Weekly Plan functions, a picture snapshot can be taken by selecting specific range of cells. In the dashboard sheets, you could select a specific report or set of reports and then click on "**Take a snapshot**" icon to create a picture file of the same which could then be sent to your mobile or smartphones for reference.

## 9. Export Function

There would be instances where you would want to share the plan/s and dashboard/s with others (for example, management team, your manager, your peers, your team members). To facilitate sharing in such a scenario, the "Export to PDF" facility is provided, which exports the content of the specific worksheet to a PDF file. [PDF = Preferred Document Format]. This PDF file can be shared as you would share any other document (via email or network share, etc.) and can be opened with a PDF viewer.



"The "Export to PDF" facility is provided for the following worksheets -

- **DailyPlan**
- **DailyPlanDashboard**
- **WeeklyPlan**
- **WeeklyPlanDashboard**
- **Done\_Daily**
- **Done\_Weekly"**

To export into the PDF format, select one of the above listed worksheets based on which sheet you want to export. Click on the PDF icon. A PDF document with that specific worksheet content is generated which automatically opens up for viewing in your PDF Viewer (for example, Adobe Reader). If you want to print multiple worksheets like say, **DailyPlan** worksheet as well as the **DailyPlanDashboard**, you can go to each of these worksheets and use the PDF export facility one by one.

The PDF file that is generated would be saved in your "My Documents" folder. Based on the Operating System you are using and the related "My Documents" folder-setting, open the respective "Documents" folder to view the file again or share the same. The name of the PDF document generated would be the specific worksheet name followed by ".pdf". For example if **DailyPlanDashboard** worksheet is exported to PDF format, then it would create a file named "DailyPlanDashboard.pdf" in the Documents folder.

**Note 1:** If a file already exists with the same file name in that location, the file would be overwritten.

### **How to customize the layout for PDF**

If you want to customize the layout of the PDF export, use Excel's page setup under its Print functionality and make the changes as required. Once you save the settings, click on the PDF icon. The PDF file gets generated with the layout in accordance with the page settings you have made.

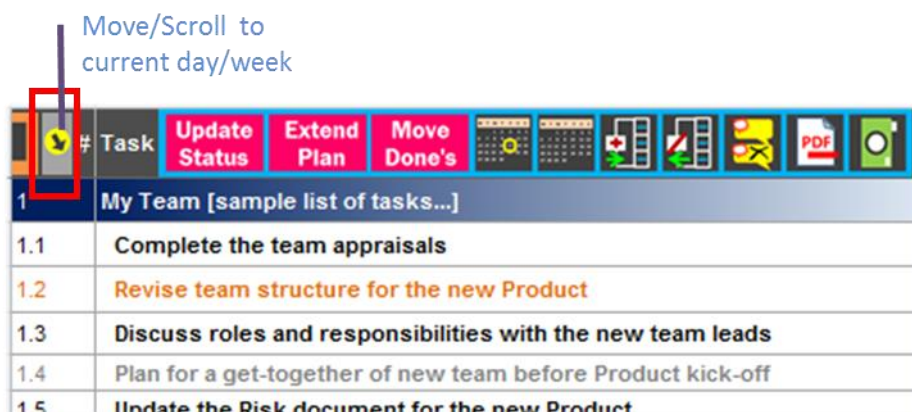
**Note:** Pre-requisites for using "Export to PDF":

1. For the PDF document to open, a PDF Viewer (like **Adobe® Reader®**) is required.

## **10. Quick-Scroll to Today or Current Week**

A feature where you can quickly move/scroll to today's column (when you are in **DailyPlan**) or current week's column (when you are in **WeeklyPlan**) is provided in the plan sheets. This saves you the time of scrolling from start of the plan or from anywhere else and gets you a 1-click option to quickly move to the current period. Especially when the plan is being used for a longer period when the number of columns will be more, this feature helps you to quickly move to today or current

week and update the plan or schedule, thus helping towards productivity enhancement. Refer the picture for how to access this feature.



## 11. Using the “UserSpace”

A worksheet named “UserSpace” is provided for extending the functionality of the Product. This worksheet can be used to store documents, store relevant project information, create new charts and pivots, etc.

As an example, a chart which gives the data of pending number of milestones to be achieved (a Burnchart) at any given point in time is provided in the tool by default (You can delete this if you do not want to keep it). You would see that there is a small formula based data that is added in the Weekly Plan sheet to get the Burnchart shown in the “UserSpace”. In similar ways this worksheet can be used to add new pivots of the plan data or add customized charts, etc. by making some small modifications to the appropriate sheet if required.

You can also use “UserSpace” to store relevant project information documents by using **Insert->Object** option provided by Microsoft Excel.

## 12. Customization

This tool allows several customizations to better suit the varied needs of users.

### a. Enter Non-Working Days (Holidays / Leaves / Any other non-working days)

In **DailyPlan**, the weekends are marked with a greyed background color so that it is easier to distinguish working and non-working days while making the plan. Similarly, you would require holidays or your planned leaves to be marked. To facilitate this, a feature has been provided where you can enter the holidays, leaves and any other non-working days so that they appear as non-working days in the **DailyPlan**.

To enter the non-working days, go to “**Customize**” worksheet. You would see the Non-Working Days table and cells marked with yellow background in them, for entry of the non-working days. (Refer picture).

A Non-Working Days		
<i>Holidays/Leaves/Other non-working days: Days in this list will be indicated as non-working days in the DailyPlan</i>		
Non-Working day description	H/L/O	Date (m-d-yy)
Sample - 1 - You may delete	H	3-3-20
Sample - 2 - You may delete	L	3-15-20

You can enter up to 35 non-working days as Holidays or as Leaves or any other non-working days as well. Once you fill up the table of cells marked with the yellow background, the rows that follow would start displaying the same format until you reach the maximum number of non-working days that can be entered.

Depending on what dates in this list appear in the Daily Plan’s schedule, those days shall be marked in the same format as the weekend format to intuitively display that it is a non-working day. For e.g. Let’s say the **DailyPlan** schedule is from **01-Dec-2019 to 31-Dec-2019** and the holiday table contains the following holidays and leaves.

<i>Holidays/Leaves/Other non-working days: Days in this list will be indicated as non-working days in the DailyPlan</i>		
Non-Working day description	H/L/O	Date (m-d-yy)
Christmas	H	12-25-19
Extended Leave - X-Mas	L	12-26-19
New Year	H	1-1-20

Out of this list, Christmas and the “Extended Leave - X-Mas” vacation fall between the start and end dates of the **DailyPlan** and hence these two days will be greyed out. Though New Year Day is listed here, since it does not fall in the plan period, it will have no impact on the daily plan. If the end date is extended to say, **14-Jan-2020**, then **January 1<sup>st</sup> of 2020** shall also be greyed out in the **DailyPlan** worksheet.

b. Customize Column/Attribute names (and corresponding report names) in DailyPlan & DailyPlanDashboard, and WeeklyPlan & WeeklyPlanDashboard

In both the "DailyPlan" and "WeeklyPlan" worksheets, some of the column names which basically are attributes for your tasks can be customized so that you can change it to reflect an attribute that is more appropriate for your needs. For example, if "Location" attribute is irrelevant to you, and you would like to change it to "Department", you could do so easily. Some of these name changes can have an impact on the dashboard names and some are just local changes to that particular worksheet.

The following are the attributes that have customizable names -

- Attributes that will impact dashboard report name

- Category
- Party
- Location
- Priority

- Attributes with no impact on dashboard report name

- MyInfo-1
- MyInfo-2
- Effort (hrs)

**B Customization of Column/Attribute names in DailyPlan and corresponding Report names in DailyPlanDashboard**

Worksheets that will be impacted - DailyPlan, DailyPlanDashboard, Done\_Daily  
 (The below picture shows for reference purpose, the default attributes from DailyPlan)

Category Party Location MyInfo-1 MyInfo-2 Effort (hrs) Priority

Customizing Daily Plan

Default Attribute name in DailyPlan	Edit Attribute name	Default Report name	Suggested Report name	Edit Report name
Category	Category	Category Dashboard	Category Dashboard	Category Dashboard
Party	Party	Party Dashboard	Party Dashboard	Party Dashboard
Location	Location	Location Dashboard	Location Dashboard	Location Dashboard
Priority	Priority	Priority Dashboard	Priority Dashboard	Priority Dashboard

For customizing **Category**, **Location**, **Priority** and **Party** columns, go to the "Customize" worksheet. For customizing the attributes in "DailyPlan", go to Section B and change the name of the attribute that you want to modify under "Edit Attribute name". This will change the attribute name in the plan sheet and also the "Done\_Daily" sheet. Similarly, for changing the attribute names in "WeeklyPlan" go to Section C and make the modifications. Please note that these name changes will also trigger a change in the corresponding dashboard report names. You can keep the suggested names or can change it to the required name.

**Note:** The editable cells are highlighted with a pattern for more intuitive editing.

For customizing the **MyInfo-1**, **MyInfo-2** and **Effort (hrs)** attributes, you can directly change the column header in the respective plan sheets (“**DailyPlan**” or “**WeeklyPlan**”). For example, if you want to change **MyInfo-1** in **DailyPlan**, to “Team”, then go to **DailyPlan** worksheet and click on “**MyInfo-1**” cell in Row-1 and then overwrite the cell content with “Team”. For quick identification, the attributes which can be directly changed are shown in a different font color.

- Customize dashboard report names in the dashboard sheets

The following report names can be customized in the dashboard (both **DailyPlanDashboard** and **WeeklyPlanDashboard**)

- **Category Dashboard**
- **Party Dashboard**
- **Location Dashboard**
- **Priority Dashboard**

When an attribute name is changed and you want to change the dashboard report name, or if you want to just change the name of the dashboard report, the changes can be done using the “**Customize**” worksheet.

For changing the dashboard report names for the daily plan, go to “**Customize**” worksheet and in **Section B**, under “**Edit report name**” change the name of the report as required. This will automatically change the report names in the dashboard worksheet. Similarly, for dashboard report name changes to weekly plan, the changes have to be done under “**Edit report name**” in **Section C** of “**Customize**” worksheet.

### c. Other Customization Options

Several other customization options are provided to enable users to setup the plan to further fit their requirements.

D Customization of other Options			Other Customize Options
#	Option	Setting	
1	Do you want to hide the worksheet tabs?	No	If you set this to "Yes", the worksheet tabs will not be visible when you reopen the workbook next. To make them visible again, select "No"
2	Which days should be marked as Weekend in DailyPlan? <a href="#">Set Weekend Option</a>	Saturday & Sunday	Select the weekend based on your work schedule or your country defaults. Based on this, the weekend indicator (gray background on blank cells) will be accordingly displayed in the DailyPlan. In WeeklyPlan, the day after the weekend will be chosen as the Week start day in the header. [Apply with "Set Weekend Option" ]
3	Secondary Header text for WeeklyPlan	Week Start (mm/dd)	This text will appear in the secondary header row of the WeeklyPlan and Done_Weekly sheets (Row #2)
4	When you export the selected data as an image (possibly for transfer to your mobile) do you want the image to be shown in a browser as soon as the export is done?	Yes	If you set this to "Yes", then when you export selected data to image format (.gif) typically to share with other devices like a mobile/smart phone, then as soon as the export is done, it image is displayed in a browser if the browser is already open
5	You want the date format to be <a href="#">Set Date Format</a>	m-d-yy	Select the date format that you want to be used in this plan. After selection click on "Set Date Format" [Apply with "Set Date Format" ]
6	Do you want to use Hyperlinks in the plan worksheets? <a href="#">Set Hyperlink Option</a>	No	If this option is set to "Yes", then operations in plan sheets where large number of columns are selected, will take longer time (due to a bug in Microsoft Excel at this point). For e.g. while selecting columns to 'group' them. [Apply with "Set Hyperlink Option" ]
7	Set the Outline Grouping property for grouping rows and columns	<input checked="" type="checkbox"/> Summary row below detail <input checked="" type="checkbox"/> Summary column to right of detail	Check the box if you want the summary row to be below the details when you group rows. Uncheck if you want it at the top Check the box if you want the summary column to be right of the details when you group columns. Uncheck if you want it at the left
8	The number of days by which DailyPlan should be extended when you click on "Extend Plan" in the DailyPlan sheet	15	You can customize the number of days by which the DailyPlan will get extended when you select the "Extend Plan" functionality in DailyPlan. For practicality reasons, this value is restricted to be between 1 and 100. This feature is typically useful when you are working on a project that is of continuous nature with no specific end date
9	The number of weeks by which WeeklyPlan should be extended when you click on "Extend Plan" in the WeeklyPlan sheet	4	You can customize the number of weeks by which the WeeklyPlan will get extended when you select the "Extend Plan" functionality in WeeklyPlan. For practicality reasons, this value is restricted to be between 1 and 15. This feature is typically useful when you are working on a project that is of continuous nature with no specific end date

- Hide/Unhide worksheet tabs

If you wish to hide the worksheet tabs at the bottom of the workbook, a facility is provided where you can set the option that will make Excel not display the worksheet tabs.

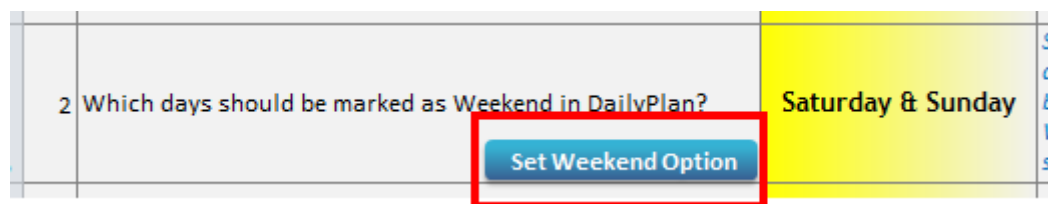
#	Option	Setting
1	Do you want to hide the worksheet tabs?	No

To hide the worksheet tabs, go to "Customize" worksheet. In Section D, for Option number 1, "Do you want to hide the worksheet tabs?", select the value as "Yes" from the dropdown list. When you save and reopen the workbook next time, the worksheet tabs will be hidden. If you want to display the worksheet tabs again, you can go back to the same setting and select "No" from the dropdown list. You can use the "Home" page to navigate easily between the sheets when the tabs are hidden.



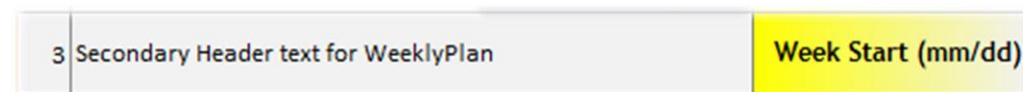
### - Weekend Selector

Based on your weekly work schedule or the country where you work, you might need to modify the weekend days which are indicated with a greyed column in the **DailyPlan**. By default, **Saturday & Sunday** are taken as the weekend days and hence Saturdays and Sundays are marked with a gray background in the **DailyPlan**. Suppose you want to change it to say, **Thursday & Friday**, then, just go to “**Customize**” worksheet, go to Section-D and click on the editable cell for Option-2. If you had not customized this earlier, then you would see “**Saturday & Sunday**” as the selected value. Click on this cell and in the drop-down list and select “**Thursday & Friday**”. Ensure that the “**Set Weekend Option**” button is clicked to save the customized setting. This would make the Thursdays and Fridays to appear in the greyed format in the **DailyPlan**. In addition, this setting would also impact the start date of the weeks in the **WeeklyPlan** worksheet in the Secondary Header row. For example, if **Saturday & Sunday** are selected as the weekend, then the start date of each week in the **WeeklyPlan** would be that of the respective Monday. In such case, the start date of say, Calendar Week 14 (CW14), for example, would be shown as 03/28.



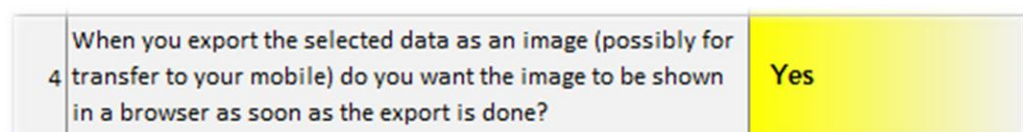
### - Secondary Header Text for Weekly Plan

In **WeeklyPlan** (and **Done\_Weekly**) sheets, you will find that the header includes a row that depicts the calendar week number and another row that shows the start date of the week. For this second row, in Column B, the header for the row appears with the default value of “**Week Start (mm/dd)**”. In this option, you can customize this text that appears in the header.



### - Exported Image show option

When you use “**Take a Snapshot**” feature to take a snapshot of the data that you want and generate the image file, you may choose to view the image as soon as it is generated by setting this option.



- **Set Date Format**

PlanDeer 10 provides you an option to choose the date format that you would want in the plan file. The following format options are available (shown along with how an example date would look with each of these options)

Example: January 14<sup>th</sup>, 2020

Format	Example date
m-d-yy	1-14-20
d-m-yy	14-1-20
m-d-yyyy	1-14-2020
d-m-yyyy	14-1-2020
mm-dd-yy	01-14-20
dd-mm-yy	14-01-20
dd-mmm-yy	14-Jan-20

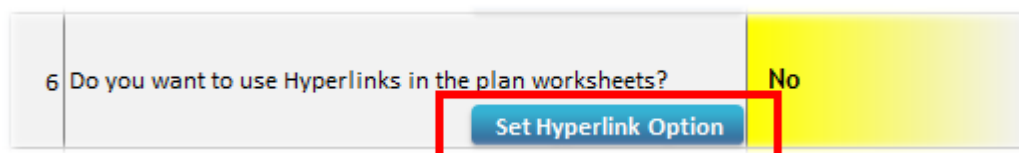
After the option has been selected, you need to set the option using “**Set Date Format**” button.



- **Allow use of Hyperlinks in the plan sheets**

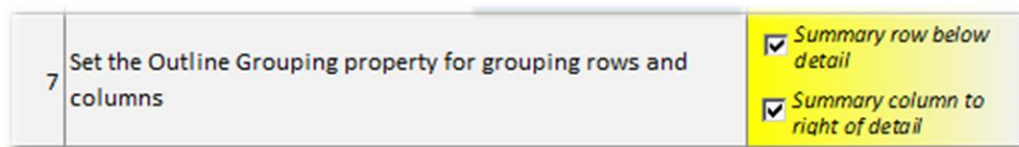
If this option is set to “Yes”, you can create hyperlinks to the data within the plan worksheets. However, if this is set to “Yes”, then when large number of columns are selected (or full sheet is selected) in the plan worksheets, Microsoft Excel will take a long time and might appear to hang. To overcome this, this option can be set to “No” and only when needed can be temporarily set to “Yes”.

After the option has been selected, you need to set the option using “**Set Hyperlink Option**” button.



- **Set Outline Grouping property for grouping rows and columns**

When you group rows or columns in Excel, you have an option that sets the summary row (or column) of the group to either above the detailed rows (or columns) or below the detailed rows (or columns). Since this option cannot be accessed from Microsoft Excel’s ribbon when the protection is on, this option has been provided under Customization.

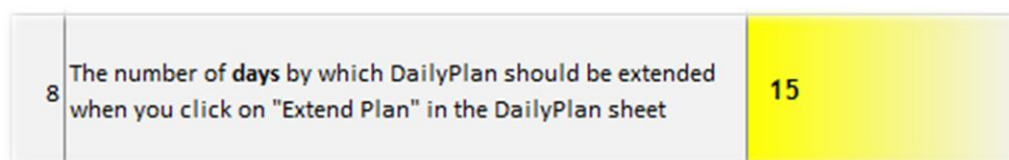


As you would see in the picture here, if you select the checkbox for “Summary row below detail”, then the summary row (across all the groups of rows) will be created below the detail rows. If it is unchecked, then the summary row will be created above the detail rows.

Similarly, if you select the checkbox for “Summary column to right of detail”, then the summary column (across all the groups of columns) will be created to the right of the detail columns. If it is unchecked, then the summary column will be created to the left of the detail columns.

- **Set the number of days to extend the daily plan when “Extend Plan” is clicked**

As explained elsewhere, PlanDeer provides a facility where you can maintain a sort of “continuous daily plan” in which you don’t want to limit the schedule end to a specific end date. To help maintain such a plan, “Extend Plan” feature is provided (in “Daily\_Plan” worksheet) which when selected, extends the daily plan schedule by a defined number of days. By default this is set to 15 days. You can change this to a number by which days you want the daily plan to be extended whenever “Extend Plan” is done. This could be done by setting a different number in this option.



**Note:** The number of days by which the daily plan can be extended when “Extend Plan” is selected, should be a number between 1 and 100 (both inclusive)

- **Set the number of weeks to extend the weekly plan when “Extend Plan” is clicked**

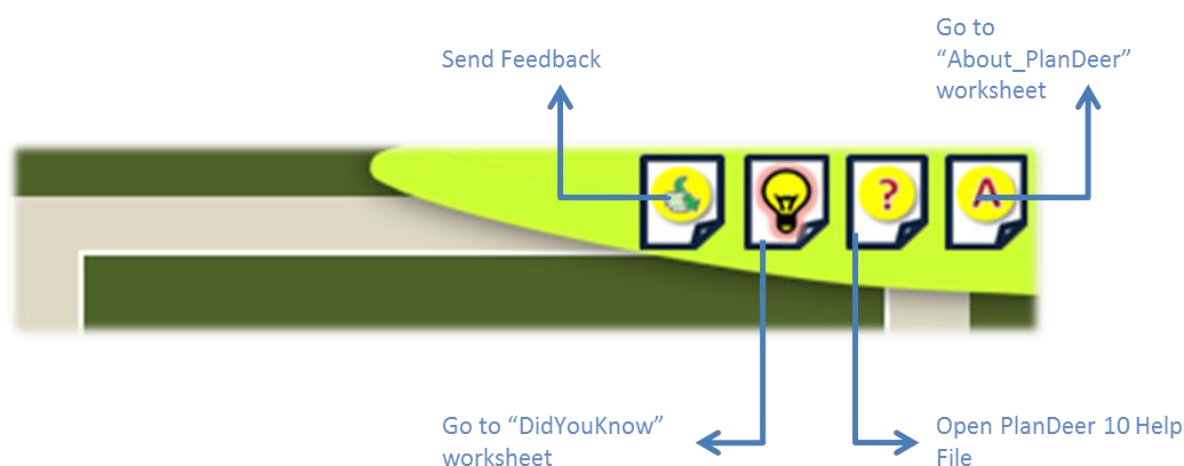
As explained elsewhere, PlanDeer provides a facility where you can maintain a sort of “continuous weekly plan” in which you don’t want to limit the schedule end to a specific week. To help maintain such a plan, “Extend Plan” feature is provided (in “Weekly\_Plan” worksheet) which when selected, extends the weekly plan schedule by a defined number of weeks. By default this is set to 4 weeks. You can change this to a number by which weeks you want the weekly plan to be extended whenever “Extend Plan” is done. This could be done by setting a different number in this option.

The number of <b>weeks</b> by which WeeklyPlan should be extended when you click on "Extend Plan" in the WeeklyPlan sheet	4
---	---

**Note:** The number of weeks by which the weekly plan can be extended when "Extend Plan" is selected, should be a number between 1 and 15 (both inclusive)

### 13. Shortcut Utilities

In "Home" page and elsewhere you would find the shortcut icons as shown in the picture below. These shortcut icons can be used to quickly send a feedback, move to "DidYouKnow" worksheet, open help file and go to "About\_PlanDeer" worksheet.



### 14. Sample Data

#### a. Sample data

When you create the initial plan document, you would see that the **DailyPlan** and **WeeklyPlan** already have tasks inside the plans. This is provided as a sample data to expedite your familiarity with the tool. It helps to have a quick understanding as to how does the plan look, how does the dashboard reports look for the given plan and also enable you to quickly try modifications and changes to the plan and see what impact it would have on the dashboards. Once you are comfortable with the same, you can clear the sample data either manually or by using the "Clear sample data..." buttons that you see in the "FirstSteps" worksheet as detailed below.



## b. Clearing the sample data

### - Clear sample plan in daily planner

To clear the sample data in the "DailyPlan" worksheet, go to "FirstSteps" worksheet. Click on "Clear sample data in daily plan" button. This brings up alerts to help ensure that it is only the sample that is being deleted and not a live plan data being deleted accidentally.

Choose the options after reading the messages carefully. If you confirm to continue deleting the data, the sample data in the daily plan is deleted. Note that the "Clear data..." button would clear those rows that were originally having the sample data. In case you have added new entries in the rows beyond the original set, then those rows are kept intact. In case you do not need them, you could take out the tasks manually. You can set the start date and end date as required for your actual plan. The other option is once done working with the sample data you may just create a new plan from the menu and start planning activity from there.

### - Clear sample plan in weekly planner

To clear the sample data in the "WeeklyPlan" worksheet, go to "FirstSteps" worksheet. Click on "Clear sample data in weekly plan" button. This brings up alerts to help ensure that it is only the sample that is being deleted and not a live plan data being deleted accidentally.

Choose the options after reading the messages carefully. If you confirm to continue deleting the data, the sample data in the weekly plan is deleted. Note that the "Clear data..." button would clear those rows that were originally having the sample data. In case you have added new entries in the rows beyond the original set, then those rows are kept intact. In case you do not need them, you could take out the rows manually. You can set the start date and end date as required for your actual plan. The other option is once done working with the sample data you may just create a new plan from the menu and start planning activity from there.

## 15. Feedback

ExcelSquare encourages its users to provide their feedback that would go a long way in making the product better and better. To contact the product team for any of your suggestions on the features or functionality, or provide feedback on the product or for any specific issues you want to report,

you can use the “**Feedback**” icon that is provided within **PlanDeer**. You will find the feedback icon in “**Home**” sheet as well as in the “**About\_PlanDeer**” sheet. When you click on the icon, a new mail message will open depending upon the default email client settings on the computer that you are using. The message would have the default email id to which the feedback would be sent and a default subject line. You can modify the subject line as needed and along with your feedback, send it to the team.



**Note:** In case no default email client is set, you may send your feedback over email to the support channel as mentioned on the publisher’s website.

## 16. Tips

This section contains certain tips for the users to make better use of **PlanDeer 10**.

- a. Whenever you want to run automated operations (like **Update Status**, **Extend Plan**, **Move Done's**), it is a good idea to save the workbook before running the same. This will help you to revert back to that particular saved state easily by closing the workbook without saving, in case you want to rollback the changes done by running the automated operation. (This is required since “Undo” wouldn’t work when automated operations are executed).
- b. When you want to move data (for example a few task rows) from one place to another in the plan sheets, do not use “Cut-And-Paste”. Instead use Copy-And-Paste and delete the original data. Cutting and pasting data from cells that are using special formatting in Excel can render the worksheet inconsistent.
- c. You can use the grouping feature provided in the Plan sheets very effectively, to hide details that are not required to be seen at all times. For example, if your plan is being used from say 4 months and the project still continues, the first 3 months schedule can be grouped together and collapsed so that you wouldn’t have to see it and scroll it every time. This would enhance the productivity significantly.
- d. Use the shortcut to “**Home**” to navigate more comfortably between different worksheets.
- e. You can use the blank cells besides your plan indicators to note down your comments. This will not only save entry time, but also be easier to refer while tracking the plans.
- f. Across the workbook, there are different levels of protection used, for - worksheet, cells, rows, columns. Do not try to overcome these protections since it might hamper the functionality.

- g. If you want to create new pivots or charts, you could use the "UserSpace" worksheet.
- h. Create your own attributes in the Plan sheets by renaming **MyInfo-1**, **MyInfo-2** and **Effort (hrs)** (for e.g. Estimated Effort, Actual Effort...). You can also add 9 more columns of data after the "Priority" column.
- i. In case you want to rename some of the attribute columns (like **Category**, **Party**, **Location...**) you can do it through the "Customize" worksheet.
- j. You can see the tooltips for the action buttons (like Grouping buttons, Export to PDF button, etc) by positioning your cursor at the top of these buttons.
- k. Keep regular backup of the workbook (on your system as well as outside it). The backup would be highly useful in case the excel file is lost or gets corrupted accidentally.
- l. When you want to use **PlanDeer** for your Project and across your team, you could use a source control tool into which you can check-in **PlanDeer** plan document and checkout on to the system where the changes are to be done at that point in time. (Each system on which you want to use **PlanDeer** should have a license purchased)
- m. When the trial period expires and **PlanDeer** is not yet activated, the file cannot be opened until the product is activated by providing the activation code.
- n. A quick reference for the indicators and feature buttons - [See picture under Section 5-g](#).

## 17. Troubleshooting

We regularly update the FAQ section in our website with frequently asked questions and also troubleshooting tips in the form of questions and answers. Please visit our website [www.excelsquare.com](http://www.excelsquare.com) (Go into FAQ and SomeMoreFAQ sections) for the latest troubleshooting tips. In case of any additional queries, contact our support channel (you may visit our website for the details)

