ENABLE 365 - PlanIt

- efficient annual planning in Teams

PLANIT

User Manual

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 presentation of activities on an annual, monthly, and weekly basis.

After you have purchased PlanIt for your business, it is ready for use on one or more Teams, depending on your license.

This guide describes how to use PlanIt as a tool in annual planning.

Good luck!

Content

Recommendations related to structure and use

PlanIt and structure in Teams

PlanIt is an app that can be installed in a channel in Teams. All members are granted access to contribute with content by default, but this can be restricted by setup if desired.

Annual planning can be split into team channels if desired. For example if the team consists of several subjects or departments. To break this up, add PlanIt as a tab to each individual channel.

PlanIt and recommended use of the app

PlanIt can be used for planning in several contexts. There are many different types of activities that are included in annual planning, and these have different needs related to implementation. To meet these needs, PlanIt has three different elements that can be created: Event, Planner task and Teams meeting. We recommend looking at these in context with the planning, so that the app serves as the best possible tool for planning and carrying out the activities.

Planning activities

Content adapted to different planning needs

During annual planning, there are several types of activities that have different needs for follow-up. PlanIt supports these needs by offering different types of elements that can be created in the annual planning.

The following describes the different types:

Schedule activity without reminder

What is it?

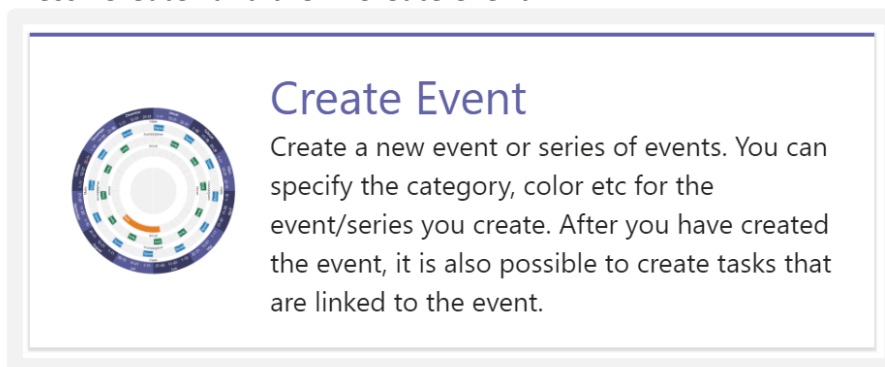This is a type of activity where there is no need for a task to be assigned.

If there is a need to distribute subtasks associated with the activity, this can be created directly from the activity, e.g. make an invitation to a meeting, book a room, order food.

An example of this could be audit etc.

How do I create it?

Registration of a new post is done like this from PlanIt in the relevant team:

1. Press "Create" and then "Create event"

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.

2. Fill in the title and description
3. Enter category and possibly custom filter category (if this has been set up)
4. Enter the start and end date, and time
5. Enter the desired color
6. Finish by clicking "Create"

Planning activity with reminder (Planner)

What is it?

Use this type when you want to be able to assign the event to one or more persons as a task and at the same time show it as an event in the annual planning. By associating the event to a Planner task, it will also be possible to see if the task has been done as well as handling reminders to the person assigned to the task.
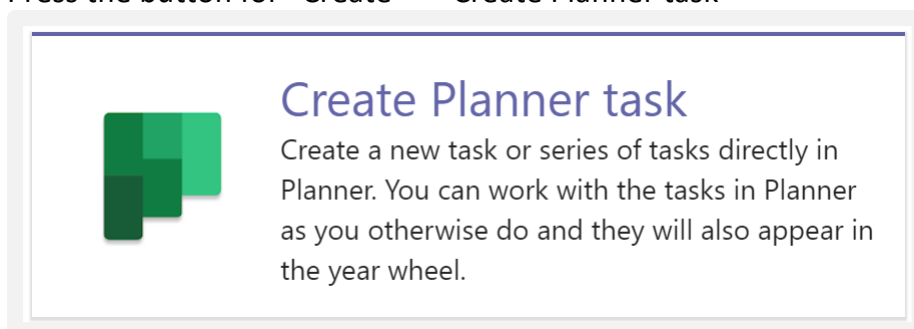
Example: Preparing a quarterly report.

Note! Creating a planning activity with a reminder requires that you have activated Planner in the relevant team. See the separate guide on Setting up PlanIt.

How do I create it?

Registration is done like this in the relevant team

1. Press the button for "Create" – "Create Planner task"

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.

2. Fill in the title and description
3. Enter category and custom filter category (if this has been set up)
4. Enter the start and end date, and time
5. Enter the desired color
6. Specify responsible person(s)
7. Enter frequency. If you specify that this should be regular, also specify an end date for the series
8. Finish by clicking "Create"

The activity is saved and visible to all users. In addition, a task will be created in Planner associated with the activity. If a person was assigned to the task, a notice will be given to that person at the same time.

Planning activity as meeting in Teams

What is it?

This is a type of activity associated with a date that is in the form of a meeting. This element creates an element in the team's calendar (group calendar), and you can invite relevant people to the meeting.
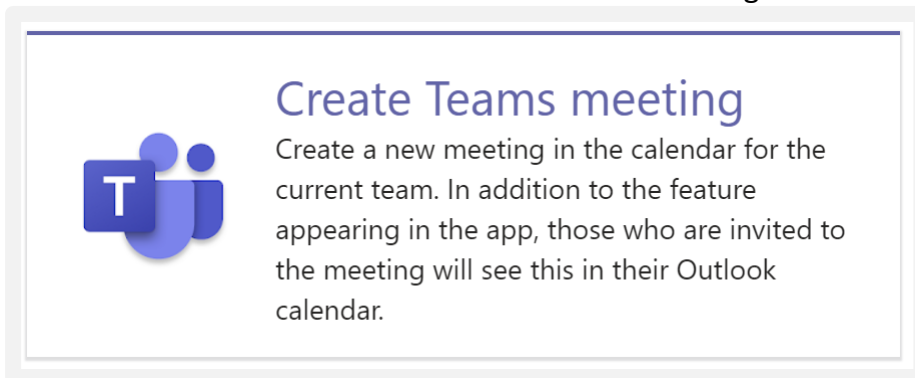
Example: Quarterly meeting, strategy meeting, departmental meeting

Note! Creating a planning activity such 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.

How do I create it?

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

1. Press the button for "Create" – "Create Teams Meeting"

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.

2. You are now sent to the form for creating a Teams meeting in a browser

3. Fill in the information, and finish by sending the meeting invite

4. Go back to the teams client and "Reload the tab"
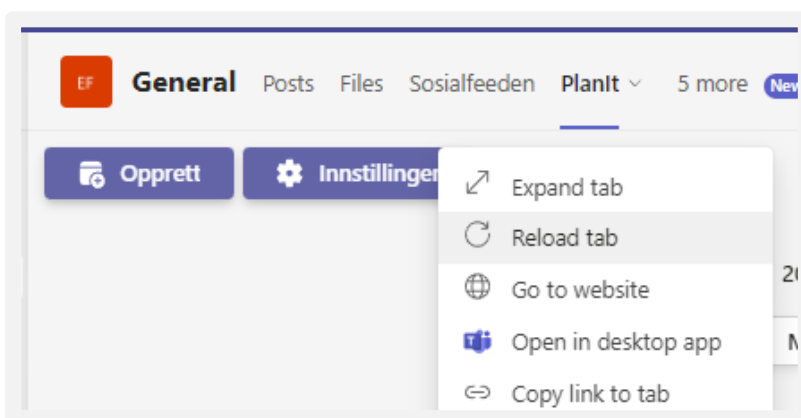
5. The Teams meeting will be registered in the category "Group calendar" in PlanIt, and a notice will be sent to all meeting participants
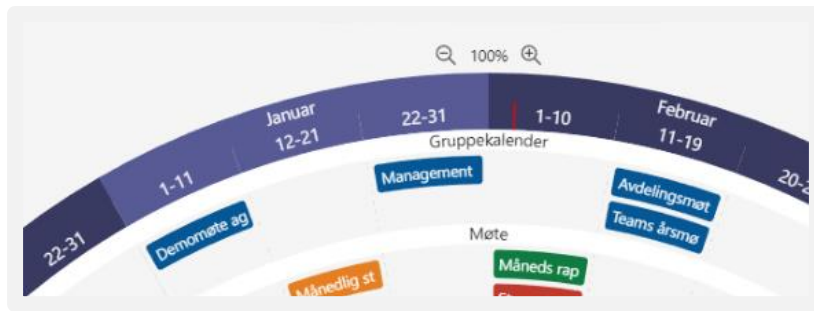
Serial events

If you want to make a serial event, tick the "Generate as series" box

1. Enter the frequency and an end date for the series. Press "Next"

2. You will now be shown all event dates that are created in the series. Check if there are dates you want to remove for example due to public holidays

3. Finish by clicking "Create series". The series is saved and becomes visible to all users

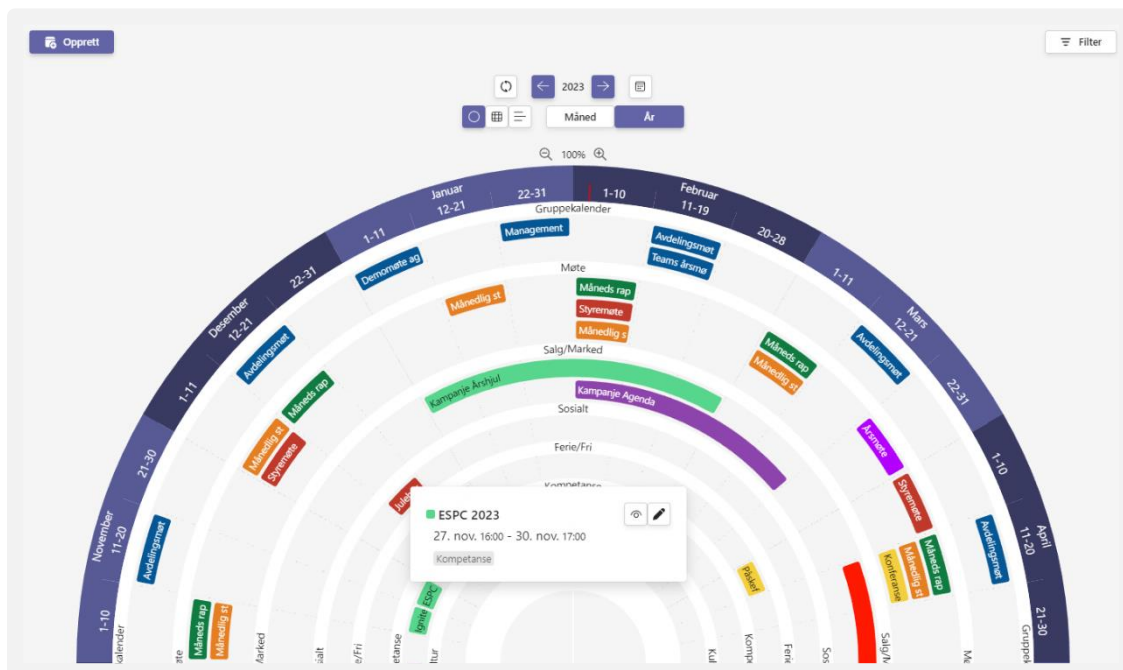4. Finish by clicking "Create". The event is saved and visible to all users.

Display of activities in PlanIt

All Events, Planner tasks and Teams meetings created in PlanIt can be displayed as a wheel, a table or as a list. Use the buttons over the wheel to choose your view:
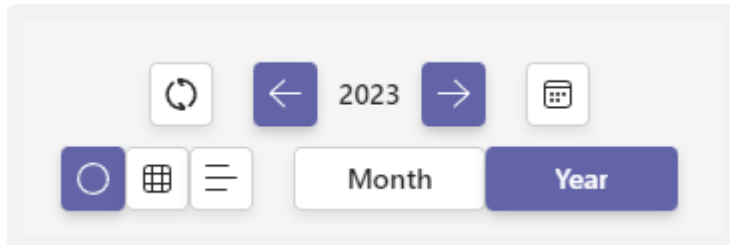
Wheel ⬤
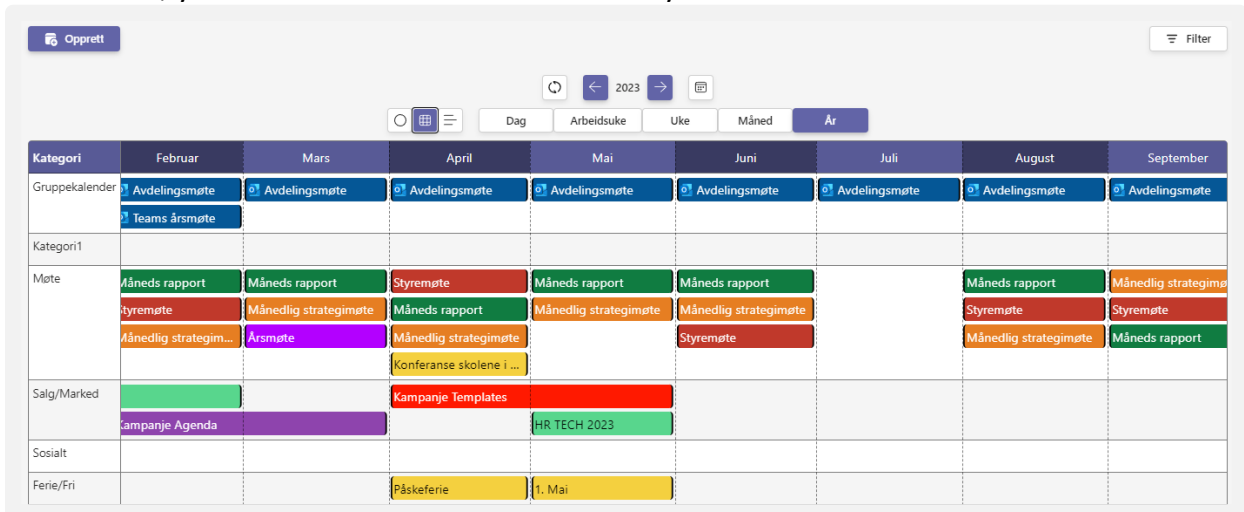
In the wheel, you get an overall view of the entire year, and can easily click on an element to see more about the activity. Good use of colors, categories and filters will also be useful for easy reading of the wheel.

The wheel shows activities that are annual and monthly:

Table

In the table, you can drill down further to the day view:

List

In addition, PlanIt also has a list view, which is well suited for mobile. The mobile view shows weekly and monthly activities: