

ENABLE →

Gold
Microsoft
Partner


Enable 365 PlanIt



Documentation

Date: 5/3/2022



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1 ABOUT THIS DOCUMENT

1.1 WHO IS THIS DOCUMENT FOR?

The document is a description of Enable 365 PlanIt functionality, both for administration and configuration, as well as for using the app.

1.2 WHICH VERSION DOES THE DOCUMENT APPLY TO?

This documentation is related to **PlanIt v 2.1.0.0**.

2 INSTALLATION

2.1 INSTALLATION PER TENANT

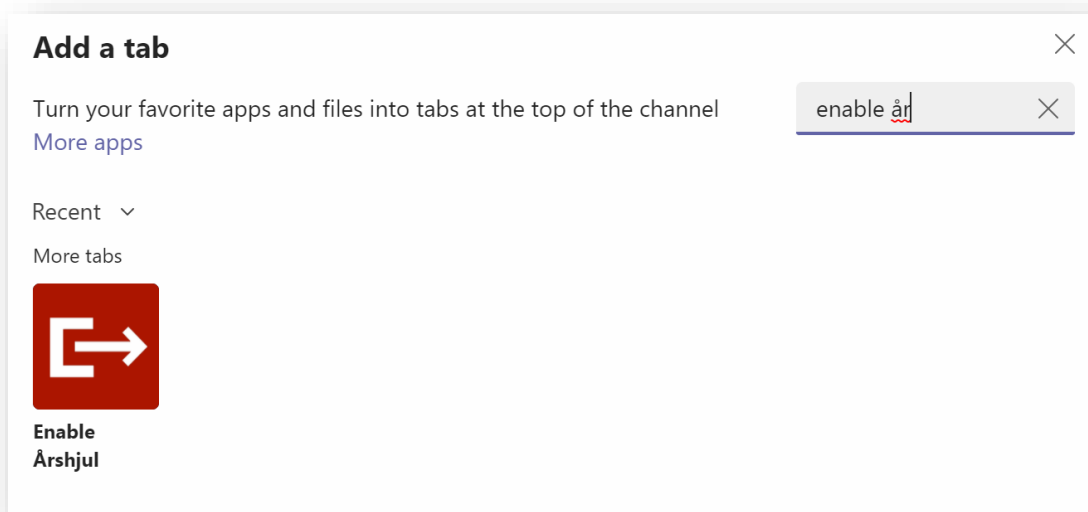
The initial installation of Enable 365 PlanIt to your Microsoft 365 tenant is done through the App Catalog.

2.2 INSTALLATION PER TEAM

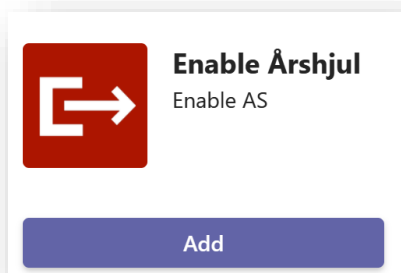
After initial installation, Enable 365 PlanIt is ready to be used in your Microsoft 365 tenant.

Do the following:

1. Go to the team you want to install it in
2. Select add a tab, will appear as the '+' icon. (Note! If you do not see this choice, you will need extended access, please contact the IT administrator in your organization)
3. Find the app for Enable 365 PlanIt, you may need to search for it:

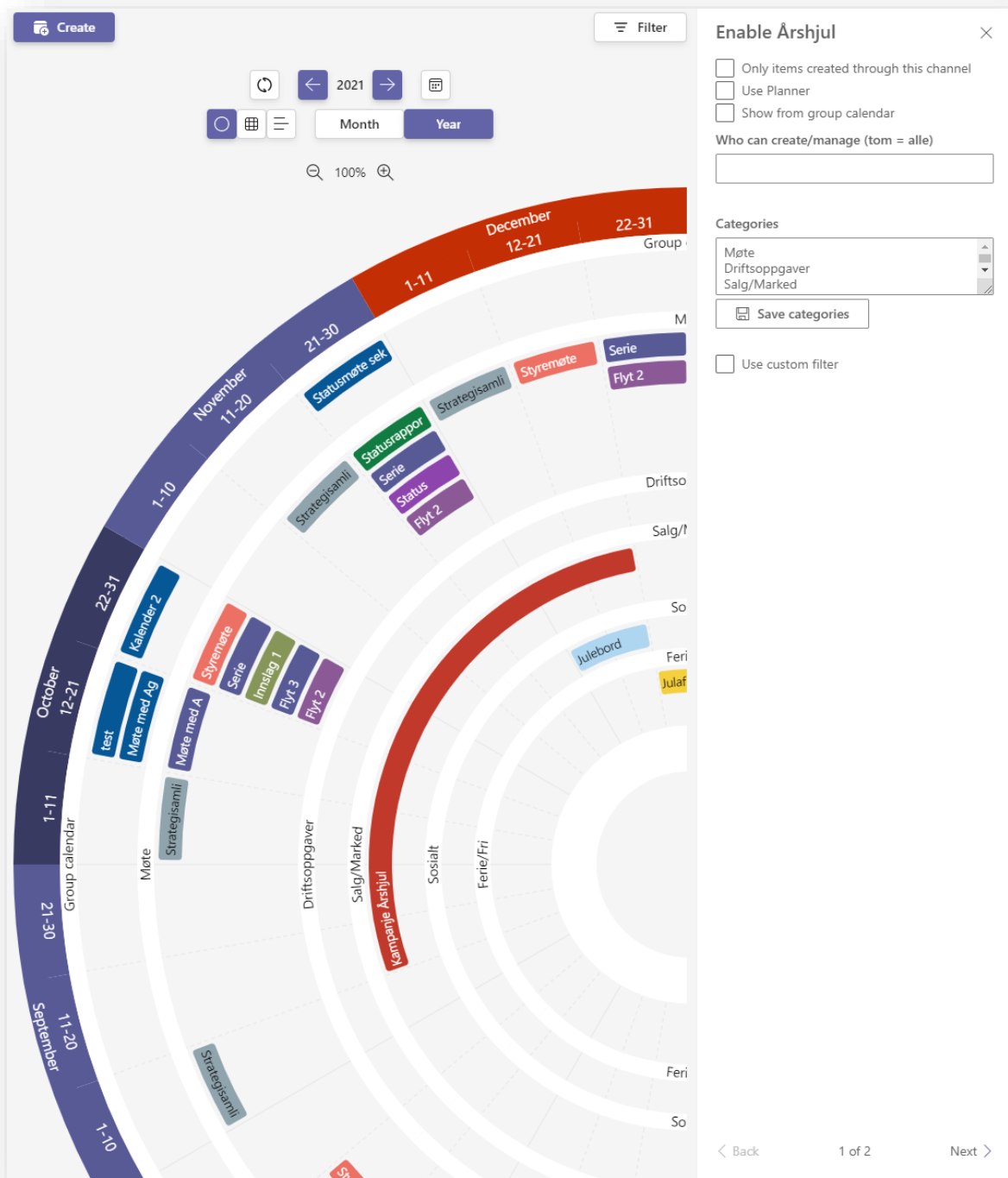


4. In the next dialog, click Add



5. Finally, confirm by pressing Save. The app will now be set up in the team and will look like this:





The app is now fully installed and ready to be configured.

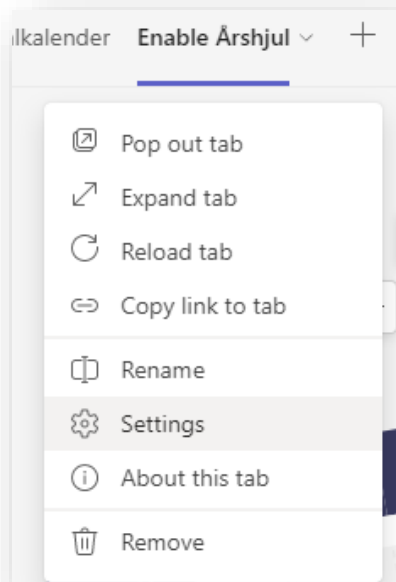


3 SETUP AND CONFIGURATION

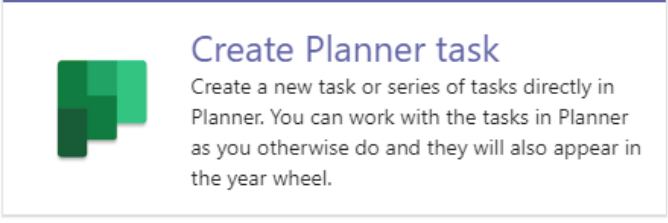
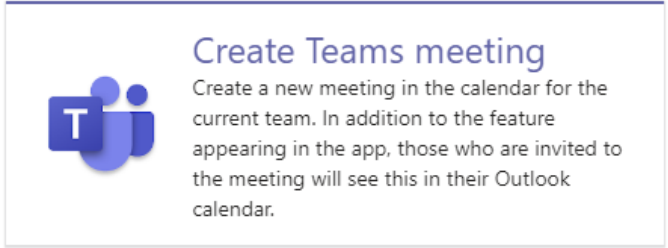
3.1 SETUP AND CONFIGURATION OF ENABLE 365 PLANIT

The following is a description of how to customize functionality in PlanIt.


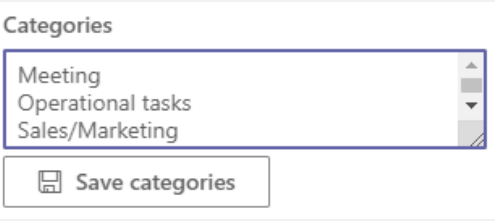
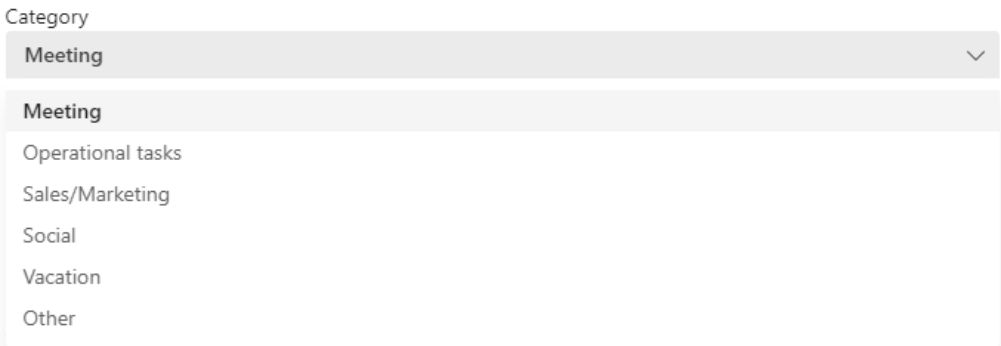
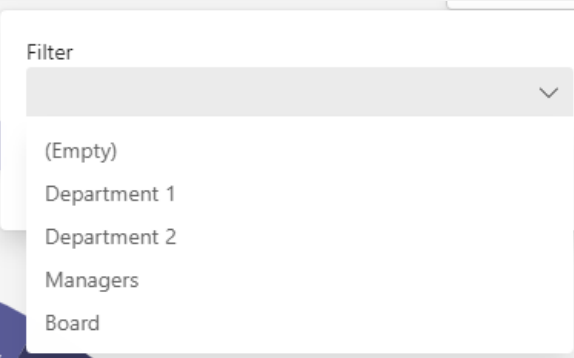
Configuration is done directly in the team in which the app is installed. Go to the relevant team and channel where Enable 365 PlanIt is installed and select the Enable 365 PlanIt tab. Then choose Settings from the drop-down menu:



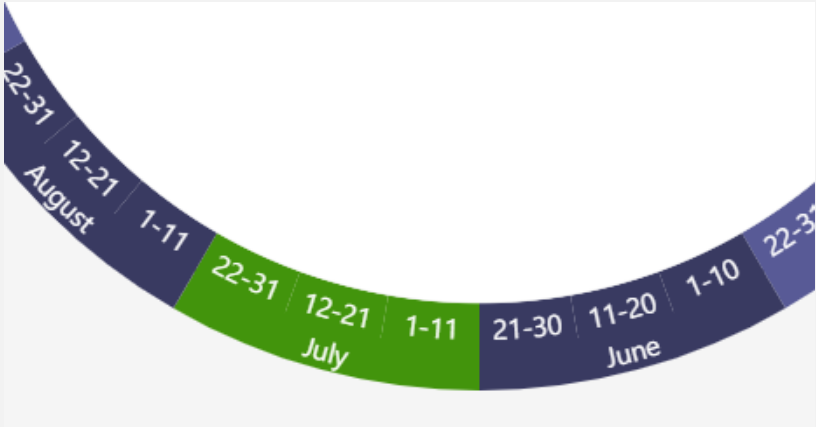
Description of Enable 365 PlanIt functions

Field	Description	Example
<p>Only features created in this channel</p>	<p>Specify whether you only want to restrict the view to show the clips created in the channel you're in. To show input from all channels, make sure the check box is unchecked.</p>	
<p>Use Planner</p>	<p>Specify whether items in the PlanIt can be registered as tasks in Planner.</p> <p><input type="checkbox"/> Use Planner</p> <p>If enabled, this will provide a checkbox option when registering new events, as shown on the right.</p>	<p>If enabled, the following options will be available under "Create":</p> <div data-bbox="1077 491 1742 715">  <p>Create Planner task Create a new task or series of tasks directly in Planner. You can work with the tasks in Planner as you otherwise do and they will also appear in the year wheel.</p> </div>
<p>View from group calendar</p>	<p>Specify that a meeting can be registered in the group calendar of the Team in which you are working.</p>	<p>If enabled, the following options will be available under "Create":</p> <div data-bbox="1077 842 1742 1091">  <p>Create Teams meeting Create a new meeting in the calendar for the current team. In addition to the feature appearing in the app, those who are invited to the meeting will see this in their Outlook calendar.</p> </div>
<p>Who can register input (blank = all)</p>	<p>Specify whether all team members can register a new input or if it's only the listed users that are able to create new inputs. If this is not to be limited to individuals, leave this checkbox unchecked.</p>	

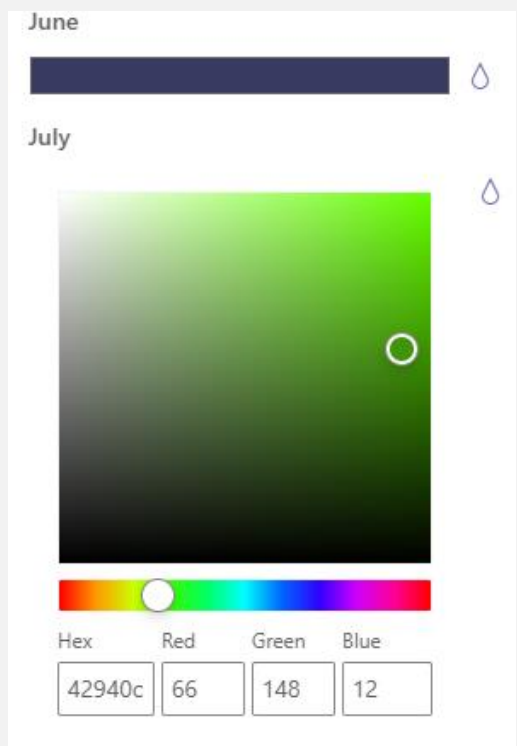


	<p>Who can create/manage (tom = alle)</p> 	
<p>Categories</p>	<p>Specify the categories that should be available. Here you can choose to use the default choices or replace them with your own.</p>  <p>NOTE! If the list is adjusted, remember to press "Save categories" to confirm changes.</p>	
<p>Apply Custom Filter</p>	<p>Specify whether a custom filter should be available for use in PlanIt. This function is disabled by default and is activated by checking the box "Apply custom filter". When activated, you can name the filter and its selection options.</p>	



	<p><input checked="" type="checkbox"/> Use custom filter</p> <p>Name of custom filter</p> <input type="text"/>	
<p>Enable 365 PlanIt colors</p>	<p>In Enable 365 PlanIt you may customize the color of months. The default layout is two different colors distributed throughout the year, but this can be customized if desired. To change colors in a month, click the droplet icon and then select the desired color in the swatch or optionally enter a color code directly.</p>	





The screenshot shows a user interface for selecting colors for two months: June and July. For June, a solid dark blue bar is shown with a water drop icon to its right. For July, a vertical color gradient bar is shown, transitioning from light green at the top to dark green at the bottom, with a white circle indicating the selected color. Below the gradient bar is a horizontal color spectrum bar with a white circle indicating the selected color. At the bottom, there are four input fields labeled 'Hex', 'Red', 'Green', and 'Blue' with the values '42940c', '66', '148', and '12' respectively.

June

July

Hex Red Green Blue

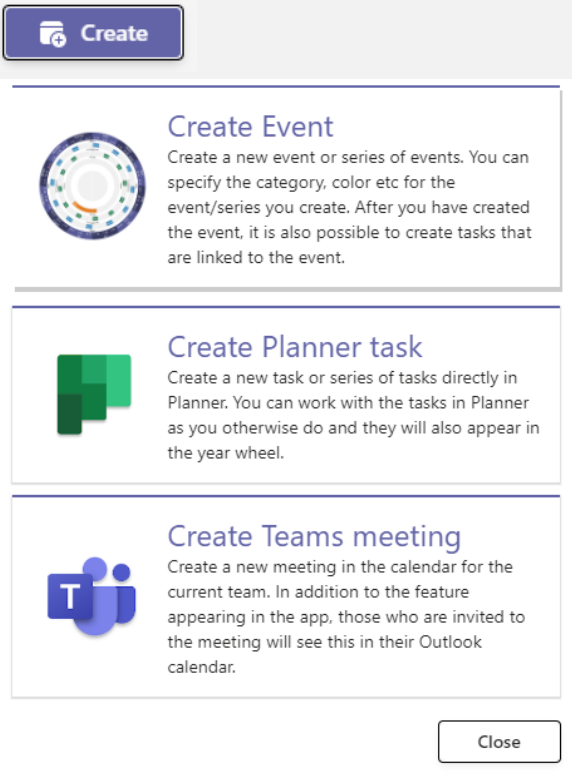
42940c 66 148 12






The color is automatically updated in the list.

4 USE OF ENABLE 365 PLANIT

4.1 COMPONENTS OF ENABLE 365 PLANIT

Brief summary of main components of Enable 365 PlanIt

Component	Description	Example
<p>Create</p>	 <p>Create Event Create a new event or series of events. You can specify the category, color etc for the event/series you create. After you have created the event, it is also possible to create tasks that are linked to the event.</p> <p>Create Planner task Create a new task or series of tasks directly in Planner. You can work with the tasks in Planner as you otherwise do and they will also appear in the year wheel.</p> <p>Create Teams meeting Create a new meeting in the calendar for the current team. In addition to the feature appearing in the app, those who are invited to the meeting will see this in their Outlook calendar.</p>	

	NOTE! "Create Planner Task" and "Create Team Meeting" options appear only if enabled under Settings.	
Reset	<p>If you navigate to other periods of time in the view, this button will take you back to today's date.</p> 	
Select year	<p>Navigate between years</p> 	
Calendar	<p>In the view, select a date that you want</p> 	
View	<p>You can choose from tre types:</p> <ol style="list-style-type: none"> 1. Circle view (default) 2. Table view 3. List view 	
Time unit selection	<p>Here you can choose among the period lengths to be shown. Available choices are associated with view type:</p> <ol style="list-style-type: none"> 1. Circle view <ul style="list-style-type: none"> a. Month: Viewing by month. Displays all events. 	Circle view (month):

- b. Year: Viewing by year. Displays individual events as well as those with monthly, quarter, and year recurrence events. Other incidents will not be presented.

2. Table view

Day Work week Week Month **Year**

- a. Day: Viewing per day. Displays all events.
- b. Work week: View per week. Displays all events.
- c. Week: Viewing per week. Displays all events.
- d. Month: Viewing per month. Displays all events.
- e. Year: Viewing per year. Displays individual events as well as those with monthly, quarter, and year recurrence events. Other incidents will not be presented.

3. List view

Month **Year**

- a. Month: Viewing per month. Displays all events in chronological order.
- b. Year: Viewing per year. Displays all events in chronological order.

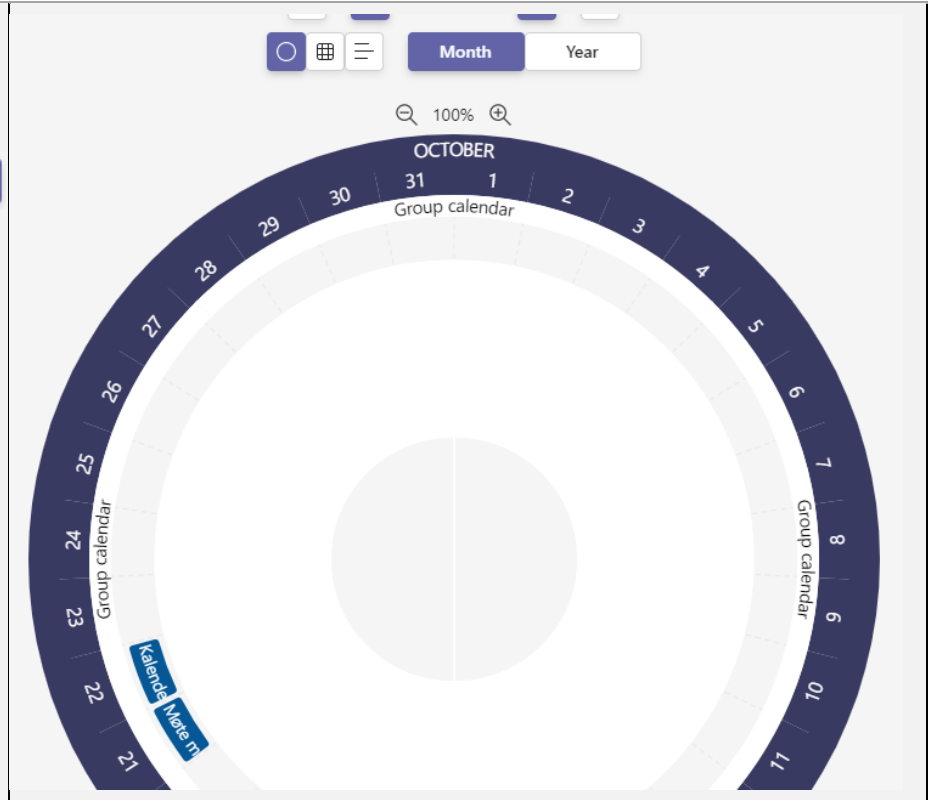


Table view (week):



The screenshot displays a calendar application interface. At the top, there are navigation icons and view selection buttons: Day, Work week, Week, Month (selected), and Year. Below this is a grid view of a calendar for Week 43, spanning from Sunday 17th to Saturday 23rd. The grid has columns for each day and rows for different categories: Group calendar, Meeting, Operational tasks, Sales/Marketing, Social, Vacation, and Other. Two events are visible: 'Møte me...' on Thursday 21st and 'Kalender 2' on Friday 22nd.

Below the grid, the text 'List view (month):' is displayed. Underneath, there are view selection buttons: Month (selected) and Year. A list of events is shown, starting with '10. November 2021'. A specific event is highlighted: 'Department meeting' on '10. Nov 13:00 - 14:00', with a 'Meeting' label below it. There are also icons for eye and edit.



4.2 USE OF ENABLE 365 PLANIT

4.2.1 Create Event - How to Register New Event Without Reminder




Create Event


Create a new event or series of events. You can specify the category, color etc for the event/series you create. After you have created the event, it is also possible to create tasks that are linked to the event.




Registration of a new post is done as follows from PlanIt in the team:

- 1) Click Create, and then chose Create Event
- 2) Fill in title and description
- 3) Select the desired category and any other filtering fields (if set up)
- 4) Enter the start and end date and time.
- 5) Enter the color you want.
- 6) Recurrence:
 - a. If you set this to be **recurring**, check the box "Generate as series" and then enter the type of frequency and end date for the series.


Generate as series 


Occurs
Weekly 


Until
17. Mar 2023  Max date based on frequency: (17. Mar 2023)


- i. Click Next
- ii. You'll now see all meeting dates created in the series. Review the list and make any changes to dates that don't fit (e.g., due to public holiday).



Create event



Title *
Add a title 


Description
Add a description 


Category
Meeting 


Filter








Start time
17. Mar 2022  13.00 

End time
17. Mar 2022  14.00 

Color


Generate as series 


 Create

Date	
Thursday 17.03.22 13:00 - 14:00	 
Thursday 24.03.22 13:00 - 14:00	 
Thursday 31.03.22 13:00 - 14:00	 

- iii. Finish by clicking Create Series. The series is saved and visible to all users.
- b. If you **don't** wish this to be **recurring**, finish by clicking Create. The event is saved and visible to all users.

NOTE! All types of posts do not appear in all views, see description in **4.1 - Components of Enable 365 PlanIt** for more info.

4.2.2 Create Planner Task - How to record new event with reminder



Create Planner task

Create a new task or series of tasks directly in Planner. You can work with the tasks in Planner as you otherwise do and they will also appear in the year wheel.

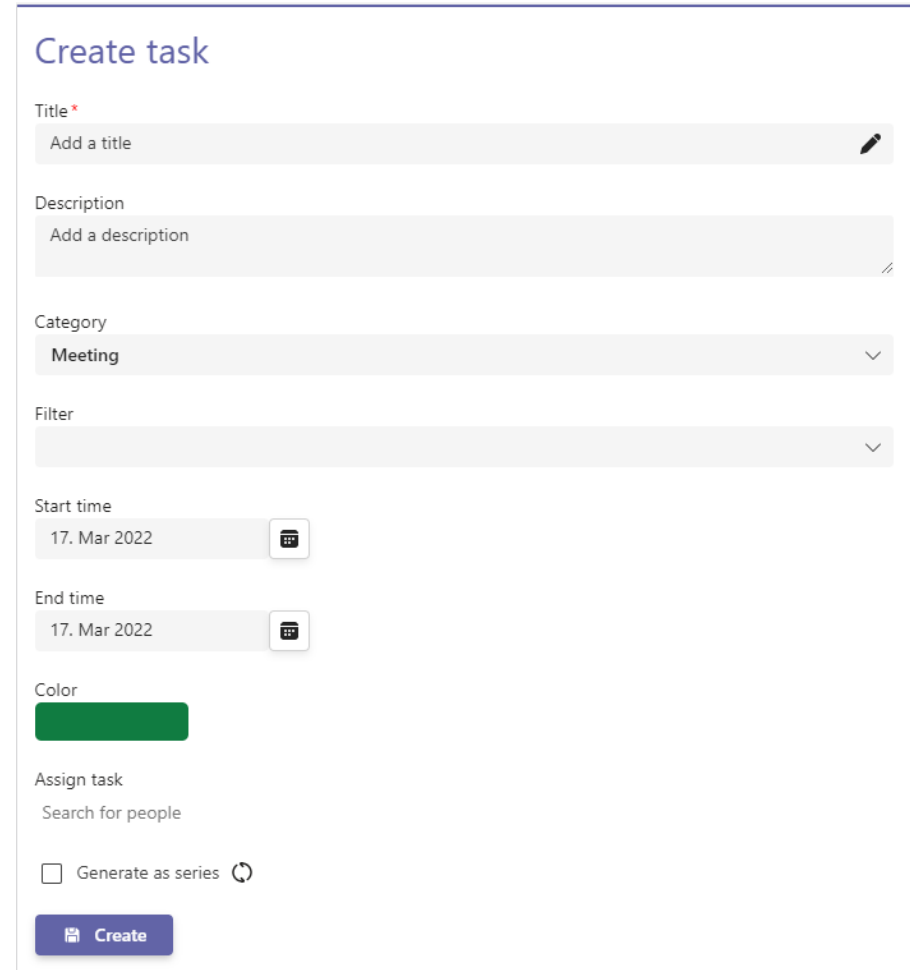
Entries to Annuals using Planner require that you have planner enabled in the current PlanIt, see **4.1 Components of Enable 365 PlanIt** about setting this up.



Registering a new post is done as follows in the relevant team:

- 1) Click Create - Create Planner task
- 2) Fill in title and description
- 3) Select the desired category and any other filtering fields (if set up)
- 4) Enter the start and end date and time.
- 5) Enter the color you want.
- 6) Specify person(s). NOTE! This is optional and can also be done directly in the Planner task later if desired. If this is a recurring event set to different persons, this should be done afterwards so that the responsible party is linked to the correct date.
- 7) Enter frequency. If you set this to be recurring, also enter an end date for the series.

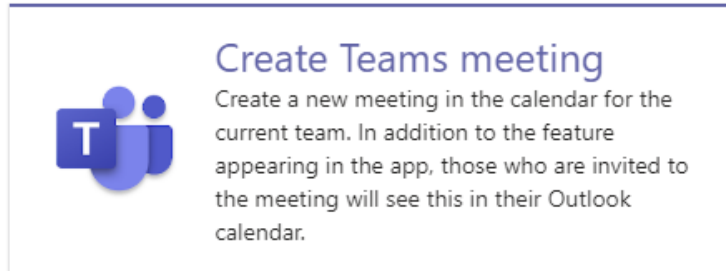
Exit by clicking Create. The post is saved and visible to all users. In addition, a task will be created in Planner associated with this post. If a responsibility for the event was specified, a notification will also be given to the person concerned.



The screenshot shows a 'Create task' form with the following fields and options:

- Title ***: A text input field with the placeholder 'Add a title' and a pencil icon for editing.
- Description**: A text input field with the placeholder 'Add a description' and a double-slash icon for completion.
- Category**: A dropdown menu currently set to 'Meeting'.
- Filter**: A dropdown menu.
- Start time**: A date picker set to '17. Mar 2022' with a calendar icon.
- End time**: A date picker set to '17. Mar 2022' with a calendar icon.
- Color**: A color selection bar currently showing a green color.
- Assign task**: A section with a search input field labeled 'Search for people'.
- Generate as series** with a refresh icon.
- Create**: A blue button with a document icon to save the task.

4.2.3 Create Team Meeting - How to record Team Meeting in Enable 365 PlanIt



Creating a Team Meeting in the Circular Calendar requires that you have enabled View from Group Calendar, see **4.1 Components of Enable 365 PlanIt** about setting this up.

Registering a new post is done as follows in the relevant team:

- 1) Click Create - Create Team Meeting
- 2) You will now be submitted to the New Team Meeting form.

Fill in the info as desired and end by sending the meeting request. After creation, the Teams meeting will be registered in the PlanIt, as well as the notice will be sent to any meeting participants.



4.3 ADMINISTRATION

4.3.1 How to manage Planner tasks created from PlanIt

If Planner is enabled, posts created with this feature will automatically create new tasks in Planner. A separate plan is created associated with an Enable 365 PlanIt, and its name will be in the form TeamName+EnablePlanIt, e.g., "Communication EnablePlanIt".

Each post generated from PlanIt with Planner will create a separate collection in Planner, whether it's a series or individual event.

Example:

Department meetings

+ Add task

○ Department meeting

📅 03/24



Vegard Hage

Planner tasks created from the circular calendar can be modified and assigned in Planner.