ENABLE 365 - PlanIt

- efficient annual planning in Teams

PLANIT

Setup

Introduction

Take Control of Annual Planning with Enable 365 PlanIt

PlanIt is a user-friendly app for effective annual planning in Teams. With PlanIt, you get a visual overview of activities on a yearly, monthly, and weekly level.

PlanIt gives you the ability to gather all your team's plans and activities in one place, making it easier to keep track and avoid overlapping tasks. The app allows you to customize the view according to your needs using color coding, categories, and filters, which makes it easy to navigate between different projects and events. Additionally, you can easily synchronize with other tools like Planner and Outlook Calendar, providing seamless integration and reducing duplication of work.

After purchase, PlanIt is ready to use in one or more Teams, depending on the license you have chosen.

This guide shows you how to use PlanIt as a tool for your annual planning.

Good luck!

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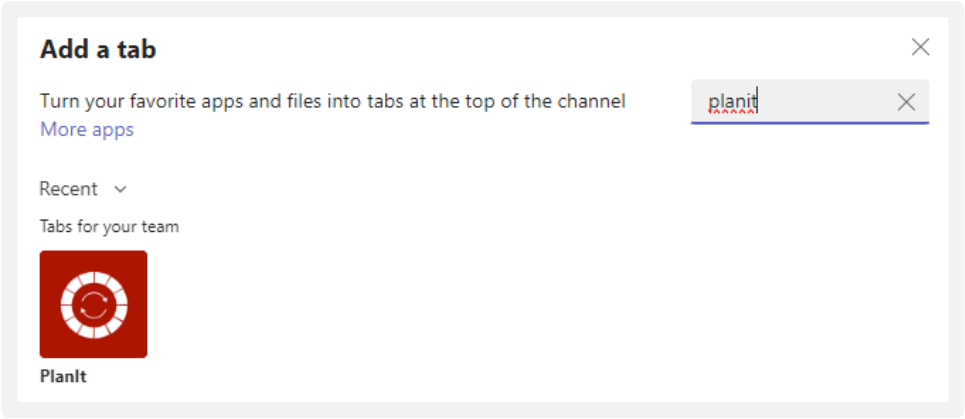
Getting Started with PlanIt

Add PlanIt as a tab

Go to the desired channel in the team, click on the plus symbol to add a tab, and search for "PlanIt" in the list of available apps.

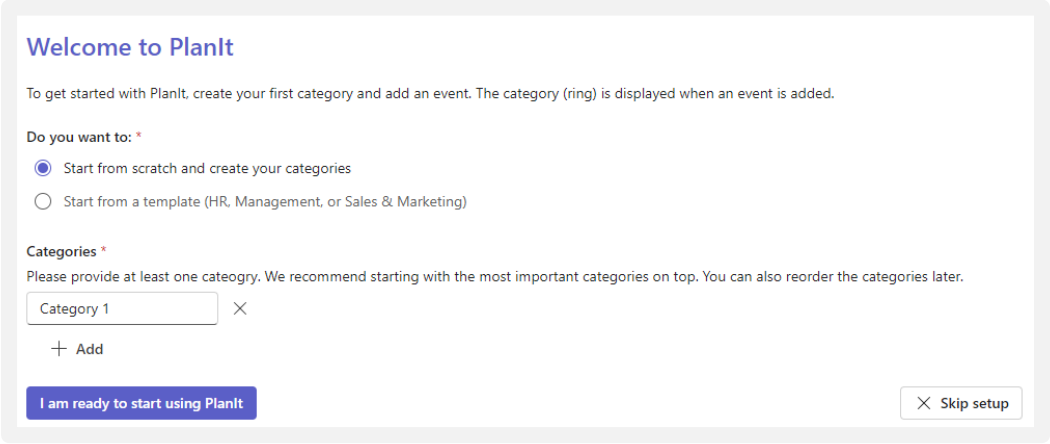


Getting Started with PlanIt

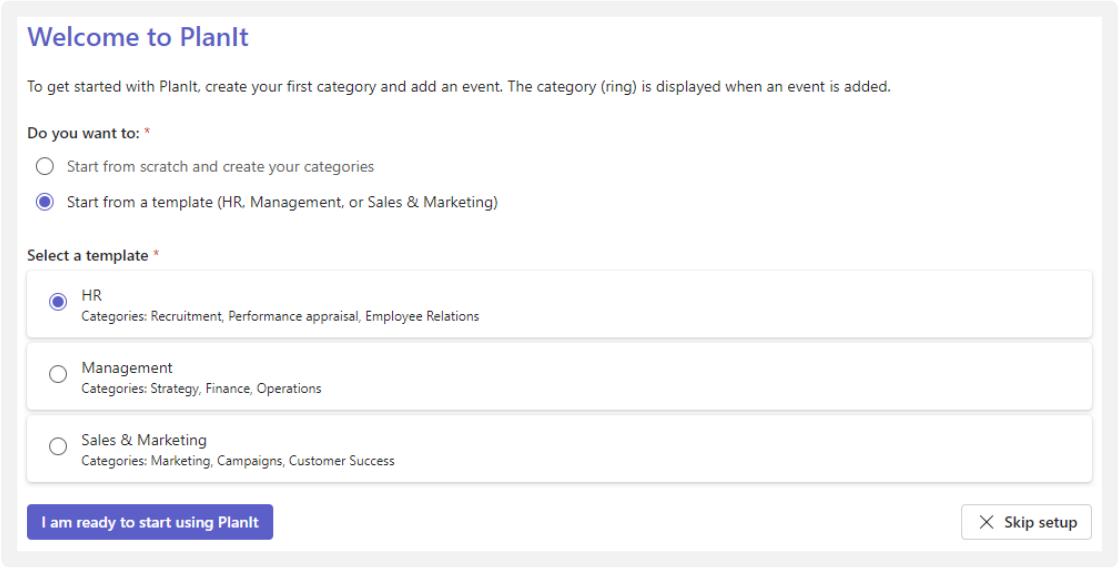
Initial Setup of PlanIt

Upon the initial startup of PlanIt, you have the following options:

1. Start from scratch and create your own categories – Here, you can define the categories you need. Note that at least one category must be created to proceed. You'll have the option to edit, remove, or add categories later as needed.



2. Use a predefined template – Choose from *HR, Management,* or *Sales and Marketing* templates. PlanIt will be set up with relevant categories based on the selected template. You can still edit, remove, or add categories later to tailor the setup to your needs.



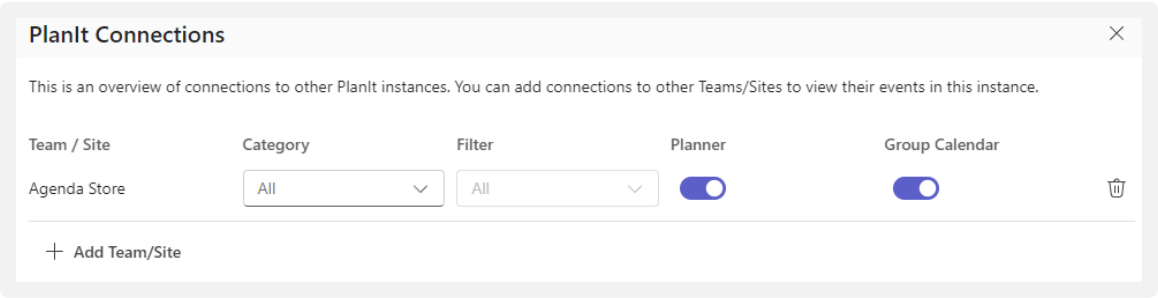
3. Skip setup – You can choose to skip defining categories for now, though this is not recommended. If you skip setup, categories will need to be created later in the settings for PlanIt to function properly.

Syncing PlanIt from Other Teams

PlanIt Connections

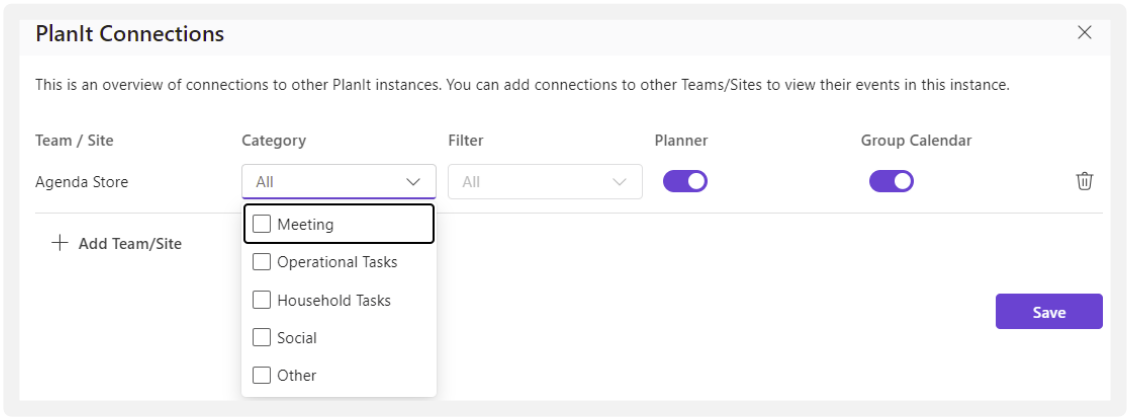
In some cases, it may be desirable to sync PlanIt from other teams to get a consolidated view of all plans. Follow the steps below to set this up:

- Go to the PlanIt Connections tab
- Add one or more teams you wish to sync with.



Once you have selected a team, the system will automatically check if PlanIt is already set up in the selected team. If there is an existing PlanIt configuration in the team, you will be able to choose categories and filters that are already set up. If the category already exists, the event will be placed alongside other events in the same lane. If not, a new lane will be created with the relevant category.

Also, remember to check off Planner and Group Calendar if you wish to sync these along with PlanIt.

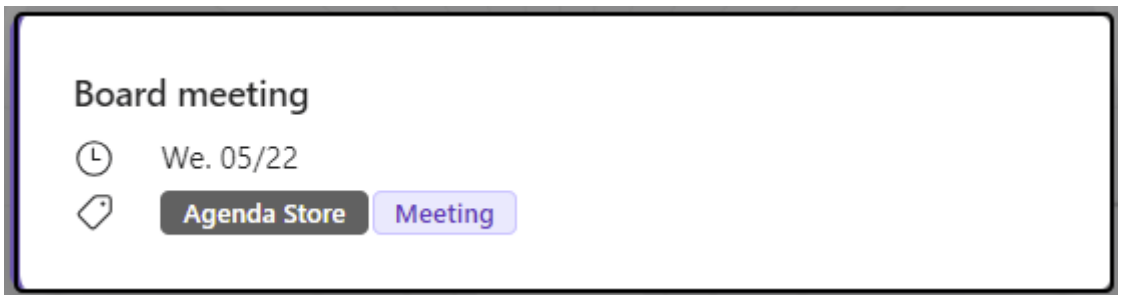


Note: If you do not select any category or filter, the system will automatically select all. If the category already exists, the event will be placed alongside other events in the same lane. If not, a new lane will be created with the relevant category.

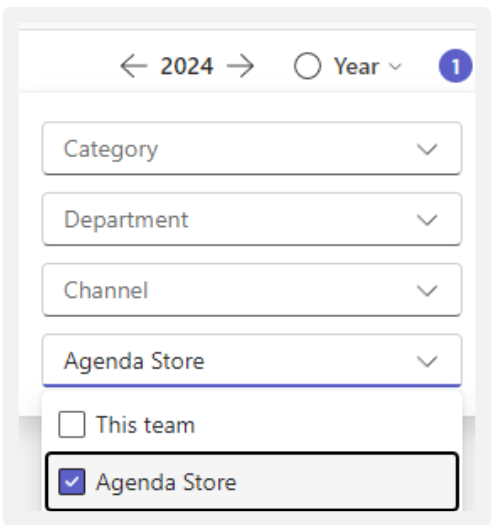
Syncing PlanIt from other teams

Synchronized Events

Events synchronized from other teams will be slightly different from local ones. When you click on such an event, it will be labeled with the name of the team it comes from, and you will not be able to edit these events.



In the Year Wheel view, you also have the option to filter events from other teams, and their categories will be included in the filters.



Note! When syncing PlanIt from other teams, only content that the logged-in user has access to will be displayed.

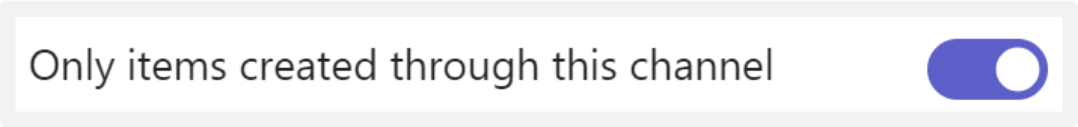
Settings for PlanIt

Show Entries from Channel or Team

Each team has one PlanIt instance. If you check the box "Only items created through this channel," PlanIt will only display items that are registered in the current Teams channel.

If you leave the box unchecked, PlanIt will retrieve items from the entire team. This means that if PlanIt is defined in multiple channels, items from all channels will be displayed in a single overview.

By default, items from the entire team are displayed.

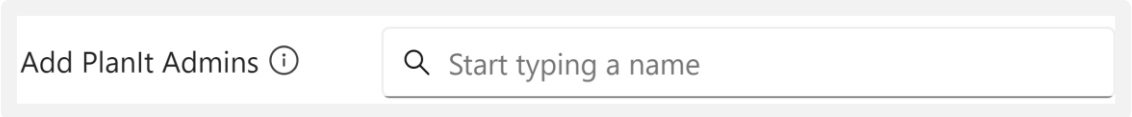


Select Start Month for Yearly View

PlanIt is set up with January as the default start month, but you can adjust this as needed. To change the start month, select the desired month from the dropdown menu "Select start month for yearly view."

PlanIt Administrators

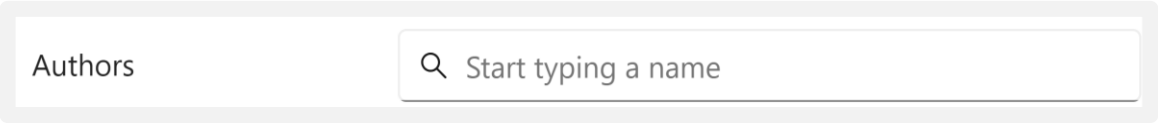
Assign administrators in PlanIt who will have access to configure settings. Users with the role of team owner in Microsoft Teams automatically have administrator rights.



Settings for PlanIt

PlanIt Authors

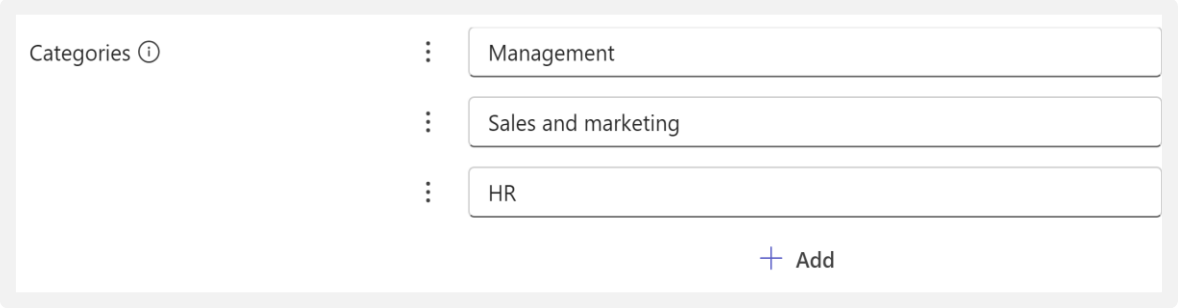
Add users who should have access to create content in PlanIt. By default, PlanIt is set up so that all team members can create entries. If desired, you can restrict this by defining specific users who are allowed to contribute entries.



Categories

Specify which categories should be used for entries in PlanIt. The categories are represented as rings in the circular view, but the rings will only appear after at least one event has been added.

The order you set for the categories will also determine the order they appear in the circular view. Therefore, it might be useful to place the categories with the most content at the outermost/top position for a clearer view.

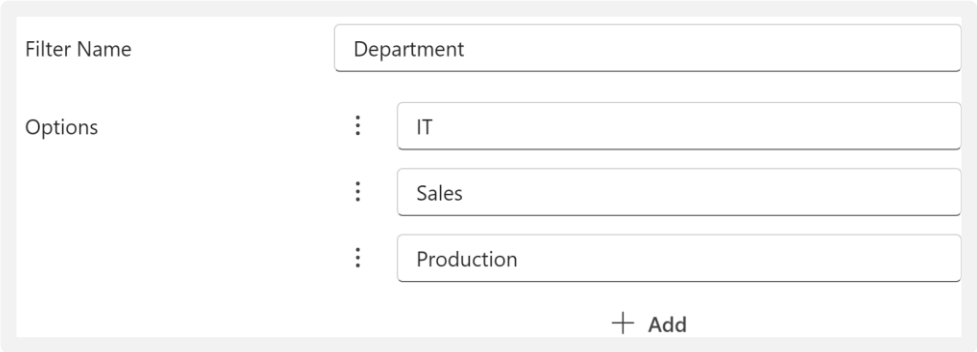


Note! PlanIt requires at least one category to be defined to function.

Settings for PlanIt

Custom Filters

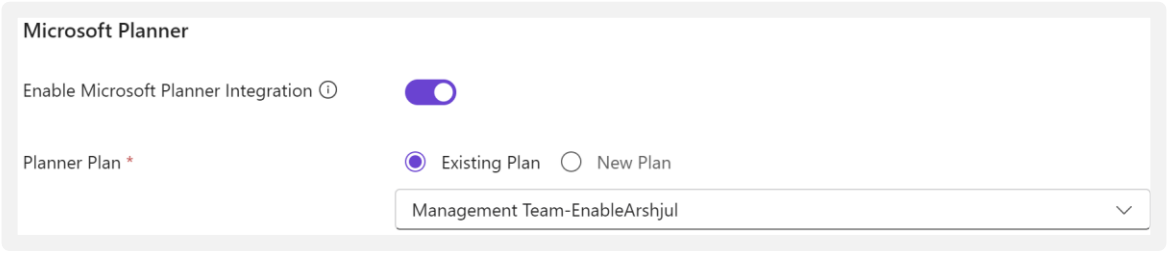
If you wish to filter entries, you can define a filter category for this. To activate a filter, enter a name in the “Filter Name" field, and then select the desired filtering options, such as:



The advantage of a custom filter is that it allows you to quickly sort and display only the entries that are relevant to you. This makes it easier to get an overview of specific events, projects, or tasks, especially when there are many entries in PlanIt. Custom filters can be tailored to your needs and give you the flexibility to focus on the most important aspects of your plans.

Planner Tasks

To be able to create Planner tasks directly in PlanIt, you must first enable this feature. This is done by checking the box "Enable Microsoft Planner integration." Then, you can either create a new plan or connect to an already existing plan in the team.



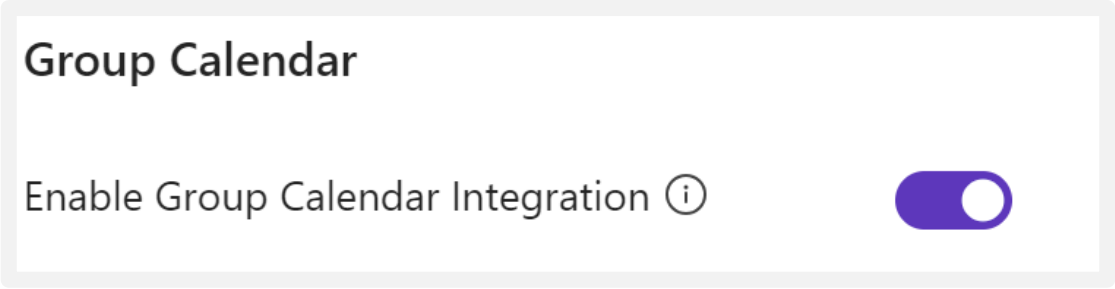
The advantage of enabling the Microsoft Planner integration is that it allows you to manage tasks seamlessly within the same tool. This provides a consolidated overview of both plans and tasks, eliminating the need to switch between different applications. By integrating Planner into PlanIt, you can easily delegate tasks, set due dates, and track progress directly from the PlanIt interface, saving time and simplifying the workflow.

Settings for PlanIt

Group Calendar

To be able to create entries in the team's shared calendar (group calendar), the feature must first be enabled. This is done by checking the box "Enable Group Calendar integration." Once this is activated, you will be able to view your events in both PlanIt and the Outlook calendar.

The advantage of enabling the group calendar integration is that it provides a comprehensive overview of both the team's plans in PlanIt and calendar events in Outlook. This makes it easier to coordinate and manage schedules across tools, ensuring that no meetings or tasks are missed. You can easily track all events in one system and avoid the manual duplication of information.



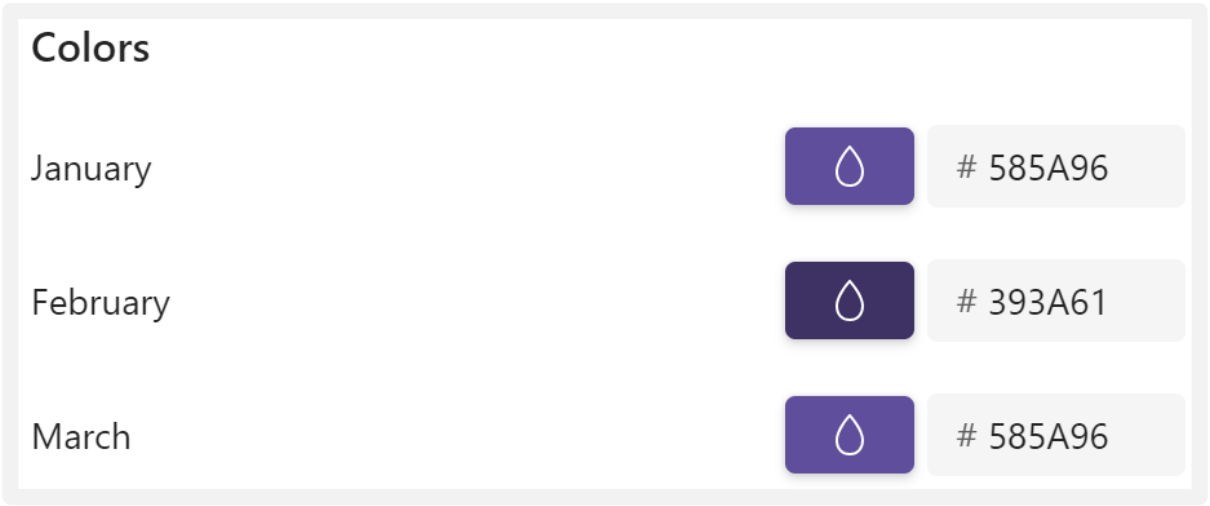
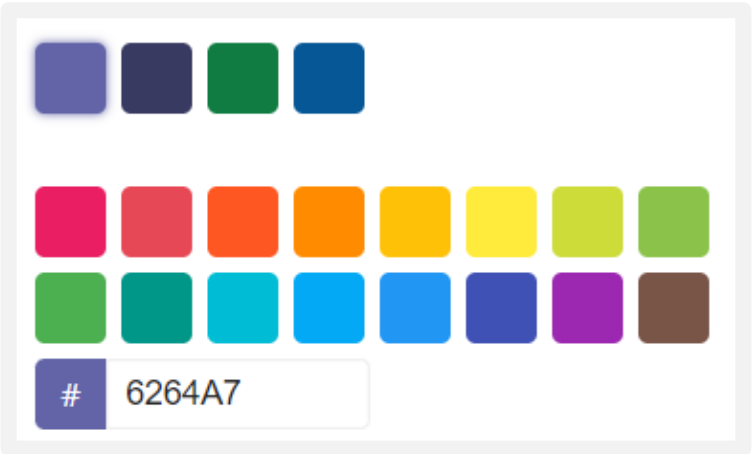
Note! For the first-time activation, a Global Administrator is required to provide the necessary consent in the Microsoft Teams Admin Center.

Settings for PlanIt

Colors

Months in PlanIt can be highlighted by using colors. By default, two different colors are set up, but this can easily be customized to suit your needs.

The advantage of using color customization is that it makes it easier to visually distinguish between periods and events in the year wheel, providing better clarity and making planning more intuitive. You can customize the colors to highlight important months, projects, or seasons, creating a more personalized and user-friendly view.



You can choose between 16 standard colors or specify your own colors using a hex code.