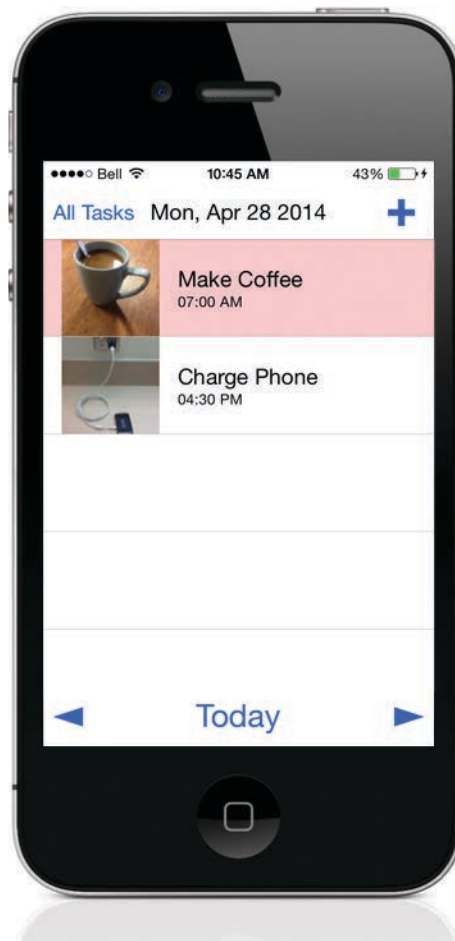


For iPhone and iPod Touch



University  
of Victoria

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## Introduction

CanPlan promotes independence and builds confidence by helping people with cognitive challenges complete tasks successfully. Virtually any activity can be broken into a sequence of easy-to-follow steps, illustrated by photos and reinforced with optional videos, text and audio. Scheduling and reminder components ensure each job gets done.

Health-care workers and therapists are providing CanPlan to their clients with cognitive disabilities, while families and caregivers are buying the tool for loved ones. For any given task, a user initially goes through the task with a support person or family member. Together, they take photos of each step in the task, adding video, text or audio as needed. The task is then filed under a customizable set of categories, which could include areas such as: Food Preparation, Household Chores, Shopping, Transportation, Exercise, Workplace Tasks, and so on.

CanPlan is especially beneficial to people who have memory challenges or difficulty performing activities that require higher-order thinking, including those with:

- Brain injury
- Dementia, including Alzheimer's disease
- Autism Spectrum Disorder
- Fetal Alcohol Spectrum Disorder
- Dyslexia
- Developmental disabilities

Key features of CanPlan:

- **Task Sequencing** – breaks each task into an easy-to-follow sequence of photos, with optional video, text or audio
- **Scheduling** – shows a list of tasks to be completed during the day
- **Prompting** – provides the option of audible timed reminders
- **Active Task Reminder** – helps the user stick with a task until it's complete
- **Task Categorization** – allows tasks to be filed in customizable categories for easy retrieval

This manual will outline how to use the CanPlan app effectively.

## What are Tasks, Steps, and Categories?

CanPlan uses **Tasks**, **Steps**, and **Categories**.

**Tasks** are things you need or want to do, such as making coffee, walking the dog, or doing laundry.

A task may include one or more **Steps**. Each step may include a picture or video, a short caption, and an audio instruction. Adding steps is optional and can be done if you think the task requires further explanation. For example, to make coffee you might add the steps:

1. Discard the old filter
2. Add a new filter
3. Put 6 scoops of coffee in the filter
4. Fill with water
5. Turn on

**Categories** are groups of related tasks such as Exercise and Housework. Initially, the Task Manager starts with no **Categories**, **Tasks** or **Steps**. Categories can be useful when you have a number of tasks, and want to sort them into groups.

The CanPlan app comes ready for you to enter your personalized tasks.

## Adding and Editing Categories

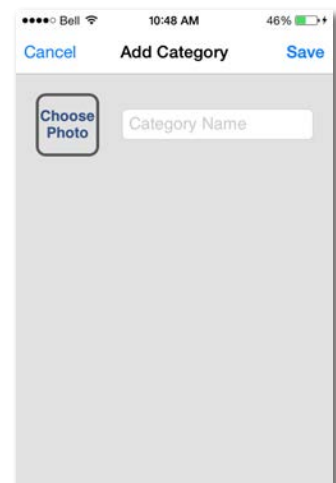
**Categories** are used to sort **Tasks** into logical groups, such as “Work,” “Transportation,” or “Exercise.” If you only have a few tasks, you can hide the categories and show all tasks in a single list to simplify the application. Enable the Categories functionality in Settings, Interface.

### Add a Category

1. Click the **Add a Category** button at the bottom left of the **All Tasks** view and the **Add Category** view will be displayed.
2. Clicking the **Choose Photo** button will open a prompt for where the photo should be chosen from (Photo Album or Camera). Choose the location and the photo to use. Click **Use** and the photo will be inserted over the **Choose Photo** button.
3. Click on **Category Name** to enter a name for the category.
4. When you are satisfied with the photo and name, click the **Save** button at the top right.

### Edit a Category

1. Click the **Edit** button at the upper right of the **All Tasks** view.



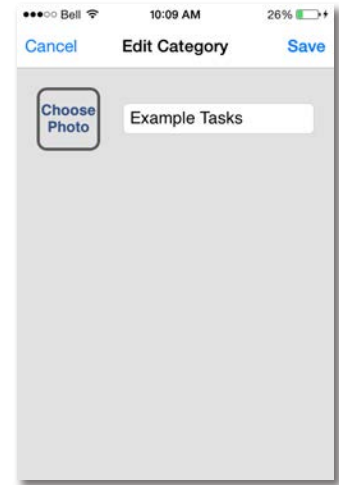
2. Click the name of the **Category** you wish to edit to open the edit screen.
3. Click the photo to change the picture for this **Category** or click the name to change the name.
4. When you are satisfied with your changes, click **Save** to save your changes.
5. Click **Done** in the upper right to exit edit mode.

### Delete a Category

1. Click the **Edit** button at the upper right of the **All Tasks** view.
2. Click the button to the left of the **Category** you want to remove, and then click **Delete**.
3. Click **Done**.

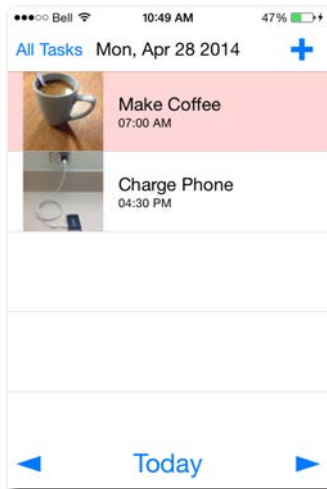
### Re-Arranging Categories

1. Click the **Edit** button at the upper right of the **All Tasks** view.
2. Press and hold to the right of the **Category** that you wish to move.
3. You can now move the **Category** to a different position in the list.

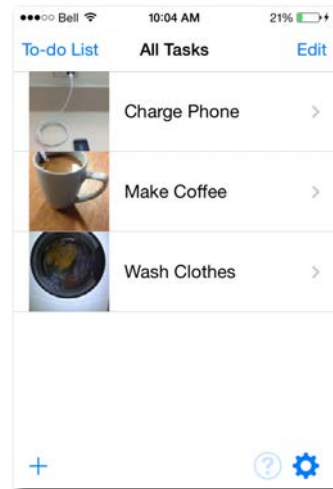


## CanPlan Screens: “To-do List” and “All Tasks”

The two main screens in CanPlan are the **To-do List**, and **All Tasks**.



**To-do List**



**All Tasks**

In the **To-do List** you will see which tasks are scheduled for today. You can also review past and future tasks by pressing the arrow buttons at the bottom of the screen to change the day.

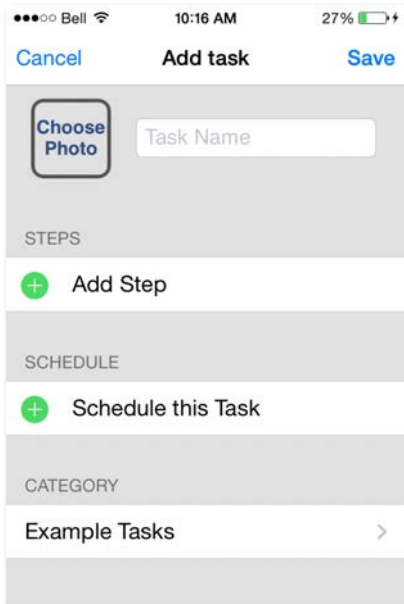
The **All Tasks** screen shows a list of all the tasks you have added in the application. In this screen you can add new tasks, and edit existing tasks.

You can switch between the To-do List and All Tasks by pressing the button at the top-left corner. If you are in the To-do List the button will say “All Tasks” and vice versa.

## Managing Tasks

### Adding a Task

1. Press the “+” button at the bottom-left corner of the **All Tasks** screen. The Add Task screen will appear:



2. Press “Task Name” to enter a name for the Task.
3. Optionally, you can add a picture to the task by pressing “Choose Photo”. This will prompt you to choose a photo for the Task from the phone’s album, or to take a new photo with the camera.
4. Adding Steps and scheduling are also optional. They are covered in the next section.
5. When you are satisfied with the new Task, press the “Save” button at the top-right corner of the screen to return to the All Tasks screen.

## Adding Steps to a Task

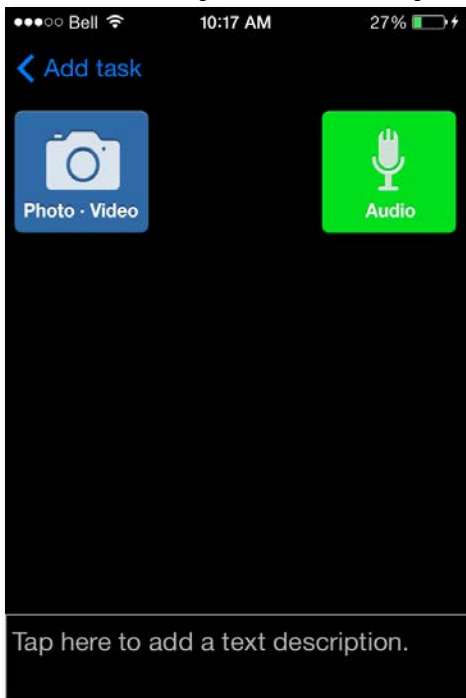
Tasks can contain any number of steps, which will guide the user through completing the task. Each step can have a photo or video, a caption, and a sound clip to help illustrate how to do the step.

To add Steps to a task *while* you are creating it: Screen Shot of Add Task screen and edit mode

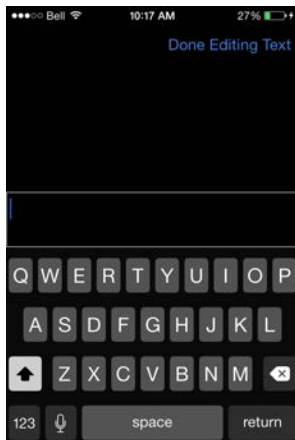
1. From the **Add Task** screen, press “Add Step.”
2. Follow steps 4) through 9) below.

To add Steps to a task *after* you have created it:

1. Press the “Edit” button at the top-right corner of the **All Tasks** screen to enter edit mode.
2. Press the name of the Task you want to edit. The Edit Task screen will appear.
3. Press “Add Step.” The Add Step screen will appear with the name of the Task at the top:



4. You can add a photo or video to the Step. This is *optional*. Press the “Photo-Video” button.
  - a. Press “Take Picture” to use the onboard camera to capture a still image.
  - b. Press “Record Video” to use the onboard camera to capture a video.
  - c. Press “Choose Existing” to select a photo or video from your devices existing files.
5. You can add a text description of the Step. This is *optional*, but each step should have a photo, video, text, or audio recording.
  - a. Press the text box at the lower half of the Add Step screen. The text box is black, with a white outline. The keyboard will appear.



- b. Type a description of the step.
  - c. When you are done typing, press the “Done Editing Text” button at the top-right corner of the screen.
6. If you purchased the optional “Step Text Reader”, the app will speak your text description entered in step 5. Instead of the computer voice, you may record your own audio clip as follows:
  - a. Press the “Audio” button to start recording.



- b. Press the anywhere on the screen to stop recording.
    - c. You can review the recording by pressing the white play button.
    - d. When you are satisfied, press the “Save” button at the top-right corner of the screen to return to the Add Step screen.
7. Once you are satisfied with the Step, press the “Done” button at the top-right corner of the screen.
8. You can add more Steps by repeating 3) through 7).
9. When you are satisfied with the Task, press the “Save” button at the top-right corner of the screen to return to the All Tasks screen.
10. Press the “Done” button at the top-right corner of the All Tasks screen to exit edit mode.

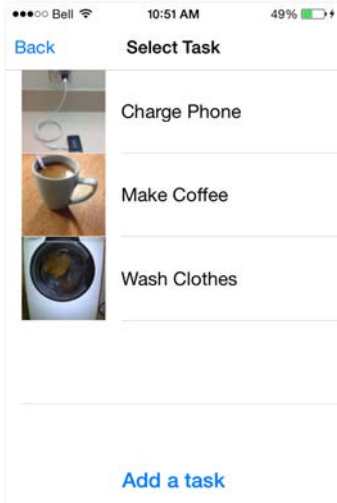


## Scheduling a Task

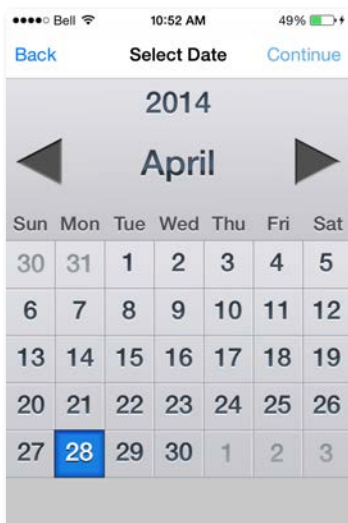
If you *schedule* a task, the app will remind you when it is time to do it.

To schedule a task *after* you have created it:

1. Press the “+” button at the top-right corner of the **To-do List** screen.
2. Press the name of the Task you want to schedule.



3. Select the date of the task and press the “Continue” button at the top right corner of the screen:

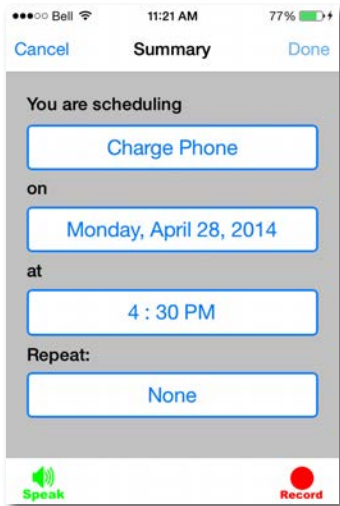


4. Select the time *that you wish to be reminded* of the task:
  - a. Select a number from the Hour column. The hour and minute columns scroll.
  - b. Press a number from the Minute column.
  - c. Press “AM” or “PM” for morning or evening, as appropriate.
  - d. Press the “Continue” button at the top right corner of the screen.

For example, if a task is at 9:00 PM, you may want to be reminded at 8:30 PM:



5. Once you have entered a date and time, the Summary Screen will appear:



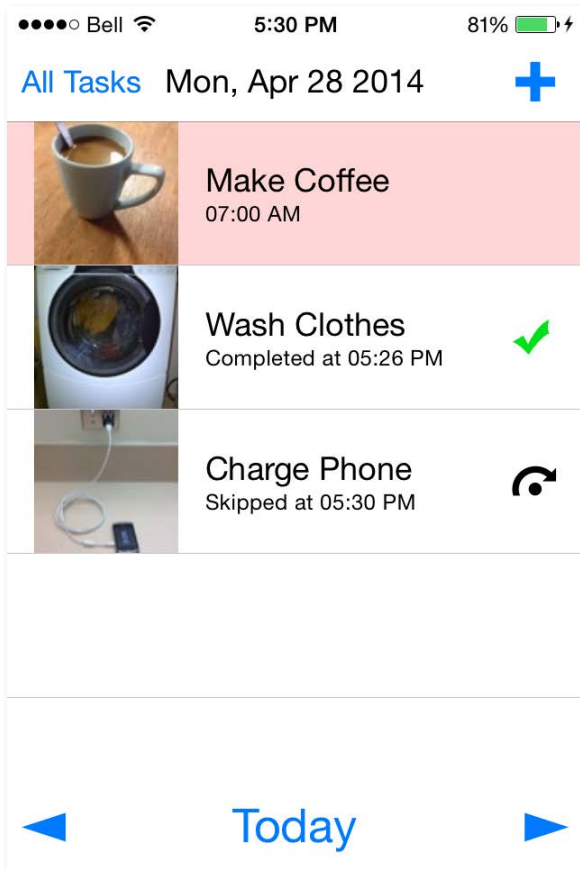
6. By default, a task will only be scheduled once. If the task should be repeated, such as daily, weekly, or monthly:
- Press “None” under the word “Repeat.”
  - Press the appropriate interval in the list that appears.
7. You can add a voice note to the task (if enabled). This is *optional*.
- Press the “Record” button at the bottom-right corner to start recording.
  - Press the “Stop” button at the bottom-right corner of the screen to stop recording.
  - You can review the recording by pressing the “Speak” button at the bottom-left corner of the screen.
  - Repeat steps a) to c) until you are satisfied with the recording.
8. When you are satisfied with the task schedule, press the “Done” button at the top-right corner of the Summary screen.

## More on the “To-do List” Screen

The To-do List shows scheduled tasks. You can right swipe a task to delete it from the “To-do list”. There are several buttons at the bottom:

- “<” allows you to view past Tasks.
- “>” allows you to view future Tasks.
- You can get back to today’s Tasks by pressing the “Today” button.

A green checkmark next to a Task name means the Task was completed. A curving arrow over a dot next to the Task name means the Task was skipped. If a Task is shaded pink, it is overdue. If a task is shaded green (not shown), it is the current task. For example:



← This task is overdue.

← This task was completed.

← This task was skipped.

## Completing a Task

Once CanPlan detects that a Task is due, it will remind you.

1. Press the Task name in the **To-do List**. The Task screen will appear. This step may not be required if you are already in the Task screen.




2. If the Task has any Steps, you can review them by pressing the “Start” button.
  - a. You can move from step to step using the arrow buttons.
  - b. The green progress bar at the top shows the progression of the task that you are working on.

There are two ways to end the Task:

- a. Press the **Done** button. This marks the Task as *completed*.
- b. Press the **Skip** button. This marks the Task as *skipped*.

If you do not want to mark the Task as completed or skipped just yet, press the button at the bottom-left corner of the Task screen to return to the **To-do List** screen.

## Settings

To launch Settings, press the  button at the bottom-right corner of the **All Tasks** screen.

The Settings screen has the following controls:

### Notifications

1. “Sound” - Which sound will be played for task reminders.
2. “Alert” – When an alert should be played for a scheduled task.
3. “Remind to stay on tasks” –If this option is selected, a reminder will sound every 15 minutes when a task is started. The reminders will stop when you mark a task as complete or skipped.

### Interface

1. “Starting Page” – Which screen the app should start up in.
2. “Allow changing date in To-do List” – Whether the Todo-list will allow the user to view dates other than today. Disable this option to simplify the interface.
3. “Use categories to manage tasks” – If you have many tasks, enabling categories will allow you to organize them into groups.
4. “Show overdue tasks on launch” - Automatically show the first overdue task when you start CanPlan.
5. “Only show today’s tasks” - Only show tasks that are scheduled for today in today’s To-do List. Overdue tasks from previous days will not be shown.
6. “Allow completing tasks at start” – Shows the buttons to mark a task as done or skipped before going through all its steps.
7. “Task Icon Size” - Changes the height of rows in the To-do List and the All Tasks screen.

### Audio & Speech

1. “Automatically play step sounds” – If enabled, the app will play audio instructions automatically when a task or step is shown.
2. “Voice note on tasks” – Adds the ability to record a voice note when scheduling a task in the To-do list.
3. “Speech Speed” - Control how quickly CanPlan speaks text (only applies if you have upgraded your app to have speech support). Acapela Text-To-Speech from Acapela Group.

## Backing Up Your Tasks

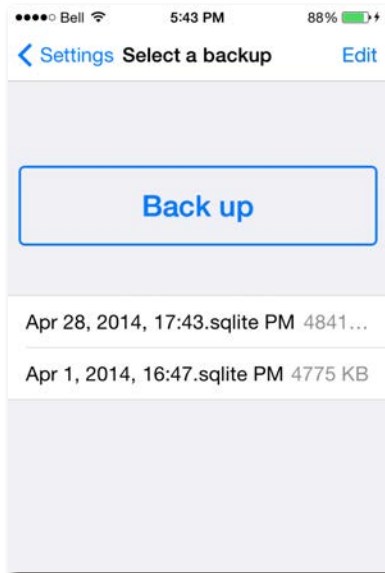
It is important to regularly back up your information, in case your device is lost or broken. There are two ways to back up your database: to iCloud (easiest option if you have an internet connection) or to your computer.

To back up information using iCloud:

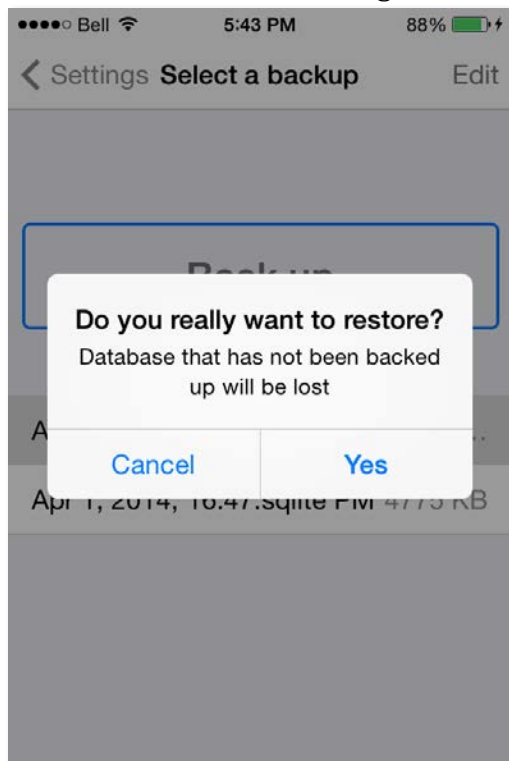
1. iCloud is a cloud-based storage service from Apple. It is integrated in your device and free to use. To Setup iCloud account:
  - a. Go to Settings > iCloud.
  - b. Enter your Apple ID and its password. Click “Sign In”.
  - c. Make sure Documents&Data is on.



2. To create backup of your information:
  - a. Click “iCloud Backup” button in the Settings screen.
  - b. Click “Back up” button at the top of the screen to create a backup of your current database. This action may take a few minutes.

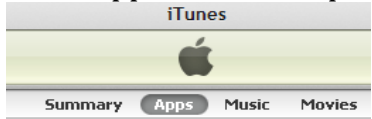


3. To restore to a backup from iCloud:
  - a. Click "iCloud Backup" in the Settings screen.
  - b. Select a date that you want to restore to.
  - c. Click "YES" to start restoring. This action may take a few minutes.



To back up your information on a Windows PC or Mac:

1. Plug your iPhone or iPod Touch into the computer.
2. Start iTunes.
3. Click the device in iTunes to select it.
4. Click “Apps” near the top of the iTunes window:



5. Scroll down to “File Sharing” and click the CanPlan icon.
6. Click the “Task\_Sequencer.sqlite” file on the right, then click the “Save to...” button at the bottom-right corner.
7. Choose a folder to save to then click the “Select Folder” button. Remember the folder you selected! You might want to write it down.

Need More Help? Email your questions or comments to [appsupport@canassist.ca](mailto:appsupport@canassist.ca)