



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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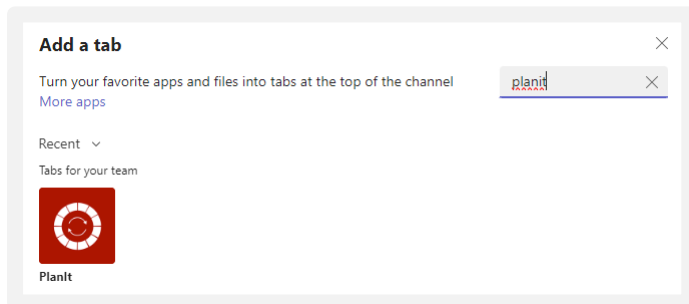
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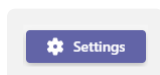
Getting started with PlanIt in your team

Add PlanIt as a tab

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



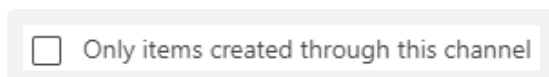
Settings for PlanIt in your team



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

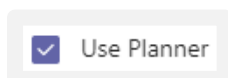
By ticking the box "Only items created through this channel", you choose that PlanIt should only display items that are registered in the current team's channel. If you leave the box open, it will fetch from the entire team, so that if PlanIt is defined in several channels, this will appear in the same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



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

Enable use of Planner

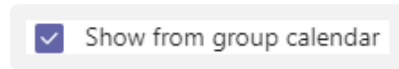
To be able to create Planner tasks directly in PlanIt, this must first be activated. Do this by ticking the box "Use Planner".



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".



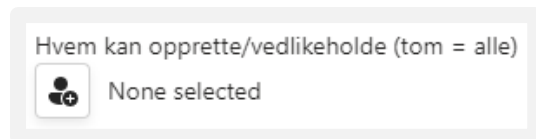
By default, the group calendar is not activated.

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

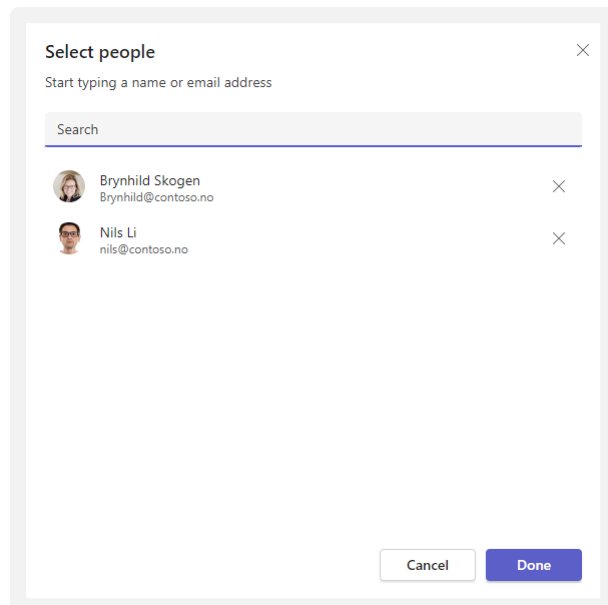
Specify who should be able to create items

PlanIt is basically set up so that all members of the team can create items. If desired, you can define selected users who is allowed to create items.

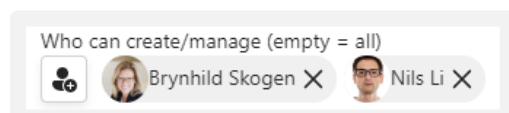
To give users this access, select the button under "Who can create/maintain (blank = everyone)."



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. A category is indicated by feature – one per line, example:



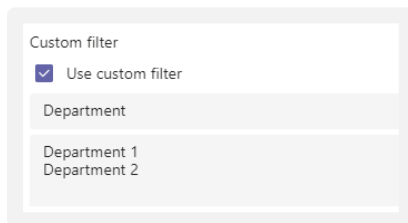
Categories

Meetings
Maintenance
Social

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 own categories for this. To activate a filter, check the box "Use custom filter" and then enter a filter and filter values, example:



Custom filter

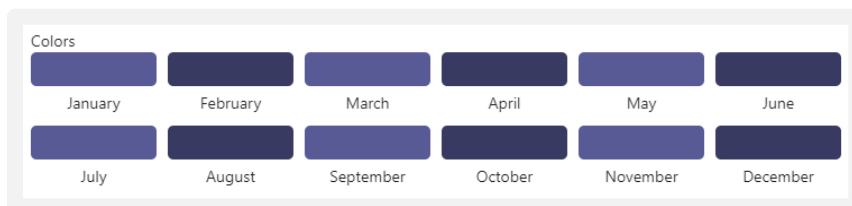
Use custom filter

Department

Department 1
Department 2

Custom colors for month

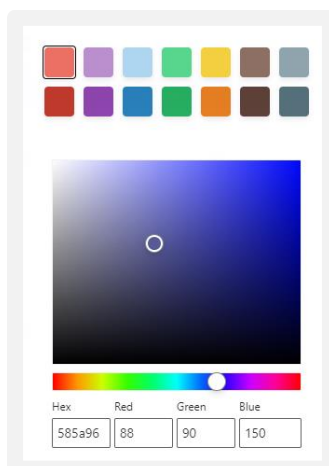
Months in PlanIt can be highlighted by using colors. These are set up with two different colors as standard, but this can be customized as needed.



Colors

January	February	March	April	May	June
July	August	September	October	November	December

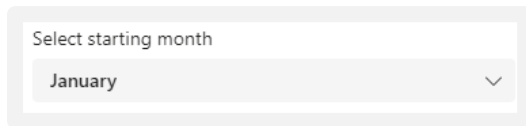
To change a color, select the month and then the desired color.



Hex: 585a96 Red: 88 Green: 90 Blue: 150

Select the start month for view

PlanIt is basically set up with January as start month, but this can be changed.

A screenshot of a web form element. It consists of a rectangular box with a light gray border. Inside the box, the text "Select starting month" is positioned at the top left. Below this text, the word "January" is displayed in a larger font, followed by a small downward-pointing chevron icon on the right side, indicating a drop-down menu.

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.
