

# Apps4.Pro Planner Migrator

Apps4.Pro Planner Migrator extension is a web-based Chrome Extension application that can be installed and used on any operating systems (Windows, Mac, Linux) with Chrome browser (also works in Edge preview build). This app helps you to successfully migrate Planner data from one Tenant to another Tenant. The Planner data includes Plans, Buckets, Tasks and Plans` associated group details.

You can migrate following Plan details between tenants:

- Plans
- Buckets
- Labels
- Plan Members

You can migrate following Task details:

- Task Title
- User Assignments
- Applied Labels
- Bucket
- Progress
- Start and Due dates
- Description
- Checklists
- Attachments
- Comments

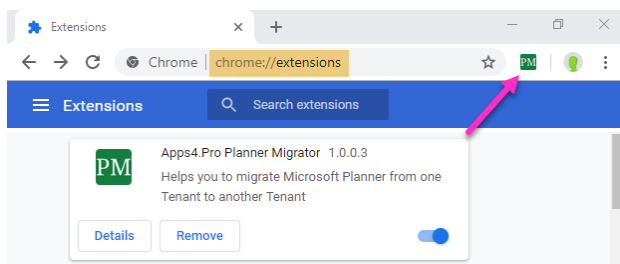
## How to install

You can install this add-in from Chrome Web Store using below link:

<https://chrome.google.com/webstore/detail/apps4pro-planner-migrator/eopkbaeephnahijjaepcjljcafdbdjf>

## How to access

Once you have installed this extension from Chrome Web Store, you can access the add-in by clicking the app short-cut icon from top-right corner of your Chrome browser as shown in below image.



## Permissions required

No special permissions required. As per current Planner design only Plan members can able to read and update planner data, so the account which you are going to use with this tool should be a member the plans those you want to migrate.

## Key Features

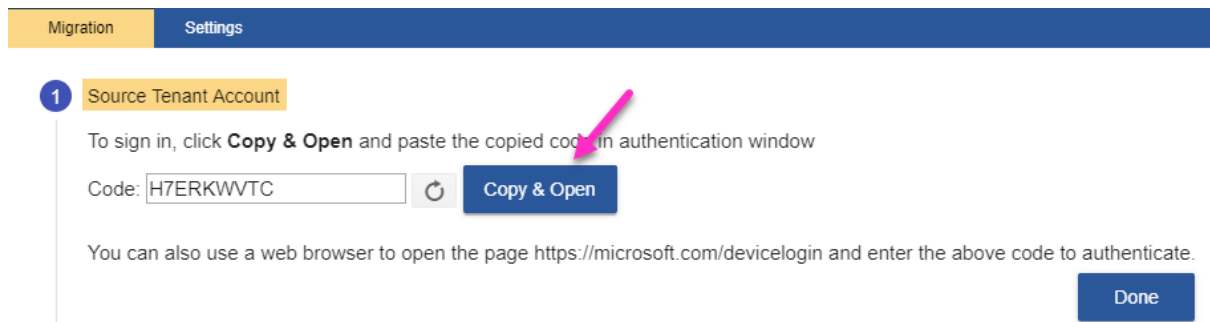
- Copy Plan data into new plan in new group / new plan in existing group / existing plan.
- Copy the actual attachment files from Source Tenant group site to Target Tenant group site.
- Copy task comments.
- Map Source Tenant users with Target Tenant users.

## Migration Steps

Follow the below steps to complete your migration work.

### Step 1 (Source Tenant Account)

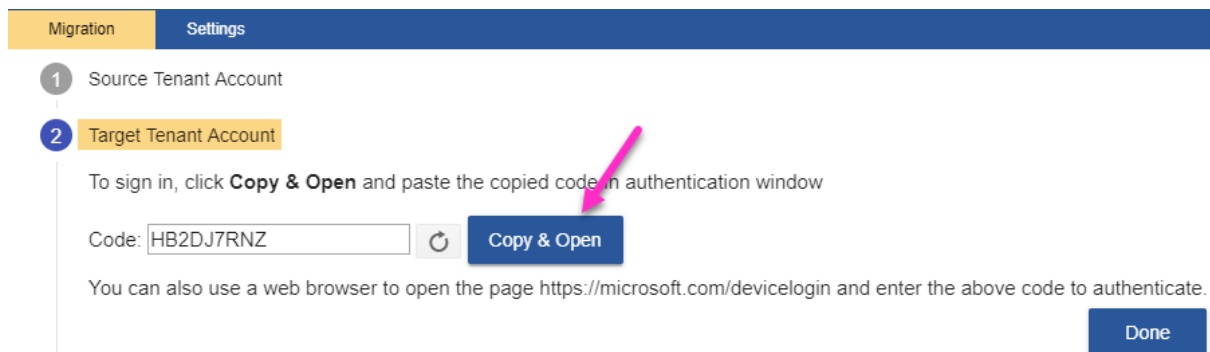
Sign-in with source tenant user account which is being a member of plans those you want to migrate.



The screenshot shows the 'Migration' tab selected in a blue header bar. Below the header, step 1 'Source Tenant Account' is highlighted with a yellow background. The instructions state: 'To sign in, click **Copy & Open** and paste the copied code in authentication window'. A text input field contains the code 'H7ERKWVTC', followed by a refresh icon and a blue 'Copy & Open' button. A pink arrow points to the 'Copy & Open' button. Below the input field, it says: 'You can also use a web browser to open the page <https://microsoft.com/devicelogin> and enter the above code to authenticate.' A blue 'Done' button is at the bottom right.

### Step 2 (Target Tenant Account)

Sign-in with your target tenant user account. If you want to migrate into existing plan (group), then this user account should be a member of the target plan (group).



The screenshot shows the 'Migration' tab selected in a blue header bar. Below the header, step 2 'Target Tenant Account' is highlighted with a yellow background. The instructions state: 'To sign in, click **Copy & Open** and paste the copied code in authentication window'. A text input field contains the code 'HB2DJ7RNZ', followed by a refresh icon and a blue 'Copy & Open' button. A pink arrow points to the 'Copy & Open' button. Below the input field, it says: 'You can also use a web browser to open the page <https://microsoft.com/devicelogin> and enter the above code to authenticate.' A blue 'Done' button is at the bottom right.

### Step 3 (Source Tenant Settings)

In this step you can choose required plan(s) to migrate. You can also choose the options whether the migration process need to copy attachments and task comments.

**3** Source Tenant Settings

Select plan(s) to migrate

Test Plan × × ↺

☒ Include Attachments

☒ Include Comments

Back Next

### Step 4 (Map Source Tenant users with Target Tenant users)

When you migrate plan data from old tenant to new tenant you may face situation that some users that are available in source tenant might not be available in target tenant, or you may want to assign some set of user's tasks to different set of users in target tenant. For this need, you can map the source tenant user with target tenant user either with same user account or different user account.

**4** Members Mapping

Source Tenant Members

Alex Wilber

Adam Wallen

Aldo Muller

Allan Deyoung

Mapped Target Tenant Members




Alex Wilber

Lee Gu

Cameron White

Allan Deyoung

Clear Mapping

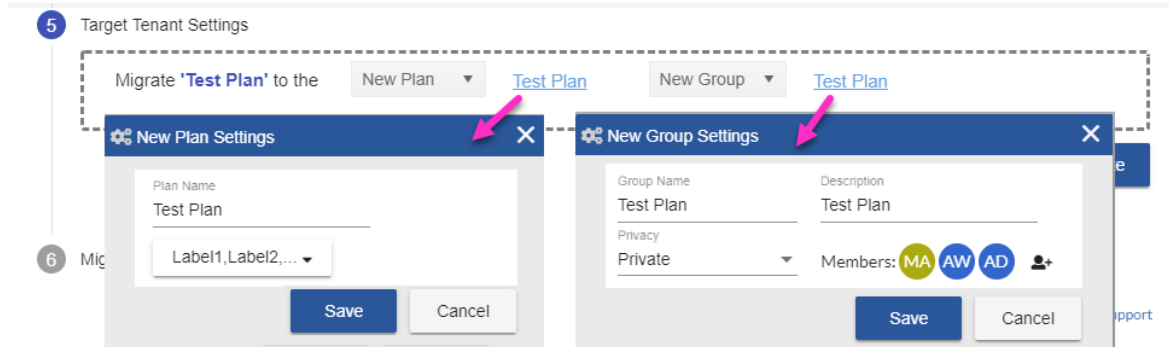
   

### Step 5 (Target Tenant Settings)

In this step you can provide target plan(s) to migrate data. You have following three options to choose target plan.

### Migrate into New plan in New group

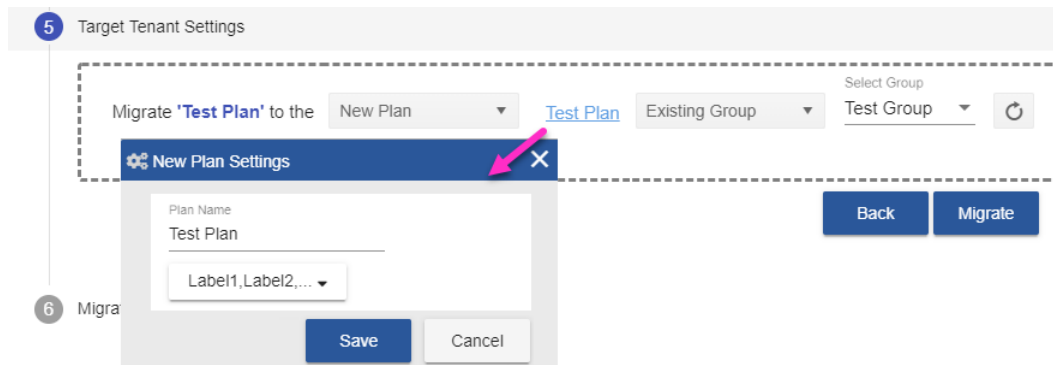
You can choose option to create new Plan in new Office 365 group and import all task details into this new plan.



The screenshot shows the 'Target Tenant Settings' step (5) with a dashed box containing two modal windows. The 'New Plan Settings' window (6) has fields for 'Plan Name' (Test Plan) and 'Label1, Label2, ...'. The 'New Group Settings' window has fields for 'Group Name' (Test Plan), 'Description' (Test Plan), 'Privacy' (Private), and 'Members' (MA, AW, AD). Both windows have 'Save' and 'Cancel' buttons. Arrows point from the 'Test Plan' links in the main settings to the respective modal windows.

### Create new plan in existing group

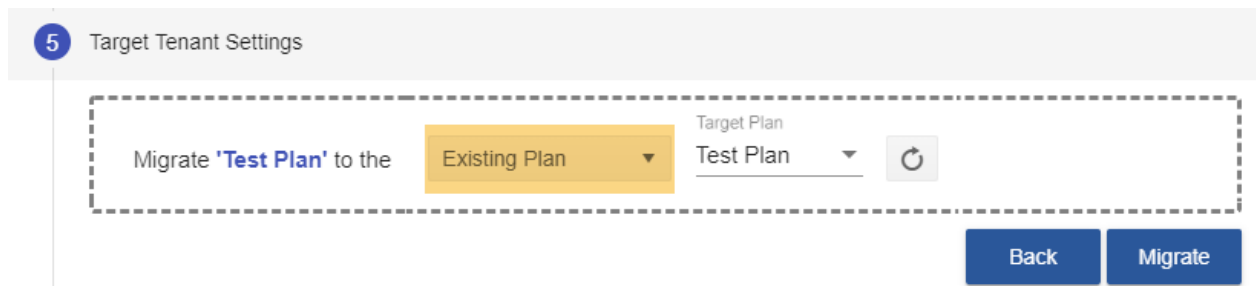
Users can choose option to create new Plan in existing Office 365 group.



The screenshot shows the 'Target Tenant Settings' step (5) with a dashed box containing the 'New Plan Settings' modal window (6). The modal window has fields for 'Plan Name' (Test Plan) and 'Label1, Label2, ...'. The main settings show 'New Plan' selected for 'Migrate Test Plan to the' and 'Existing Group' selected for 'Select Group'. There are 'Back' and 'Migrate' buttons at the bottom right.

### Copy all tasks into existing Plan

If you already created required plan in target tenant portal, then you can choose Existing Plan option and select the required plan to copy tasks.



The screenshot shows the 'Target Tenant Settings' step (5) with a dashed box containing the 'Existing Plan' option. The 'Migrate Test Plan to the' dropdown is set to 'Existing Plan', and the 'Target Plan' dropdown is set to 'Test Plan'. There are 'Back' and 'Migrate' buttons at the bottom right.

### Add members when create a new group

You can add members from target tenant when you create a new group.

