



ENABLE 365 - PlanIt

- efficient annual planning in Teams

PLANIT

Setup

Introduction

Take control of your annual planning with Enable 365 PlanIt

PlanIt is an app in Teams for effective annual planning. Enable PlanIt is easy to use and provides a visual representation of activities on an annual, monthly, and weekly basis.

After purchasing PlanIt for your business, it is ready for use on one or more teams, depending on your license.

This guide describes how to setup and get started with PlanIt in your team.

Good luck!



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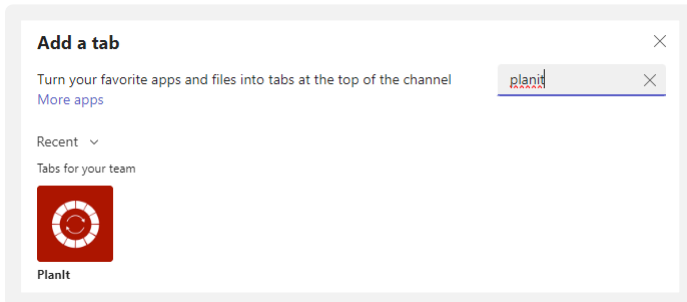
Content

- Introduction** _____ **2**
- Getting started with PlanIt in your team** _____ **4**
- Add PlanIt as a tab** _____ **4**
- Settings for PlanIt in your team** _____ **4**
 - Show items from the current channel or the entire team _____ 4
 - Enable use of Planner _____ 5
 - Enable use of the team's shared calendar _____ 5
 - Synchronize PlanIt from other teams _____ 6
 - Specify who should be able to create items _____ 8
 - Specify categories for items in PlanIt _____ 9
 - Activate use of filter _____ 9
 - Custom colors for month _____ 10
 - Select the start month for view _____ 10

Getting started with PlanIt in your team

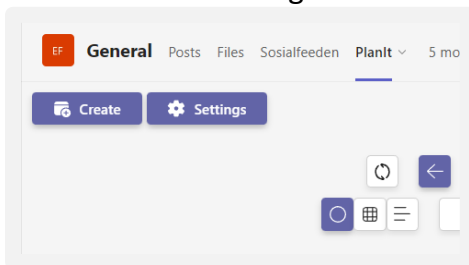
Add PlanIt as a tab

Go to the team's channel where you want to add PlanIt, click the plus symbol to add a tab, search for "PlanIt" and select "PlanIt" in the list of available apps:



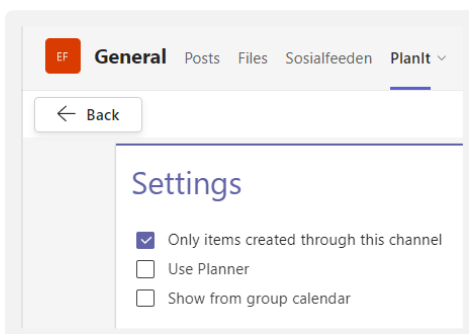
Settings for PlanIt in your team

Under "Settings" you can choose the type of item for planning activities, set categories and more. The settings are described in the sections below.



Show items from the current channel or the entire team

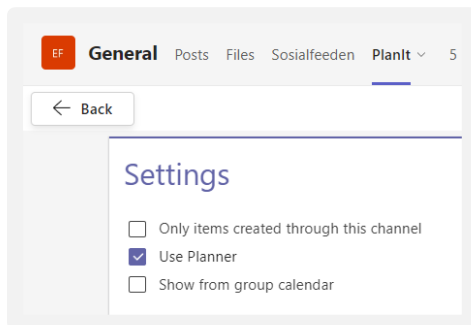
You have one PlanIt per team. By ticking the box "Only items created through this channel", you choose that PlanIt should only display items that are registered in the current team's channel. If you leave the box open, it will fetch from the entire team, so that if PlanIt is defined in several channels, this will appear in the same overview.



By default, items from the entire team is to be displayed.

Enable use of Planner

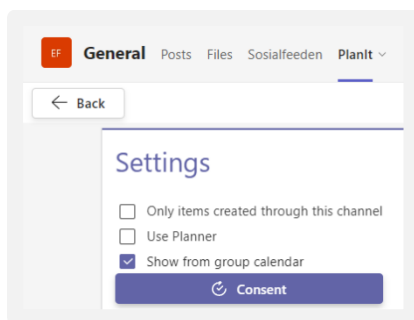
To be able to create Planner tasks directly in PlanIt, this must first be activated. Do this by ticking the box "Use Planner".



By default, Planner is enabled.

Enable use of the team's shared calendar

To be able to create items in the team's common calendar (group calendar), this must first be activated. You do this by ticking "Show from group calendar".

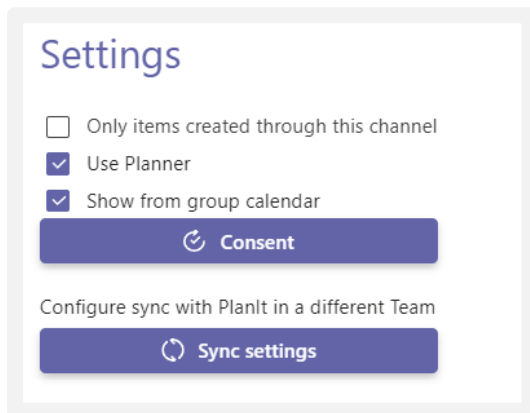


By default, the group calendar is not activated.

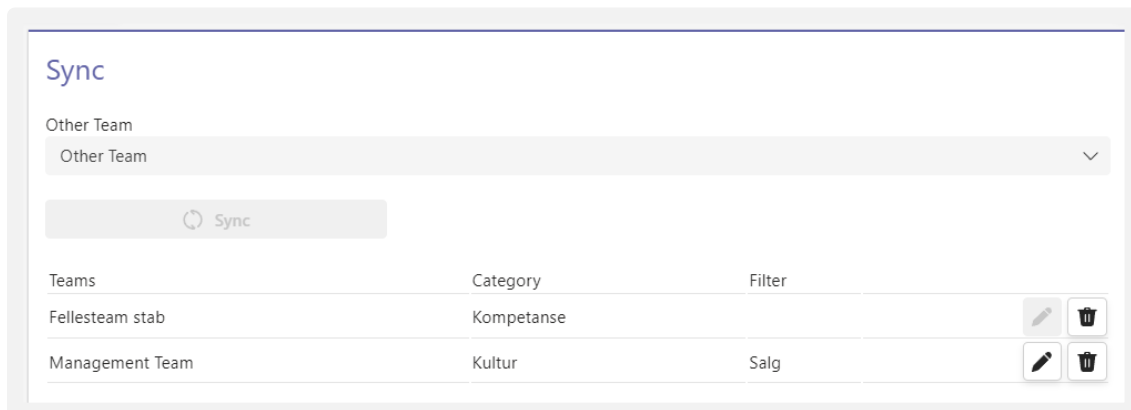
Note! Use of the group calendar requires approval from the team owner before use. If this has not already been done by the team owner, press "Consent".

Synchronize PlanIt from other teams

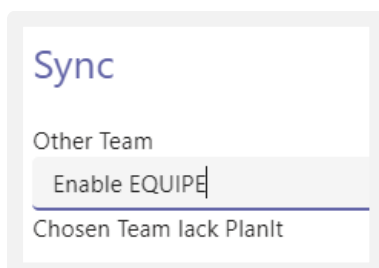
One may sometimes wish to view all plans from different teams, together. This is done by setting up synchronization and can only be performed by the owner of the team.



When you select "Settings for sync", you can create, edit, delete and view updated content from PlanIt in other teams.



To create a synchronization, you must first select a team. A check will then be carried out to see if the selected team contains PlanIt. If it does not exist, a message will appear.



If PlanIt is found in the selected team, it will be possible to select from existing categories and filters.

Sync

Other Team
Management Team

Category
Choose (empty = all)

Filter
Choose (empty = all)

Sync

Note! If you do not select a category and/or filter, it will be equivalent to selecting all.

If the category of the event already exists, it will be placed together with events from PlanIt in this team. If the category does not exist, a new lane will be created with the category of the event.

The existing synchronizations will be placed in a table on the page where you can see which other PlanIt it is synchronized from along with selected categories and filters. Here there is also the possibility to edit and delete synchronizations:

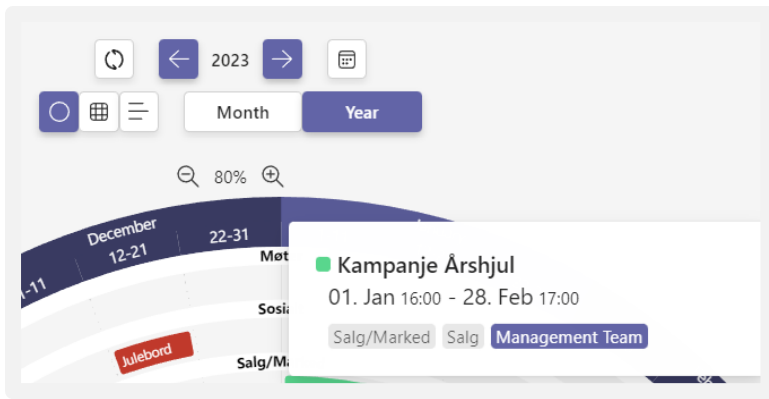
Sync

Teams	Category	Filter	
Fellesteam stab	Kompetanse		
Management Team	Kultur X	Salg X	

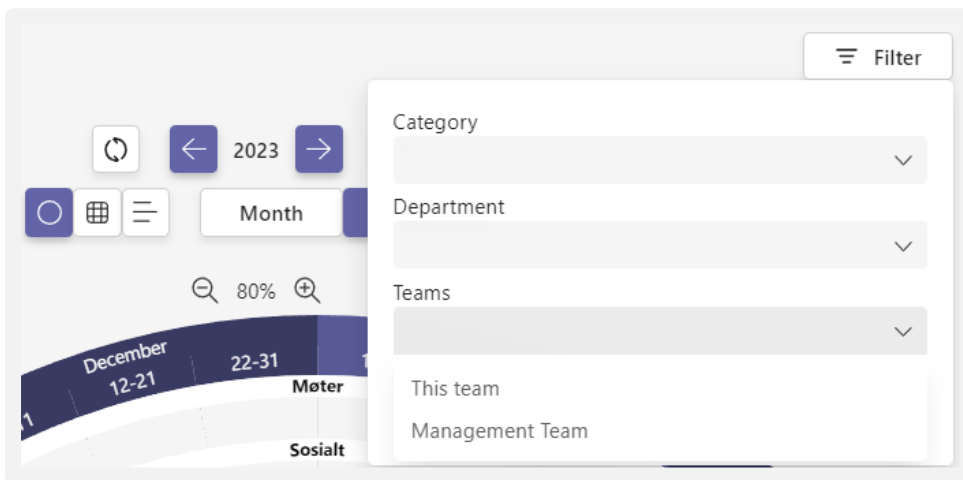
Møte
Salg/Marked
Sosialt
Ferie/Fri
Kompetanse

v2.1.0.1

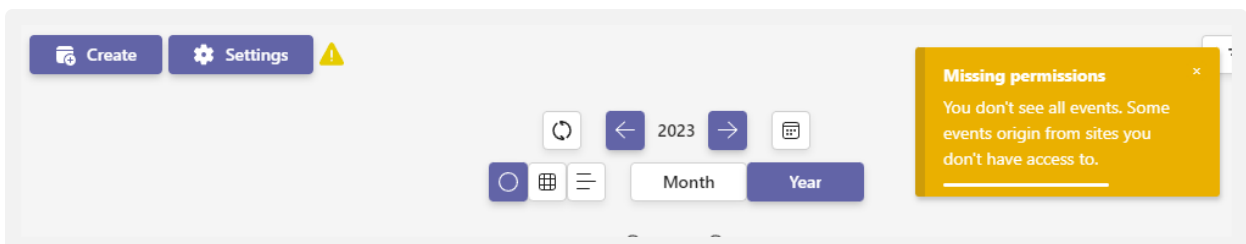
Events from PlanIt one syncs from be slightly different than the others. When you tap on an event it will be marked with the name of the team it comes from, with no option to edit those events.



When you are in the wheel view, you also have the option to filter events from PlanIt in other teams, and the categories are included in the category filter.



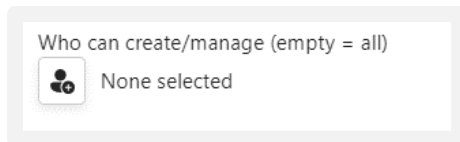
When synchronizing PlanIt from other teams, it may be possible that a user does not have access to these teams. The user will be made aware of this by a warning icon. If you click this, a message will appear explaining the reason.



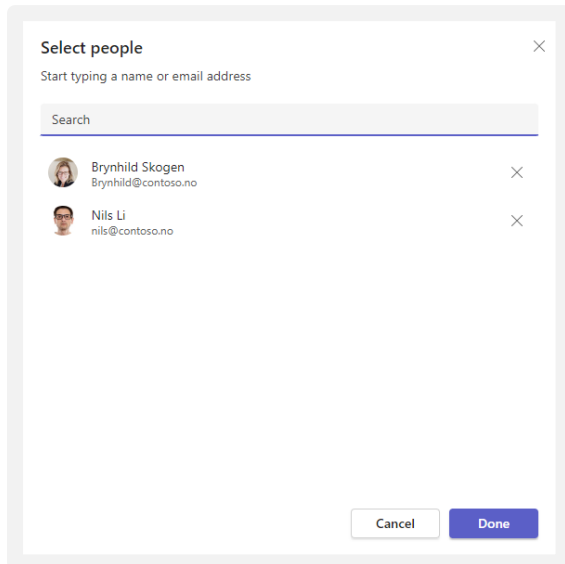
Specify who should be able to create items

PlanIt has by default set that all members of the team can create items. If desired, you can define selected users who is allowed to create items.

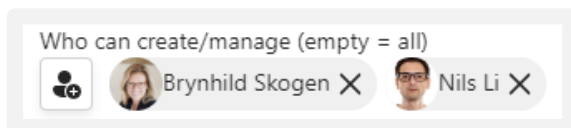
To give users this access, select the button under "Who can create/maintain (blank = everyone)."



You then search for users and add them. Finish with "Done".

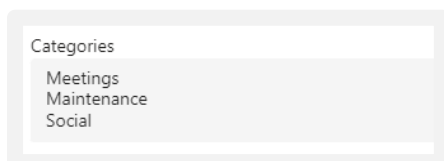


Users with access will then appear on the page:



Specify categories for items in PlanIt

Specify which categories are to be used for items in PlanIt. Write one category per line, example:



Note! PlanIt requires you to have at least one category defined.

Activate use of filter

If you want to be able to filter items, you can define filter categories for this. To activate a filter, check the box "Use custom filter" and then enter a filter and filter values, example:

Custom filter

Use custom filter

Department

Department 1
Department 2

Custom colors for month

Months in PlanIt can be highlighted by using colors. These are set up with two different colors by default, but this can be customized as needed.

Colors

January February March April May June

July August September October November December

To change a color, select the month and then the desired color.

Hex Red Green Blue

585a96 88 90 150

Select the start month for view

PlanIt is by default set with January as start month, but this can be changed.

Select starting month

January

To change, click on the drop-down field under "Select start month" and choose the desired month.

Note! Remember to press "Save" to save the changes.
