Apps4.Pro Planner Manager

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1.Prolusion

Apps4.Pro Planner Manager is an effective app to manage Microsoft Planner easily. This desktop app saves time for manager and makes an easy way to create tasks from Excel import, generate Gantt chart for planning and analyzing status, share task details to user who is not a member of the Group and to create sub tasks and custom fields for Planner Tasks. This manual helps you with the steps to install the app and initial configuration to get started easily.

2.System Requirements

Windows 7 and above.

3.Installation

Step 1: Download Apps4.Pro Planner Manager from http://apps4.pro/planner-managerdownload.aspx

Step 2: After completing the download, double click on the downloaded setup to start installation. The below screen will appear. Click Run to continue.

Open File - Security W	arning
Do you want to rur	n this file?
Publisher: Type:	\Downloads\Apps4Pro-PlannerManger_2210.exe <u>JUI TECHNOLOGIES PRIVATE LIMITED</u> Application C:\Users\jijiuser\Downloads\Apps4Pro-Planner
potentially ha	opening this file

Fig 3.1. Security Warning

Step 3: Apps4.Pro Planner Manager Setup Wizard window will appear. Click Next.



Fig 3.2. Apps4.Pro Planner Manager Setup Wizard

Step 4: Read the End User License Agreement and accept it to proceed further.

Apps4.Pro Planner Manager Setup	×
End-User License Agreement	
Please read the following license agreement carefully	3
JIJITECHNOLOGIES LICENSE TERMS	^
These license terms are an agreement between JiJiTechnologies and you. Please read them. They apply to the software "Apps4.Pro" you are downloading from apps4.pro, which includes the media on which you received it, if any. The terms also apply to any JiJiTechnologies	*
1 O I accept the terms in the License Agreement	
I do not accept the terms in the License Agreement	
Apps4.Pro	
< Back Next > Can	cel

Fig 3.3. End-User License Agreement

Step 5: This wizard ensures that Apps4.Pro Planner Manger will be installed on your computer. Click Next.

🕢 Apps4.Pro Planner Manager Setup	×
Select Required Components for Installation	2
Apps4.Pro Planner Manager	
Apps4.Pro < Back Next > C	Cancel

Fig 3.4. Select Required Components for Installation

Step 6: Now click Install button to start installation process.

Apps4.Pro Planner Manager Setup	×
Ready to Install	
The Setup Wizard is ready to begin the Apps4.Pro Planner Manager installation	2
Click "Install" to begin the installation. If you want to review or change any of your installation settings, click "Back". Click "Cancel" to exit the wizard.	
Apps4.Pro < Back Install Ca	ncel

Fig 3.5. Ready to Install

Step 7: Installation in progress.

	lanner Manager Setup Apps4.Pro Planner Manager
	ait while the Setup Wizard installs Apps4.Pro Planner Manager、This may eral minutes.
Status:	Extracting files from archive
os4.Pro	
	< Back Next > Cancel

Fig 3.6. Installing Apps4.Pro Planner Manager

Step 8: Once completed click Finish



Fig 3.7. Completing the Apps4.Pro Planner Manager Setup Wizard

Step 9: Apps4.Pro Planner Manager is successfully installed on your computer.

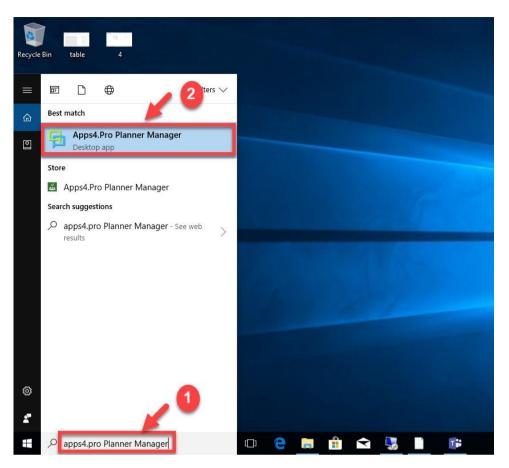


Fig 3.8. Desktop

4.Getting Started

Step 1: Double click on the shortcut icon of Apps4.Pro Planner Manager in your desktop to start the app.



Fig.4.1. Apps4. Pro Planner Manager

Step 2: Enter the username and password.

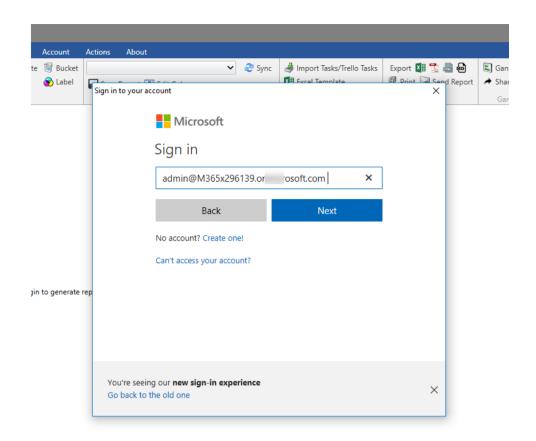


Fig.4.2. Sign in

Step 3: Manage Plans.

Here you need to select the plans which you would like to manage using this app. You can able to perform all actions from this app for the plans that are selected here.

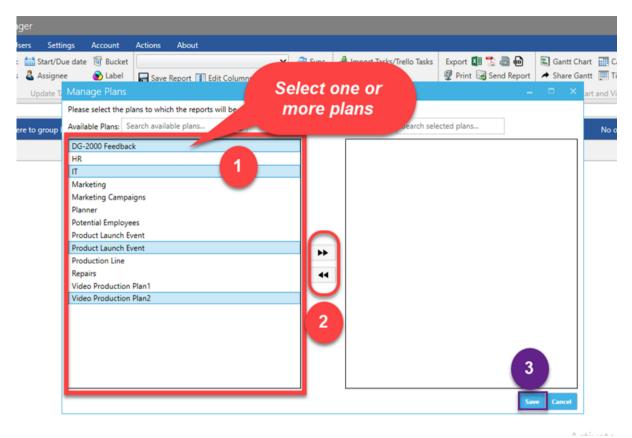


Fig.4.3. Manage Plans

Step 4: Sync in Progress

Now the app will start sync the Planner tasks to Apps4.Pro. Once the sync process is completed, you can start using the app.

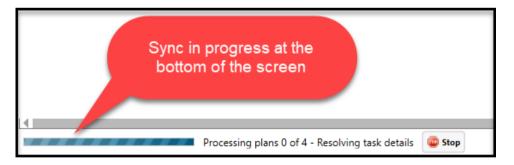


Fig.4.4. Sync in Progress

Step 5: Report

lom	e Plan Te	emplate U	sers Settings Acc	ount	Actions About					
Ne			-	Bucket			✓ 2 Sy	nc	Import Tasks/Trello Task	
De	elete 📲 Move	Progress	🕹 Assignee 🛛 🕥	Label	Save Report 🕕 Edi	it Ca	olumns		Excel Template	
	Tasks		Update Tasks			Re	eport		Import	
All T	asks ×									
rag	a column header	and drop it he	ere to group by that colun	nn						
	Plan Name	۲	Task Title	т	Bucket	T	Progress	۲	Assigned to	
	DG-2000 Feedb	ack	Update Spec		3D Printer Integration		InProgress		Lidia Holloway	
	DG-2000 Feedb	ack	Flash Placement		Design Ideas		InProgress		Johanna Lorenz	
	DG-2000 Feedb	ack	Review Color Palette		Design Ideas		NotStarted		Lidia Holloway	
	DG-2000 Feedback		Explore Lens Filter Types		Design Ideas		InProgress		Irvin Sayers	
	DG-2000 Feedb	ack	Raw Materials for New Product Ordered		Materials and Packaging		Completed		Megan Bowen	
	DG-2000 Feedb	ack	QA/Testing of spec Draft	t 1	Spec Review		Completed		Jordan Miller	
	DG-2000 Feedb	ack	Production Line Test		Operations		Completed		Megan Bowen	
I,	DG-2000 Feedb	ack	Purchase New Tooling Equipment		Operations Completed		Completed		Megan Bowen	
	IT		IT Training Plan		Backlog		InProgress		Megan Bowen	
	п		Feature request: Tint Control		Backlog NotStarted		NotStarted		Megan Bowen	
	п		Check toggles in server	room	Low priority		InProgress		Alex Wilber	
	п		Workplace Innovation R	eport	Low priority		InProgress		Alex Wilber	
	IT		Assign licenses to new h	nire	Medium priority		NotStarted		Henrietta Mueller	

Fig.4.5. Report

5.Menu/Ribbon

5.1. Home

Home Pla	n Template	Users	Settings	Account	Actions About					
🕂 New 🔹 👗 Delete 🗗					All Tasks	🗙 🍣 Sync	Import Tasks/Trello Tasks Import Tasks/Trello Tasks	Export 🕼 📆 🝶 🖨	Gantt Chart Galendar	Custom Fields
Tasks		Upd	late Tasks		Report		Import	Export	Gantt Chart and View	Customize

Fig.5.1. Home Ribbon

5.1.1. Tasks

Icons	Description
- New	Create new Planner task
X Delete	Delete Planner task. You can select tasks from multiple plans and delete at once.
🗈 Сору	Copy multiple tasks from one plan to another plan. You can copy tasks from multiple plans at once.
p Move	Move tasks from one plan to another plan. You can select multiple tasks at once from different plans.

Table.5.1.1.1. Tasks

Note:

		Alle	owed	
Icons		Task		Plan
	Single	Multiple	Single	Multiple
💥 Delete	Yes	Yes	Yes	Yes
🗈 Сору	Yes	Yes	Yes	Yes
J Move	Yes	Yes	Yes	Yes

New Task

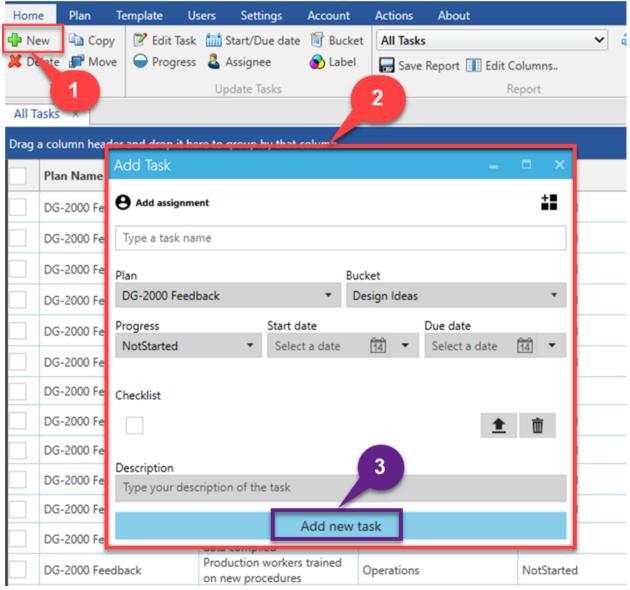


Fig.5.1.1.1. New Task

Manage Category

Promote checklist item to a task

Tip: You will not be able to post comments during task creation. After the task was created, you can double click on it to post the comments.

Dele	ete task								
–	прр <u>з</u> т.но н		inagei						
Hom	e Plan	Template	Users	Settings	Account	Actions	About		
🛟 Ne	ew 📄 Copy	📝 Edit	Task 🛄	Start/Due date	🗑 Bucket	All Tasks		~	ಿ Sync
🔀 De	elete 🗗 Move	🗕 🝚 Prog	ress 💄	Assignee	😙 Label	- Save	3 Edit	Columns	
-	asks		Up	odate Tasks				Report	
All Ta	ask								
Drag			nfirma	tion					×
Diago		and and							
	Plan Name								
	DG-2000 Feed	back	?	Are you	sure you	u want to	delete sel	ected 5 tasks?	
	DG-2000 Feed	back							
~	DG-	back				_			_
~	DG- d	back				۲ ۱	es	No	
~	JG-2000 Feed	back	Equi	pment	ing (Operations		Completed	
~	п		IT Tr	aining Plan	I	Backlog	4	InProgress	
~	п		Feat	ure request: Tir	nt Control	Backlog		NotStarted	
	п		Cheo	k toggles in se	erver room	Low priority		InProgress	

Fig.5.1.1.2. Delete Task

Copy task

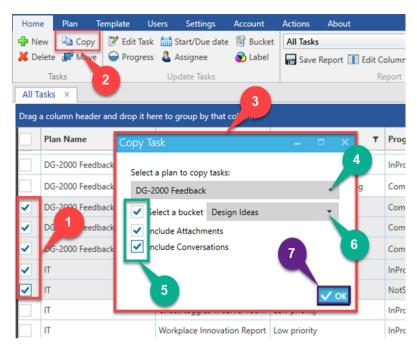
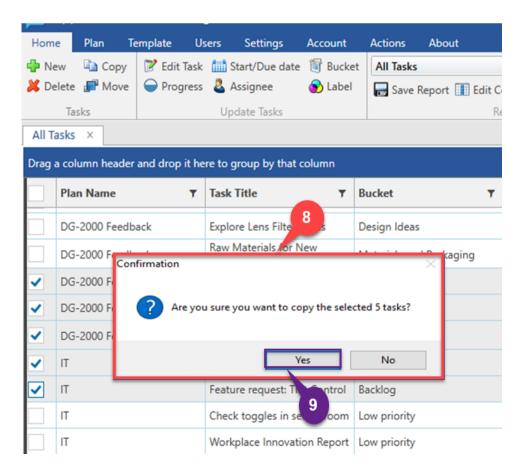


Fig.5.1.1.3. Copy task

Tip: You can copy the task with attachments and conversations by selecting the checkboxes.



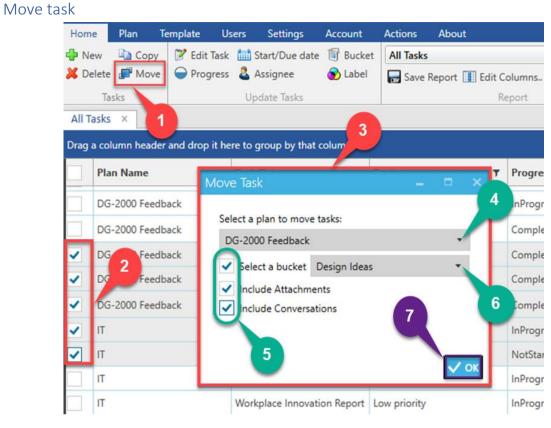


Fig.5.1.1.4. Confirmation

Fig.5.1.1.5. Move Task

Tip: You can move the task with attachments and conversations by selecting the checkboxes.

Home	e Pla	an Te	mplate	Users	Settings	Account	Actions	About
🛟 Ne		Сору		-	Start/Due date		t All Tasks	
👗 De	elete 🚛	Move	- Progre	ess 👗	Assignee	😵 Label	ave	Report 🔳 I
	Tasks			U	pdate Tasks			
All Ta	asks ×							
Drag a	a colum	n header a	and drop it	here to	group b 8 c	olumn		
	Plan N	ame		Task	Title	T	Bucket	_
	DG-20	Confirma	tion					×
	DG-20	0	Arevou	CUTA V	ou want to mo	ve the cele	cted 5 tacks	ing
~	DG-20	4	Aleyou	i sure ye	ou want to mo	ve the sele		
~	DG-20							
~	DG-20				Ye	s	No	
~	п			IT Tr	aining Plan		Backlog	
✓	IT			Feat	ture request:	ntrol	Backlog	
	IT			Che	ck toggles in se	rver room	Low priority	
	IT			Wor	kplace Innovatio	on Report	Low priority	

Fig.5.1.1.6. Confirmation

5.1.2. Update Tasks

lcons	Description
Edit task	Update task details / post comment for the task
Progress	Update the current state of the task
Start/Due Date	Update the start and due date of the task. You can also add /
	deduct the dates based on numbers.
Assignee	Used to update the assignee.
Bucket	Used to update the buckets.
😧 Label	Used to set the label for the tasks.

Table.5.1.2.1. Update Tasks

Note:

Certain actions can be performed only for single task / tasks in a single plan. Below chart lists down those details.

Actions	Т	ask		Plan
	Single	Multiple	Single	Multiple
🖉 Edit task	Yes	-	-	-
● Progress	Yes	Yes	Yes	Yes
tart/Due Date	Yes	Yes	Yes	Yes
Assignee	Yes	Yes	Yes	-
Bucket	Yes	Yes	Yes	-
📀 Label	Yes	Yes	Yes	Yes

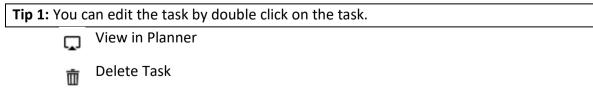
Table.5.1.2.2. Note for Update Tasks

Edit Task

Hom	e Plan T	emplate Users	Settings Acco	unt Actions	3 out	
P Ne			🖞 Start/Due date 🏾 🛐 B	lucket All Ta		~
🗶 De	elete <table-cell-rows> Move</table-cell-rows>	Progress	Assignee 🚯 L	abel 🔲 🔒	ve Report 🚺 Edi	t Columns.
	Tasks 2	Update	Task		-	
All T	asks			+	ti 🖵 🚺	Save
Drag	a column header	and di	sk name			
	Plan Name	QA/Test	ing of spec Draft 1		4	
	DG 1 eedb	+ 1 Jordan	n Miller	A	ssigned by Lidia I	Holloway ss
	DC and Feedb		Bucket	Progress	statements where the same	e date
~	DG-2000 Feedb	DG-200	Spec *	Corr 🔹	14 -	ā ▼ ed
	DG-2000 Feedb	ack Checklist	/Sub-tasks			ed
	DG-2000 Feedb	ack A	dd new item		ेंच 🟦	d ed
	IT	Descriptio	on			s
	IT		ur description of the ta	sk here		ed
	IT					s
	IT					is
	IT					ed .
	IT	Attachme		ere, you the com		s
	IT	0 Att	tach	the com	ments	55
	IT					55
	п	Commen	ts fice move planning	To do		InProgress
-1	т	Da	maged network cable	To do		NotStarted

Fig.5.1.2.1. Edit Task

Home	Plan Template U	sers 2 :ttings	Account		About		
🕂 New 🛛	🗈 Copy 📝 Edit Task	Start/Due date	🗑 Buck	3 Tasks			
样 Delete 👔	Move Orogress	& Assignee	🕤 Lab	ave Save	Report 🔳 E	dit C	olumns
Task	Update Task			_	□ ×	Re	eport
All Tasks	+ Jordan Miller		Assigned	by :Lidia Ho	lloway 🔺		
Drag a colur	Plan Buc	lut Durana	Charles de				
Plan		ket Progress e • Cor •	Start da	te Due ▼ 14		٣	Progress
DG-2	Checklist/Sub-tasks				- 1		InProgres
DG-2	Add new item		E:	1	İ		Complete
✓ DG-2							Complete
DG-2	Description Type your description	n of the task here			- 1		Complete
1 .2	Type your description	for the task here					Complete
Π							InProgress
п							NotStarte
п	Attachments						InProgres
п	🛛 Attach 😋	P Link	4				InProgres
п				_			NotStarte
п	Comments						InProgres
П	Type your message h	ere			5		InProgress
🗌 п					41		InProgress
п			-		Post		InProgress
IT		Damaged network		lo do			NotStarte
		Fig.5.1.2.2. Post	comment				



Promote checklist item as subtask

Progress

Home	2	Plan	Template	Users	Settings	Account	Actions	About	
🕂 Ne	w	Co	py 📝 Edit	Task 🛄	Start/Due dat	e 🧃 Bucke	t All Tasks		
样 Del	lete	尸 Mo	ove 🝚 Prog	ress 🚨	Assignee	📀 Label	ave	Report 🚺 Edit C	olun
	Task	(S		U	pdate Tasks			R	epor
All Ta	isks	×		2					
Drag a	ı colu	mn he	ader and drop	it here to	group by that	t column			
	Plan	Name		▼ Tasl	c Title	3 🔻	Bucket	т	Pro
	DG-2	2000 Fe	edback	Expl	ore Lens Fiiter	r Types	Design Ideas		InF
	DG-2	2000	Update Pro	gress		-	• ×	Packaging	Co
~	DG-2	2000	NotStar	ted	4 s	elect ar	IV IV		Co
~	D			ess		one			Co
~	Г <i>3</i> -2	000	Comple	ted				5	Co
~	п							~	InF
~	IT						🗸 ок		No
-	IT			Che	ck toggies in s	server room	Low phoney		InP
	IT			Wor	kplace Innova	tion Report	Low priority		InF
	IT			Assi	gn licenses to	new hire	Medium pric	ority	No

Fig.5.1.2.3. Update Progress

Hom	e Plan	Template	Users	Settings	Account	Actions	About		
Ne	ew 🗈 Co	py 📝 Edit	Task 🛄 S	start/Due date	Bucket	All Tasks		~	2
6 De	elete 🗊 Mo	ove 🝚 Prog	ress 🚨	Assignee	🕤 🕤 Label	ave F	Report 🚺 Edit C	Columns	
	Tasks		Up	date Tas 2			R	leport	
All Ta	asks ×			6					
)rag a	a column he	ader and drop	it here to g	group by that	column	3			
	Plan Name		Task	Title	Ţ E	BU	Ŧ	Progress	
	DG-2000	Update Star	t and D	ue date			-	- ×	
	DG-2000				(4			
/	DG-2000	Start date :	Use ex	isting value	ी 🗸 Use	existing valu	e + Add 0	days.	
/	DG-2000					-			
/	D 1 DO	Due date :	Use et	disting value	4 Use	existing valu	e + Add 0	🗘 days.	5
/									-
,	п							✓ OK —	
~	п		Chec	k toggles in se	erver room L	ow priority		InProgress	
-									

Start/Due Date

Fig.5.1.2.4. Update Start and Due Date

Tip: Here, you can update new dates or you can add or deduct days from an existing date.

Assignee

Hom	e Plan		Users	Settings	Account	Actions	Abo
中 Ne	ew 🗈 Cop elete 🗗 Mo	-		rt/Due date signee	Bucket	All Tasks	Report
	Tasks			ite Tasks	3		apon
All T	asks ×						
Drag	a column hea	_{der anc} Updat	e Assigr	nee		×	
	Plan Name	✓ F	Remove all	users from	assignment	t	
	DG-2000 Fe	edback Sea	rch user		s	elect the	
	DG-2000 Fe	edback All us	ers:	4	7 ~	users	ack
~	D 1 Fe		Administ	rator		A leview	
~	G-2000 Fe	edback Alex	Wilber			tions	
~	DG-2000 Fe	edback	@M365x29 a Berger	6139.OnMicros	oft.com	tions	
	IT		-	96139.OnMicro	soft.com		
	п		Fernandez @M365x296	: 139.OnMicroso	oft.com	5	
	ІТ				_	riority	
	ІТ				\checkmark	OK riority	
	П		Assign	licenses to n	ew hire	Medium pric	ority
	П		Vendor	access to da	ata	Medium pric	ority

Fig.5.1.2.5. Update Assignee

Tip: All Users List down all users of the Plan

Bucket

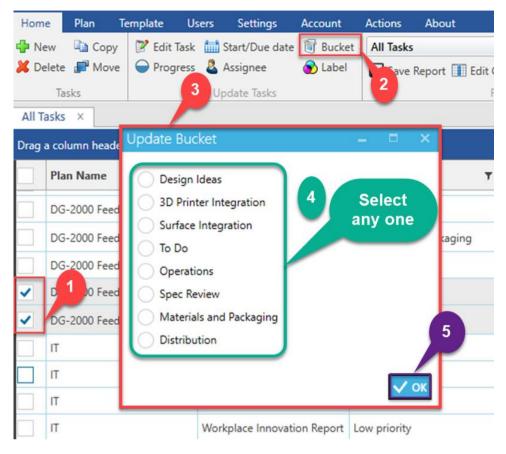


Fig.5.1.2.6. Update Bucket

Label

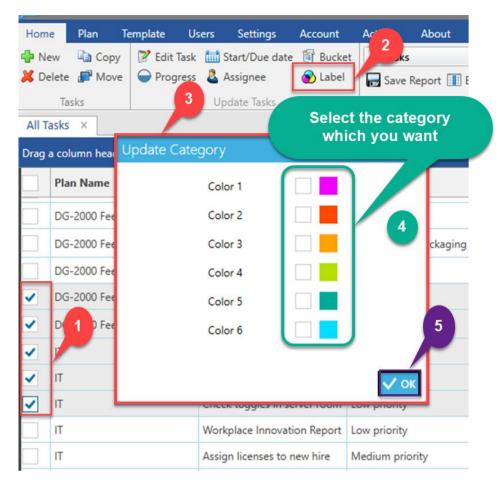


Fig.5.1.2.7. Update Label

5.1.3. Reports

Icons	Description
area Sync	Sync Planner tasks to the app database in your computer.
	Edit the required changes (Edit columns, Group by, Filter) to the report and save as new report.
Edit columns	Add / remove tasks fields as columns to reports.

Table.5.1.3. Reports

Report

	Actions	About							
t	All Tas	ks	~	🔁 Sync	Import Tasks/Trello Tasks	Exp	ort 💵 🕵 📾 <table-cell></table-cell>	属 Gantt Chart	Cale
									×ne
	Gene	eral	4						
	All	Tasks		All Tasks	with Filter		All Tasks by Plan		200
	1	Tasks with Start and	Due date	All Tasks	by Bucket		All Tasks by Assignee		
Bu	All	Tasks by Assigner							_
Di	Usag	e and Statistics							
Di	Me	mbers with their task	cs(All tasks)	Member	s with Unfinished tasks		Top N Members with U	nfinished tasks	
M	Тор	N Busy Members in	next N days	All Unas	signed tasks		Buckets with their tasks	;	
M	Pla	ns with their overdue	tasks	All over	lue tasks		Tasks with no Due Date	•	
Sp									
-	Cust	om Reports							
Sp Sp	L Mu	task	×						
Sp	ec Revie	ew	NotStarted		Grady Archie	15-0	1-2018	08-12-2018	

Fig.5.1.3.1. Report

Actions	Description
General	
All Tasks	Reports all tasks across all plans in a single view.
All Tasks with Filter	Reports all tasks filtered by plan, bucket and assignee.
All Tasks by Plan	Reports all tasks filtered by Plan
All Tasks with Start and Due Date	Reports all tasks filtered by start and due date.
All Tasks by Bucket	Reports all tasks filtered by bucket.
All Tasks by Assignee	Reports all tasks filtered by task assignment
All Tasks by Assigner	Reports all tasks filtered by person who assigned the task
Usage and Statistics	•
Members with their tasks (All	Reports members with their task count for selected
Tasks)	plans.
Members with Unfinished Tasks	Reports you the In progress task count against each
	member from the selected plans.

Top N members with unfinished	Reports you the top N members with tasks that are in
tasks	progress. Here, N is selected by you.
Top N Busy Members with in next	Reports you the users with most tasks for next N days
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.
Tasks with no Due Date	Reports you the tasks from all plans that has no due date
	set
Custom Reports	·
It contains the report which is saved	d by you.

Table.5.1.3.1. Task Reports

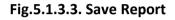
Sync

Hor	ne <mark>Plan T</mark> e	emplate l	lsers Settings	Account	Actions	About			
	lew 🛯 🗋 Copy	📝 Edit Tasl	c 🛗 Start/Due da	te 🧃 Bucket	t All Tasks		•	🖌 🍣 Sync	im 🍓
6	elete 📲 Move	Progress	s 🤱 Assignee	🚯 Label	ave R	eport 🔳 Edit C	olumns		×≣ Ex
	Tasks		Update Tasks			R	eport	1	
All '	Tasks × All	Tasks with Fil	ter × All Tas	ks ×					
				1					
rag	a column neader	and drop it n	ere to group by tha	it column					
	Plan Name	т	Task Title	Ŧ	Bucket	T	Progress	T	Assig
	DG-2000 Feedb	ack	Sales and Distribu Channels Confirm		Distribution		NotStarted		Isaiah
3	DG-2000 Feedb	ack	Product Pricing E and Approved	stablished	Distribution		NotStarted		Prade
	DG-2000 Feedb	ack	Press Release Rea Publication	dy for	Distribution		NotStarted		Mega
	DG-2000 Feedb	ack	Draft Package De	isgn Test I	Sync i	n ^{ing}	NotStarted		Alex V
	DG-2000 Feedb	ack	Promotional mate	erials rea	progres		NotStarted		Mega
			Review Litware's						

Fig.5.1.3.2. Sync

Save Report

Home	Plan	Template	Users	Settings	Account	Actions Ab	out		Same y	
New	Сору	📝 Edit Ta	sk 🛄	Start/Due date	🗑 Bucket	All Tasks		~	😂 Sync	Import Tasks
🕻 Delete	e 💕 Move	e \varTheta Progre	iss 🚨	Assignee	🕤 Label	ave Report	rt 🔳 Edit C	olumna		Excel Templa
Ta	asks		Up	odate Tasks			R	eport		Impo
Drag a co	olumn heade	er							, you can saved re	
Pla	an Name			d to sa ur repo		t	Ŧ	Prog.	saveure	
	an Name 3-2000 Feed				rt	et D Printer Integra			-	Lidia Holloway
DO		lback	yoı		rt	e t 20 Printer Integra Design Ideas		Prog		
	3-2000 Feed	lback lback	you Flash	ur repo	rt			Prog.		Lidia Holloway
	3-2000 Feed 3-2000 Feed	lback lback lback	YOU Flash Revie	ur repo	rt	Design Ideas		Prog. InProgress InProgress	baveu le	Lidia Holloway Johanna Lorenz



Edit Columns

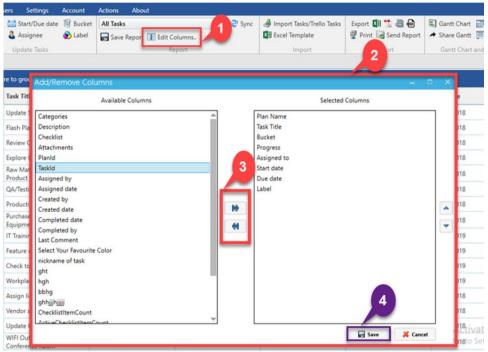


Fig.5.1.3.4. Edit Columns

5.1.4. Import

Icons	Description
3	Users to import an excel template or Trello excel.
Excel Template	Used to export an excel template.

Table.5.1.4. Import

Import Tasks/ Trello Tasks

Home	Plan	Templat	e Us	iers	Settir	ngs	Account	1	Actions	Abo	ut										
New	Сору	1 1 E	dit Task		Start/Du	e date	🗃 Buc	ket	All Tasks	s with	Filter				~	2 Sy	rnc	🕹 lm	port Ta	sks/Tre	ello Ta
Delete	J Move	e e	^o rogress	2	Assignee	e	🕤 Lab	el	- Save	Repor	t 💷 I	Edit Co	olumns					X E F .	el Tem	plate	
Tas	sks			U	pdate 2	sks						Re	port					U	Im	port	
II Tasks	with Filter	×	All Tas	ks		Tasks	with Filt	er	< Тор	N Bus	y Me	mber	s in ne	xt N d	ays	× /	All Tasl	us ×	Al	l Tasks	with
Select an Excel or Tin	ello's ISON file		Browse ♥	Downloa	ad Samples		ģ							6							
Plan Name Task Titl	le Bucket Progre	ss Assigned t	Start date Due d	ete Cate	gories Cheo	ownload Sample ownload Sample	e Excel file e Trello's Excel file	Planid	Import Task Select an		ISON File CI	Users\jijuser7	AppDataliLocal	UI Brow	/se ♥ E	lownload Sam	ples ¥			¢ /	. C
			harmond and harmon		Dr	ownload Sample	e Trello's JSON file		Plan Name	Task Title	Bucket	Progress	Assigned t	Start date	Due date	Categories	Checkfist	Description	Attachmen	Taskid	Plantd
		Select	t any o	ne	3					Task * Facebook Can Visual Brandir			Allan Deyoun Megan Bower			Cate: * "URGENT:2"," "URGENT:2"	Che: * Prepare cam Paick a date * Initiate preca Discussion w	Define icons, 1	Attac * *E:\A4P\Apps= *E:\A4P\Apps=		Notir •
	_						Ok	Cancel		27		NotStarted	CIE Administr	08-11-2017	15-11-2017	"URGENT:2"		Create market	*Marketing Ca		
port Tasks								- 8	Dnline Marker	Elevator Pitch		NotStarted	Alex Wilber		18-11-2017		"Discuss camp		*Elevator Pitch *https://apps/		
Select an Excel or Tre	elo's JSON file		Browse Y	Downloa Select Exc	ud Samplar, M	-	۵			197			Allan Deyoun				"Discuss camp "Prepare camp		10 N		
lan Name • Task Title			Start date Do		cel template	iptics A	ttachmen Taskid	Planid •	Existing Plan	Existing Task 2	Messaging an	Completed	Megan Bower		29-01-2018	"URGENT:2"	"Paick a date 1 "Initiate preca "Discussion w	Define icons, s	*Sample*,"EiV	IDh_acwbxUG	
Se	lect any	one			ilo's Excel Export file			5			т		utput this			d				OK	8 Cancel

Fig.5.1.4.1. Import Tasks/Trello Tasks

5.1.5. Export

lcons	Description
Export 🚺	Used to export tasks to excel file.
Export 📆	Used to export tasks to pdf.
Export 💦	Used to export tasks to HTML.
Export 👦	Used to export tasks to CSV.
Print	Used to print the report.
Save Report	Used to send the report.

Table.5.1.5. Export

Export

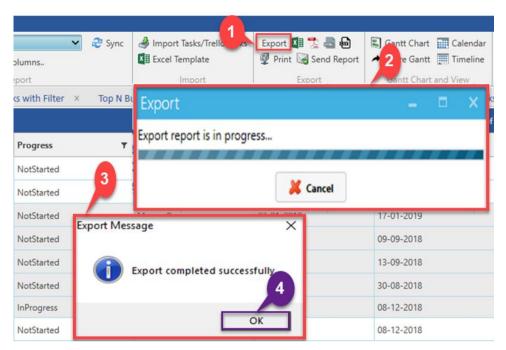


Fig.5.1.5.1. Export

Tip: Here, you can export tasks to Excel, CSV, PDF and HTML

5.1.6. Gantt Chart and View

Icons	Description
Gantt Chart	To view the report in Gantt chart
Share Gantt	To share Gantt chart
Calendar	To view the tasks in Calendar
Timeline	To view the tasks in Timeline

Table.5.1.6. Gantt Chart and View

Gantt Chart

rs Settings	Account Actions About			
📑 Start/Due d	late 🗊 Bucket All Tasks		🗸 🎅 Sync	🦂 Import Tasks/Trello Tasks 🛛 Export 💵 🏂 📾 🚱 🕄 Gantt Chart 📰 Calendar
🚨 Assignee	🕤 Label 🛛 🔚 Save Report 💷 Edit	Columns		🕼 Excel Template 🖉 Print 🐼 Send Report 🛹 Share Gantt 🏢 Timeline 🖉 Custom Fields
Update Tasks		Report	2	3 nport Export Gantt 1 nd View Customize
				3
to group by t	Gantt Chart			_ = ×
ask Title	Filter By ❤ Group By ❤ Show/Hid	e Columns 🗸	2 Refresh	🦷 Visible Range 🛩 Categories 🛩 🏓 Share 🖷 Print
				December, 2017 January, 2018
ales and Distri hannels Confi		Progress	Days Left	23 24 25 26 27 28 29 30 31 01 02 03 04 05 06 07 08 09 10 11 12 13 14 15 16 17 18 1
roduct Pricing		24	351	
nd Approved ress Release R	▼ Design Ideas	33	21	
ublication				Review Color Palette
raft Package [oduction	Review Color Palette	0	18	
nal Package D	Flash Placement	50	20	Flash Placement
pproval ocus Group Re	Explore Lens Filter Types	50	21	Explore L
ackaging	 Surface Integration 	25	21	
A/Testing of S	Adapter Support	50	21	Adapter Support
roduction Tea pproval	Review Litware's Feasibility Report	0	11	Review Litware's Feasibility R
larketing Revi	 Materials and Packaging 	25	225	Task: Adapter Support
esign Team Re				Bucket: Surface Integration
pproval	Raw Materials for New Product O	rc 100	221	AssignedTo: Irvin Sayers Product Ordered Start: 28-12-2017
inal Copy Edit	Draft Package Deisgn Test In Prod	u 0	221	End: 21-02-2018
roduct and de	Final Package Design Approval	0	225	Final Package Design Approval
ata compiled roduction wor	Focus Group Review of Packaging	0	211	
n new proced		1-		
romotional ma	aterials readt To Do	NotStarted		Megan Bowen 15-01-2018 28-11-2018

Fig.5.1.6.1. Gantt Chart

Note:

In Gantt Chart you can perform the below actions,

- Filter By Start date and due date, start date alone, due date alone, start date or due date.
- ➢ Group by − Plan, Bucket, Assigned to, Parent task.
- Show/hide columns Plan, bucket, title, progress, assigned to, start date, due date, days left, parent task.
- Visible Range from start date to end date
- Category Completed, Delayed, Not started, In progress
- Share and print Gantt chart.

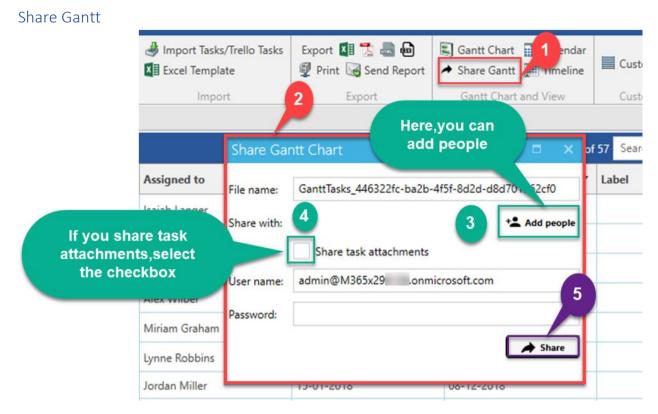


Fig.5.1.6.2. Share Gantt

5.1.7. Customize

Icons	Description
Custom Fields	To add the custom fields for task

Table.5.1.7. Customize

Custom Fields

bout				
	🗸 🤣 Sync	Import Tasks/Trello Tasks	Export 🚺 📜 📾 <table-cell></table-cell>	🕄 Gantt Chart 🔛 Calendar
ort 🔳 Edit	Columns	Excel Template	👰 Print 😡 Send Report	→ Share Gantt
	Report	Import	Export	Gantt Chart and Customize
			2	
				0 of 57 Ser
	Custom Fields Set	tings		× 4
۲	Progr			
	NotSt Plan: DG-2000 Fe	edback 🔻 3	5	Add New Field
	NotSt			
	Title	Туре	Requir	red
		Add Custom Fie	eld – 🗆	
ckaging	Here,select	Title:	6	Here,you
ackaging	your plans	Type custom f	ield name	can give the
ckaging	Notat	Field Type:		field name
	InProc	SingleLine		
		IsRequired		
	NotSt	Iskequired		8
	NotSt		Update	9
	NotSt	Here,you can		
	NotSt	select the		Save Cancel
		field type		
	InProgress	neid type	01-2018	05-12-2018
	NotStarted	bu .	07-01-2018	03-12-2018

Fig.5.1.7.1. Custom Fields

5.2. Plan

5.2.1. Plan

	lcons	Description
4	New Plan	Used to create a new plan.
2	Edit Plan	Used to update the plan.
2	Manage Plan Members	Used to add/remove the members of the plan.
1	Add new Bucket	Used to add a bucket for a plan.

Table.5.2.1. Plan

New Plan

P New Plan 👺 Manage Plan Members 🛛 🗛 🖓		
	🗸 🔁 Sync	Export
🍸 Edit Van 🧃 Add New Bucket 🛛 🕁 Save Report 🏢 Edit Conns		🖞 Print 🟹
1 Plan 2		Ex
All Plans ×		
Drag a column he Create Plan	– = ×	
Plan Plan name:		ublic
Like 'IT Support' or 'Website Redesign'		
DG-2000 Fr		le
HR		P
		-
Members:	+ Add members	
IT Make this plan public: Yes		le
Plan description:		
Add information about your plan for other people to see.		
Marketing	3	e
Create tasks from template:	· /	
	eate Plan Cancel	
Marketing		e
	oduct teams. o the team that	
Planner 96139.onmicrosoft.com the Mark 8.		ſrue

Fig.5.2.1.1. New Plan

Tip 1: Here, you can create the tasks for a plan from template also. **Tip 2:** You can make your plan as private by changing Make this plan public to No.

Edit Plan

Hom	e Plan Templ	ate Users	Settings Ac	count	Actions	About		
1 - A ROW TO DO	ew Plan 🐉 Manage lit Plan 🗑 Add New		All Plans	🚺 Edit	Columns	~ 2	Sync	Export 🕼 🕵 📾 🖗 👰 Print 🥁 Send Report
All P	Plan lans 2				Report			Export
orag	a column header and	drop it here to	roup by that colu	mn				
	Plan	🔻 Mai	Edit Plan					× ,
-	D. Feedback	dg-	Plan name:					
-	DC Feedback	613	HR					
~	HR	hr@ ft.co	Email Address:					
_		ince	hr@M365x2961	39.onmio	crosoft.com			
	п	it@l t.co	Members: Make this plan pr	_	W OB (PF)	107 - 10 I - 10	AD (IL)	😢 🔸 Add members
_		mar	Plan description:					
	Marketing	mic	A group that co	llaborate	s about onb	oarding and	other H	R-related topics.
								Save Cancel
	Marketing Campaigr	ns 2961	59.0nmicrosoff.co		ampaigns to different pro	or the compa duct teams.	ny s	4
	Planner		8ProjectTeam@M: 9.onmicrosoft.com	365x2		the team tha bled to create		ue

Fig.5.2.1.2. Edit plan

Tip: You can edit a plan by double click on the plan.

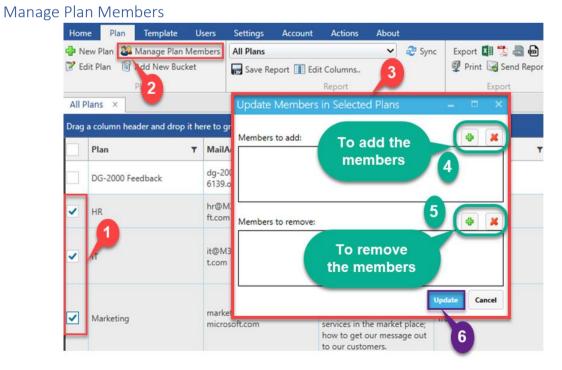


Fig. 5.2.1.3. Manage Plan Members

32

Add New Bucket

Hom	ne Plan	Template	Users	Settings	Account	Actions	About	(
		Add New Bud		All Plans	eport 🚺 Edi	it Columns Report	~	🤁 Syn
	Plans X	eader and drop	it here to g	group by tha	t column	Report		
	Plan		T Mail	Address	3 7	Description	1	Ŧ
~	DG-2000	Feedback		000feedback Iew Bucke		Come here t	-	our Iagship
~	1		Type n	ew bucket n	ame:			ates d other
~	п						ок	lating to ab to IPs for
	Marketing	1		eting@M36 osoft.com	5x296139.on	common pro This group is Marketing! H position our services in th how to get o to our custor	al 4 low to 5 products ne marke our messa	s and t place;

Fig.5.2.1.4. Add New Bucket

5.2.2. Report

Report

Actions	Description
All Plans	Report of all plans.
Private Plans	Report of all private plans.
Public Plans	Report of all public plans.
Plan Buckets	Reports you the buckets of the plan.

Table.5.2.2. Plan Report

Edit Columns

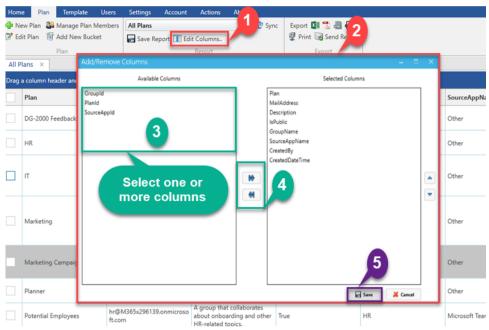


Fig.5.2.2.1. Edit Columns

5.3. Template

5.3.1. Task Template

Icons	Description
Create Template	Used to create new template.
Import Template	Used to import the saved template.

Table.5.3.1. Task Template

Create Template

Home	Plan	Template	Users	Settings	Account	Actions	About			
🕂 Create	Template	Save	Excel Temp	late All	Template Tas	sks		~	🍣 Sync	Export
Impor	t Tomplate	e 🤳 Impoi	rt Excel Ter	nplate 🕞	Save Report	Edit Colu	umns			👰 Print 📓
Task Te	mp 1	Exce	el Template	2		Rep	ort			E
All Temp	olate rask	s ×								
Drag a co	lumn head	der and drop	it here to	group by that	t column	1				
							2			
			C	reate Temp	olate from	Plan			- ×	
				inclute herry						
			S	elect a plan:	DG-200	00 Feedback		•	C	
			- 1		Inclu	de Complet	ed Tasks			
				Create nev	v template	Add to e	xisting tem	plate		
			T	emplate nam	e: Type no	ew template	name]	
			- I				Save Temp	late	1	
										No F
								3		
L.								Č		



Import Template

Home	Plan	Template	Users	Settings	Account	Actions	About			
🕂 Create T	emplate	Save	Excel Temp	olate Al	I Template Ta	sks		~	ಿ Sync	Exp
🌛 Import T	emplate	e 🌛 Impo	rt Excel Ter	mplate 🕞	Save Report	Edit Colu	umns			Ţ
Task Tem	place	Exc	el Template	e		Rep	ort			
All Templa	ite i 1	×								
Drag a c <u>olu</u>	mn head	der and drop	it here to	group by th	at column	2				
		_						_	_	
		Import	tasks fro	m Templa	te			3	×	
		Select Te	mplate:				-	~		
		Target pl	an:	DG-2000 Fe	edback			C		
			Ē		h l			4		
				Select a	DUCKET			4		
			5			순 Import	Template			
		_								
							6			

Fig.5.3.1.2. Import Template

5.3.2. Excel Template

lcons	Description
Save Excel Template	Used to create new excel template.
Import Excel Template	Used to import the saved template.

Table.5.3.2. Excel Template

Save Excel Template

🕂 Create Template	Save Excel Template	All Template Tasks	🗸 🤔 Sync	Export
Jimport Template Jask Template	Excel 1 late	Save Report 🕕 Edit Columns. Report		🖞 Pri
All Template Tasks ×				
Drag a column header an	d drop it here to group t	by that column 2		
	a arop it nere to group t			
	_			
	Excel Template	Management	- X	
	Save excel tem	plate Import excel template	3	
		4		
	Excel file :	Select an excel f	Browse 🗸	
	Template name:	Type excel template name	A	
			5	
		Save Template		

Fig.5.3.2.1. Save Excel Template

Import Excel Template

Home F	Plan	Template	Users	Settings	Account	Actions	About		
🛟 Create Te	mplate	X Bave E	xcel Temp	late All	Template Tas	ks		~	2 s
import Te	emplate	🤳 Impor	t Excel Ten	nplate	Save Report	🚺 Edit Colu	mns		
Task Temp	plate	Exce	l Template			Repo	ort		
All Templat	te Tasks	×		1					
Drag a colun	nn head	er and drop	it here to a	group by tha	at column	2			
	_					<u> </u>			
	Exc	el Templa	te Mana	gement			– ×		
	0	Save excel t	emplate	Import	excel template		3		
	Se	lect Templat	her .				~		
		incer reinpier						L	
					된	Import Temp	late		
						4			

Fig.5.3.2.2. Import Excel Template

5.3.3. Report

Actions	Description
All template Tasks	Reports you the tasks of all templates.
All templates	Reports you all templates which were already saved.
All Excel Templates	Reports you the excel templates which were already saved.

Table.5.3.3. Template Report

5.4. Users

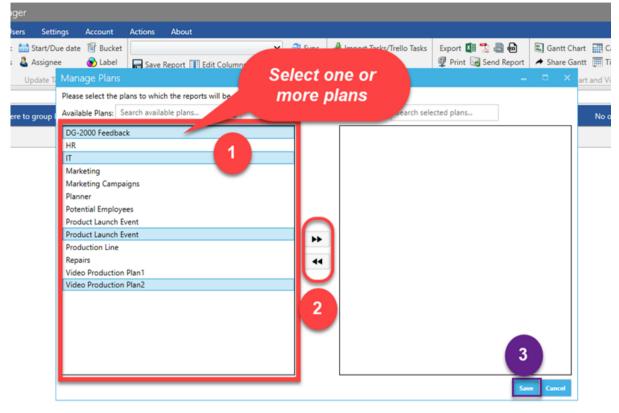
Actions	Description
All Plan Members	Report of all plans with their members
All Members by plan	Reports you the members of selected plan.

Table.5.4. Users

5.5. Settings

5.5.1. Plans

Manage Plans



A _____ - ___



5.5.2. Application

Application Settings

Home	Pla	an	Template	Users	Settings	Account	Actions	About		
🚺 Ma	nage Pl	ans	🍪 Applicati	ion Setting	s 🚳 Servi	ce Settings	🗥 Backup	Tasks to Or	eDrive	2
Cus	tom Fie	lds			-		🗒 Backup	Tasks to Lo	cal Sto	rage
P	lans		Applic	atic	Se	rvice		Backup		
All Pla	an Mei	Adv	anced Set	tings				- •		
Drag a	colum	He	e Turbo Sync		Yes					
	Plan			_						Ŧ
	DG-20		tch Task Com mport Option		No)				
	DG-20		Create new p		viete	No				
	DG-20									
	DG-20		- Make	e new plan	as Public:	N	0			
	DG-20		- Enab	le email sul	bscription:	Ν	lo			
	DG-20		Jpdate label	names in p	lan:	Yes				
	DG-20									
	DG-20	Lle	e native exce	llibrary		o				
	DG-20	05	e nauve exce					_		
	DG-20						Sav	e Cance	1	
	DG-20		aback			Nestor Wilke				
	DG-200	0 Fee	dback			Isaiah Lange	r			

Fig.5.5.2. Application Settings

5.5.3. Service

Service Settings

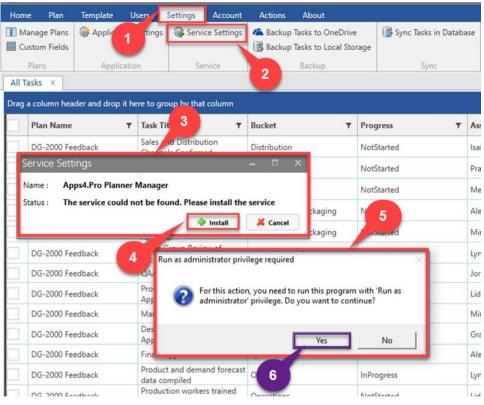


Fig.5.5.3. Service Settings

5.5.4. Backup

Backup Tasks to OneDrive

Home	Plan	Template	Users	Settings	Account	Actions	About	
🚺 Mana 📃 Custo	ge Plans m Fields	2 plicat	tion Settings	Serv	ice Settings		p Tasks to One p Tasks to Loc	
Pla All Pla		Appli Tasks to O	cation neDrive	S	ervice	ch	re,you can loose your Irive locati	
Drag a	✓ Ba	ckup tasks to	OneDrive -					\sim
	OneDri	ve Location:	Select One	Drive locati	on to sav <mark>e f</mark> ile	Br	rowse 🗸	T
	File nar	me:	All Tasks					-
	Save fi	ile as:	EXCEL		•			
	Export	tasks from	All Plans		•	C	Columns	
	Backup	Interval:		6 💂	Hours •			
		OneDrive U			lonm		ou can set time interv	
		Password:					3	
						Sav	Cancel	
	3-2000 Fee	edback			Irvin Sayers			-

Fig.5.5.4.1. Backup Tasks to OneDrive

Backup Tasks to Local Storage

Home	Plan	Template	Users	Settings	Account	A	ctions	About	
🚺 Mana	ge Plans	Application	n Settings	Servic	e Settings	6	Backup	o Tasks to OneDriv	re 1
Custo	m Fields		2				Backup	o Tasks to Local St	orage
Pla	ns	Applicati		Ser	vice			Backup	
All Plan	Mem	ackup Tasks t	o Local	Storage					
Drag a co				storage					re,you 💦
PL	an	 Backup tas 	ks to local	storage				and the second se	choose storage
	G-2000	File name:	AII	Tasks					ation
D	G-2000	Save file as:	EXC	EL	•	1			AlexW@I
D	G-2000					5 			DebraB@
D	G-2000	Storage Location	on: Sel	ect storage	location to :	save	ile.	Browse V	PattiF@N
D	G-2000	Export tasks fro	om: All F	lans		•	C	Columns	Pradeep
D	G-2000	Backup Interva		6	Hours	•	1		JoniS@M
D	G-2000	buckup interva			· · · · · · · · · · · · · · · · · · ·				ChristieC
D	G-2000	Here,you	u can					3	AllanD@
D	G-2000	set bac	kup				1	Save Cancel	Johannal
D	G-2000	time int	erval					Curcer	EnricoC@
D	G-2000 Fe	edbac		1	Vestor Wilke	2			NestorW

Fig.5.5.4.2. Backup Tasks to Local Storage

5.5.5. Sync

Sync Tasks in Database

Backup Tasks to OneDrive Backup Tasks to Local Storage Backup		rage	Sync Tasks in Database		
Bucket	т	Progress	▼ Assigned to	т	Start date
Distribution		NotStarted	Isaiah Langer		22-01-2018
Distribution		NotStarted	2 Pradeep Gupta		22-01-2018
Distribution	Sunc T	asks in Database			-01-2018
Materials and Packa	Sync ia		3	4	-01-2018
Materials and Packa	Sync I	nterval:	4 Hour(s) Save		-01-2018
Materials and Packa	_				-01-2018
Spec Review		InProgress	Jordan Miller		15-01-2018

Tip: You can automate the sync process by using Sync Tasks in Database option.

5.6. Account & Actions

- Account For Sign-In or Sign-out your account.
- Actions To maintain the history of your actions.