

Apps4Pro Automate- Installation & User guide

Apps4.pro Automate is a desktop application that helps to back up the Planner Tasks in OneDrive and get the Plans report in Power Bi directly. This tool provides the flexibility to make the automatic schedule based on your time for sync the Planner Tasks details.

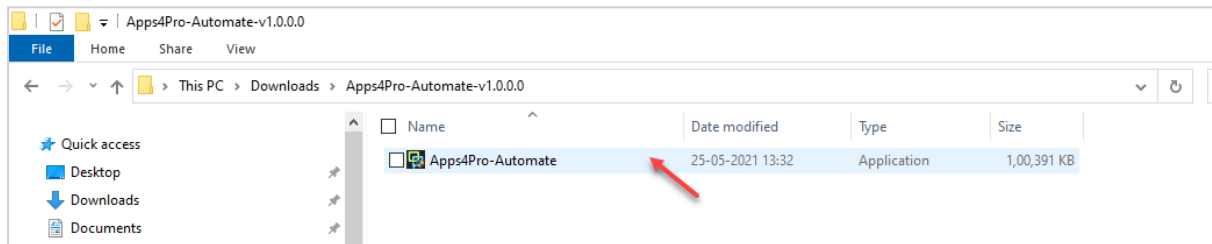
Microsoft Partner Gold Application Development



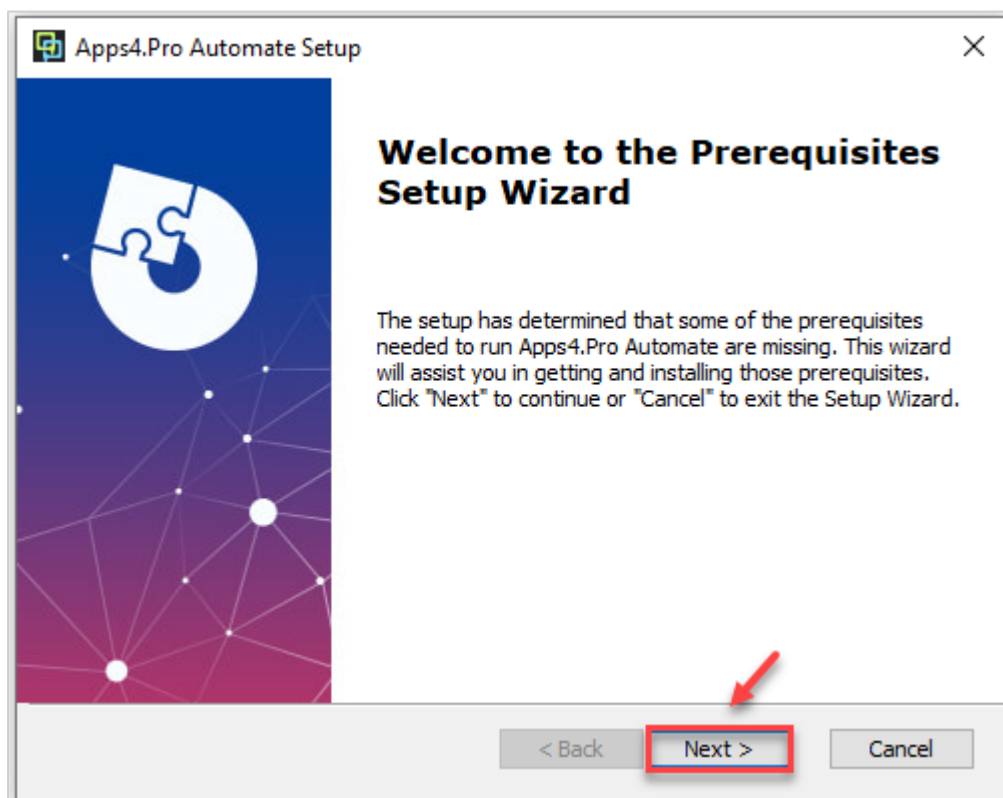
Installation

Step1: Download Apps4.pro Automate from <https://apps4.pro/powerbi-reporting-for-microsoft-planner/#freetrial>

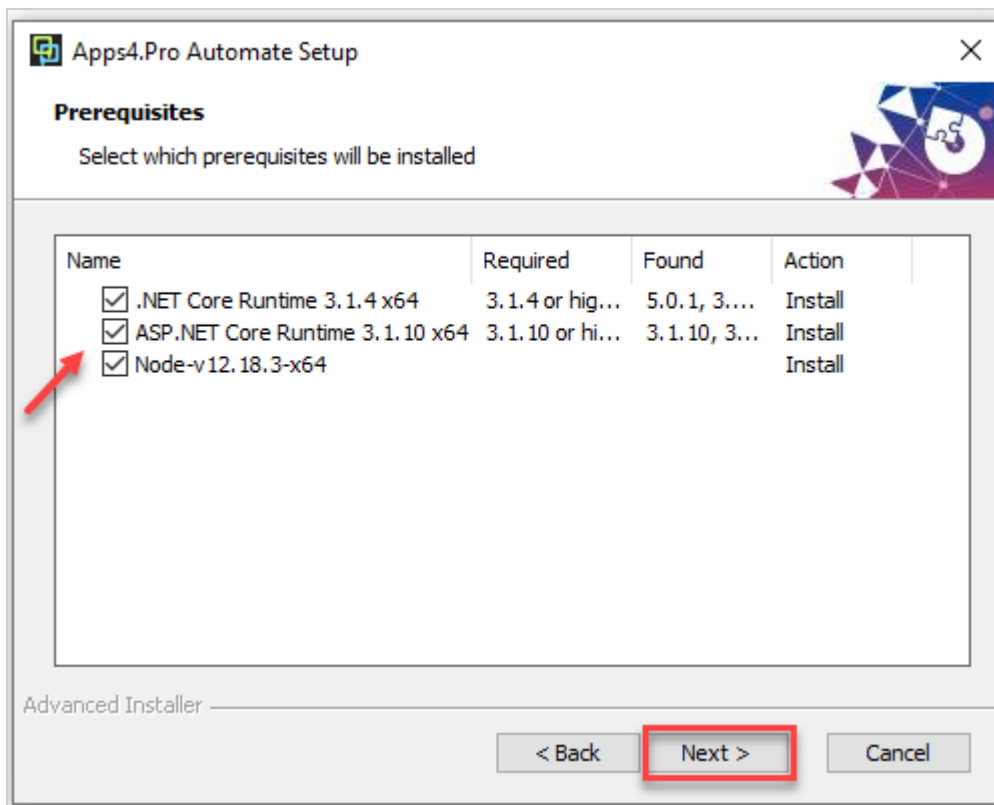
Step2: After completing the download, Extract it and double click on the Apps4.pro Automate Application to install.



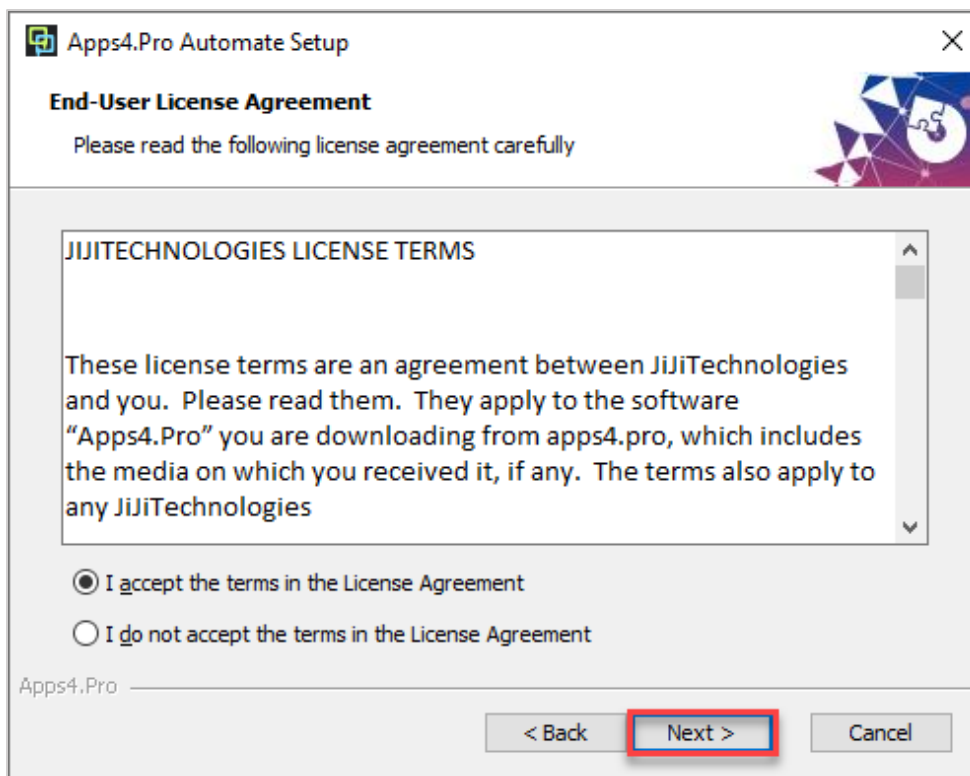
Step3: Apps4.Pro Automate Setup Wizard window will appear. Click Next.



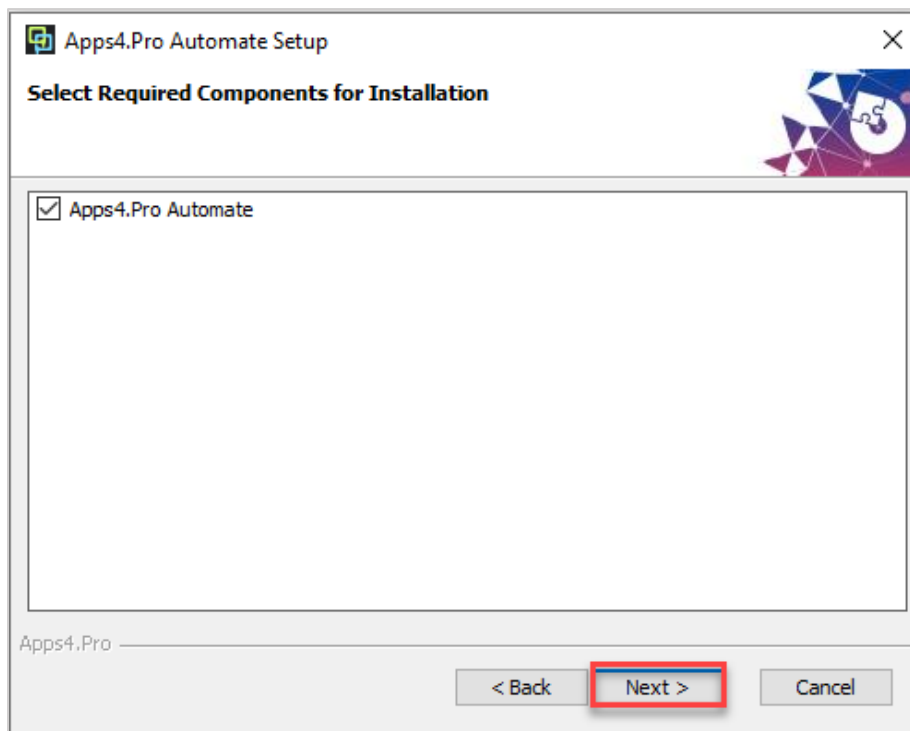
Step4: Select listed prerequisites to install and click on Next.



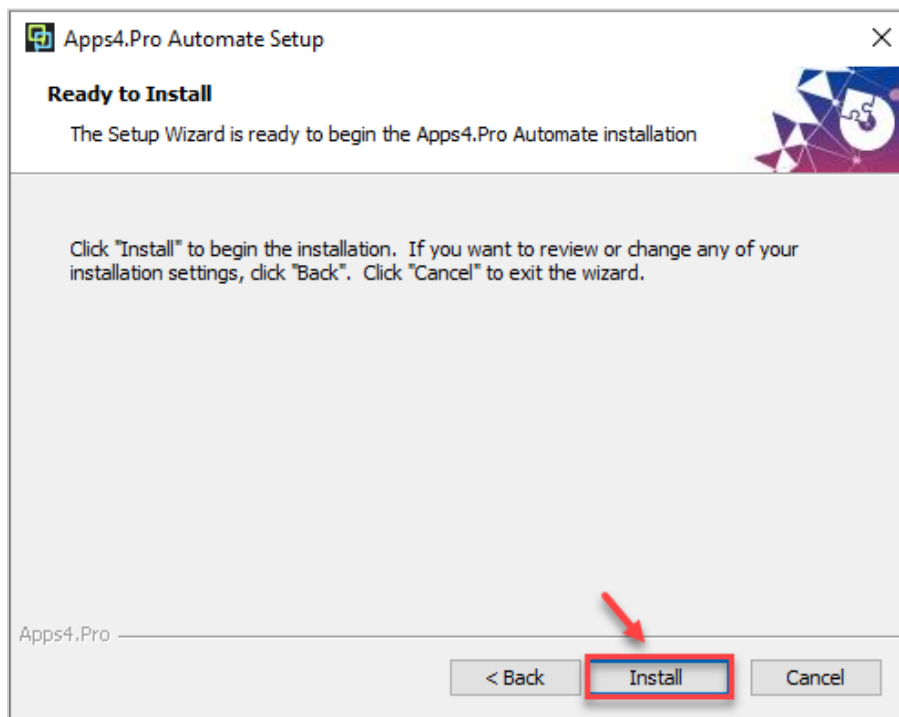
Step5: Once installed, Click on Next and Read the End User License Agreement and accept it to proceed further.



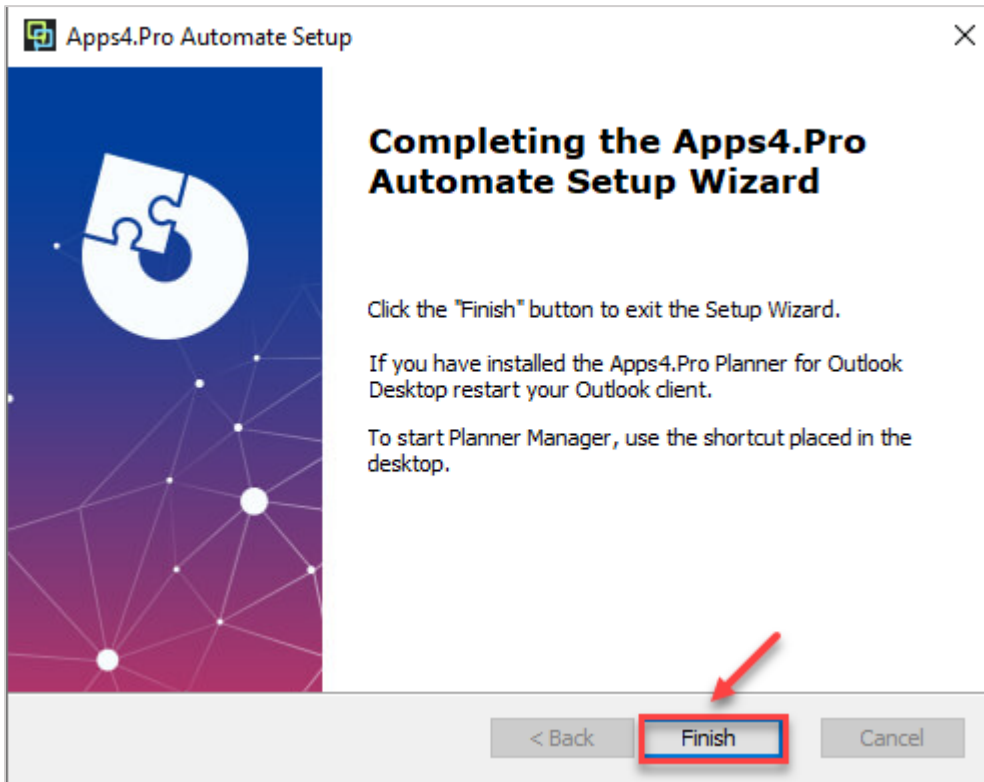
Step6: This wizard ensures that Apps4.Pro Automate will be installed on your computer. Click Next.



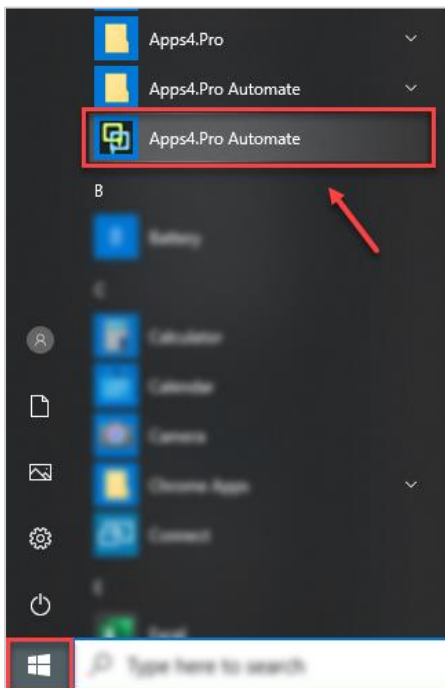
Step7: Now click Install button to start installation process.



Step8: Once completed the Installation process, click on Finish.



Apps4.pro Automate is successfully installed. Now you can access this by double clicking on it.

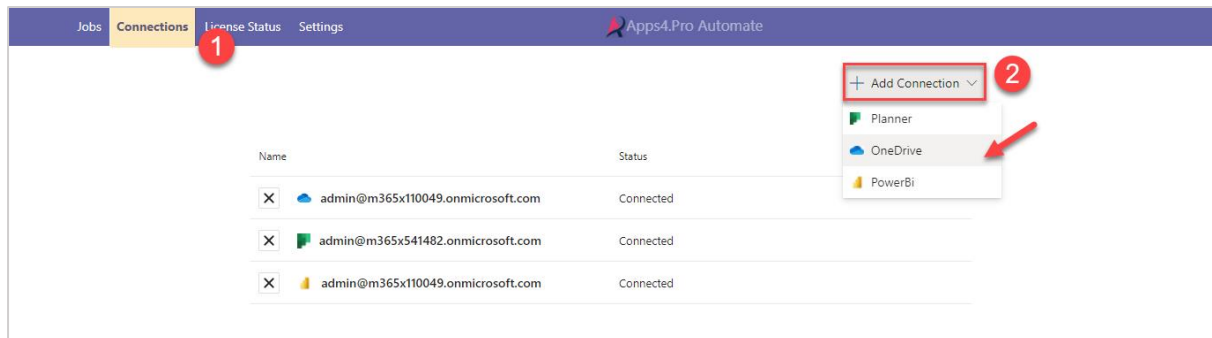


Steps to get started.

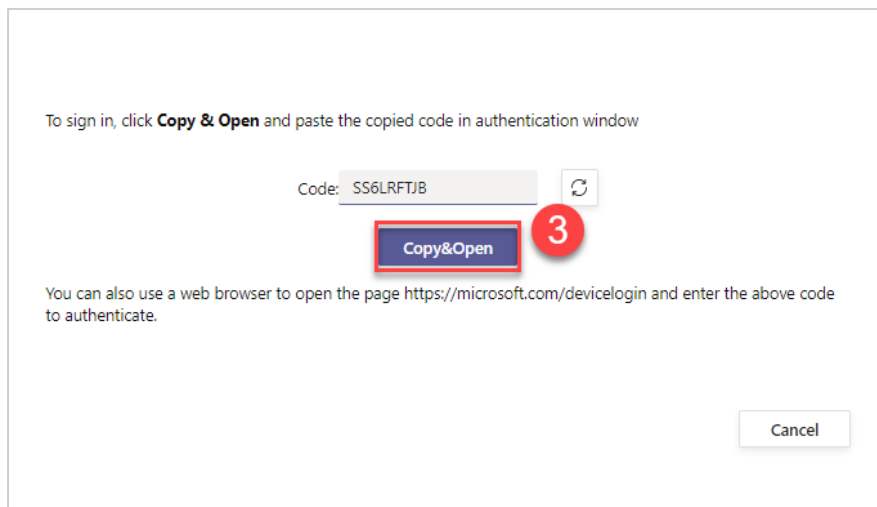
Before proceeding to create sync, go to the **Connections** tab and add the connections to which accounts you want to require.

Connections

Choose the connection type in the **Add Connection** option under Connection tab. Signin with the user account whose plans must sync and backup.



To Signin, click on Copy & Open button. It will copy the code shown in the console and opens a new window. Paste the copied code in the new window and click the Next button.



You can be able to connect multiple accounts under Connections tab.

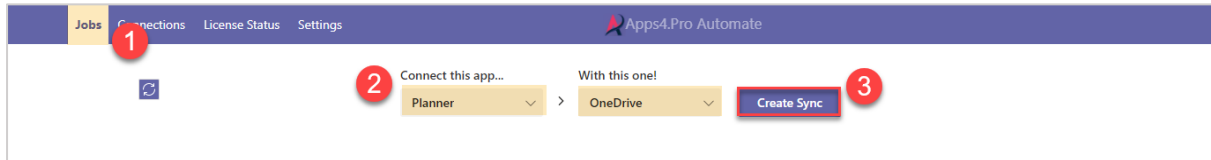
Once you have done this, then move to the jobs section to create sync.

Create Sync

You can create sync for Planner with OneDrive or PowerBi as stated below. This tool supports creating sync between different Office365 tenants.

Planner-OneDrive Sync

To create Planner-OneDrive sync, Select **Planner** from Connect this app option and **OneDrive** from With this one option under jobs section. Then click on **Create Sync**.



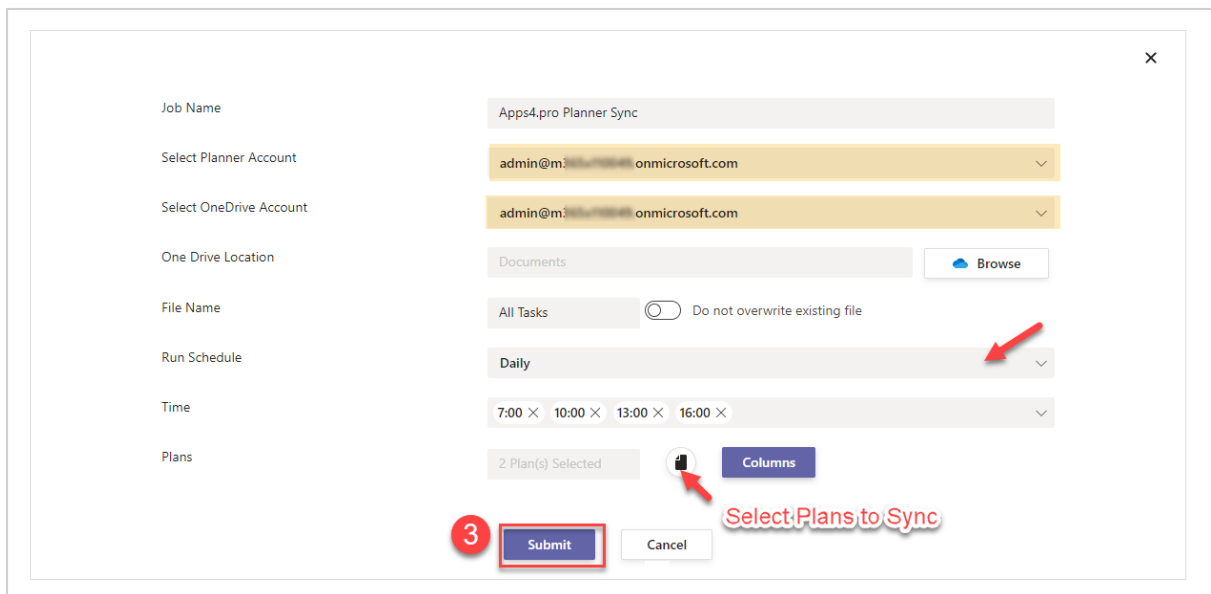
Now, you must provide the Job Name and Select the Planner and OneDrive accounts that are connected to this app.

You can find out the OneDrive location to Back up the Planner Tasks by clicking Browse option.

Then Enter the File name for keeping this in OneDrive.

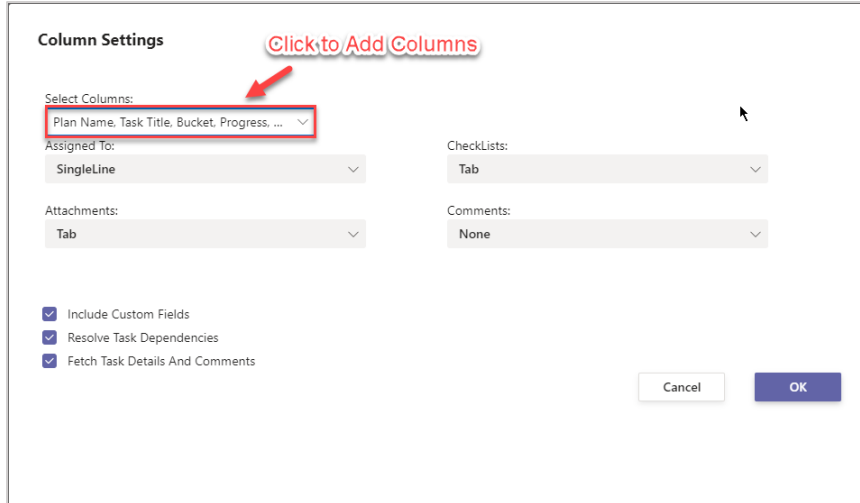
The schedule can run automatically based on an hourly or Daily so select accordingly.

By default, this backup task overwrites the existing OneDrive file. You can choose the option “Do not overwrite existing file” if you want to create new file in every run.



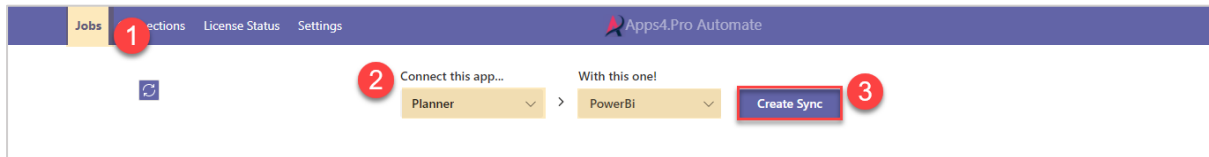
Columns Settings

To customize the Backup OneDrive file, click on the **Columns settings**. Here you can add more columns and make the listed fields (Assigned To, Attachments...) in below image as tab or single columns.

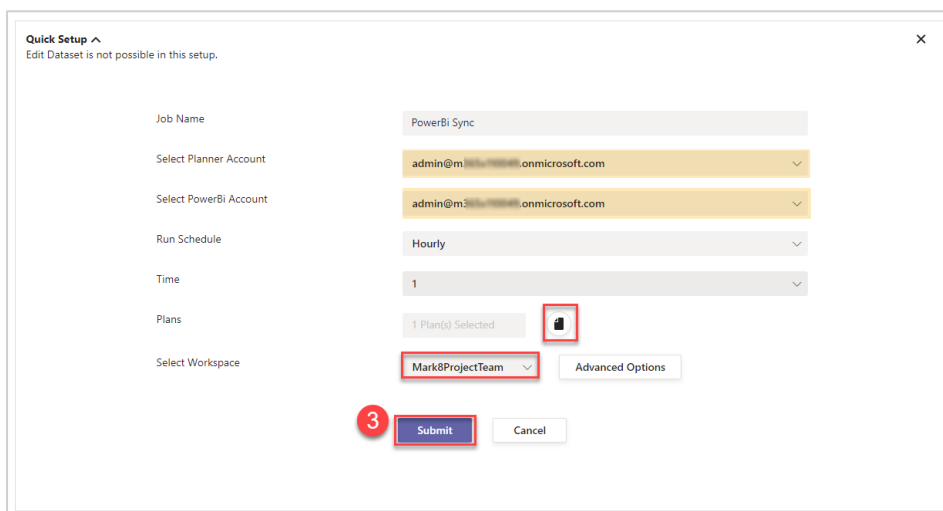


Planner-PowerBi Sync

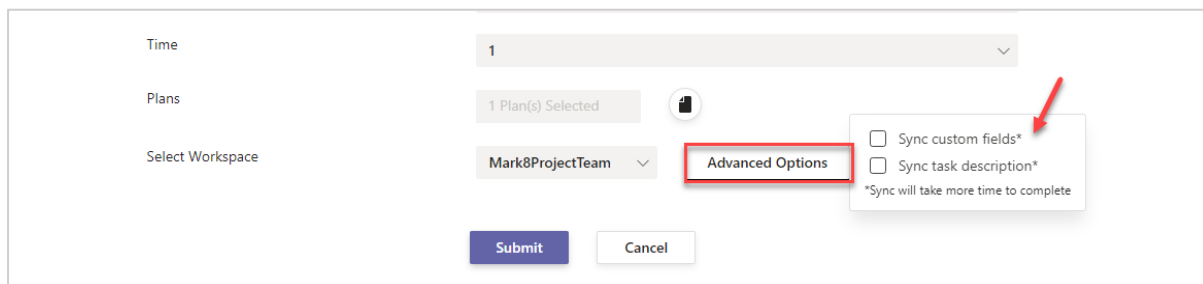
From the Jobs tab, Pick the **Planner** from Connect this app and **PowerBi** from With this one to create Planner-PowerBi sync. Then click on Create Sync.



Now, you must provide the Job Name and Select the Planner and PowerBi accounts that are connected to this app. Pick the option to run the schedule based on either hourly or Daily. Then Choose the Plans and Workspace to sync in PowerBi.



For getting custom fields and task description, you need to enable those options in the **Advanced Options**.



Note: you cannot edit the Dataset in PowerBi If you work with the Quick Setup.

Edit Dataset

You can build your own dashboards by editing the Datasets in Powerbi. This can be achieved with an **Advanced setup**. Please refer to the below link to work with this.

<https://support.apps4.pro/apps4pro-automate-advance-setup-guide>

Jobs

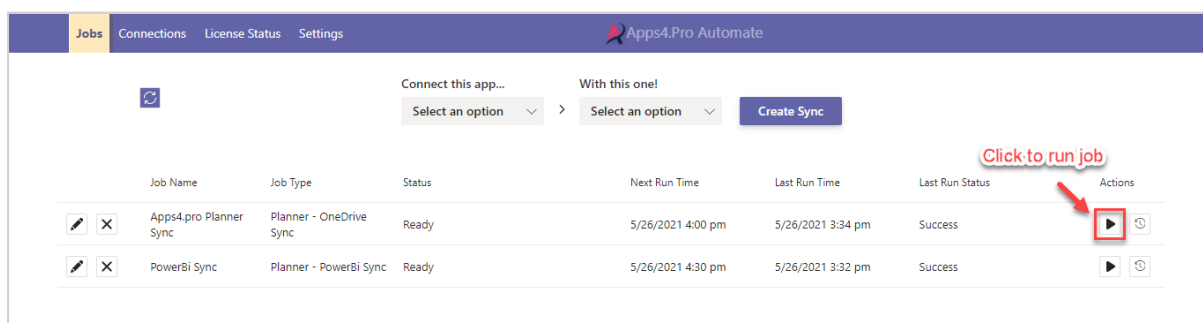
Once you have created the sync, this sync will be listed under the Jobs section with the following details.

- JobName & Type
- Job Status
- Next Runtime of job
- Last Runtime of job

And you can perform some action like edit and delete the job here.

Run Job

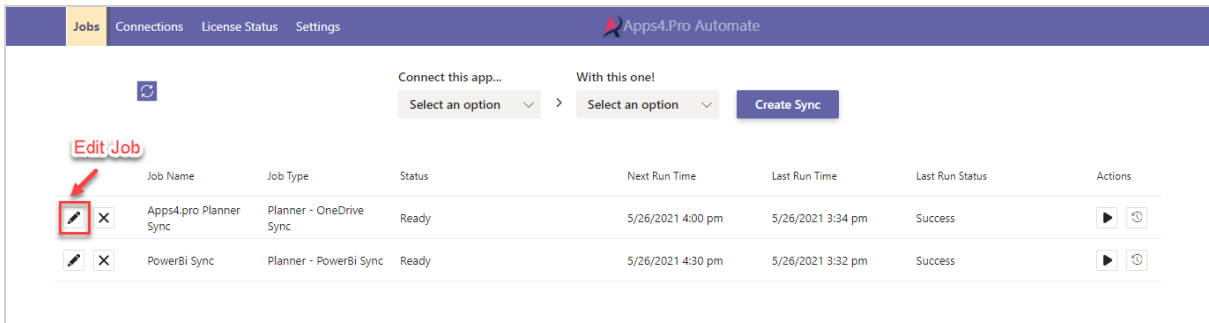
You can run the job manually by clicking this **Run Now** option. Then Planner Task details will be synced in OneDrive and PowerBi as well.



Job Name	Job Type	Status	Next Run Time	Last Run Time	Last Run Status	Actions
Apps4.pro Planner Sync	Planner - OneDrive Sync	Ready	5/26/2021 4:00 pm	5/26/2021 3:34 pm	Success	Run Now (play icon)
PowerBi Sync	Planner - PowerBi Sync	Ready	5/26/2021 4:30 pm	5/26/2021 3:32 pm	Success	Run Now (play icon)

Edit Job

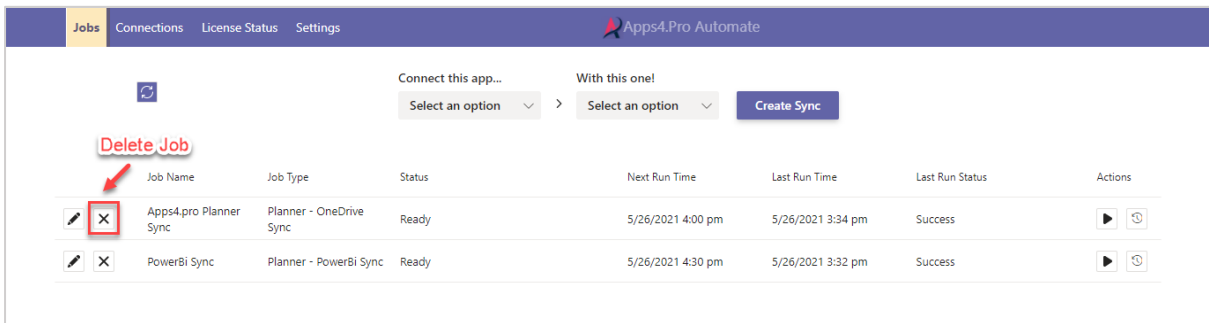
Click the **Edit** option to modify the job. This will show the existing job details. Once modified, then submit same job again.



Note: JobName is not editable.

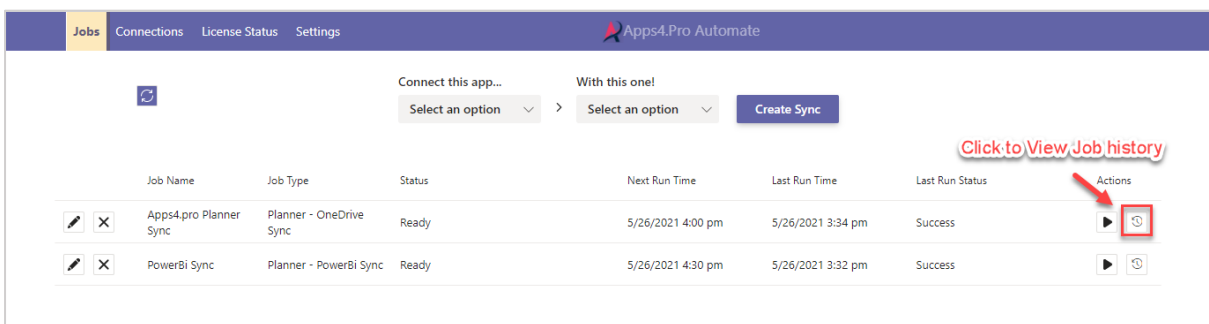
Delete Job

For deleting the Job, click the icon shown in the below image.



Job History

When running the job every time, this tool keeps the log for this. You can view this by clicking the **Job History** option.



Then Select the date ranges to filter the job history.

Select Date Range for Job History - Apps4.pro Planner Sync ×

From:
Wed May 26 2021

To:
Wed May 26 2021

→

Now you can view the job history as shown in the below image.

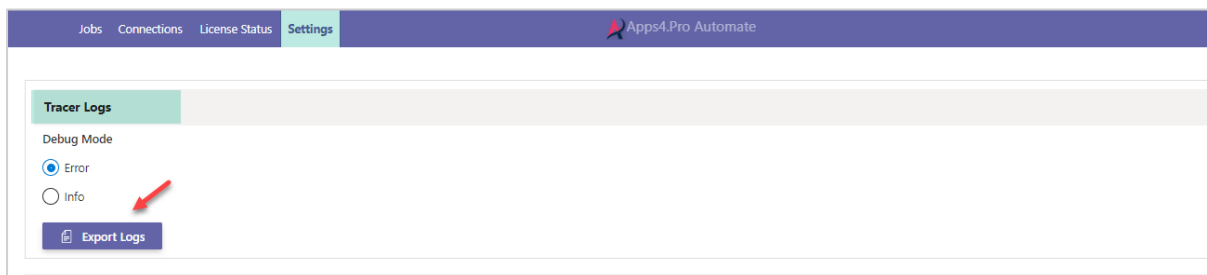
Job History - Apps4.pro Planner Sync ×

Last Run Time	Message	Status
5/26/2021 4:02 pm	Success	Success
5/26/2021 3:34 pm	Success	Success

Settings

Tracer Logs

For troubleshooting and analyse, the tool logs the required details in local web storage (Indexed DB). If you face any problem, you can Export Logs and send to support@jjitechnologies.com to get more help for your problem.





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support@jijitechnologies.com