

Apps4.Pro Planner Manager Edge Extension – User Guide

Apps4.Pro Planner Manager is a web-based extension that can be installed in Edge Chromium 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 app, you can also update existing Planner tasks. This extension supports following key features:

- Generate tasks and statistics report from multiple plans.
- Create new task, update and delete tasks.
- Create custom fields and update custom fields in individual tasks.
- Create new plan, update plan, add bulk members from CSV or Excel and copy members between Plans (Group).
- Export tasks from multiple plans.
- Import tasks to new plan in new group / new plan in existing group / existing plan.
- Import tasks includes User assignments, Checklist, Attachments, Comments, Custom Fields, Task Dependencies, WBS and other common fields.
- Copy task's attachment file from old plan's group to new plan's group.
- Bulk update existing tasks using Excel.

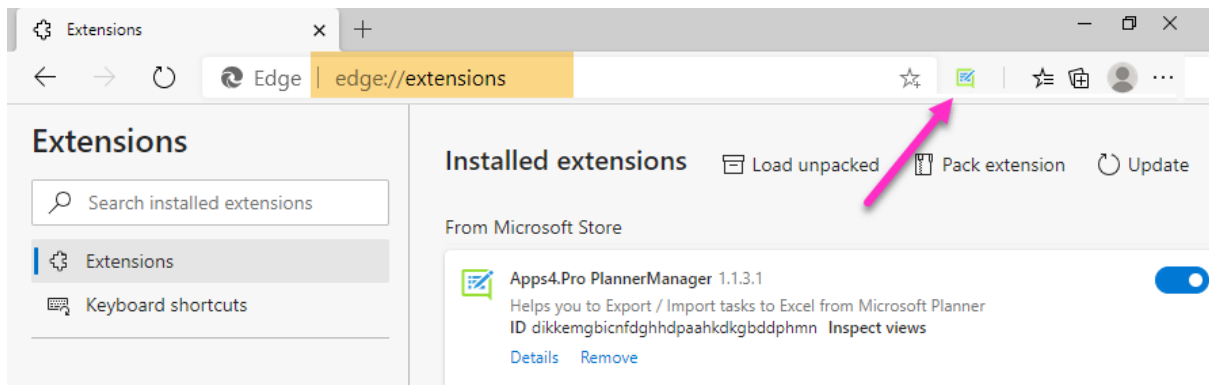
1. How to install

Please follow the steps below to use the unpacked extension.

- Download the unpacked extension source from our website.
- Extract the downloaded zip file.
- Visit `edge://extensions` in your browser (or open the Edge 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).
- Remove or disable the live version of the extension.
- Enable the Developer mode checkbox in the bottom left-hand corner.
- Click Load unpacked extension... to pop up a file-selection dialog.
- Navigate to the directory in which your extension files live (the extracted folder - PM1.4.0.0) and select it.
- Now open the app to check.

2. How to access

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

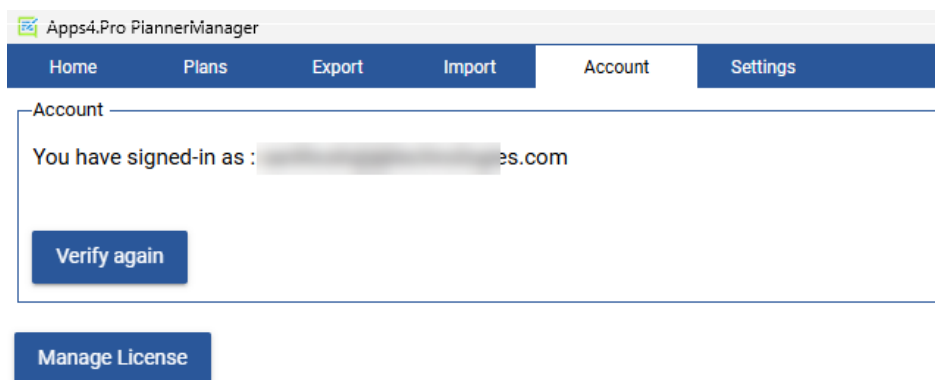


3. Permissions required

No special permissions required. The user account should be a member of all the plans in which you want to manage tasks.

4. Steps to get started

Before proceeding to work with this app features, go to Account tab and sign-in with your Office 365 account.



5. Reports and Task Management

You can pick multiple plans and instantly generate tasks report. In report grid, you can easily select required tasks and update details with quick actions.

5.1 All Tasks report

Select required plans in plan picker and click **Generate** button to populate tasks from selected plans.

	Plan Name	Task Title	Bucket	Progress	Assigned to	Start date	Due date	PercentComplete
<input type="checkbox"/>	Test Plan	This is support mail	To do	InProgress	MOD Administrator			50
<input type="checkbox"/>	Test Plan	This is user mail	To do	InProgress	MOD Administrator			79
<input type="checkbox"/>	Test Plan	Test SOC T	To do	NotStarted	Alex Wilber	3/5/2018	4/18/2018	0
<input type="checkbox"/>	Test Plan	Test Task 4 - Edit 2	To do	InProgress	Alex Wilber			50
<input type="checkbox"/>	Test Plan	Test Task 3	To do	NotStarted	Alex Wilber	3/5/2018	4/18/2018	0

By default, the task report populates only limited number of columns, if you need more columns, click **Edit Columns** button and add required columns as shown in below image.

5.2 Quick Actions

5.2.1 Add Task

Click Add (+) button to create a new planner task.

5.2.2 Edit Task

You can edit individual task either by double-clicking on the required task or select the required task and click **Edit** button to open the Edit Task window. You can update task details, post comments, upload attachments and update custom fields.

Note: To update custom field values, you should have already created custom field settings for the task’s associated plan. You can refer the below section (**10.1 Custom Field Settings**) to know more about how to create custom field settings

5.2.3 Update Multiple Tasks

You can select multiple tasks and update task fields, Progress, Start date, Due date, Bucket, User Assignment and Label.

5.2.4 Delete Tasks

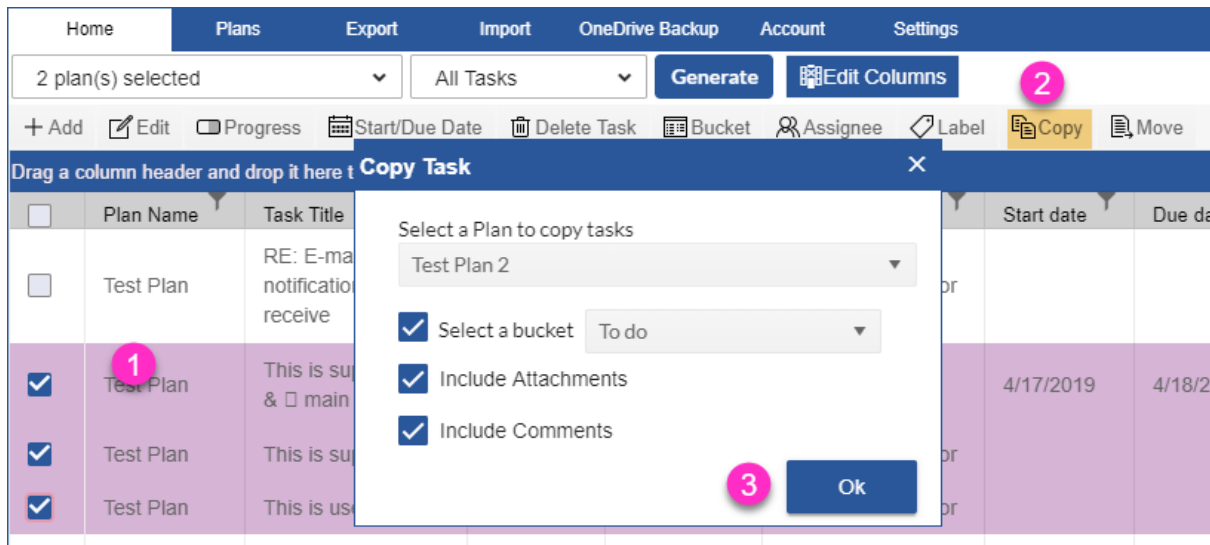
After selecting required tasks, you can click **Delete** button to remove the tasks permanently from Planner portal.

Note: You can’t recover the deleted tasks, so be cautious before deleting tasks.

	Plan Name	Task Title	Bucket	Progress	Assigned to	Start date	Due date
<input type="checkbox"/>	Test Plan	RE: E-mail notification doesn't receive	To do	InProgress	MOD Administrator		
<input checked="" type="checkbox"/>	Test Plan	This is support task & ☐ main task ☐	To do	InProgress	W.Adam	4/17/2019	4/18/2019
<input checked="" type="checkbox"/>	Test Plan	This is support mail	To do	InProgress	MOD Administrator		
<input checked="" type="checkbox"/>	Test Plan	This is user mail	To do	InProgress	MOD Administrator		

5.2.5 Copy Tasks

You can copy existing Planner tasks into different plan with task attachments and comments.

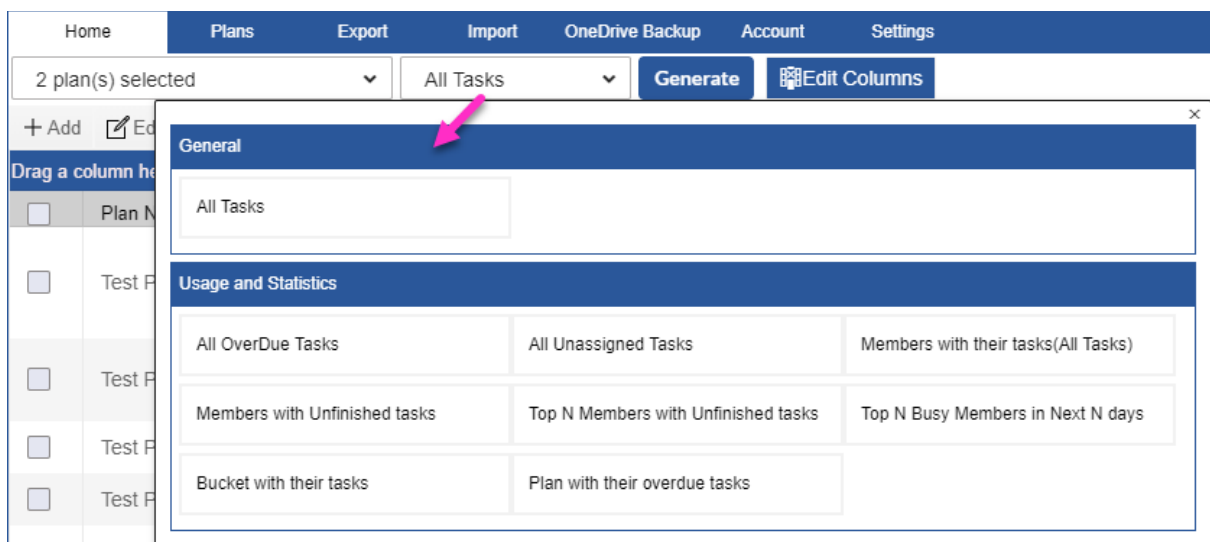


5.2.6 Move Tasks

You can move existing Planner tasks to different plan with task attachments and comments.

5.3 Usage and Statistic Reports

You can generate following usage and statistic reports:



Report	Description
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Members with their tasks (All Tasks)	Reports members with their task count for selected plans.
Members with Unfinished Tasks	Reports you the unfinished task count against each member from the selected plans.
Top N members with unfinished tasks	Reports you the top N members with tasks that are in progress. Here, N is selected by you.
Top N Busy Members with in next N days	Reports you the users with most tasks for next N days
All Unassigned Tasks	Reports you the tasks which are not assigned to anyone.
Buckets with their Tasks	Reports you the task's count for each bucket in a plan.
Plans with their Overdue Tasks	Reports you the task's count against each plan which are not completed within a duration.
All Overdue Tasks	Reports you the tasks which are not completed within a duration.

5.3 Report Grid -> Filter, Grouping and Search

You can easily filter the report by adding proper condition with every available column and you can also group report by dragging required columns into grouping panel.

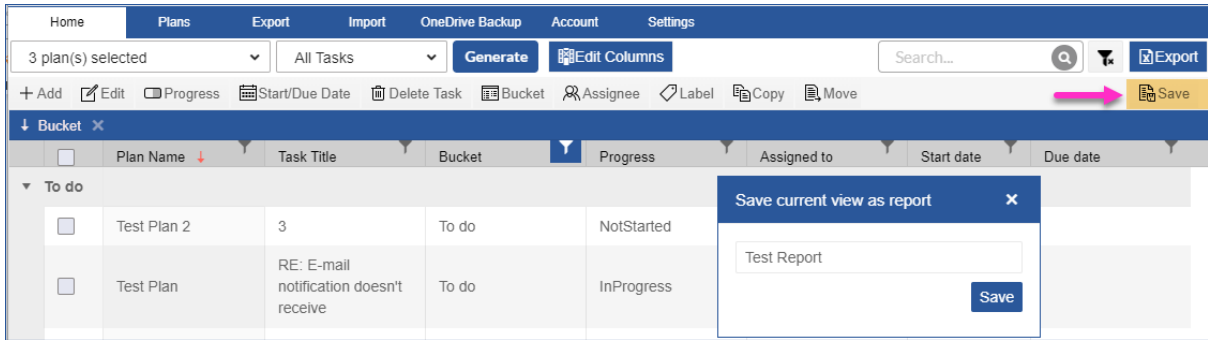
The screenshot displays the Report Grid interface with several key features highlighted by pink callouts:

- Search:** A search bar at the top right of the interface.
- Grouping:** A panel on the left side where columns like 'Plan Name' and 'Bucket' are dragged to group the data.
- Multi-Select Filter:** A dropdown menu for the 'Bucket' column showing options like 'Select All', 'To do', 'End of Life', 'In Stock', and 'Legend'.
- Filter:** A panel on the right side where conditions like 'Is equal to' are applied to columns such as 'Start date' and 'Due date'.

The main data table shows columns for Plan Name, Task Title, Bucket, Progress, Assigned to, Start date, Due date, and PercentComp. The 'Bucket' column is currently set to 'To do'.

5.4 Save current view as Report

Once you have applied required filters and grouping, you can easily save the current view as new custom report by following the steps shown in below image. You can access the custom reports from Report Picker panel.



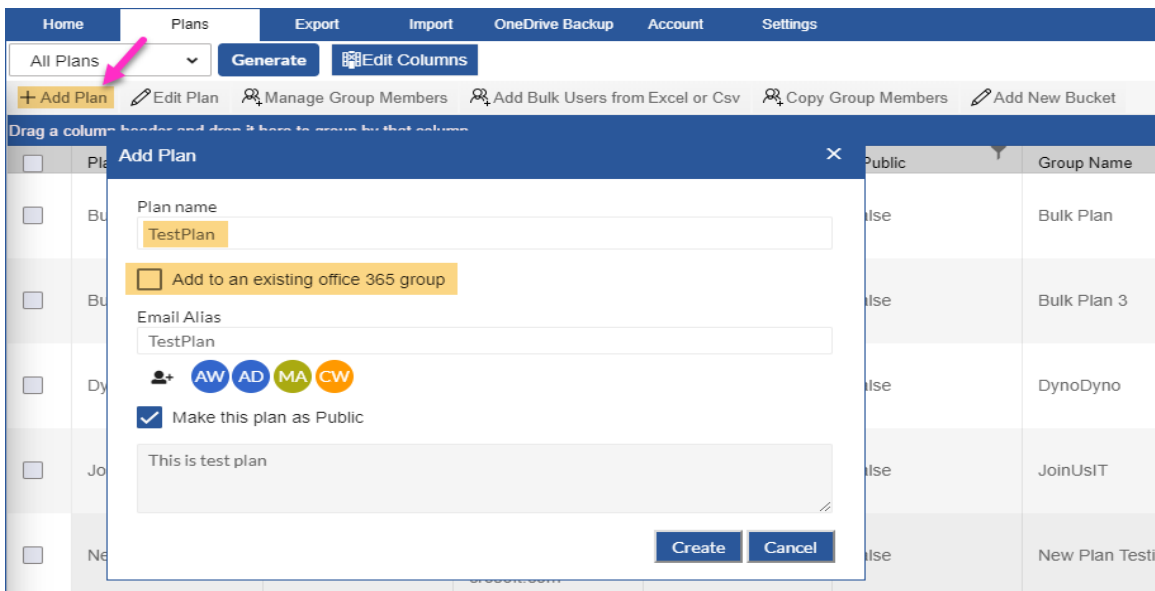
6. Plans

6.1 Reports

You can generate All Plans and All Groups report.

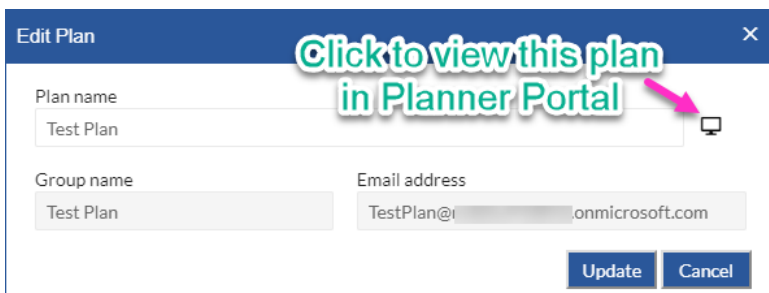
6.2 Add Plan

You can create new plan with new group, and you can also create new plan in existing group.



6.3 Edit Plan

Select a single plan and click **Edit Plan** button, currently this tool supports only to rename the plan. To view and edit more Plan settings, you can click the button as shown in below image (View in Planner portal), it will open the selected plan in Planner web portal and you can update required settings from portal.



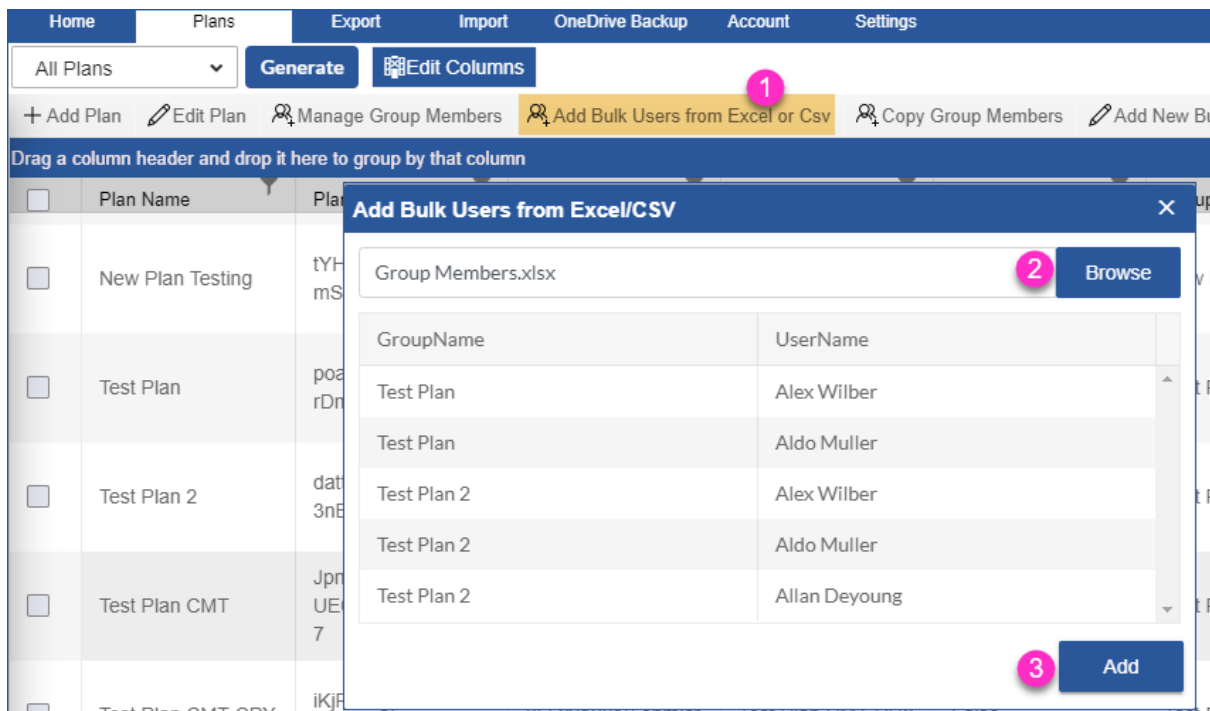
6.4 Manage Group Members

You can add or remove multiple users in selected plan's associated group. This action supports multiple plans update.

The screenshot shows the 'Manage Group Members' interface. At the top, there are navigation tabs: Home, Plans, Export, Import, OneDrive Backup, Account, and Settings. Below these are buttons for 'Generate' and 'Edit Columns'. A dropdown menu shows 'All Plans'. The main toolbar includes '+ Add Plan', 'Edit Plan', 'Manage Group Members' (highlighted with a pink circle '2'), 'Add Bulk Users from Excel or Csv', and 'Copy Gro'. Below the toolbar is a table with columns 'Plan Name' and 'Plan'. The table contains several rows, with 'Test Plan' and 'Test Plan 2' selected (indicated by blue checkmarks and a pink circle '1'). A modal window titled 'Update Members in Selected Groups' is open, showing two sections: 'Members to add:' (with a pink circle '3') containing 'Alex Wilber' and 'Allan Deyoung', and 'Members to remove:' containing 'Cameron White'. At the bottom of the modal are 'Update' and 'Cancel' buttons, with a pink circle '4' next to the 'Update' button.

6.5 Add Bulk Users from Excel or CSV

Using this action, you can add bulk users as member of existing groups. Your Excel or CSV file should include the column header "UserName", the column "GroupName" is optional, if your file does not include GroupName, then the tool asks you to choose the target group.



6.6 Copy Group Members

You can easily copy group members from one group to another group.

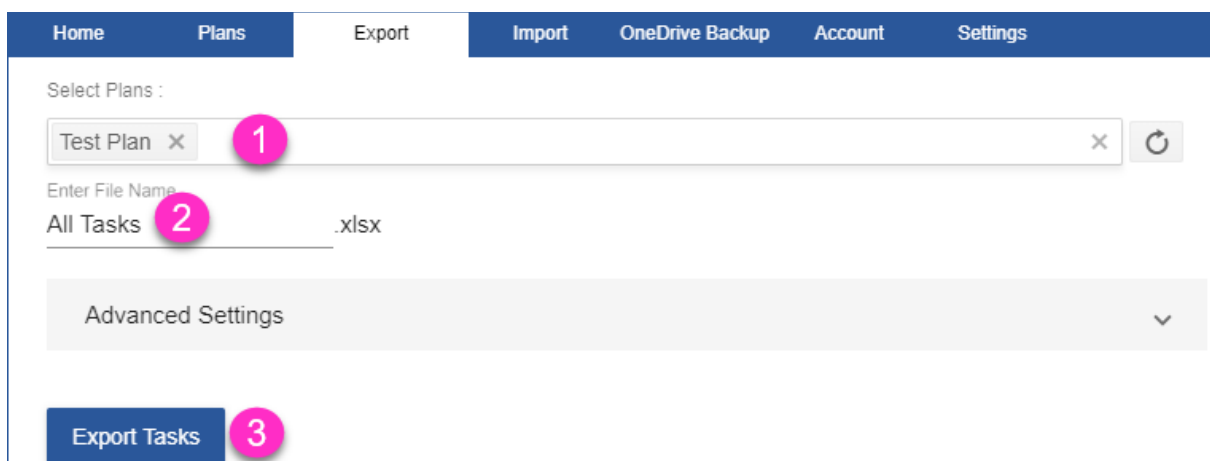
6.7 Add New Bucket

This action allows you to create a new bucket in the selected plans.

7. Export Tasks

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

- Export includes Task Title, Progress, Bucket, Start date, Due date, Labels, User assignments, Checklist, Attachments, Comments, Custom Fields, Task Dependencies, WBS (Work Breakdown Structure) and more...
- You can export user assignments, checklists, attachments and comments as separate Tab in Excel file.



7.1 Export Plan as Template

For repetitive project, you need 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 Apps4.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	ogn9RehL(1b1isN4-Hkq1	{ "Alex W	
2	Test Plan	TT2 Sub Task 1	Sub Tasks	NotStarted		2018-06-15T	2018-06-27	Orange:3		1.1	Sss	3	Automatic	95t_NtxiuF1b1isN4-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	sK5AJWl0k1b1isN4-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	BOtV7tAJN1b1isN4-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	HgGNvkmT1b1isN4-Hkq1	{ "Alex W	
8	Test Plan	Test Task 3	To do	NotStarted	Allan Deyoung	2018-06-27T	2018-07-07	Pink:1		8			Automatic	JPzjQwHQ1b1isN4-Hkq1	{ "Allan D	

8. Import Plan Template (Excel tasks)

You can export required Plan and Task details to Excel file and keep this file as Template (Refer section 7. **Export Tasks**). During Excel import, you can pick this template Excel file and Planner Manager will create new Plan and create Buckets and Tasks and add users to Plan and assign tasks for them.

You can import following Plan details from Excel:

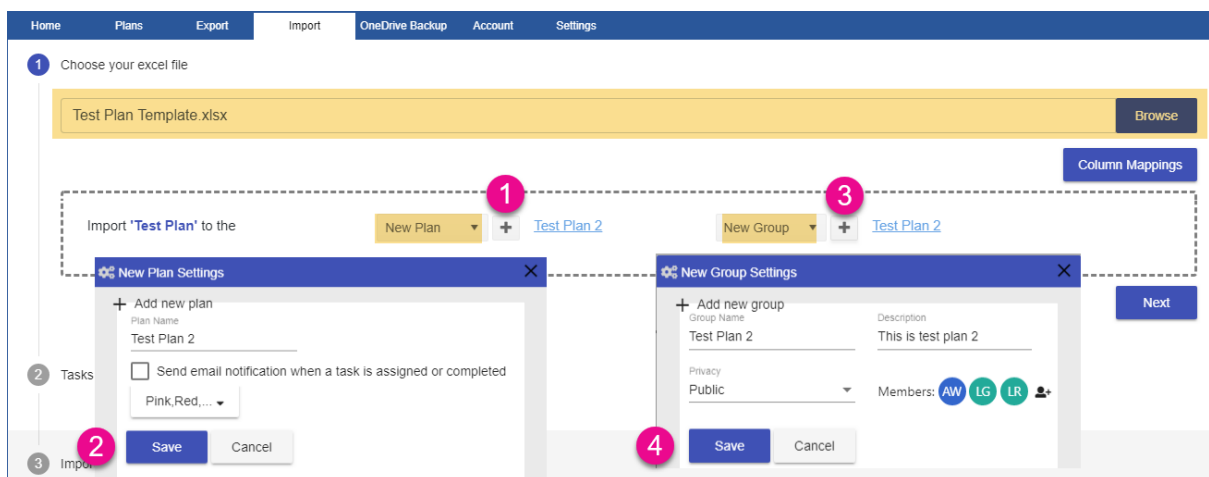
- Buckets
- Labels
- Plan Members

You can import following Task details from Excel:

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

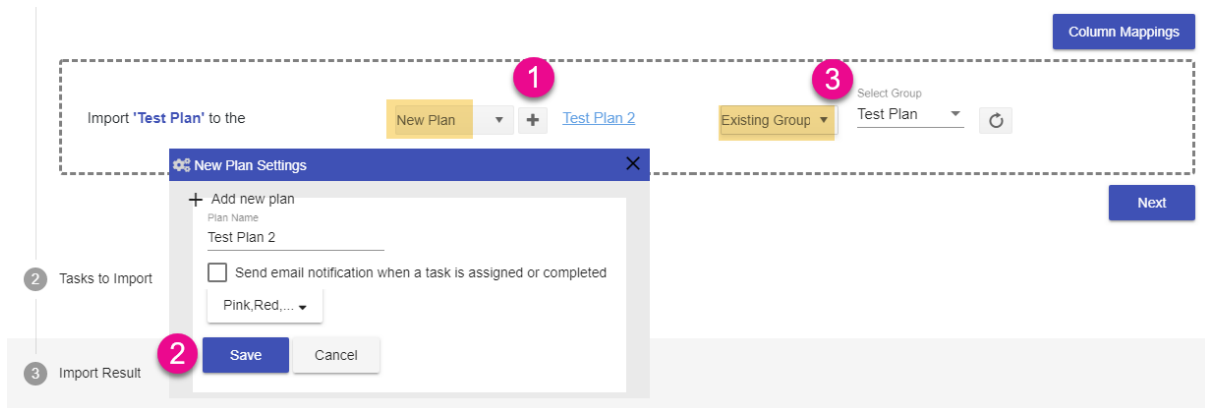
8.1 Import tasks into New plan in New group

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



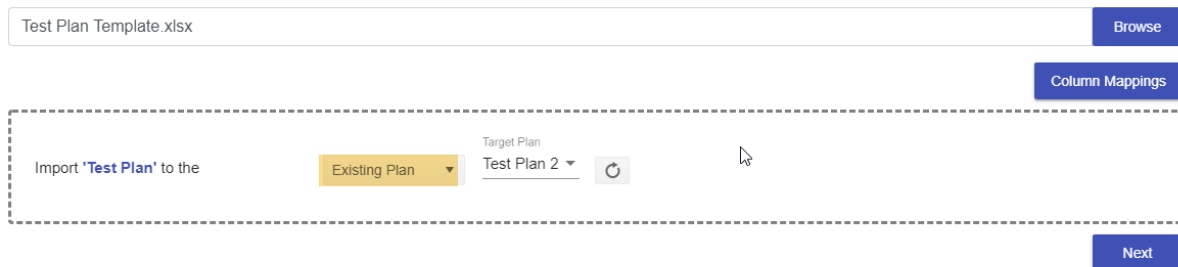
8.2 Import into New plan in existing group

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



8.3 Import tasks into existing Plan

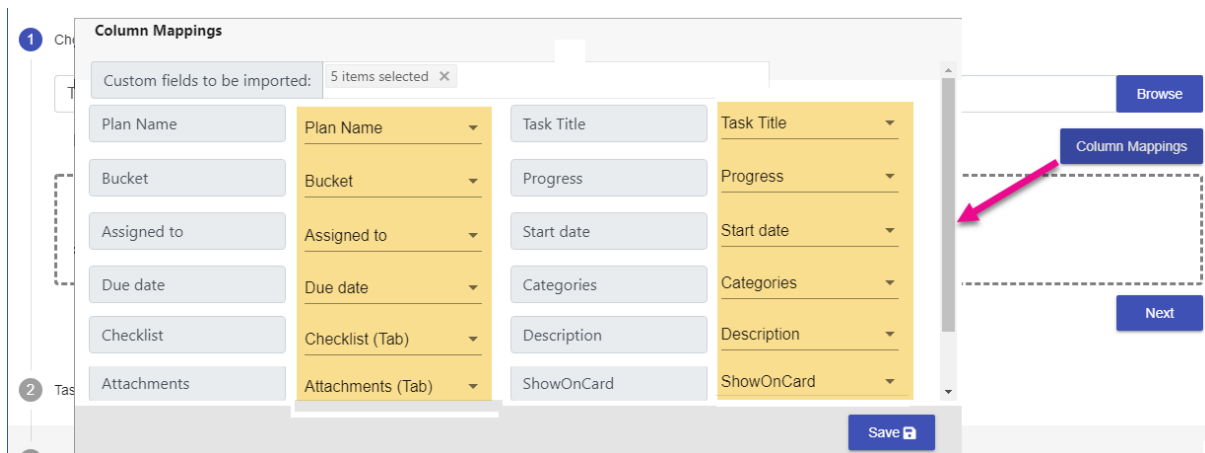
Instead of creating new plan, you can also import all your Excel tasks into existing Planner plan.



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

8.4 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.



8.5 Update existing Planner tasks using Excel file

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.

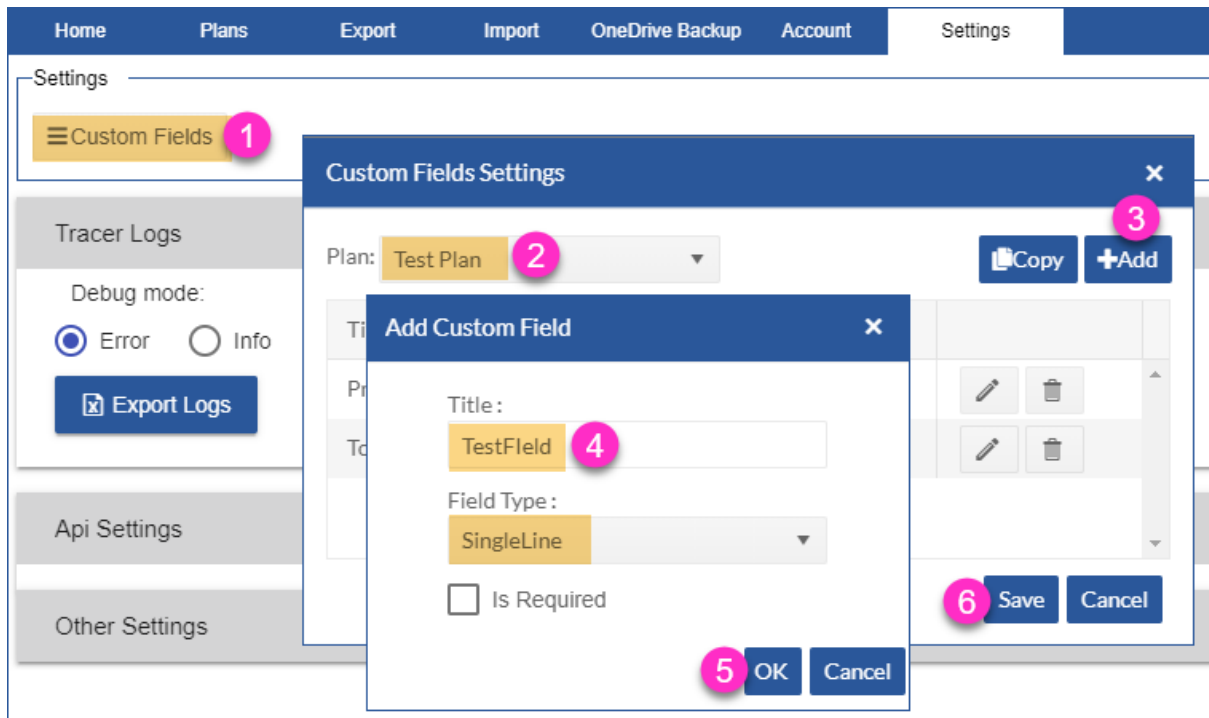
8.6 Copy Task attachment file from old Plan’s SharePoint site to new Plan’s SharePoint site

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 should have signed-into Graph API account under Account tab.

9. Settings

9.1 Custom Field Settings

To set custom values in Planner tasks, first you need to create required Custom Fields in required plans. The custom fields are unique to specific plan, if you want to use same fields in multiple plans then you need to create (or copy) fields in every plan.



Note: The tool will create a Planner task with the name “Apps4.Pro Settings” in the particular plan and save the custom field settings in this task. You should not delete or edit this task to keep the custom field settings. If you delete this task, you won’t lose the custom field values that you have configured in the individual tasks, but the custom field settings will be removed, and you need to re-create the fields in this case.

9.2 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@jijitechnologies.com to get more help for your problem.

9.3 Date & Time Format

You can set your own Date & Time display format as shown in below image. Based on this setting, the datetime value will be displayed in Report grid, Add and Edit task window.

