



ENABLE 365 - PlanIt

- efficient annual planning in Teams

PLANIT

User Manual

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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Recommendations for Structure and Use

Structure in Teams

PlanIt is an app that can be installed in a Teams channel, where all members can contribute content. However, access can be restricted if needed through the app's settings.

If you want to divide annual planning within a team, this can be done by using different channels for various subject areas, departments, or other units. To achieve this, you add PlanIt as a tab in each channel.

Recommended Uses

PlanIt can be used for planning in a variety of contexts, with support for different types of activities involved in annual planning. Each activity has different needs related to execution, and therefore, PlanIt offers various elements that you can create based on what suits best. For example, you can assign an activity as a task to a specific person or schedule it as a calendar entry for one or more people.

We recommend exploring the different options so you can fully benefit from PlanIt and get the best possible support for planning and executing your activities.

Planning Activities

Content Adapted to Different Needs

In annual planning, there are various types of activities that require different levels of follow-up. PlanIt accommodates these needs by offering different types of entries that can be created in the annual plan.

Below is a description of the different types of activities: *Standard*, *Planner Task*, and *Group Calendar*.

Standard activity

This is a type of activity where it is not necessary to assign the entire task to a specific person, or where the activity should be linked to a calendar invitation for one or more participants. If there is a need to add subtasks under the activity, this can be done directly within the activity, for example, by creating a meeting invitation, reserving a room, or ordering food.

A typical example of such an activity might be an audit or something similar.

Planner Task Activity

This is a type of activity where it is desirable to create a task that can be assigned to a person, while the task is also displayed in PlanIt. The task is created in Planner, allowing easy tracking of progress, seeing if the task has been completed, and sending reminders to the responsible person.

For example, this could be preparing a quarterly report.

Group Calendar Activity

This is a type of activity that is linked to a specific date and designed as a meeting. By creating this entry, it is added to the team's shared calendar (group calendar), and you can invite relevant people to the meeting.

Examples of such activities might include quarterly meetings, strategy gatherings, or department meetings.

Standard Activity

How to Create it?

1. Click the "Create" button in the top left corner.
2. In the panel on the right, select "Standard" from the list under "Type".
3. Enter the event's Title and Category.
4. Set the start and end Date and Time, or select "All day" if the event lasts the entire day.
5. If applicable, choose a Custom Filter Category (if this option has been set up).
6. Fill in the event Description.
7. Choose the desired Color for the event as it will appear in the year wheel.
8. If this is a recurring event, under "Repeat as series", set how often the event should repeat and for how long. See the Repeat as Series section for more details.
9. Decide whether the event should be visible in the Year View (this is enabled by default).
10. Finish by clicking "Save".

Form for Standard Activity

New Event

Type ⓘ

Standard

Title *

Category *

Date *

05/08/2024

05/08/2024

All day

Department

Description

Normal

B

I

U

A

Color

6264A7

Repeat as series

Show in annual displays

Save

Overview of the Fields in a Standard Activity

Planner Task Activity

How to Create it?

1. Click the "Create" button and select "Planner Task" in the "Type" field.
2. Fill in the "Title" and "Description" fields.
3. Set the start and end Date.
4. Assign the task to one or more people.
5. Choose whether to create a new bucket in Planner or use an existing bucket.
6. **If "New Bucket":**
 - Enter the Name of the bucket.
 - Specify the Category and, if applicable, a custom filter category (if this has been set up).
 - Choose the desired Color to represent this bucket.
 - Decide whether the event should be displayed in the Year View or not (shown by default).
7. **If "Existing Bucket":**
 - Select a bucket from the dropdown list. This will show buckets from the associated plan, as specified in Settings in PlanIt.
 - Set the Frequency. If you specify that this should be recurring, also set an End Date for the series. See [Repeat as series](#) for an explanation.
8. Finish by clicking "Save".

The activity is saved and becomes visible to all users. Additionally, a task will be created in Planner linked to the activity. If a responsible person was assigned, they will also receive a notification.

Note! To create planning activities with reminders, you must have Planner activated in the relevant team. See the separate guide on [Setting up PlanIt](#) for more information.

Form for Planner Task Activity

New Event

Type ⓘ

Planner task

Title *

Description

Date *

05/08/2024

05/08/2024

Assignment

Start typing a name

Planner bucket

☒ New bucket

☐ Existing bucket

Bucket name *

Category *

Department

Color

107c41

Show in annual displays

☒

Repeat as series

☐

Save

Overview of the Fields in a Planner Task Activity

Group Calendar Activity

How to Create it?

1. Click the "Create" button and select "Group Calendar" in the "Type" field.
2. Enter the Title and Category.
3. Set the Date and Time for the start and end, or select "All day".
4. Specify any Custom Filter Category (if this has been set up).
5. Fill in the Description.
6. Choose the desired Color for the event in the year wheel.
7. Indicate whether the meeting should be created as a Calendar entry only or held as a Teams meeting (default is off).
8. Decide if all team members should be invited. If you want to control who receives the invitation, uncheck the "Invite team/group" box and then specify participants below.
9. Add external participants by entering their email addresses, separated by a ";" (internal/external).
10. Choose whether the event should be shown in the Year View (shown by default).'
11. Finish by clicking "Save".

The Teams meeting will now appear in PlanIt, and the invitation will be sent to the meeting participants.

Note! Creating a Group Calendar activity as a meeting in Teams requires that you have activated the group calendar in the relevant team.

See the separate guide on Setting up PlanIt for more information.

Form for Group Calendar Activity

New Event

Type ⓘ

Group calendar

Title *

Category *

Date *

05/08/2024

All day

05/08/2024

Department

Description

Normal

B

I

U

Color

055796

Teams meeting

Invite team/group email ⓘ

Internal attendees

Brynhild Skogen

Start typing a name

Invite all team/group members

External attendees

Enter email addresses separated by ";"

Show in annual displays

Save

Overview of the Fields in a Group Calendar Activity

Repeat as Series

How to Create it?

If you want the event or task to be recurring, check the box for "Repeat as series" (support for group calendar series will be available in a future version).

Repeat as series

Every

1

Month

☒

On date 28.

☐

4. Monday

☐

Last Monday







Until:

10/29/2024

Max date:

10/28/2027

1. Select the Frequency Type (note that the options may be adjusted, and some choices may be hidden):
 - On date: The event repeats on the same date each time.
 - On X day: The event repeats on the same weekday in the same week each time.
 - Last day: The event repeats on the last day of each month.
2. Set an End Date for the series and click "Next".
3. You will now see an overview of all meeting dates created in the series.

New Event			
From	To		
Mo. 10/28/2024	Mo. 10/28/2024		
Th. 11/28/2024	Th. 11/28/2024		
Sa. 12/28/2024	Sa. 12/28/2024		

4. Review the list and make any necessary changes to dates that do not work, for example, due to public holidays.
5. Finish by clicking "Save". The series is saved and becomes visible to all users.

Planner in PlanIt

Settings

In the settings, you choose which Planner plan PlanIt should subscribe to. With Planner integrated into PlanIt, you can easily get an overview of and manage all tasks in the plan. You can choose between using an existing plan or creating a new one. When creating a new plan, you select a name, and PlanIt will automatically subscribe to it. If you want to subscribe to an existing plan, first select the plan in the settings, and then go to "Planner Buckets" (to the right of "Create") to choose which buckets you want to subscribe to.

Microsoft Planner

Enable Microsoft Planner Integration ⓘ

Planner Plan *

Existing Plan

New Plan

Management Team-EnableArshjul

To choose which bucket you want to subscribe to, click on "Planner Buckets."

+ Create

Planner Buckets

PlanIt Connections

Settings

Export

Information

Planner in PlanIt

Planner Buckets

Under "Planner Buckets," you will see an overview of all the buckets you are subscribed to or can subscribe to, as shown in the figure below. To subscribe to bucket, select the desired Category and Color. You can also choose a Custom Filter Category and decide whether the bucket should be displayed in the Year View.

Category *

Sales and marketing

▼

Department

IT

▼

Color

107c41

Show in annual displays

Cancel

Save

Customize category, department, color, and display options when subscribing to a bucket

Planner bucket	Category	Department	Color	Count	
Subscribed buckets					
✓ Get PlanIt	Strategic Objectives	Sales		4	<div></div> <div></div> <div></div>
Available buckets					
Foss	-	-	-	2	<div></div> <div></div>
Opiniosec	-	-	-	3	<div></div> <div></div>

Overview of subscribed and available buckets

PlanIt Connections

PlanIt Connection

Through connections, you can establish a link to other PlanIt installations. PlanIt will then fetch all events from the selected year wheel. You can filter which events you want to import using the Category and Filter settings, as well as choose whether to connect to Planner and Group Calendar, as shown in the figure below. A major advantage of this functionality is that you can easily import and synchronize events from multiple PlanIt installations, providing a comprehensive overview of activities across teams and areas. This streamlines planning and makes it easier to keep everyone involved up to date, while also allowing you to filter and customize which events to import.

Connecting to another team or area is only possible if that team has its own PlanIt installation.

PlanIt Connections

×

This is an overview of connections to other PlanIt instances. You can add connections to other Teams/Sites to view their events in this instance.

Team / Site	Category	Filter	Planner	Group Calendar	
Agenda Store	<div>All</div>	<div>All</div>	<div></div>	<div></div>	<div></div>
ESG English	<div>All</div>	<div>All</div>	<div></div>	<div></div>	<div></div>
<div>+ Add Team/Site</div>					

Save

To delete an existing connection, click the trash can icon on the right.

Activity Display in PlanIt

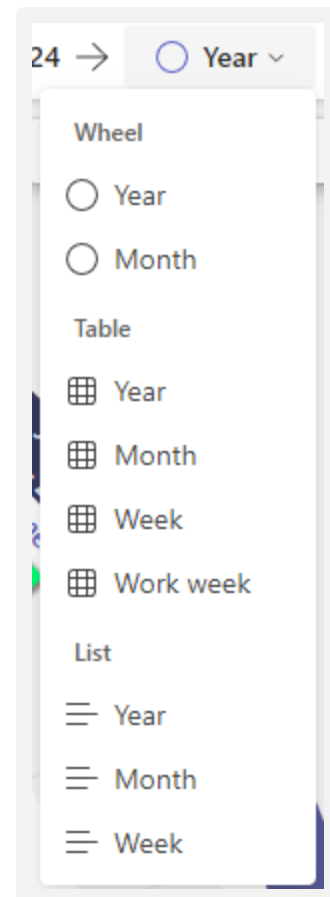
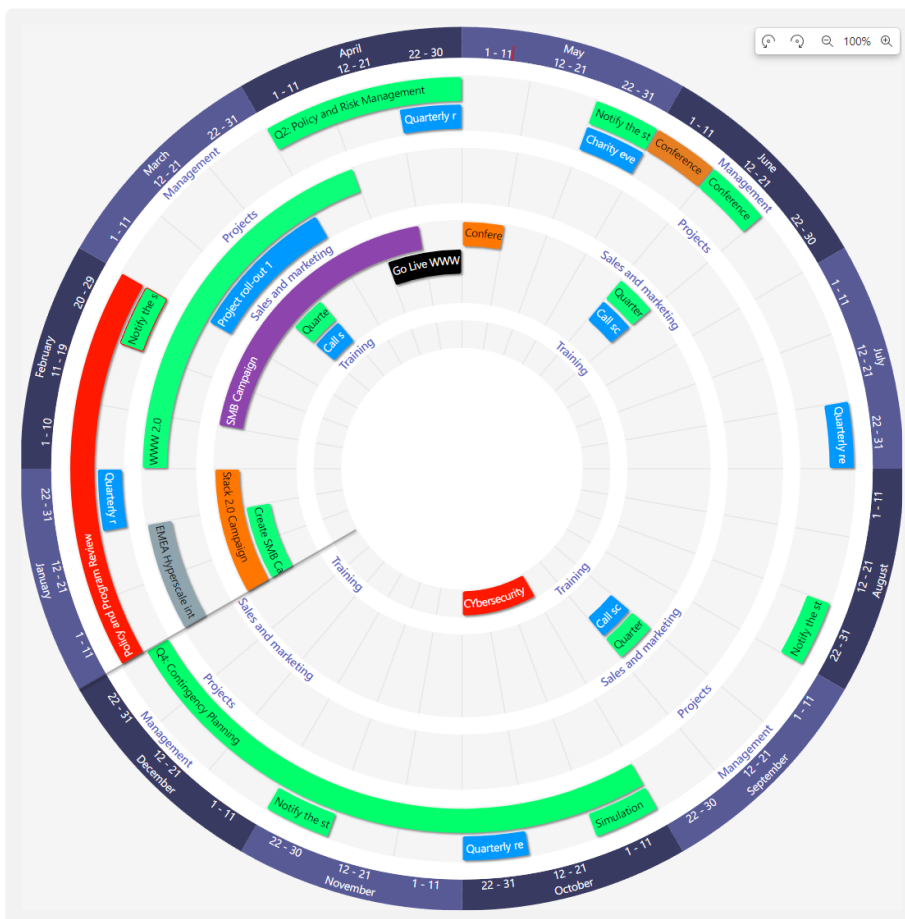
Different Views of the Year Wheel

All activities created in PlanIt can be displayed as a wheel, a table, or a list. To change the view, click the button in the top right, as shown in the figure.

Wheel/Circular View

The wheel provides a comprehensive overview of the entire year, and you can easily click on an item to view detailed information about each activity. The use of colors, categories, and filters contributes to a clear and organized display of the wheel.

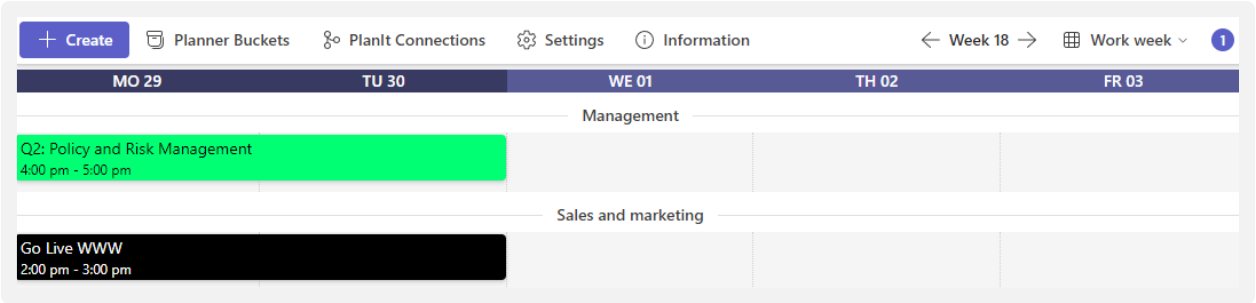
The wheel displays both annual and monthly activities:



Activity Display in PlanIt

Table View

In the table view, you can zoom in on details down to the weekly level, providing an accurate overview of all activities. The table makes it easy to plan and follow up on specific tasks and responsibilities, offering a structured view of both short- and long-term plans.



List View

In addition, PlanIt offers a List View optimized for mobile devices. This view is designed for smaller screens and ensures a simple and clear presentation of activities, as both the wheel and table views may be less user-friendly on narrow screens.

