

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-manager-download.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.

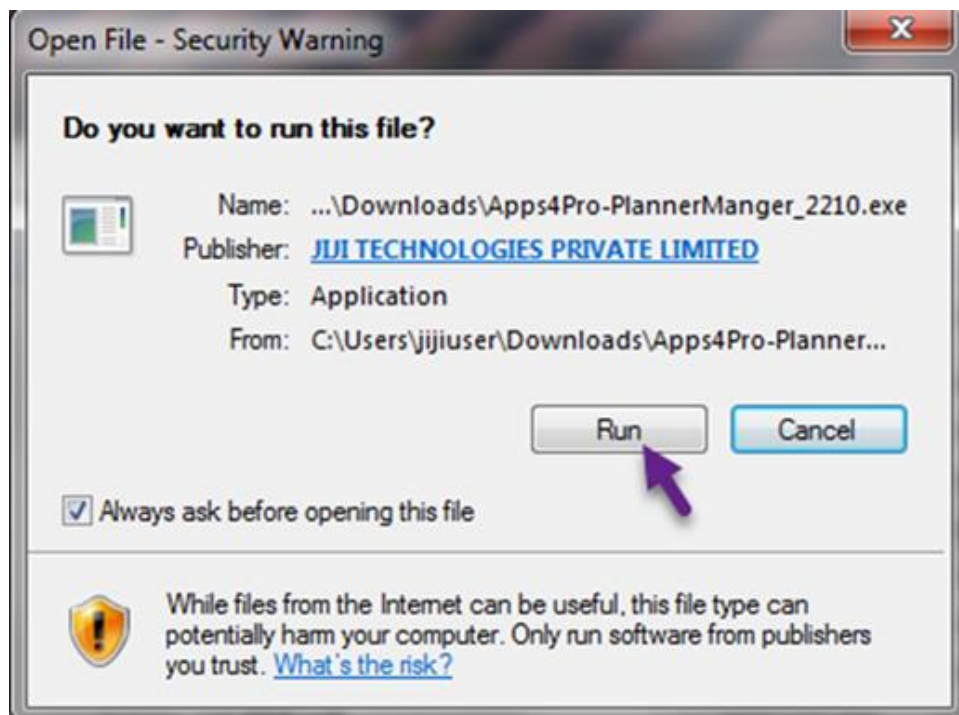


Fig 3.1. Security Warning

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

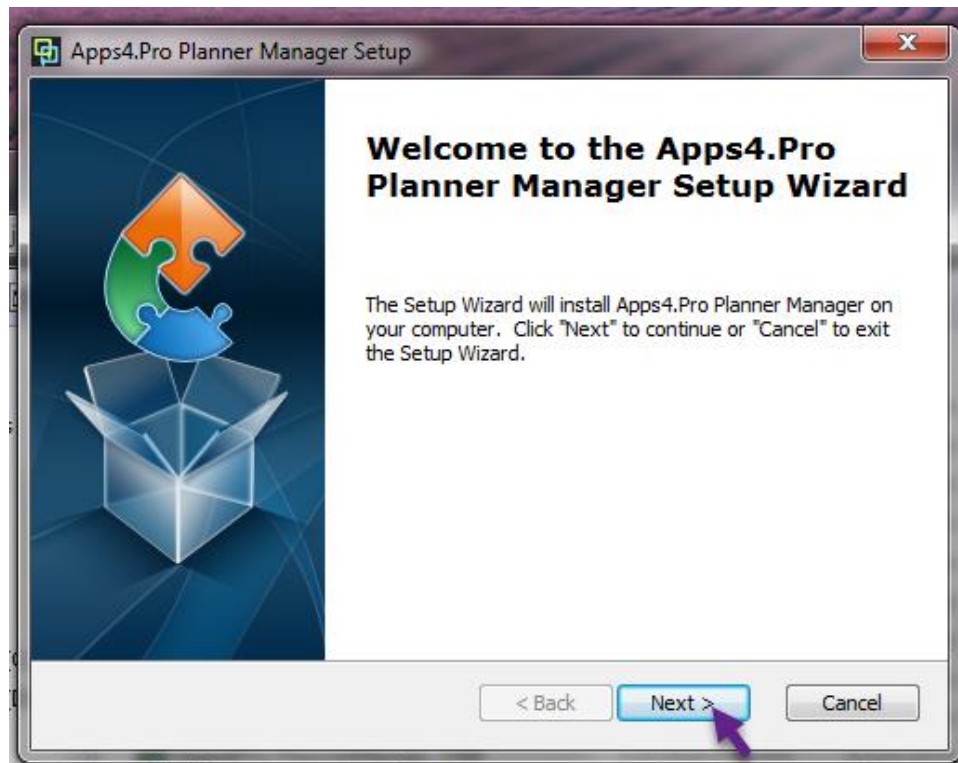


Fig 3.2. Apps4.Pro Planner Manager Setup Wizard

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

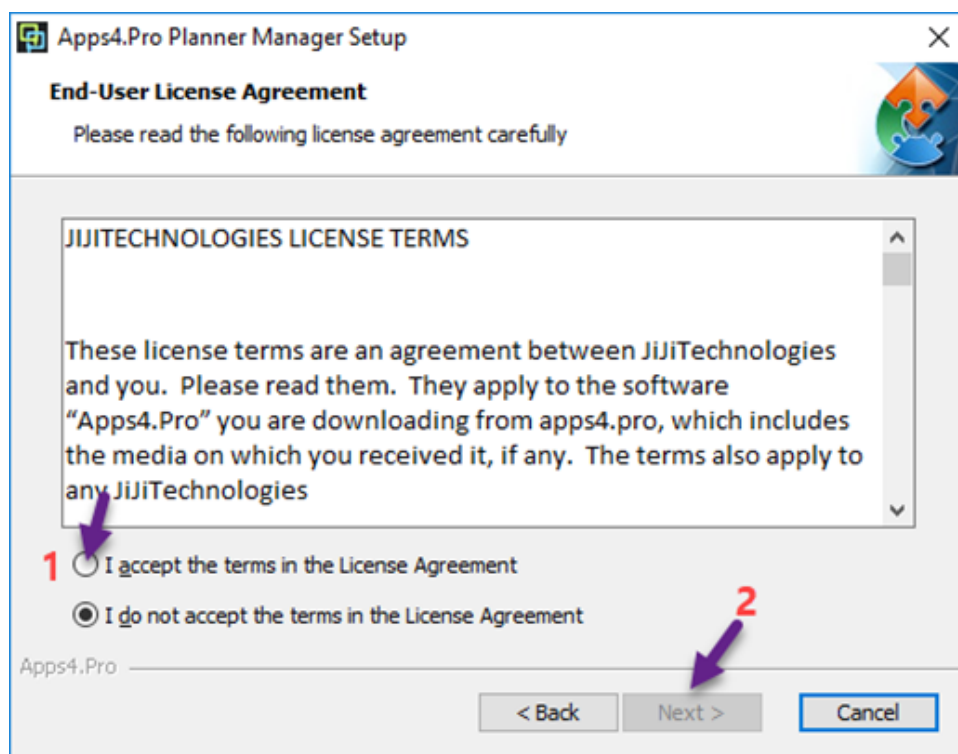


Fig 3.3. End-User License Agreement

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

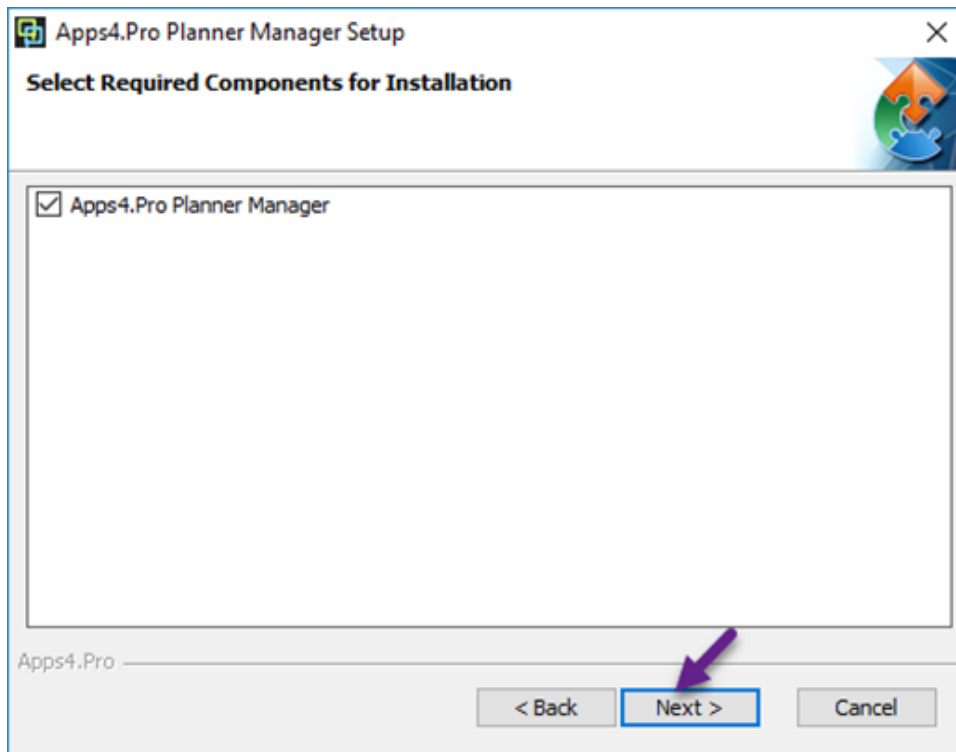


Fig 3.4. Select Required Components for Installation

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

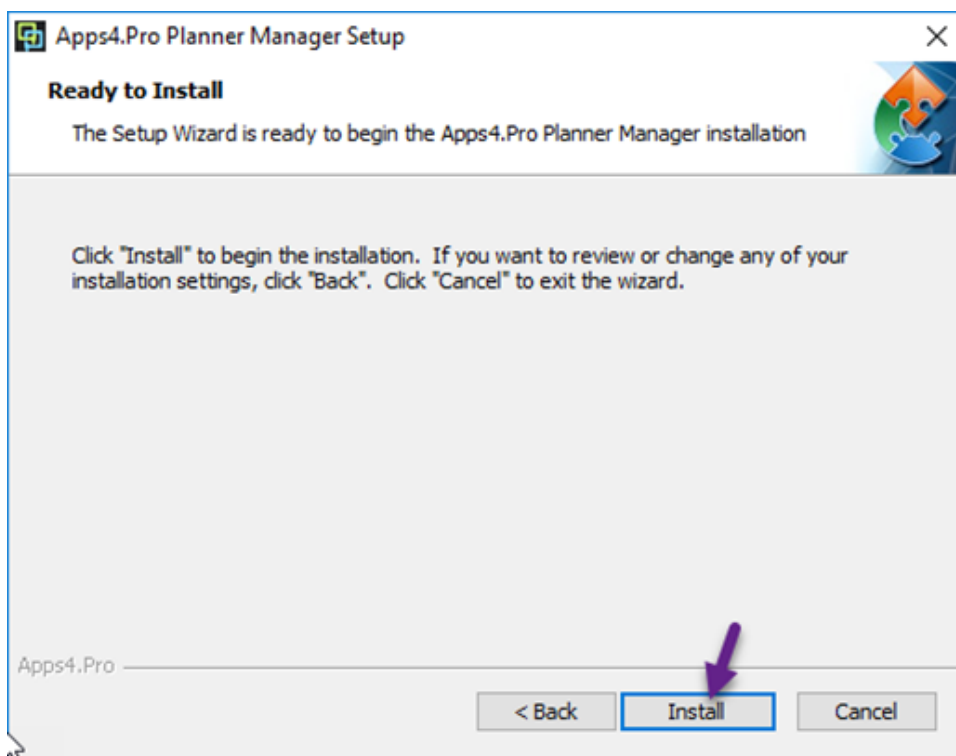


Fig 3.5. Ready to Install

Step 7: Installation in progress.

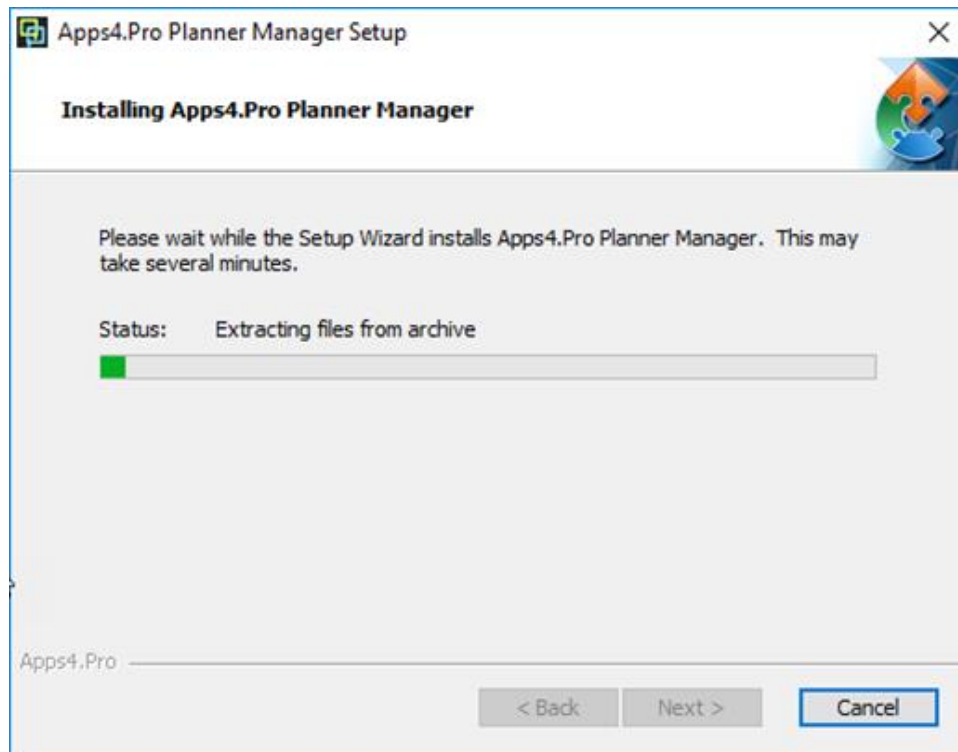


Fig 3.6. Installing Apps4.Pro Planner Manager

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.

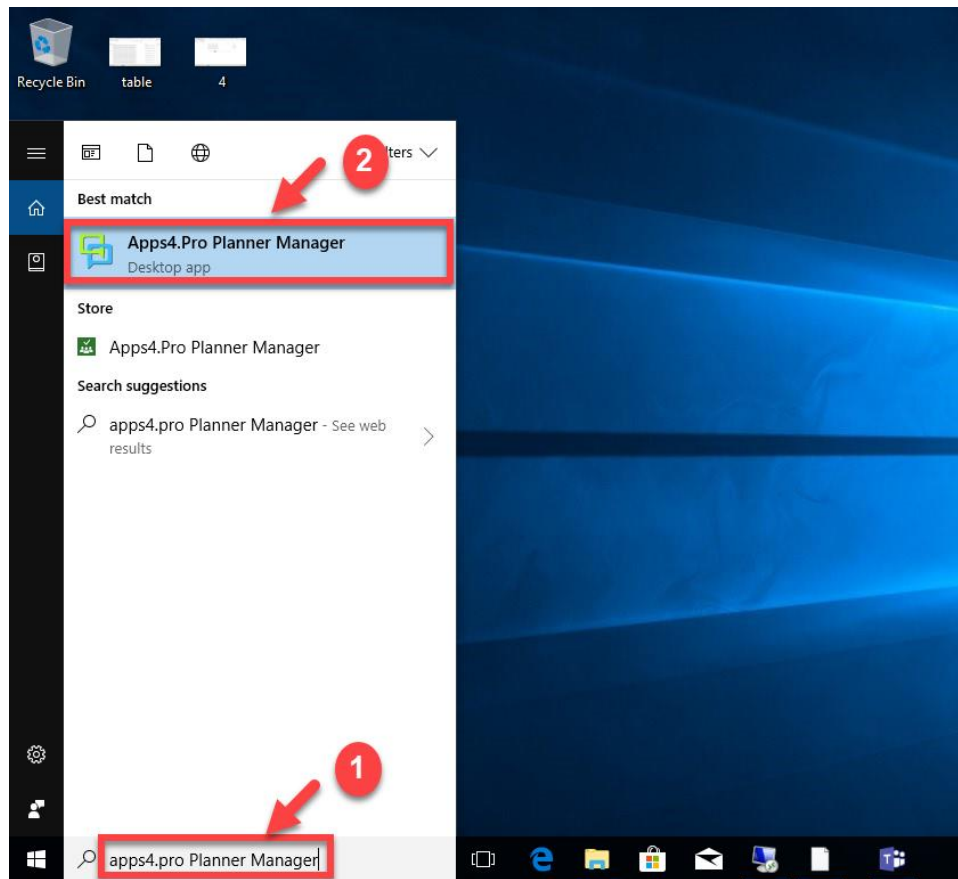


Fig 3.8. Desktop

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.

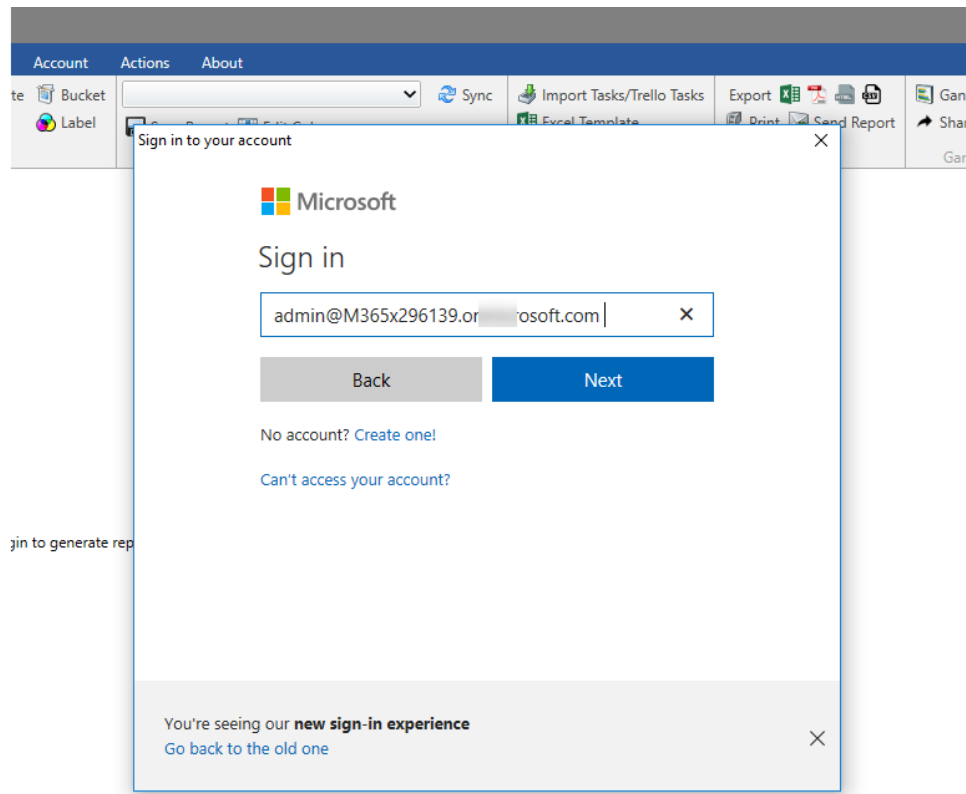


Fig.4.2. Sign in

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.

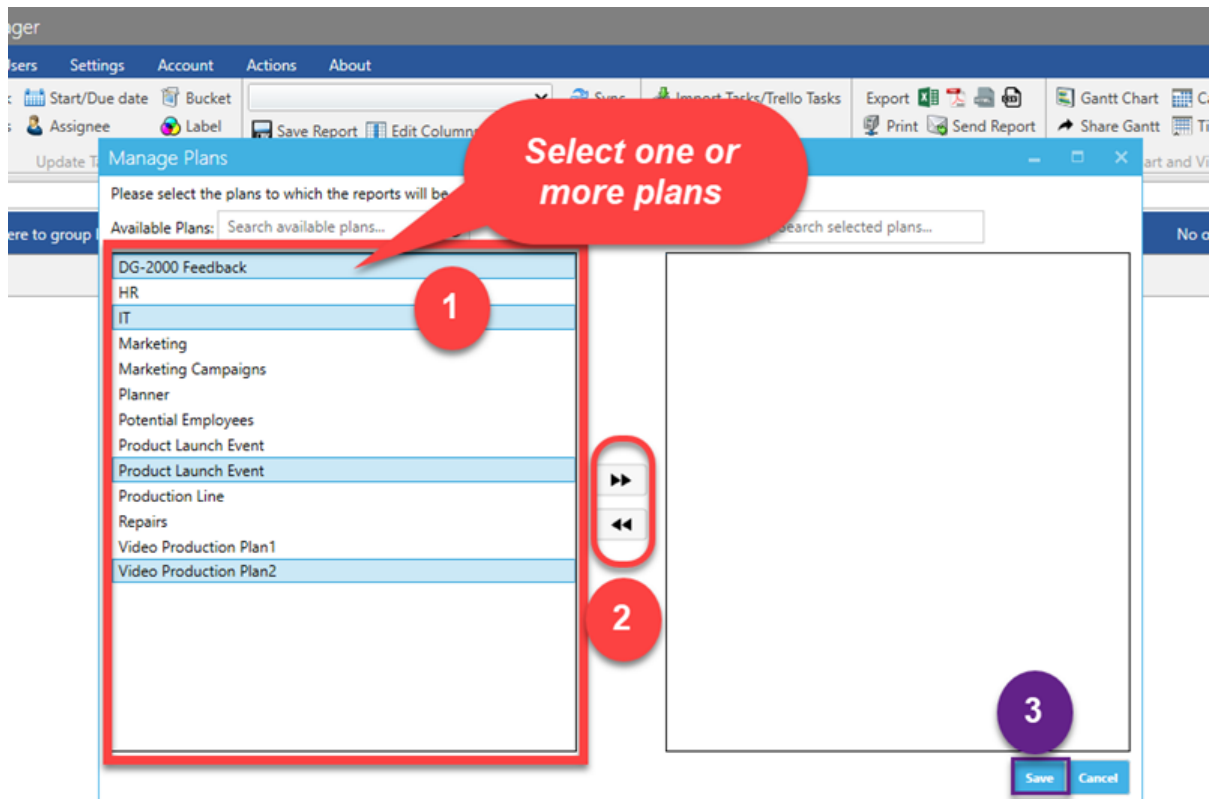


Fig.4.3. Manage Plans

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.

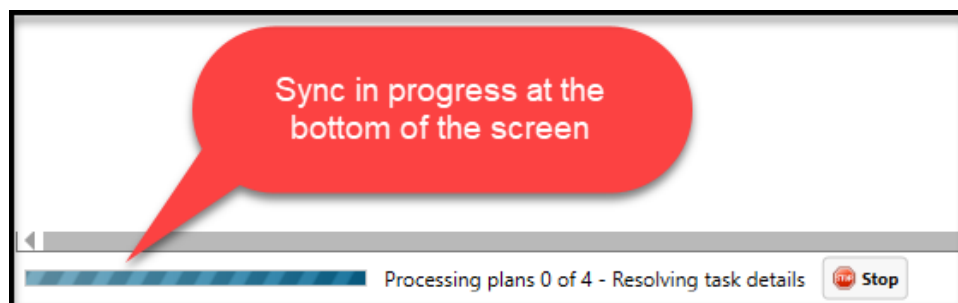


Fig.4.4. Sync in Progress

Step 5: Report

Plan Name	Task Title	Bucket	Progress	Assigned to
DG-2000 Feedback	Update Spec	3D Printer Integration	InProgress	Lidia Holloway
DG-2000 Feedback	Flash Placement	Design Ideas	InProgress	Johanna Lorenz
DG-2000 Feedback	Review Color Palette	Design Ideas	NotStarted	Lidia Holloway
DG-2000 Feedback	Explore Lens Filter Types	Design Ideas	InProgress	Irvin Sayers
DG-2000 Feedback	Raw Materials for New Product Ordered	Materials and Packaging	Completed	Megan Bowen
DG-2000 Feedback	QA/Testing of spec Draft 1	Spec Review	Completed	Jordan Miller
DG-2000 Feedback	Production Line Test	Operations	Completed	Megan Bowen
DG-2000 Feedback	Purchase New Tooling Equipment	Operations	Completed	Megan Bowen
IT	IT Training Plan	Backlog	InProgress	Megan Bowen
IT	Feature request: Tint Control	Backlog	NotStarted	Megan Bowen
IT	Check toggles in server room	Low priority	InProgress	Alex Wilber
IT	Workplace Innovation Report	Low priority	InProgress	Alex Wilber
IT	Assign licenses to new hire	Medium priority	NotStarted	Henrietta Mueller

Fig.4.5. Report

5.Menu/Ribbon

5.1. Home




Fig.5.1. Home Ribbon

5.1.1. Tasks

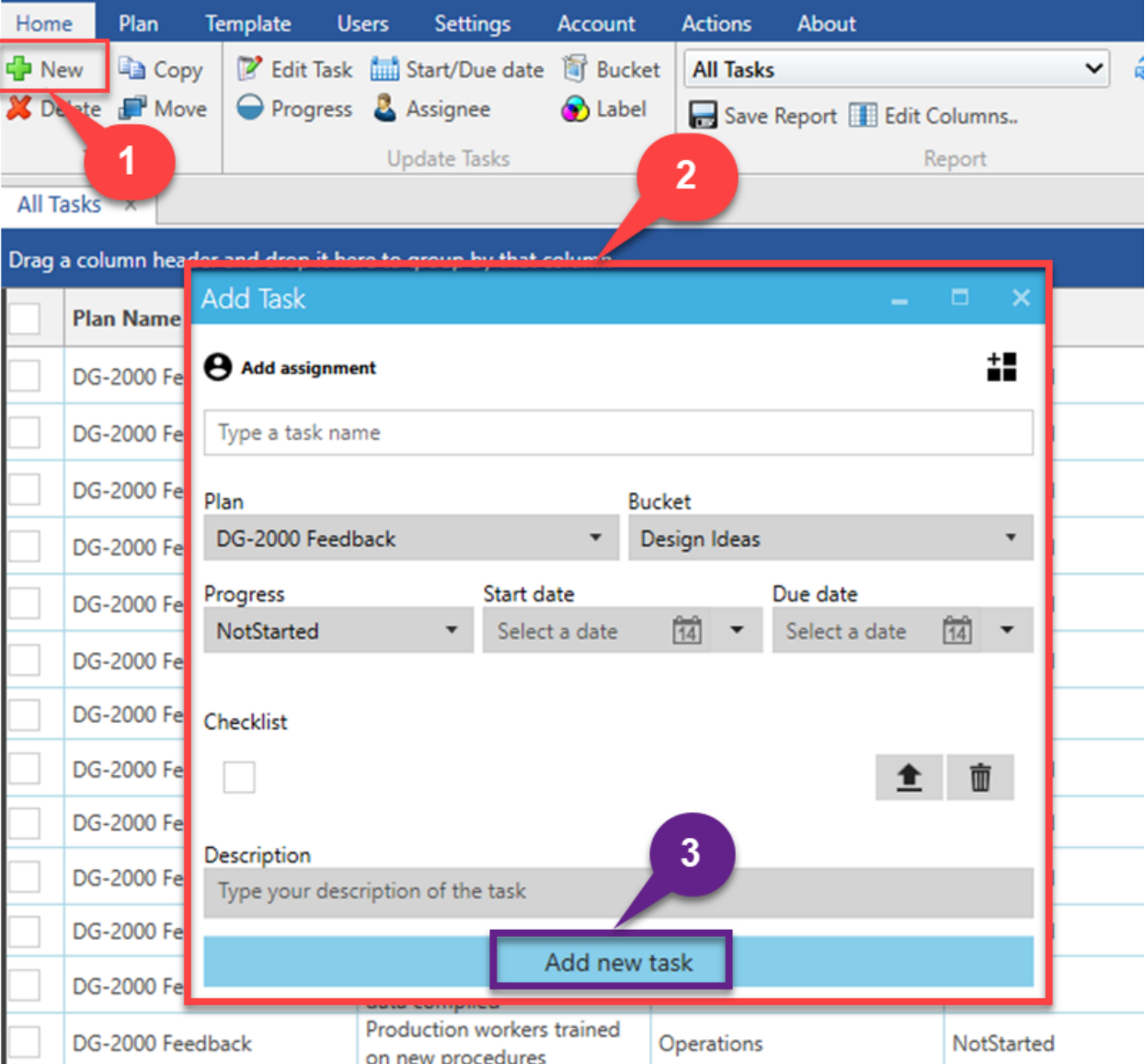
Icons	Description
New	Create new Planner task
Delete	Delete Planner task. You can select tasks from multiple plans and delete at once.
Copy	Copy multiple tasks from one plan to another plan. You can copy tasks from multiple plans at once.
Move	Move tasks from one plan to another plan. You can select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

Table.5.1.1.1. Tasks

Note:

Icons	Allowed			
	Task		Plan	
	Single	Multiple	Single	Multiple
 Delete	Yes	Yes	Yes	Yes
 Copy	Yes	Yes	Yes	Yes
 Move	Yes	Yes	Yes	Yes

New Task



The screenshot shows the 'Add Task' dialog box in a software application. The dialog is titled 'Add Task' and contains the following fields and options:

- Task Name:** A text input field with the placeholder 'Type a task name'.
- Plan:** A dropdown menu set to 'DG-2000 Feedback'.
- Bucket:** A dropdown menu set to 'Design Ideas'.
- Progress:** A dropdown menu set to 'NotStarted'.
- Start date:** A date picker set to '14'.
- Due date:** A date picker set to '14'.
- Checklist:** A section with a checkbox and a trash icon.
- Description:** A text area with the placeholder 'Type your description of the task'.
- Buttons:** A blue button labeled 'Add new task' at the bottom.

Red callout boxes with numbers 1, 2, and 3 point to the 'New' button in the top toolbar, the 'Add Task' dialog, and the 'Add new task' button respectively.

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.

Delete task

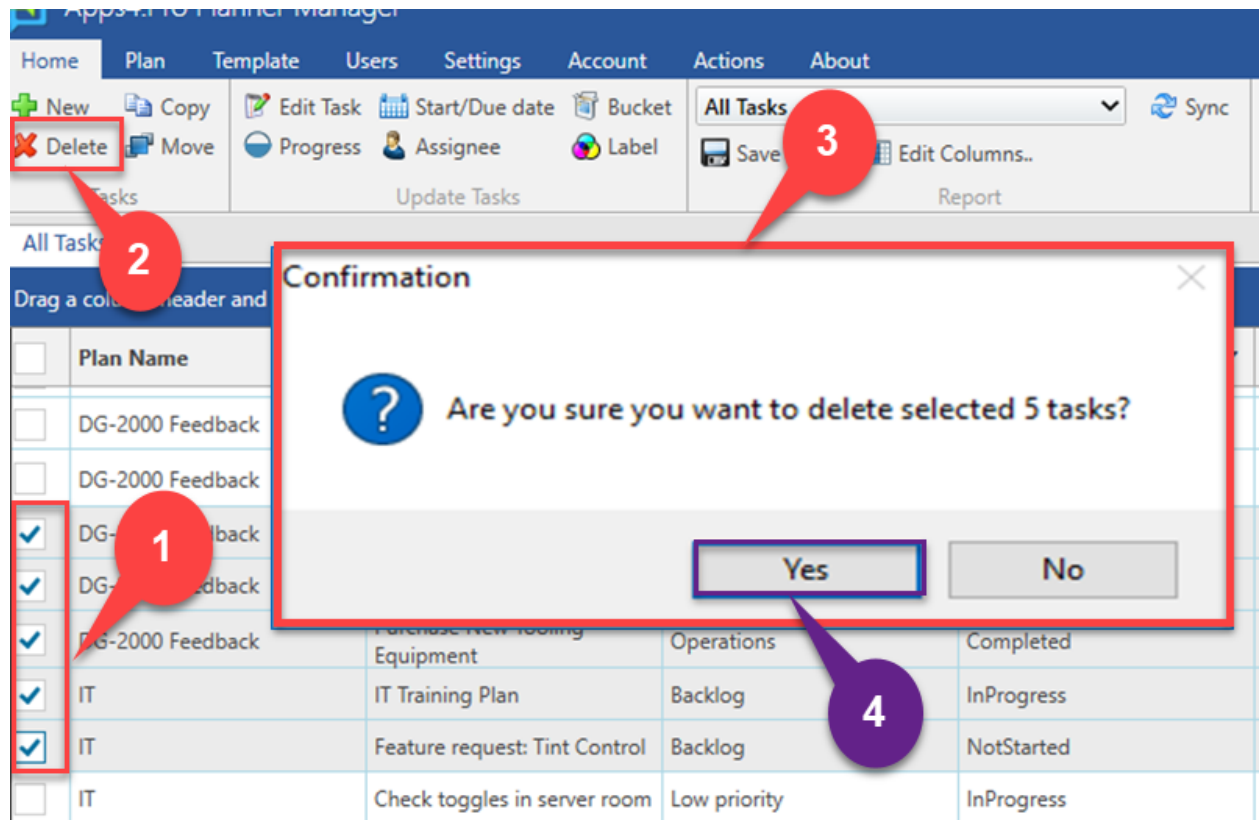


Fig.5.1.1.2. Delete Task

Copy task

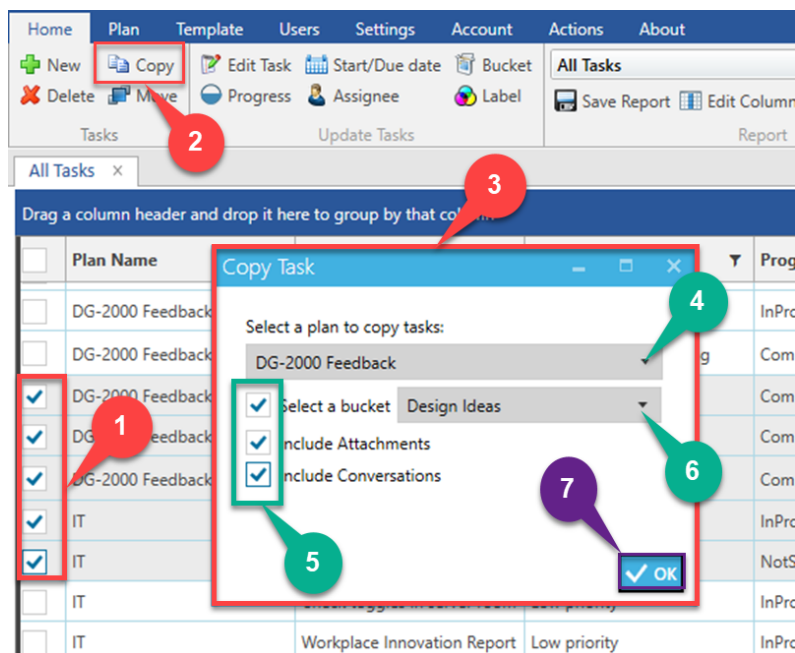


Fig.5.1.1.3. Copy task

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

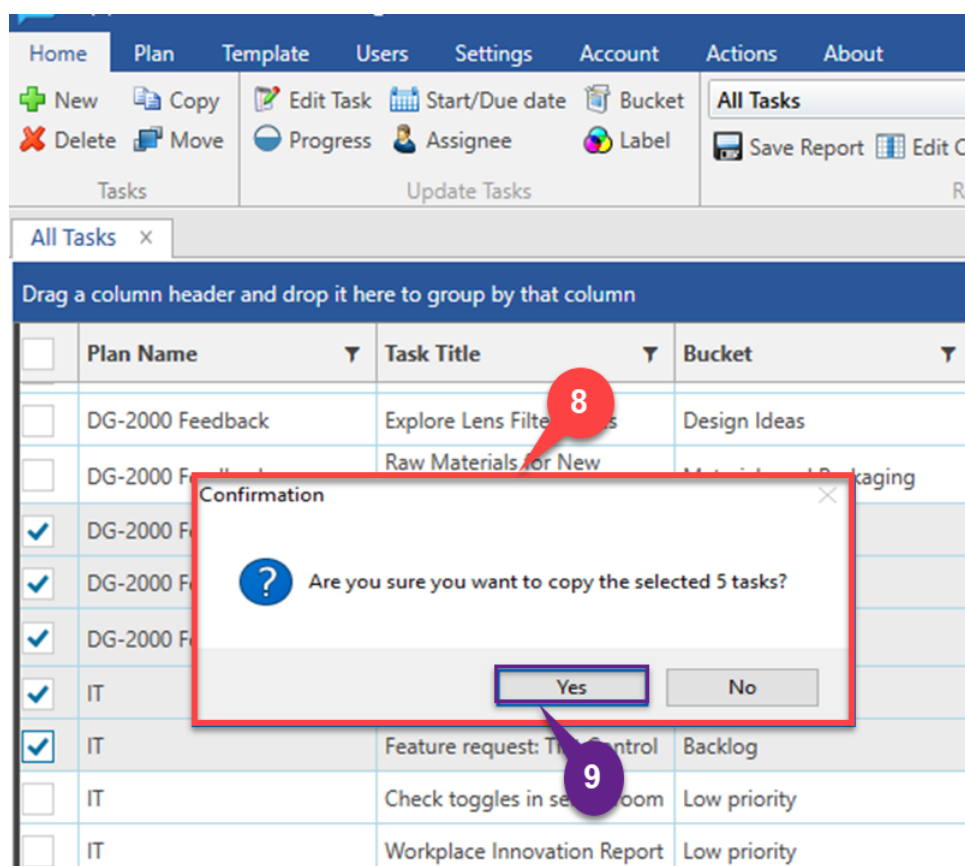


Fig.5.1.1.4. Confirmation

Move task

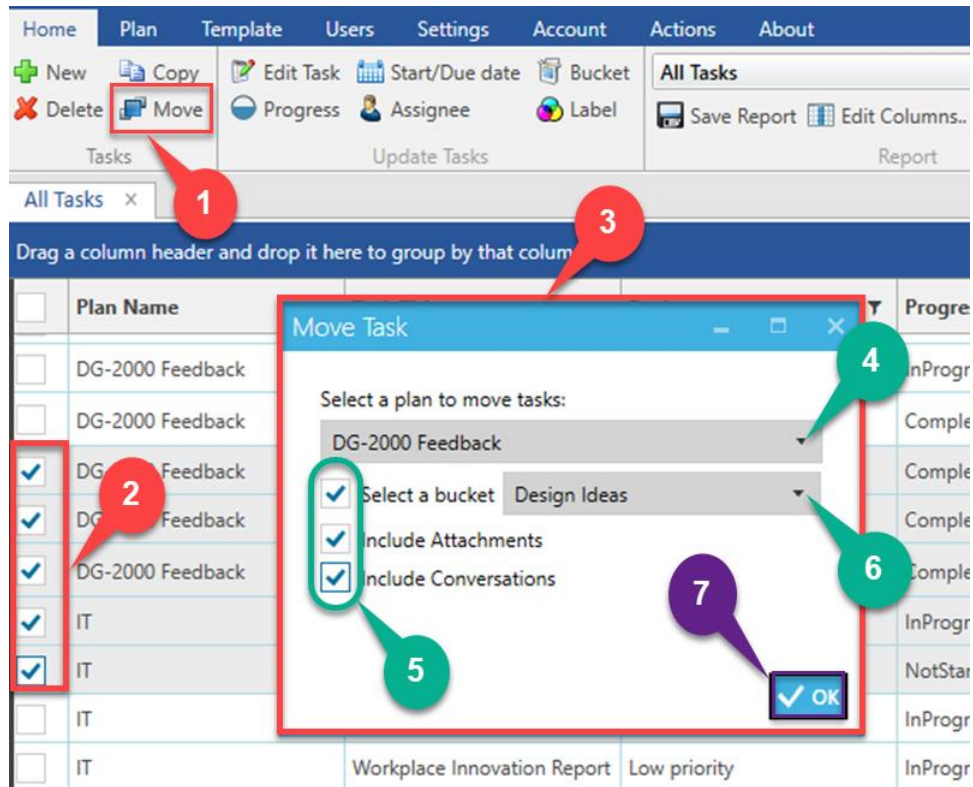


Fig.5.1.1.5. Move Task

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

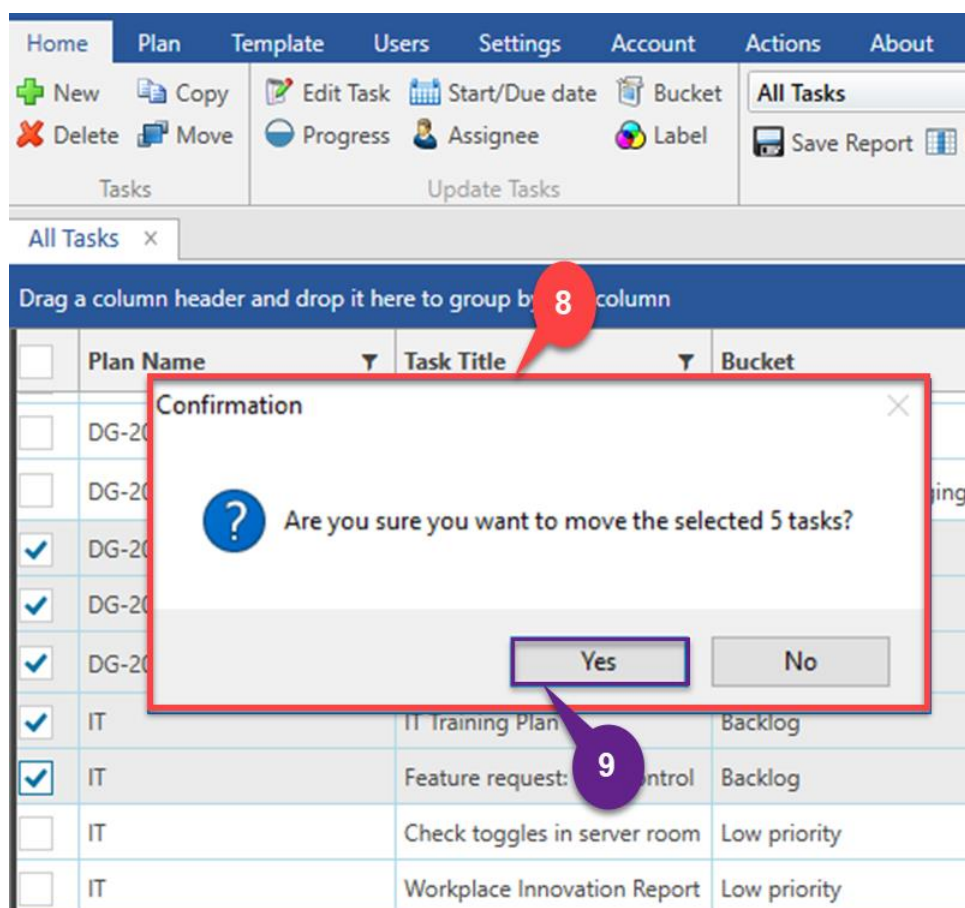


Fig.5.1.1.6. Confirmation

5.1.2. Update Tasks







Icons	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	Task		Plan	
	Single	Multiple	Single	Multiple
 Edit task	Yes	-	-	-
 Progress	Yes	Yes	Yes	Yes
 Start/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

The screenshot shows the 'Update Task' dialog box with the following elements:

- 1**: Points to a task row in the background list.
- 2**: Points to the 'Edit Task' button in the top toolbar.
- 3**: Points to the 'All Tasks' dropdown in the top right.
- 4**: Points to the 'Save' button in the dialog's top right.
- Here, you can give the comments**: A green speech bubble pointing to the 'Comments' section at the bottom of the dialog.

The dialog box contains the following sections:

- Task Name**: A text input field with the value 'QA/Testing of spec Draft 1'.
- Assignee**: A dropdown menu showing 'Jordan Miller' and 'Assigned by: Lidia Holloway'.
- Metadata**: Fields for Plan (DG-200), Bucket (Spec), Progress (Corr), Start date (14), and Due date (14).
- Checklist/Sub-tasks**: A section with an 'Add new item' button and a list of tasks.
- Description**: A text area for describing the task.
- Attachments**: A section with an 'Attach' button.
- Comments**: A section for adding comments to the task.

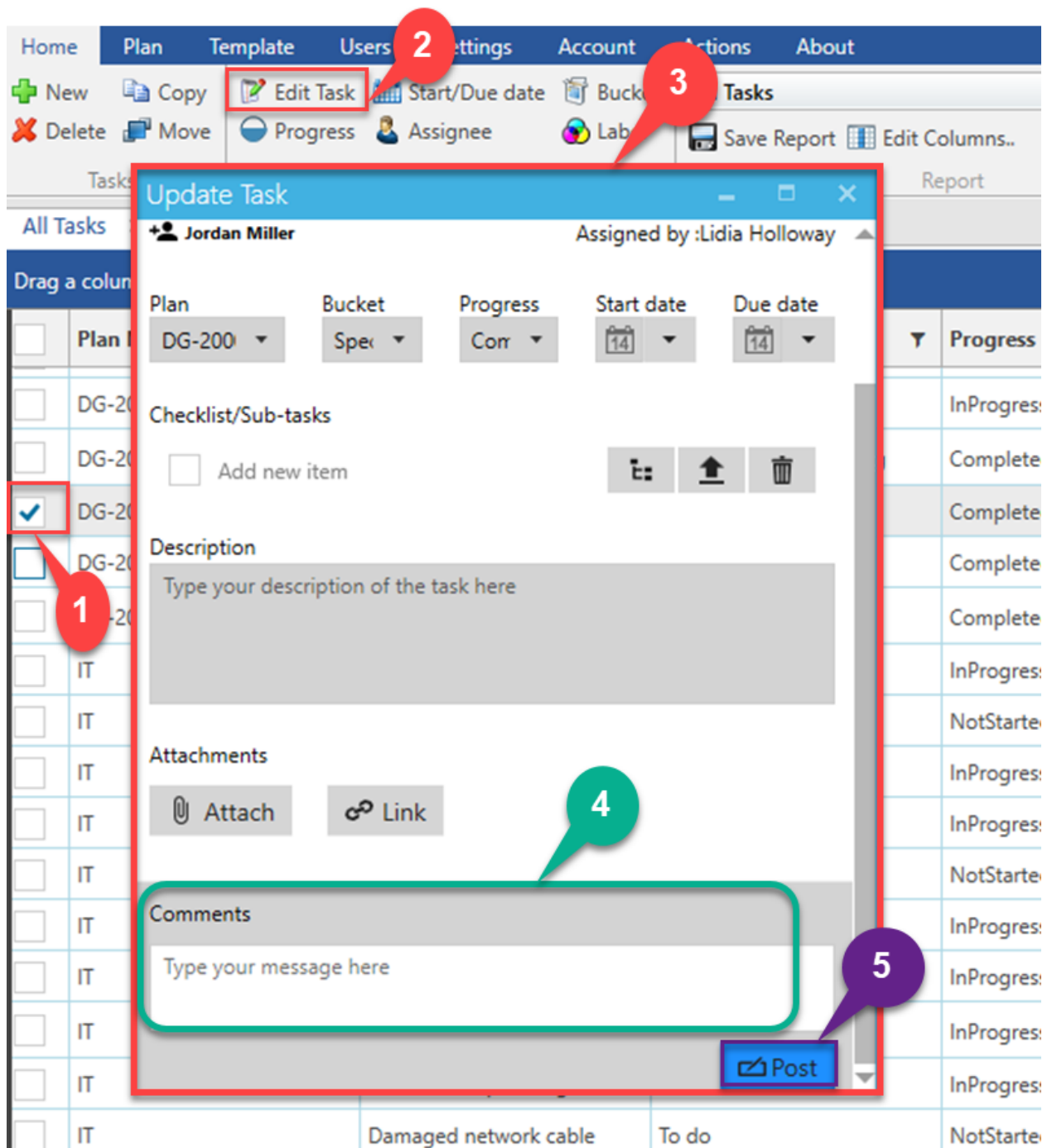





Fig.5.1.2.2. Post comment

Tip 1: You can edit the task by double click on the task.

-  View in Planner
-  Delete Task
-  Promote checklist item as subtask

Progress

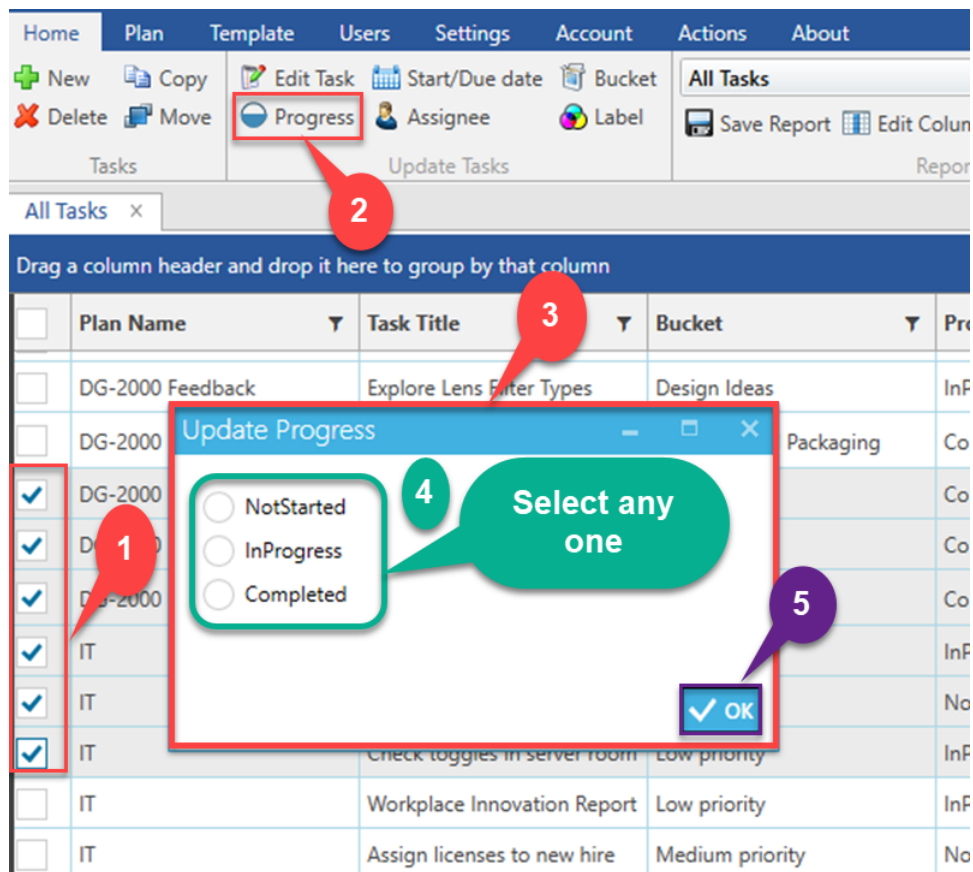


Fig.5.1.2.3. Update Progress

Start/Due Date

The screenshot shows a software interface for managing tasks. At the top, there is a menu bar with options: Home, Plan, Template, Users, Settings, Account, Actions, and About. Below the menu is a toolbar with icons for New, Copy, Edit Task, Start/Due date, Bucket, Delete, Move, Progress, Assignee, Label, Save Report, and Edit Columns.. The 'Start/Due date' button is highlighted with a red box and a callout '2'. Below the toolbar is a table with columns: Plan Name, Task Title, Bucket, and Progress. The table contains several rows of tasks, some of which are selected with checkboxes. A red box and callout '1' highlight the selection checkboxes. An 'Update Start and Due date' dialog box is open, showing input fields for Start date and Due date. The dialog has a title bar with a red box and callout '3'. The input fields have a red box and callout '4'. The 'OK' button is highlighted with a red box and callout '5'. The dialog also includes checkboxes for 'Use existing value' and a '+ Add' button with a spinner for days.

Plan Name	Task Title	Bucket	Progress
DG-2000			
DG-2000			
DG-2000			
DG-2000			
DG-2000			
IT			
IT	Check toggles in server room	Low priority	InProgress
IT	Workplace Innovation Report	Low priority	InProgress

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

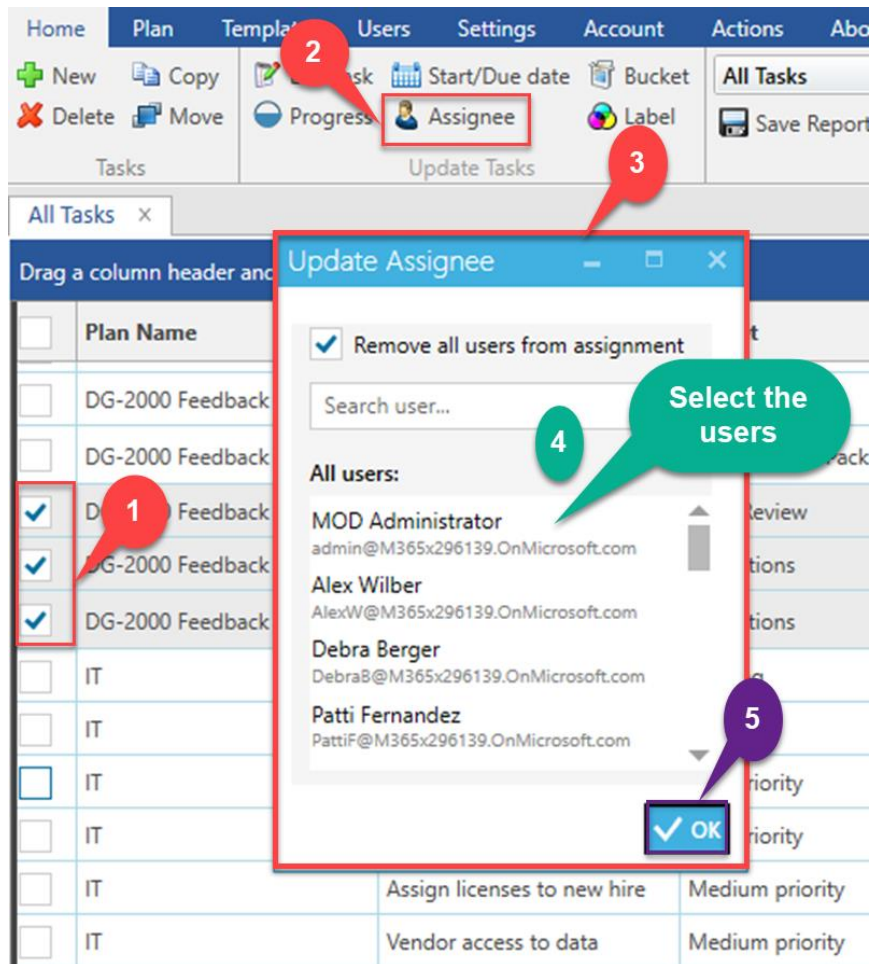


Fig.5.1.2.5. Update Assignee

Tip: All Users → List down all users of the Plan

Bucket

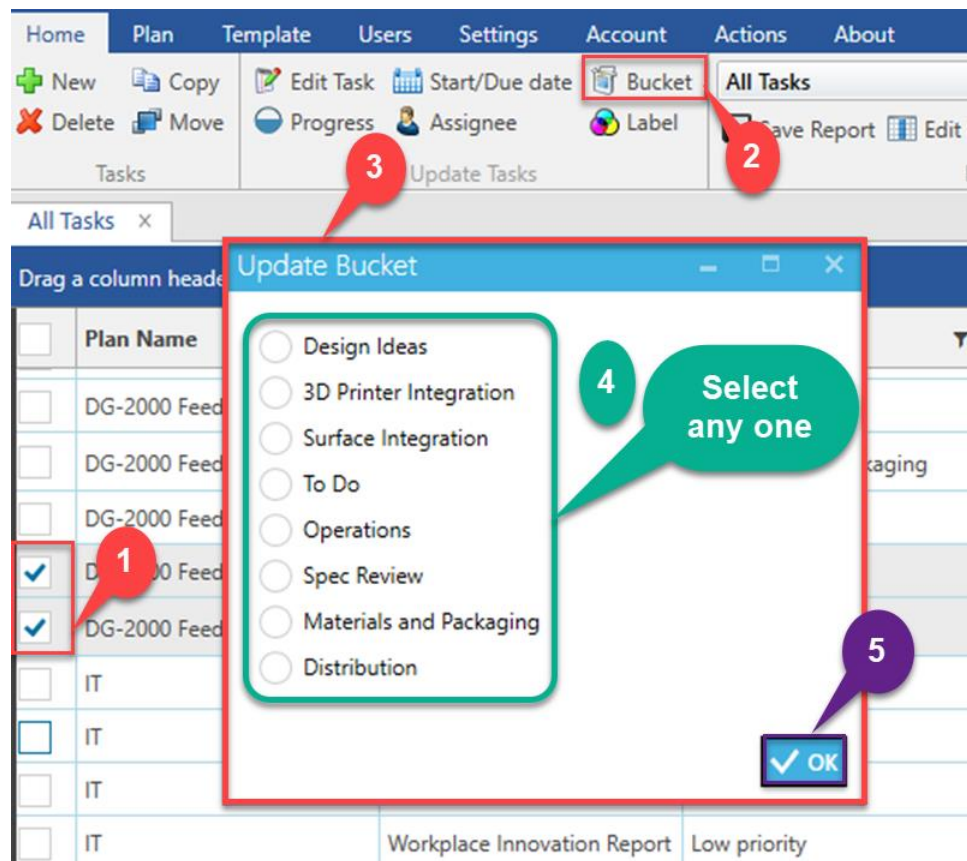


Fig.5.1.2.6. Update Bucket

Label

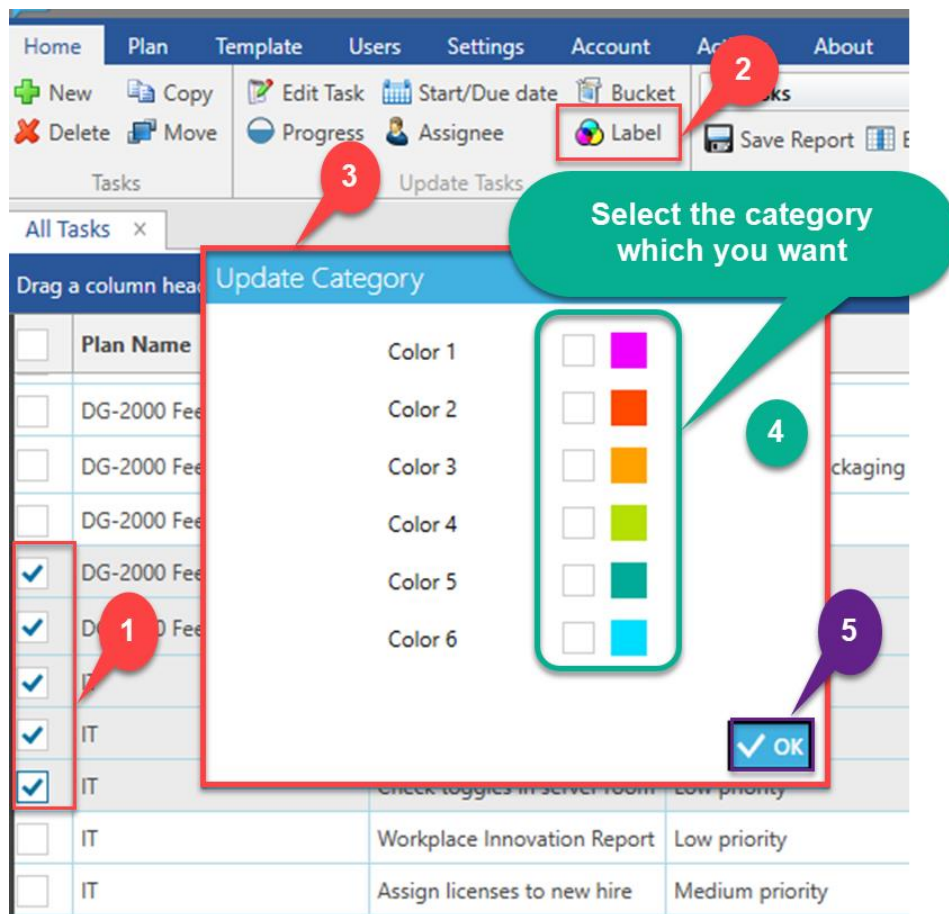


Fig.5.1.2.7. Update Label

5.1.3. Reports




Icons	Description
 Sync	Sync Planner tasks to the app database in your computer.
 Save report	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

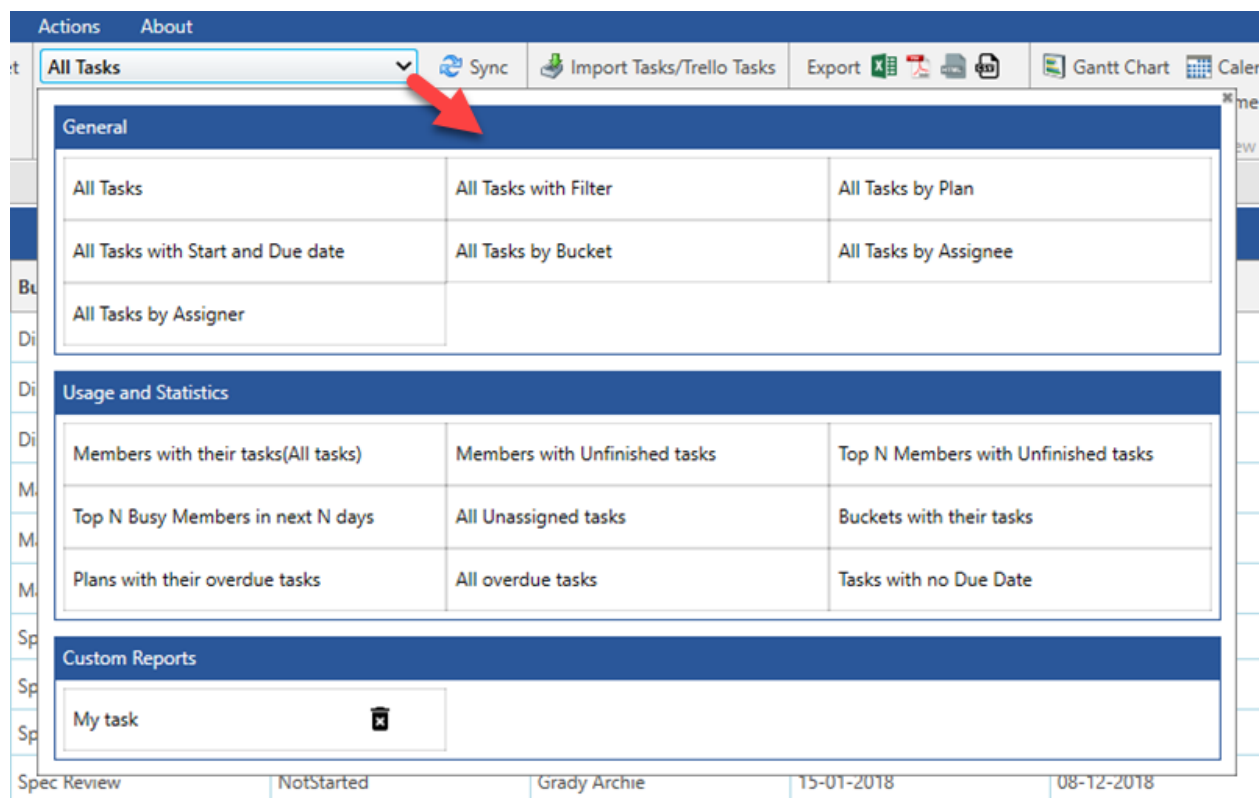


Fig.5.1.3.1. Report

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 Tasks)	Reports members with their task count for selected plans.
Members with Unfinished Tasks	Reports you the In progress 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.
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 by you.	

Table.5.1.3.1. Task Reports

Sync

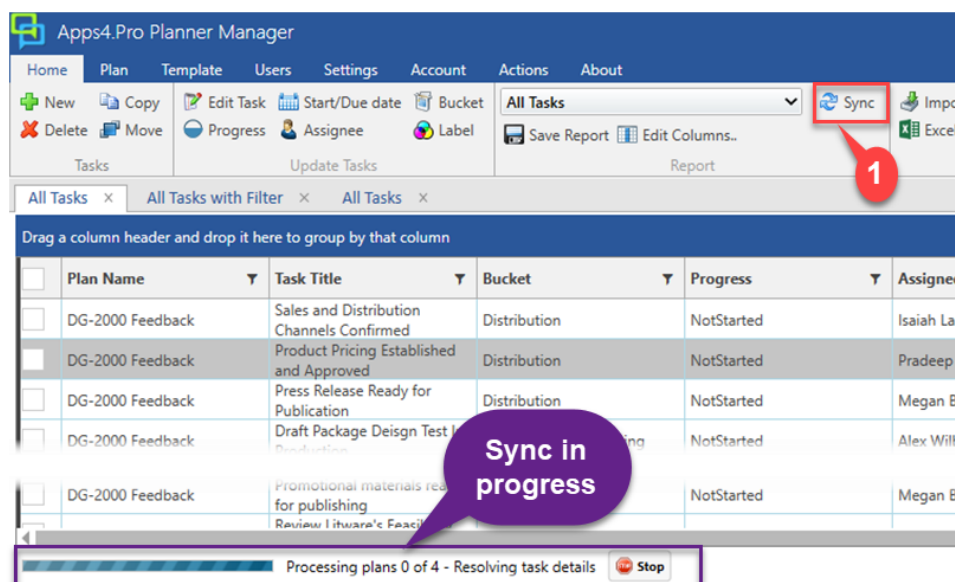


Fig.5.1.3.2. Sync

Save Report

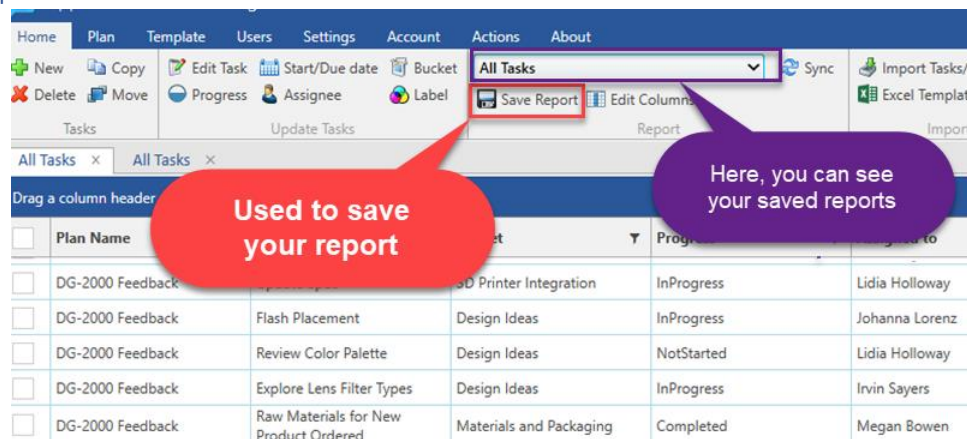


Fig.5.1.3.3. Save Report

Edit Columns

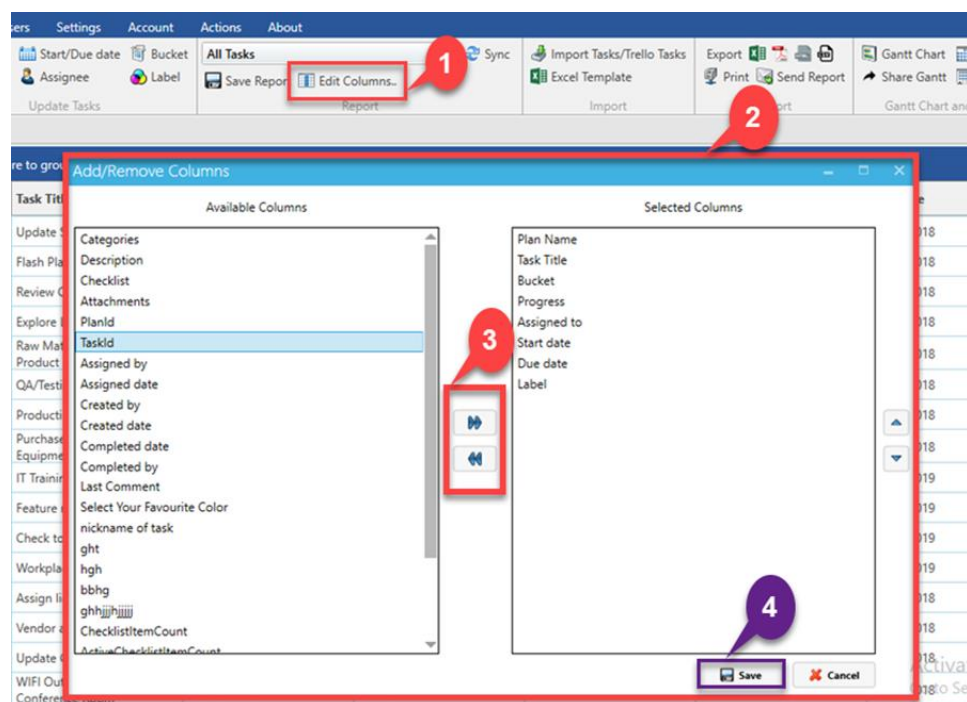


Fig.5.1.3.4. Edit Columns

5.1.4. Import



Icons	Description
	Import Tasks/Trello Tasks
	Excel Template

Table.5.1.4. Import

Import Tasks/ Trello Tasks

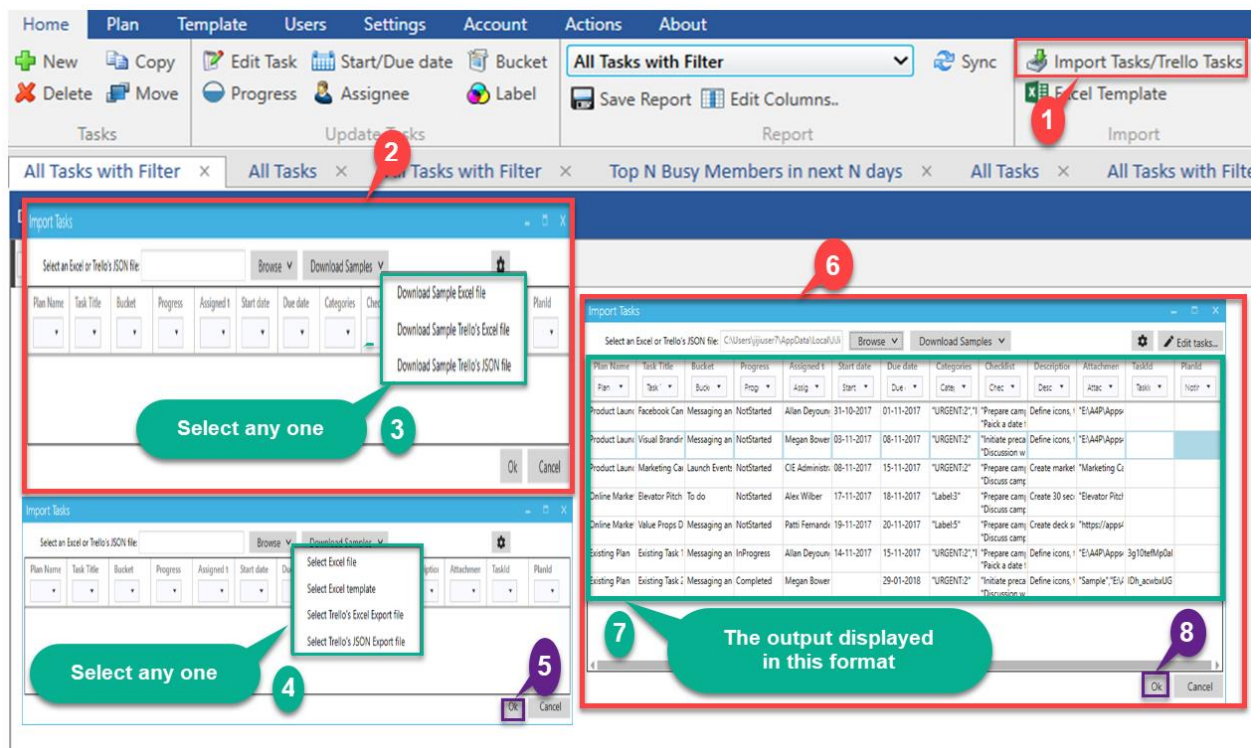


Fig.5.1.4.1. Import Tasks/Trello Tasks

5.1.5. Export







Icons	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

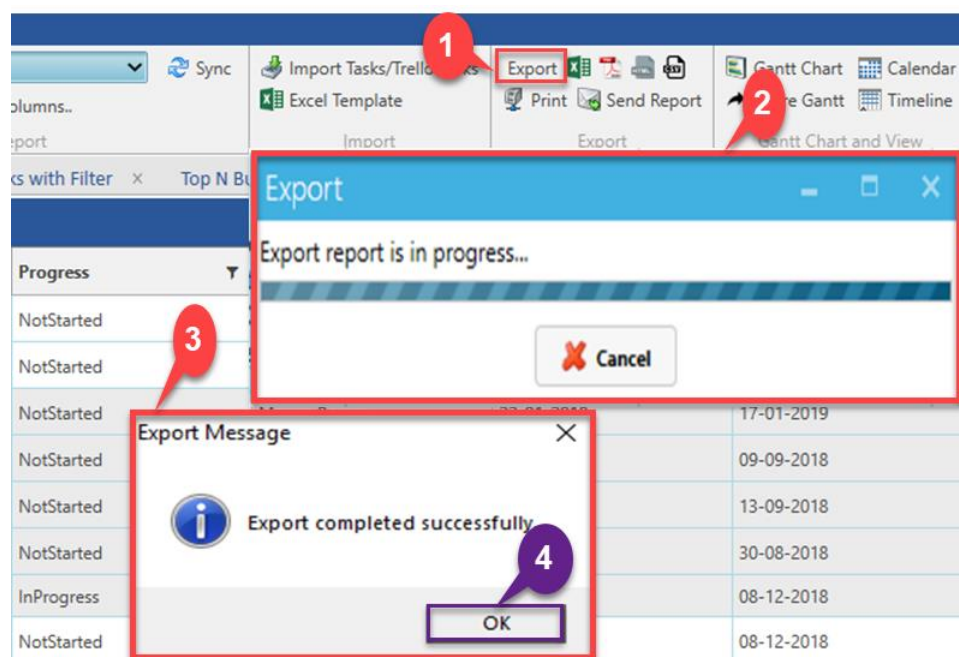


Fig.5.1.5.1. Export

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

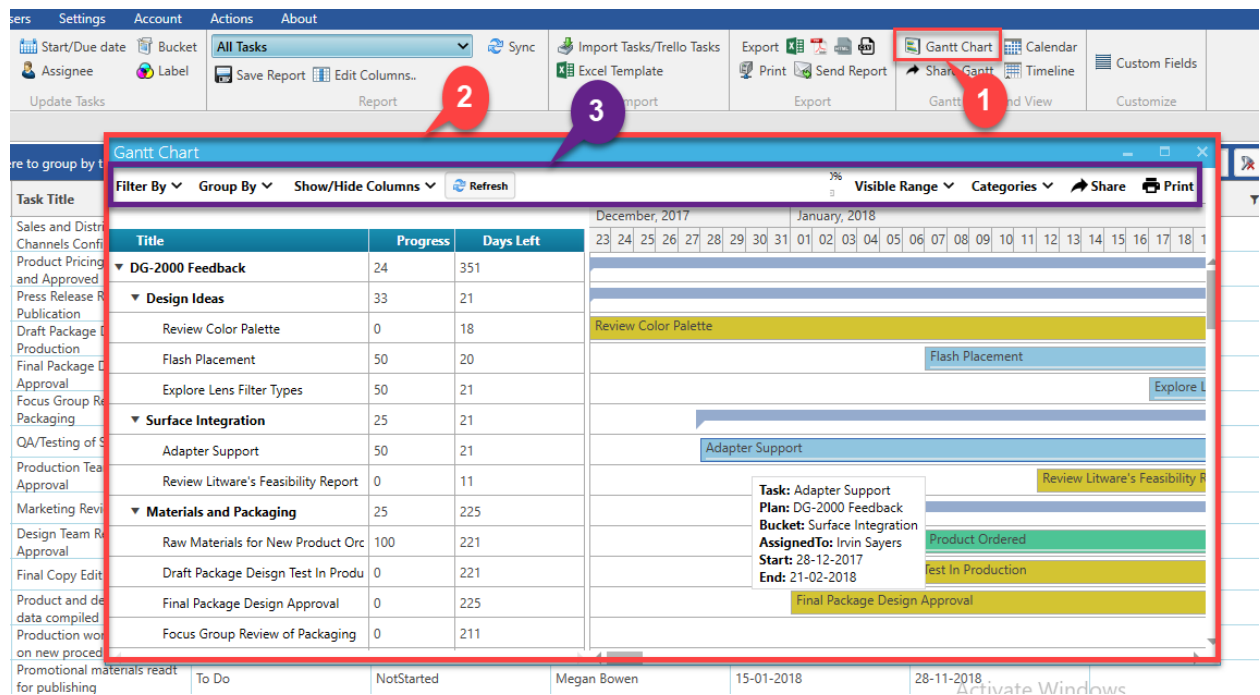


Fig.5.1.6.1. Gantt Chart

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.

Share Gantt

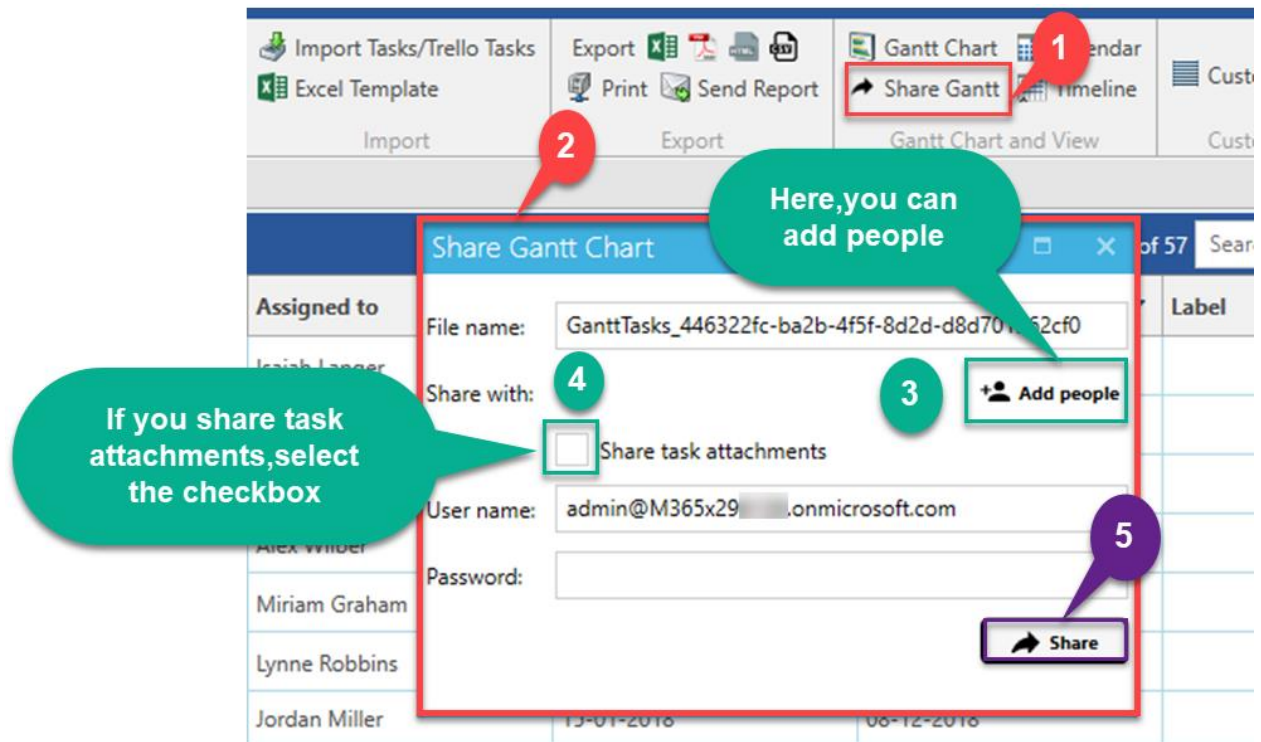


Fig.5.1.6.2. Share Gantt

5.1.7. Customize


Icons	Description
 Custom Fields	To add the custom fields for task

Table.5.1.7. Customize

Custom Fields

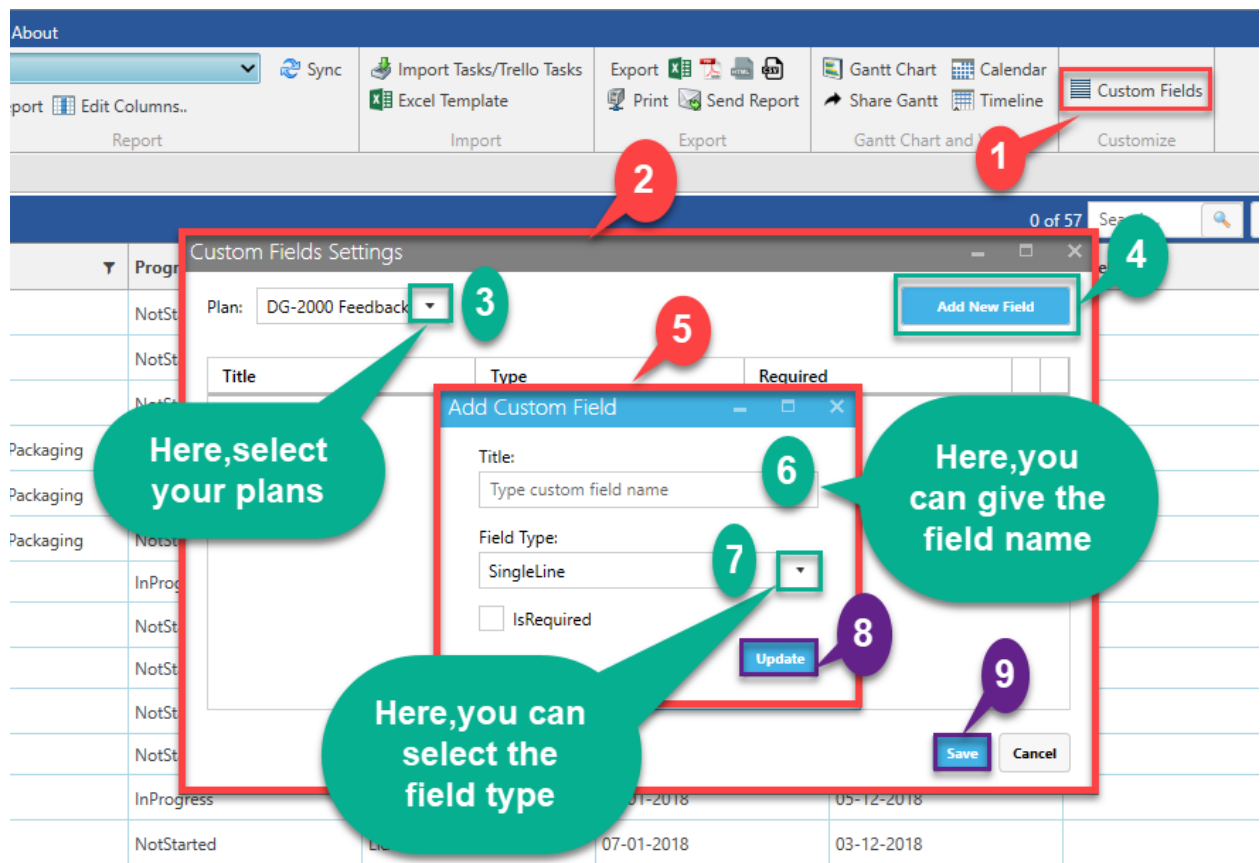


Fig.5.1.7.1. Custom Fields

5.2. Plan

5.2.1. Plan





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

Table.5.2.1. Plan

New Plan

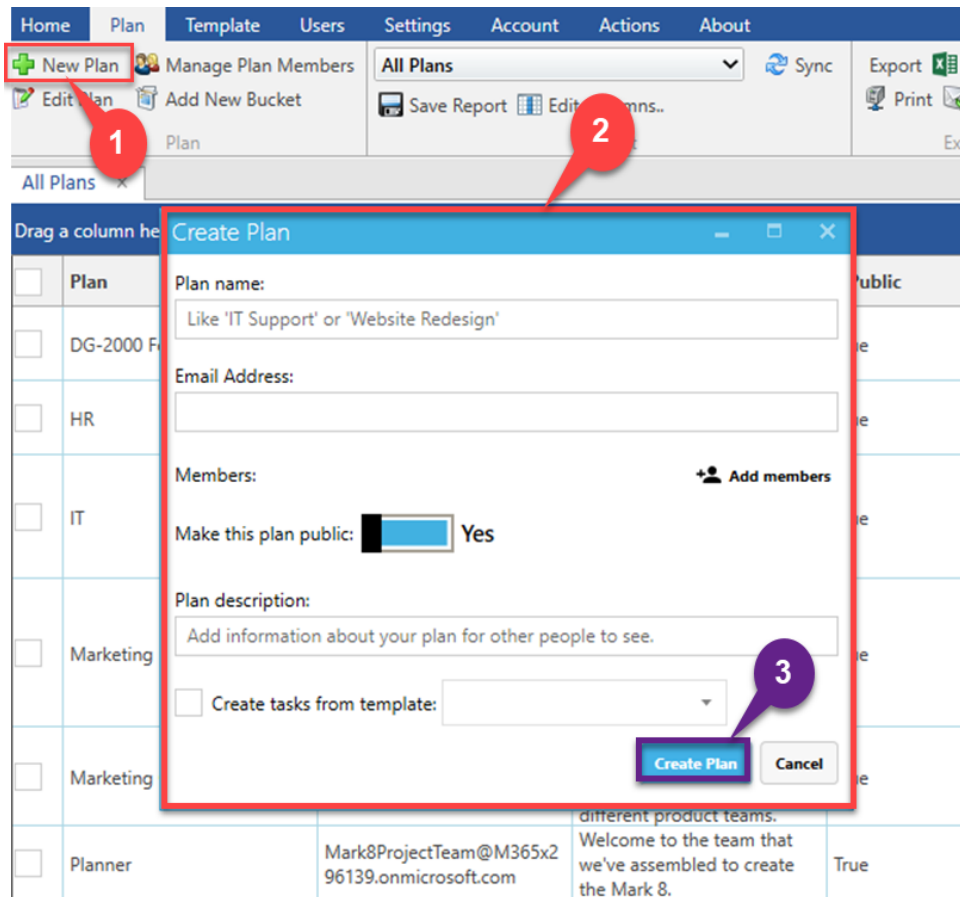


Fig.5.2.1.1. New Plan

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

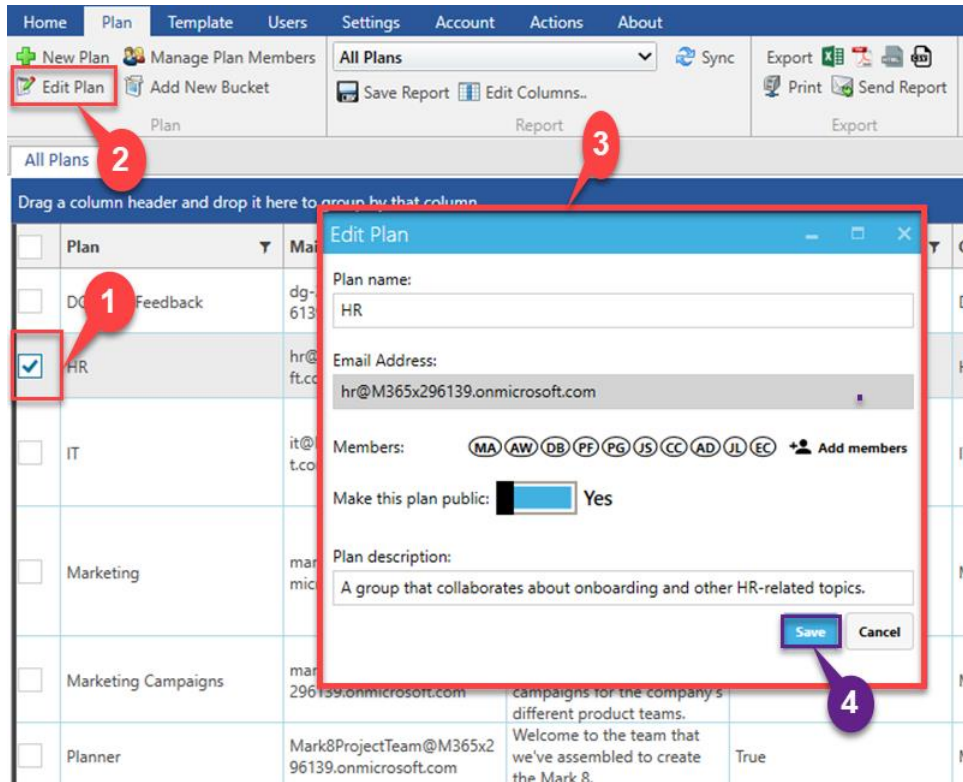


Fig.5.2.1.2. Edit plan

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

Manage Plan Members

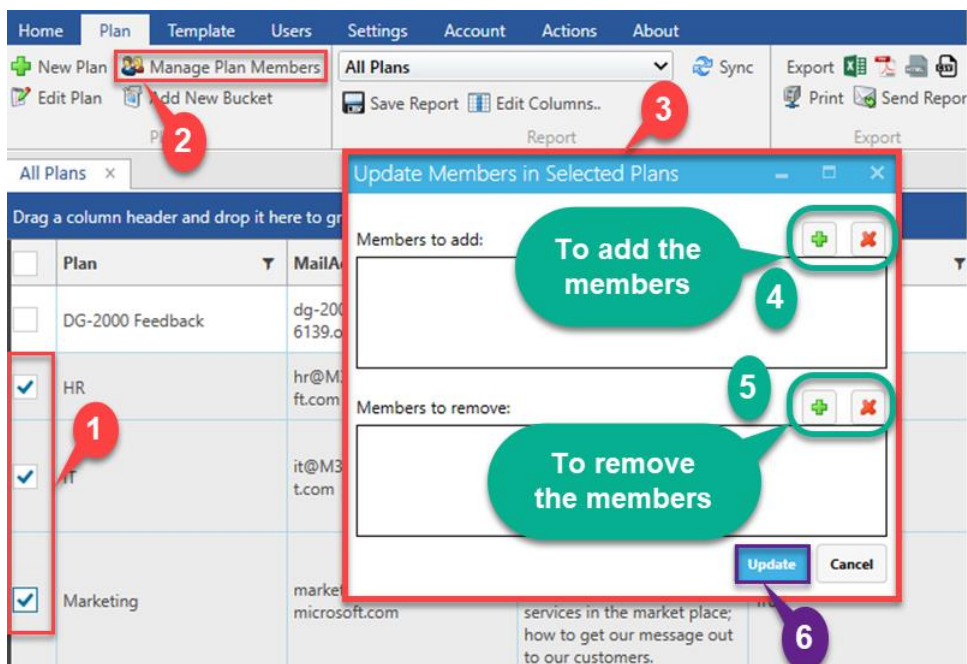


Fig. 5.2.1.3. Manage Plan Members

Add New Bucket

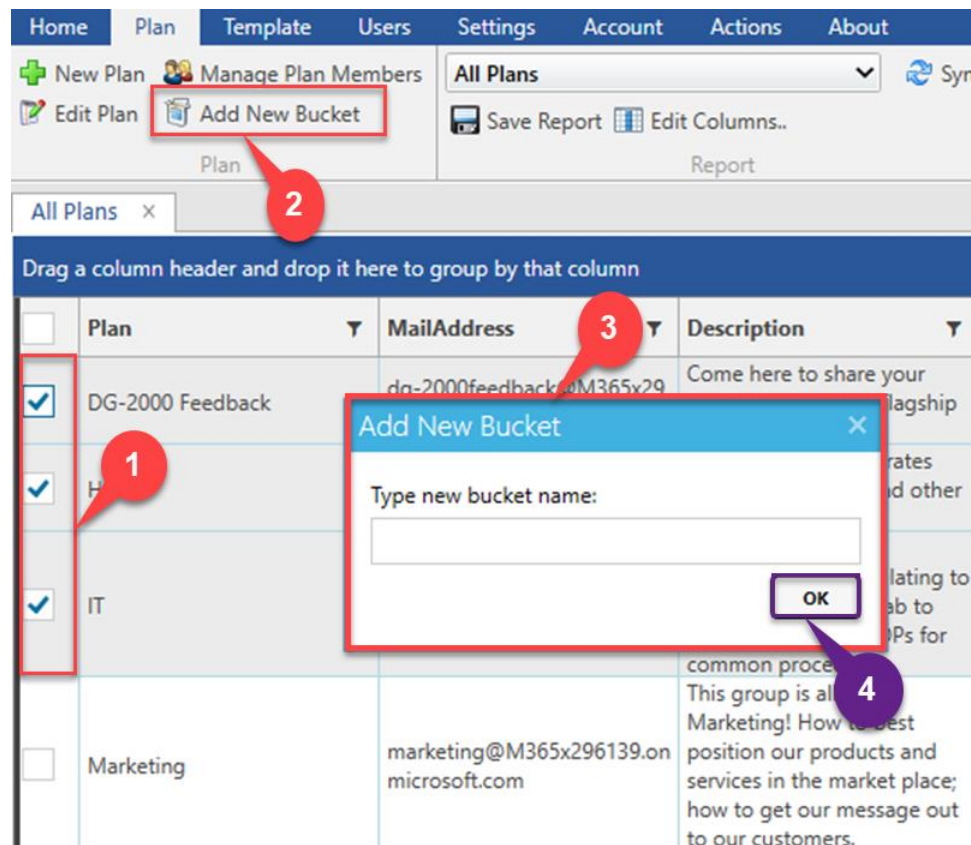


Fig.5.2.1.4. Add New Bucket

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

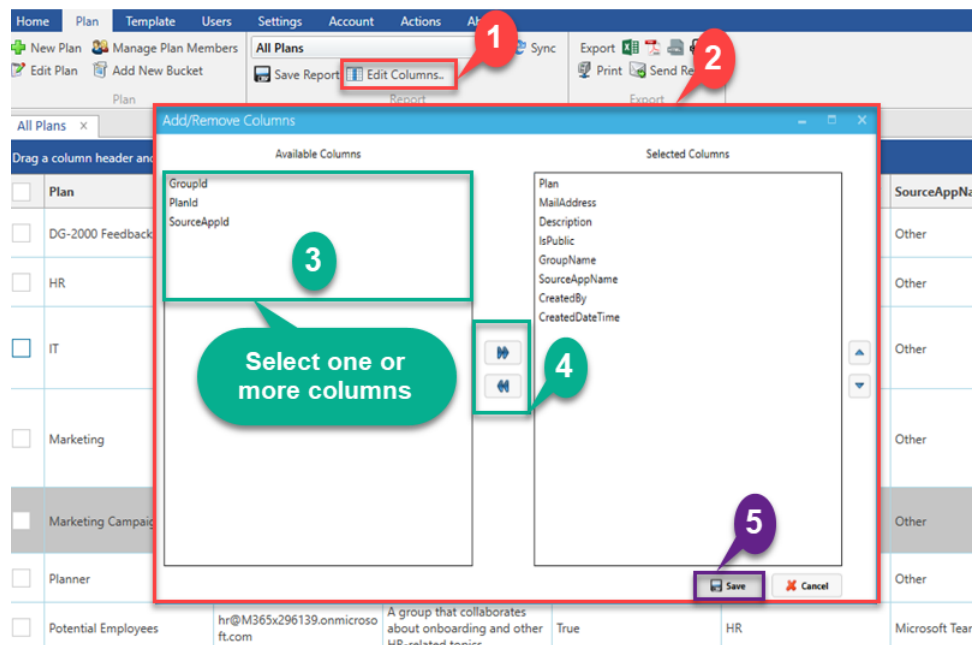


Fig.5.2.2.1. Edit Columns

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

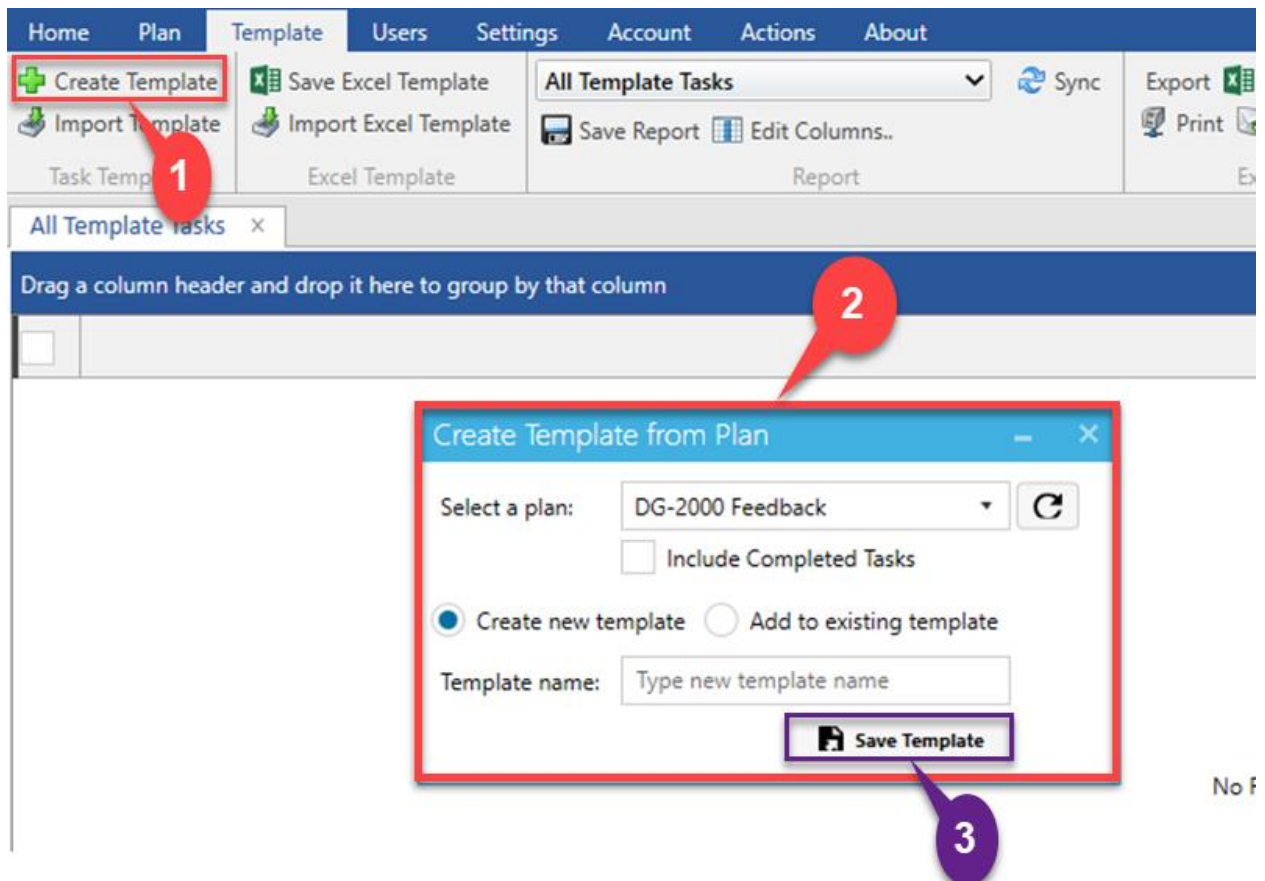


Fig.5.3.1.1. Create Template

Import Template

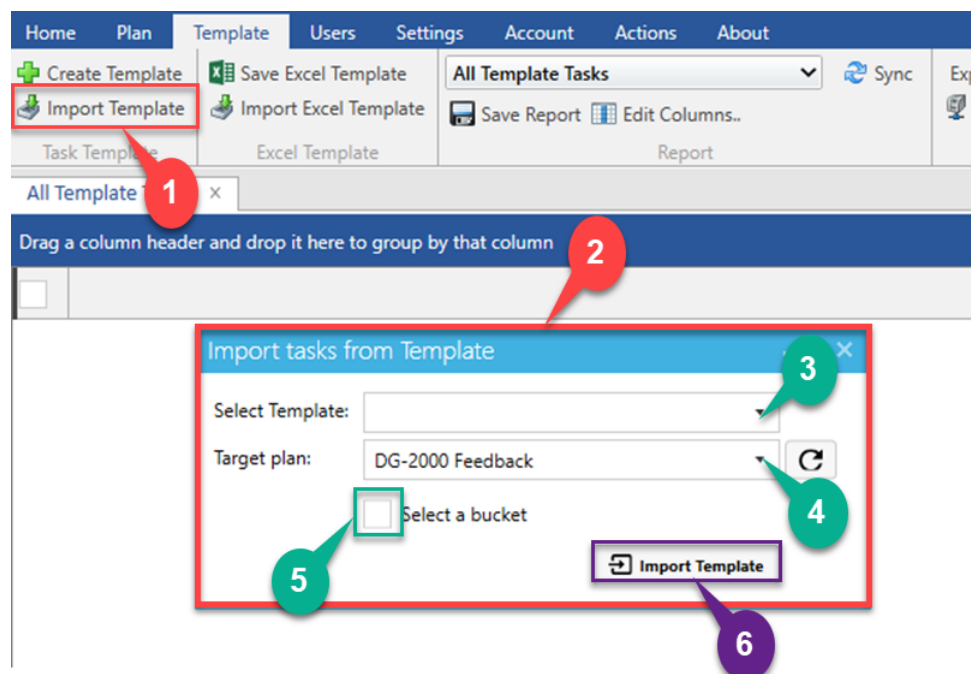


Fig.5.3.1.2. Import Template

5.3.2. Excel Template



Icons	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

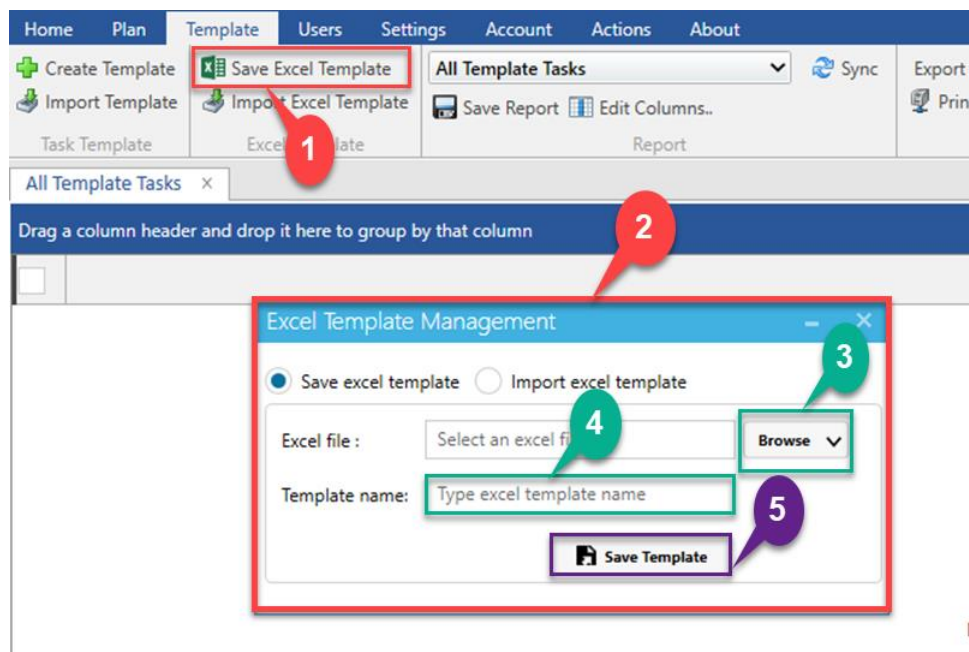


Fig.5.3.2.1. Save Excel Template

Import Excel Template

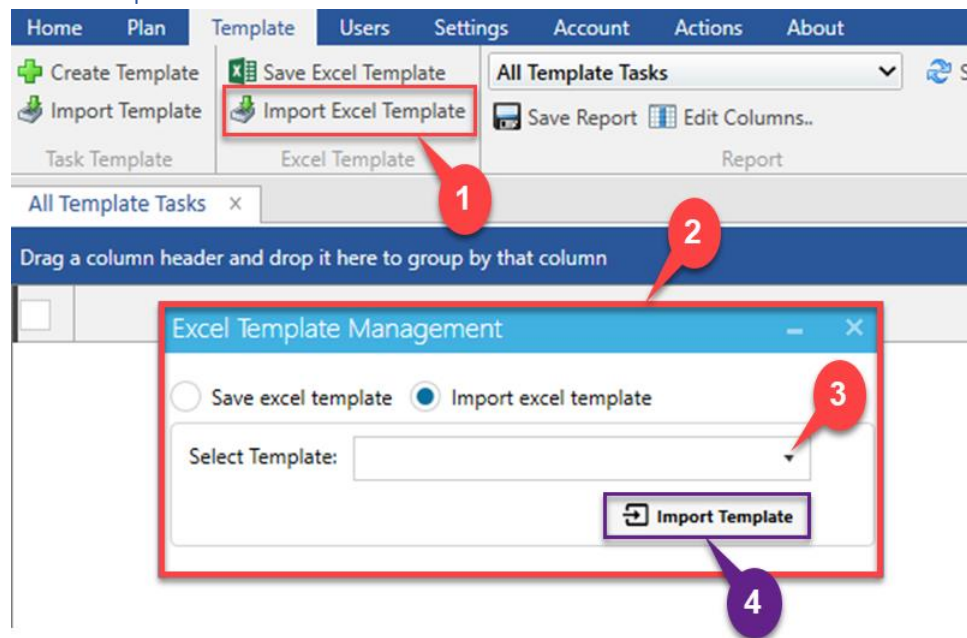


Fig.5.3.2.2. Import Excel Template

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

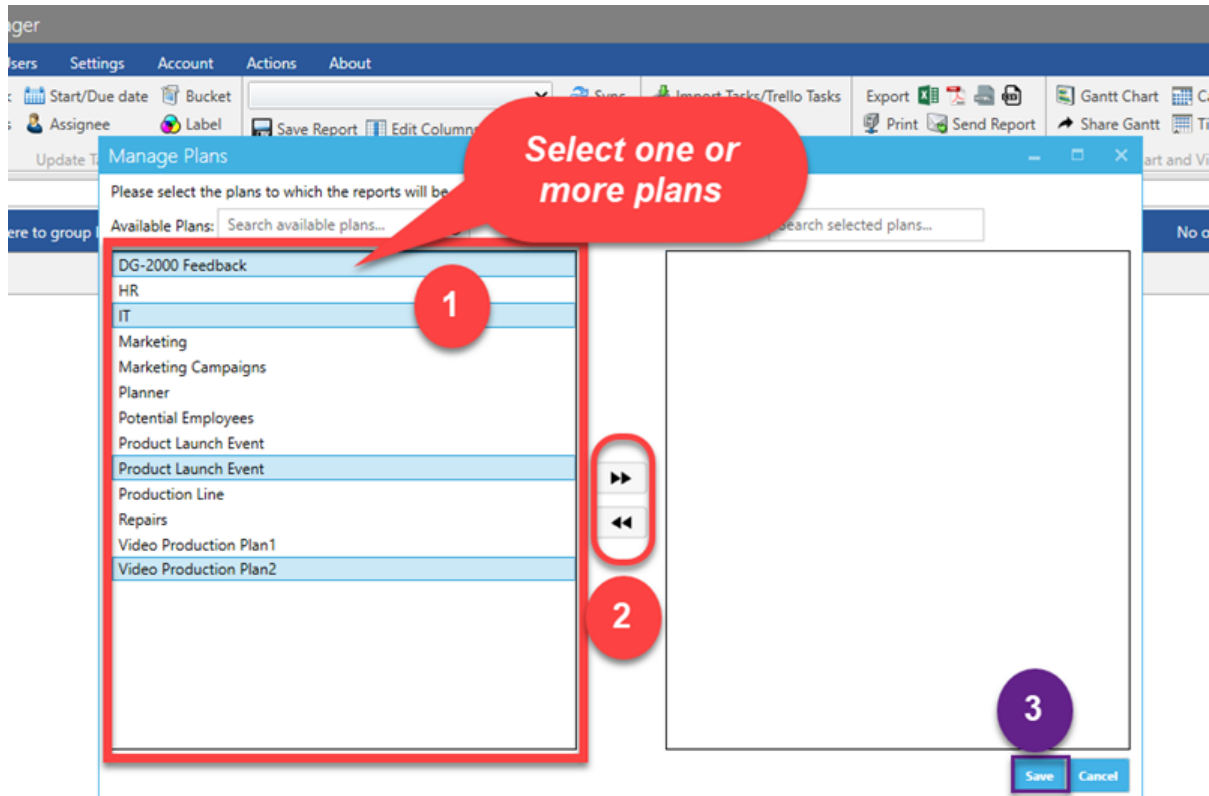


Fig.5.5.1. Manage Plans

Application Settings

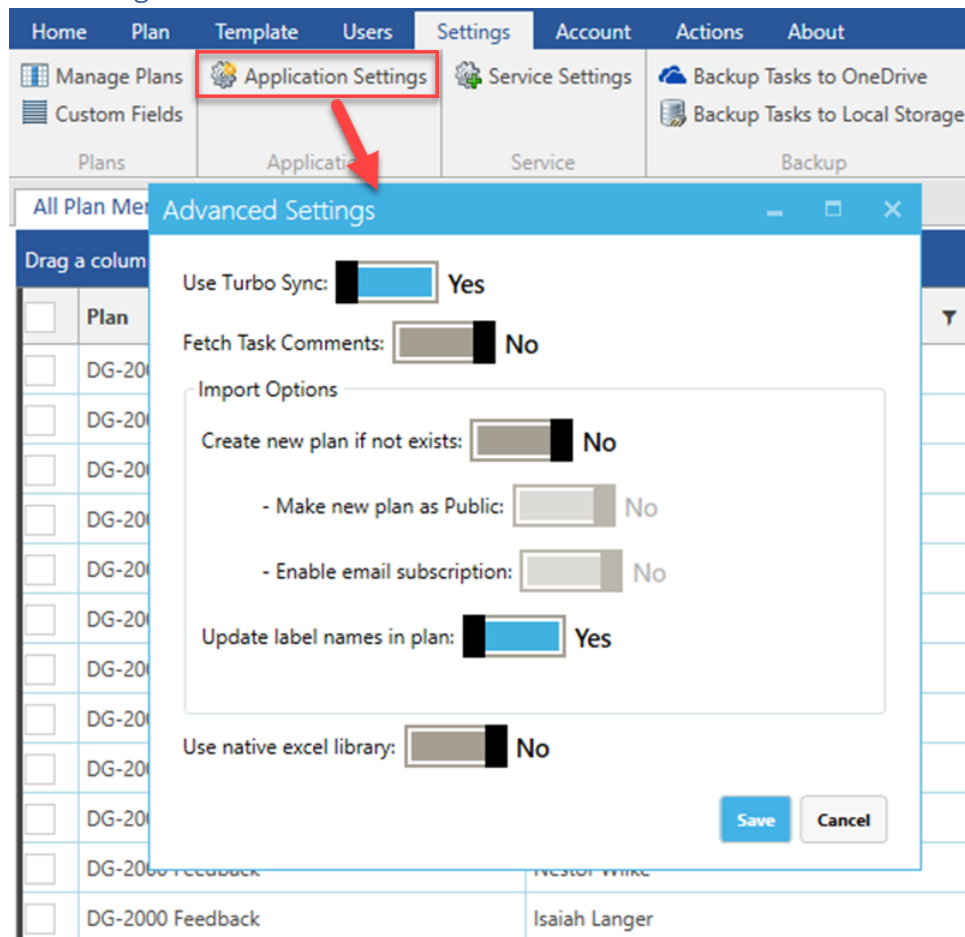


Fig.5.5.2. Application Settings

5.5.3. Service

Service Settings

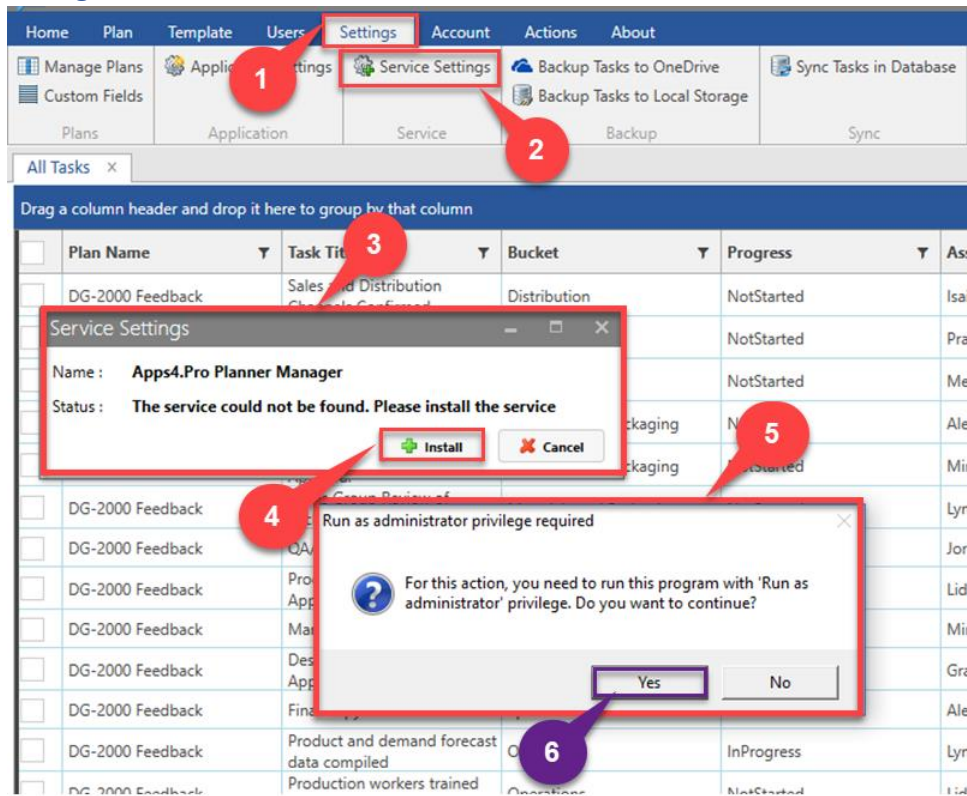


Fig.5.5.3. Service Settings

5.5.4. Backup

Backup Tasks to OneDrive

Home Plan Template Users Settings Account Actions About

Manage Plans Application Settings Service Settings Backup Tasks to OneDrive Backup Tasks to Local Storage

Plans Application Service

All Plans

Drag a

☒ Backup tasks to OneDrive

OneDrive Location: Select OneDrive location to save file. Browse

File name: All Tasks

Save file as: EXCEL

Export tasks from: All Plans Columns...

Backup Interval: 6 Hours

OneDrive User Credentials

User name: admin@M365x2...onmi

Password:

Save Cancel

DG-2000 Feedback Irvin Sayers

Fig.5.5.4.1. Backup Tasks to OneDrive

Backup Tasks to Local Storage

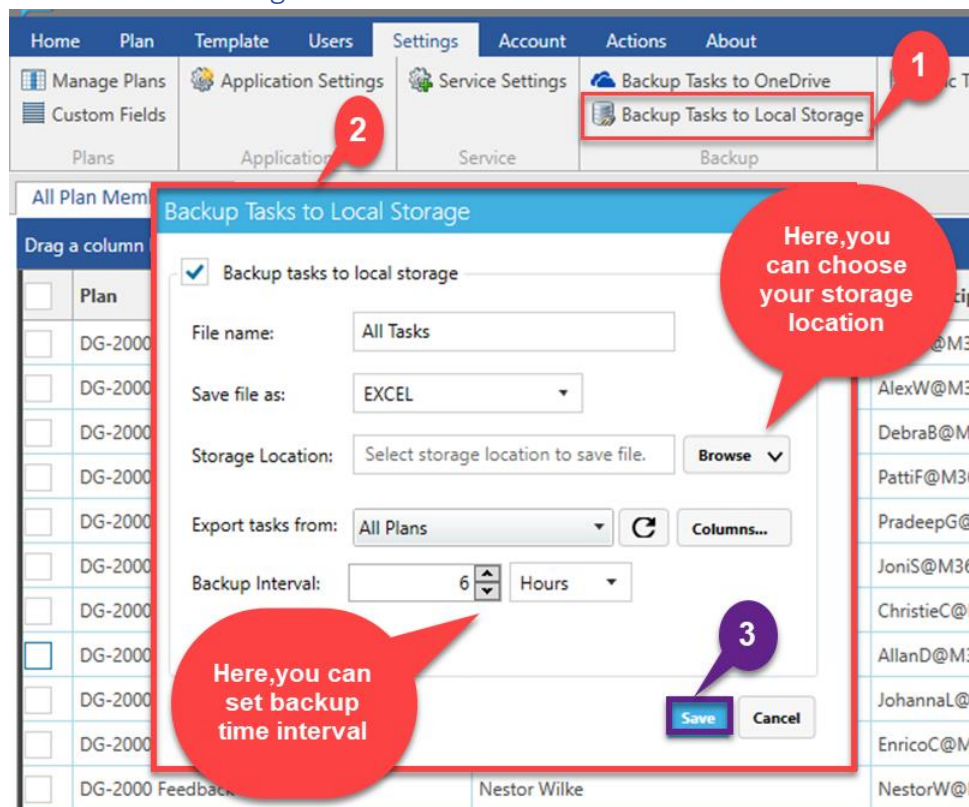


Fig.5.5.4.2. Backup Tasks to Local Storage

5.5.5. Sync

Sync Tasks in Database

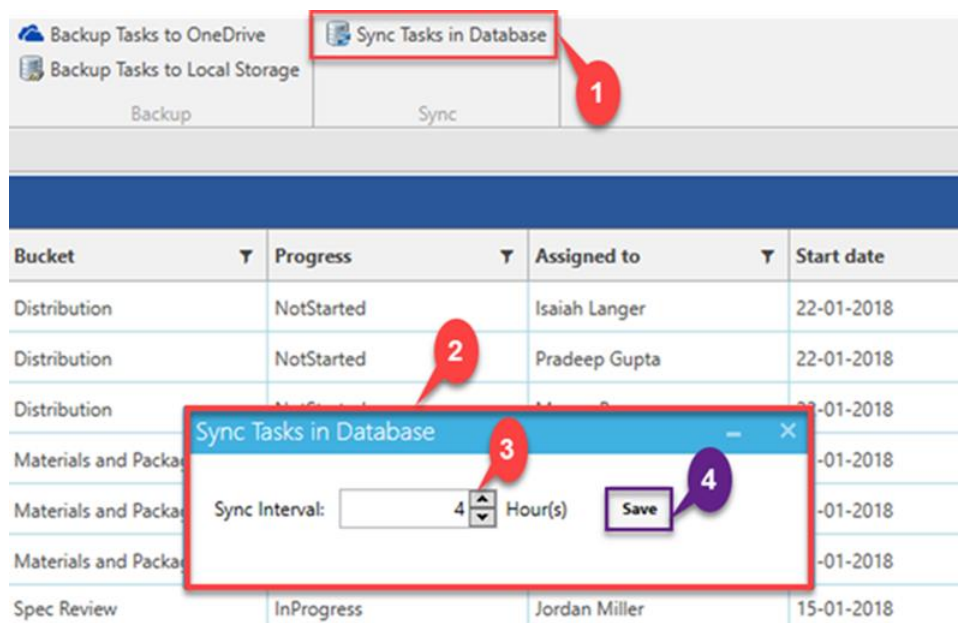


Fig.5.5.5. Sync Tasks in Database

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.