

Up and running in five minutes

You do not need to learn the whole tool. Pick the road you need today and the rest stays out of your way.

1 Open it in Chrome or Edge

Save the HTML file somewhere you keep work (a OneDrive or Teams folder is ideal) and open it. In Chrome or Edge it saves straight back to your Excel workbook. Other browsers work too; Save downloads an updated copy instead.

2 Pick your road on the welcome screen

JUST A PROBLEM

Standalone AAA

Work Assess, Assemble, Action and Re-assess on one problem. No project needed. Turn it into a plan later if you want.

A PROJECT

Start my first project

Name it, then follow the sidebar the way the book runs: Initiating, Stage 1 to 4, Execution, Delivery and Closing.

JUST LOOKING

Explore the sample portfolio

Click anything. Nothing is saved unless you choose Save. Plan lives in another tool? Try **Standalone Four-Stage Planning** or **Standalone Red Zone**.

3 Find your way

Sidebar: everything for where you are now. **Top left:** where you are, click to go back up. **Ctrl+K:** find anything. **Gold button, top right of each page:** the main thing to do there. Drag cards on any board, or use the "Move to" list on the card. The **RAID log** holds risks, assumptions, issues and dependencies; decisions have their own **Decision log**.

4 Read the colors

The same five colors mean the same thing everywhere, from a task to the whole portfolio.

 **Gray** not started

 **Green** on track

 **Yellow** at risk

 **Red** issue

 **Blue** complete

5 Your data is an Excel workbook you own

Pick or create the workbook once; after that changes save on their own a few seconds after you stop typing (the dot top right shows it). Close the workbook in Excel while the page is open. Keep a backup: copy the .xlsx, or **Settings, JSON backup**.

6 Need it in a company tool?

Import & export sends your plan to Microsoft Project, Smartsheet, ServiceNow, Jira, Azure DevOps, CSV or Excel, and brings plans back in. The Theme, Objective, Task structure survives the trip. Later, **Export changes** sends only what changed, and **Import updates** brings an updated plan back so you can review every change before it is applied. **Help, Export guide** has the import steps for each tool, including routes without Microsoft Project.

7 Working with Claude?

Every stage has a **Copy for Claude** button that hands your live data to the matching Field Guide skill. Paste Claude's tables back with **Import**.

More help: the **Help** item in the sidebar has the visual guide. **Beta:** This is a beta. It is provided as is, without warranty. Your project data stays in your own workbook and browser; the app does not send it anywhere. Keep a backup copy of your workbook, especially before big changes.