

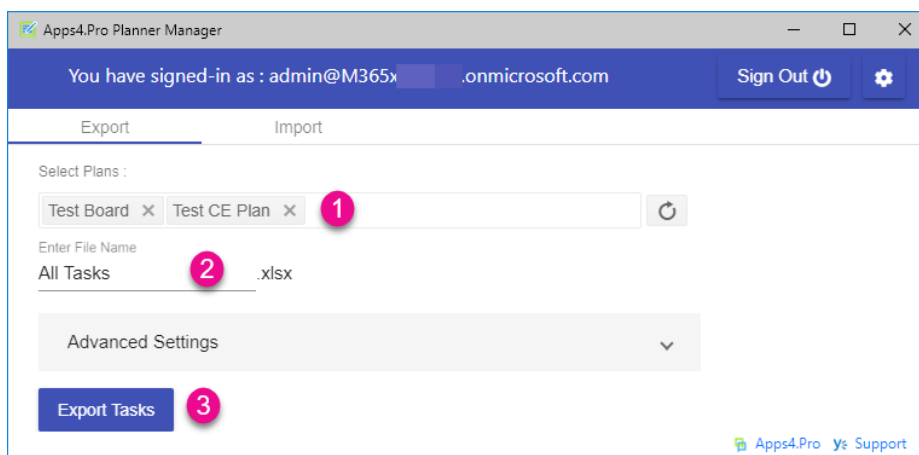
# Apps4.Pro Planner Manager Chrome Extension – User Guide

Apps4.Pro Planner Manager extension is a web-based Chrome Extension application that can be installed and used on any operating systems (Windows, Mac, Linux) with Chrome browser. This extension helps you to successfully export all planner data to excel file from selected plan, you can use this exported excel file as template and import the template into another plan. Using this extension, you can also update existing Planner tasks. This extension supports following key features:

- Can export all plans and tasks.
  - Export tasks from multiple plans.
  - Export includes Task Title, Progress, Bucket, Start date, Due date, Labels, User assignments, Checklist, Attachments, Comments, Task Dependencies, WBS (Work Breakdown Structure) and more...
- Note:** You can create sub tasks and task dependencies using our other tool **Apps4.Pro Gantt**.
- Can export user assignments, checklists, attachments and comments as separate tab in Excel file.
  - Import tasks to new plan in new group / new plan in existing group / existing plan.
  - Import tasks includes User assignments, Checklist, Attachments, Comments, Task Dependencies, WBS and other common fields.
  - Upload local file into Plan associated group and set it as task attachment.
  - Copy task's attachment file from old plan's group to new plan's group.
  - Can map Excel column headers with Planner fields.
  - Bulk update existing tasks.

## Export Tasks Report:

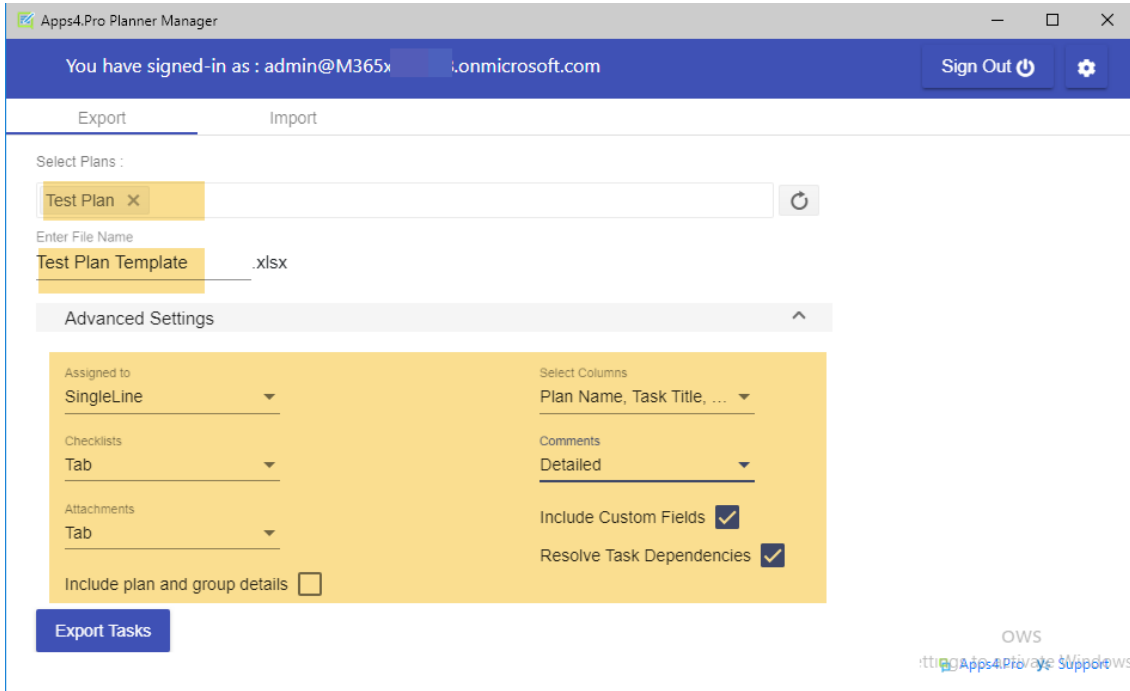
You can export tasks from single and multiple plans to Excel file.



## Export Plan as Template:

For repetitive project, you have to create tasks every time when you create plan, you can overcome this repetitive work by creating common tasks in a plan and export that plan as a template for future work. The template is nothing but the exported Excel file, you can make required changes in that template and import them into another new plan/existing plan.

You can export Checklists, Attachments and Comments as separate tab in Excel file, so that you can easily add new checklist items in that tab itself before importing into new plan.



If you are using App4.Pro Gantt and created sub tasks and task dependencies, you can also export those details in template.

ID	Plan Name	Task Title	Bucket	Progress	Assigned to	Start date	Due date	Categories	Description	WBS	Predecessor/Successors	ShowOnCard	Task Id	Plan Id	resource
1	Test Plan	Test Task 2	To do	NotStarted	Alex Wilber	2018-06-15T	2018-06-29	Pink:1	This is test tas	1		Automatic	ogn9RehL1b1isN4-Hkq1	{ "Alex W	
2	Test Plan	TT2 Sub Task 1	Sub Tasks	NotStarted		2018-06-15T	2018-06-27	Orange:3		1.1	5ss	3	Automatic	95T_Nbxlu1b1isN4-Hkq1	{ }
3	Test Plan	TT2 Sub Task 2	Sub Tasks	NotStarted		2018-06-24T	2018-06-29	Orange:3		1.2		8	Automatic	CmW2iwF1b1isN4-Hkq1	{ }
4	Test Plan	Test Task 1	To do	NotStarted	Lee Gu	2018-06-14T	2018-07-05	Orange:3	This is test tas	4		Automatic	Sk5AJW10k1b1isN4-Hkq1u8qDQsc		
5	Test Plan	TT1 Sub Task 1	Sub Tasks	NotStarted	Lynne Robbins	2018-06-14T	2018-06-20	Pink:1		4.1		6	Automatic	vh7zFjy_t01b1isN4-Hkq1	{ "Lynne
6	Test Plan	TT1 Sub Task 2	Sub Tasks	NotStarted	Allan Deyoung	2018-06-21T	2018-06-25	Red:2		4.2		7	Automatic	BOV7tAJN1b1isN4-Hkq1	{ "Allan D
7	Test Plan	TT1 Sub Task 3	Sub Tasks	NotStarted	Alex Wilber	2018-06-26T	2018-07-05	Orange:3	This is test tas	4.3		Automatic	HgGNvkm1b1isN4-Hkq1	{ "Alex W	
8	Test Plan	Test Task 3	To do	NotStarted	Allan Deyoung	2018-06-27T	2018-07-07	Pink:1		8		Automatic	JpJzQwHQ1b1isN4-Hkq1	{ "Allan D	

## Import Plan Template (Excel tasks) into New plan in New group

Users can choose option to create new Plan in new Office 365 group and import all tasks into this new plan.

The screenshot shows the 'Import' tab in a web application. At the top, a blue header bar displays the user's signed-in account: 'admin@M365...onmicrosoft.com' with 'Sign Out' and a settings icon. Below the header, the 'Import' section is active. A yellow box contains the file 'Test Plan Template.xlsx' with a 'Browse' button. A dashed box highlights the main import area. On the left, a vertical sidebar has steps: '1 Choose your excel file', '2 Tasks', and '3 Import'. In the main area, the text 'Import 'Test Plan' to the' is followed by a 'New Plan' dropdown and a '+' icon, and 'Test Plan 2'. To the right, 'New Group' dropdown and '+' icon, and 'Test Plan 2'. A 'Column Mappings' button is on the far right. Two modal windows are open: 'New Plan Settings' (left) and 'New Group Settings' (right). The 'New Plan Settings' modal has a 'Plan Name' field with 'Test Plan 2', a checkbox for 'Send email notification when a task is assigned or completed', and a 'Pink,Red,...' dropdown. The 'New Group Settings' modal has a 'Group Name' field with 'Test Plan 2', a 'Description' field with 'This is test plan 2', a 'Privacy' dropdown set to 'Public', and 'Members' listed as 'AW', 'LG', and 'LR'. Both modals have 'Save' and 'Cancel' buttons. A 'Next' button is also visible. Red circles with numbers 1, 2, 3, and 4 highlight specific elements: 1 points to the 'New Plan' dropdown, 2 to the 'Save' button in the 'New Plan Settings' modal, 3 to the 'New Group' dropdown, and 4 to the 'Save' button in the 'New Group Settings' modal.

## Import Plan Template into New plan in existing group

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

The screenshot shows the 'Import' tab in a web application. At the top, a blue header bar displays the user's signed-in account: 'admin@M365...onmicrosoft.com' with 'Sign Out' and a settings icon. Below the header, the 'Import' section is active. A yellow box contains the file 'Test Plan Template.xlsx' with a 'Browse' button. A dashed box highlights the main import area. On the left, a vertical sidebar has steps: '1 Choose your excel file', '2 Tasks to Import', and '3 Import Result'. In the main area, the text 'Import 'Test Plan' to the' is followed by a 'New Plan' dropdown and a '+' icon, and 'Test Plan 2'. To the right, 'Existing Group' dropdown and '+' icon, and 'Test Plan 2'. A 'Column Mappings' button is on the far right. A modal window 'New Plan Settings' is open. The 'New Plan Settings' modal has a 'Plan Name' field with 'Test Plan 2', a checkbox for 'Send email notification when a task is assigned or completed', and a 'Pink,Red,...' dropdown. The modal has 'Save' and 'Cancel' buttons. A 'Next' button is also visible. Red circles with numbers 1, 2, and 3 highlight specific elements: 1 points to the 'New Plan' dropdown, 2 to the 'Save' button in the 'New Plan Settings' modal, and 3 to the 'Existing Group' dropdown.

## Import tasks into existing Plan

Instead of creating new plan, you can also import all your Excel tasks into existing Planner plan.

Test Plan Template.xlsx Browse

Column Mappings

Import 'Test Plan' to the Existing Plan Target Plan Test Plan 2 ↻

Next

**Note:** When you import tasks into existing Plan, if the Excel includes the field Task Id, then the extension look for the Planner task for the specified task id and update the task with current details that found in Excel file.

## Map Excel column headers with Planner fields

When you import the Excel file that was exported from Planner Manager, you don't need to worry about this Column Mappings as it will automatically get mapped. But if you are importing the Excel file that was downloaded from different source (Ex: MS Project), then you need to map the Excel fields with Planner fields.

You have signed-in as : admin@M3 onmicrosoft.com Sign Out ⚙️

Export Import

**Column Mappings**

Custom fields to be imported: 5 items selected ✕

Plan Name	Plan Name	Task Title	Task Title
Bucket	Bucket	Progress	Progress
Assigned to	Assigned to	Start date	Start date
Due date	Due date	Categories	Categories
Checklist	Checklist (Tab)	Description	Description
Attachments	Attachments (Tab)	ShowOnCard	ShowOnCard

Save

Apps4.Pro Ye Support

## Copy Task attachment file from old Plan's group to new Plan's group

If you have created Excel template by exporting tasks with attachments, the attachment URL path points the SharePoint site of the source plan's associated group, when you import into another plan the attachment URL simply target the group site of old plan. So, if you want to download the attachment file from old plan and upload it into new plan, you have to complete the following steps to provide permissions to copy file between groups.

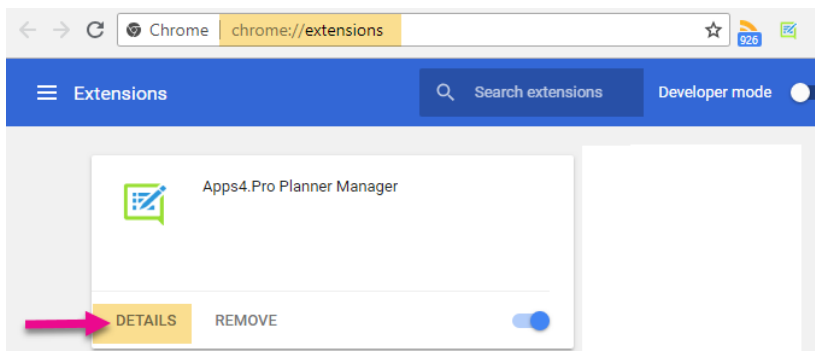
- Click Settings button (gear-icon) on top-right of the page.
- Go to Account tab -> click **Copy & Open**.
- Paste the copied code in Authentication window and complete the sign-in process and close the authentication window.

The screenshot displays the application's user interface. At the top, a blue header bar shows the user is signed in as 'admin@M365' on a '.onmicrosoft.com' domain, with a 'Sign Out' button and a gear icon for settings. A 'Settings' dialog box is open, showing the 'Account' tab. The dialog contains a 'Code' field with the value 'G7BD8CA4H' and a 'Copy & Open' button. A pink arrow points from the 'Sign Out' button in the header to the 'Settings' dialog. The background shows a 'Choose your excel file' section with a file named 'Test Plan Template.xlsx' and an 'Import Test Plan to' section. There are also 'Browse' and 'Next' buttons visible.

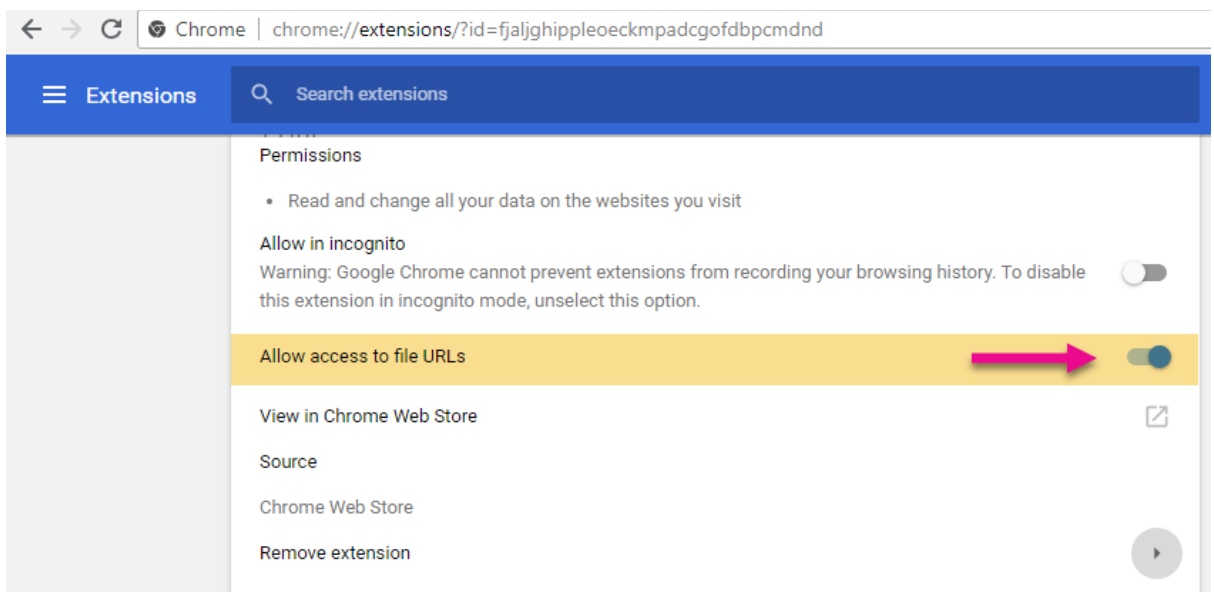
## Upload Local file into Plan associated group

Instead of providing web URL as task attachment, occasionally we may have required to upload file from local system and set it as attachment. So, if you want to upload local file into group site, you have to complete following steps to provide permissions to read local file system.

- Visit **chrome://extensions** in your browser (or open up the Chrome menu by clicking the icon to the far right of the Omnibox and select Extensions under the More Tools menu to get to the same place).
- Locate the Planner Manager extension and click **Details** button.



- Select the option **Allow access to file URLs** to give permissions to access local files.



## Bulk edit existing Planner tasks

Along with creating new tasks you can also use this extension to update existing Planner task fields.

Follow the below steps to update existing plan tasks:

- Export tasks with all fields (including Task Id) from a single plan that you want to update.
- In Excel file, do the required changes for the tasks you want update (Ex: Start date, Due date, Assigned to, etc..) and save the Excel file.
- Go to Import tab -> select the modified Excel file and choose the Existing Plan option and select the Plan (the source plan where you exported the tasks).
- Now proceed the import process, the tool finds the original task by task id field in the selected plan and update the changes.

**Note:** The Excel file should have the field Task Id and every task that you want change should have the value for Task Id field. If any task found without Task Id field value, the tool creates a new task.