

Planner Gantt User Manual

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1. Introduction

Apps4Pro Planner Gantt is the desktop app, which needs to be installed on your computer to plan and manage Planner tasks in Gantt chart with ease. This app requires a valid Apps4Pro license and Office365 enterprise license (login to the app with the O365 account, so the app will fetch the Plans you are member of) to use.

2. Installation Prerequisites

When you start installing the app, it will run a pre-installation check and install the below components by itself.

- .net core runtime 3.1
- .net desktop runtime 3.1
- Microsoft edge webview2 runtime (any version)

3. Installing the app

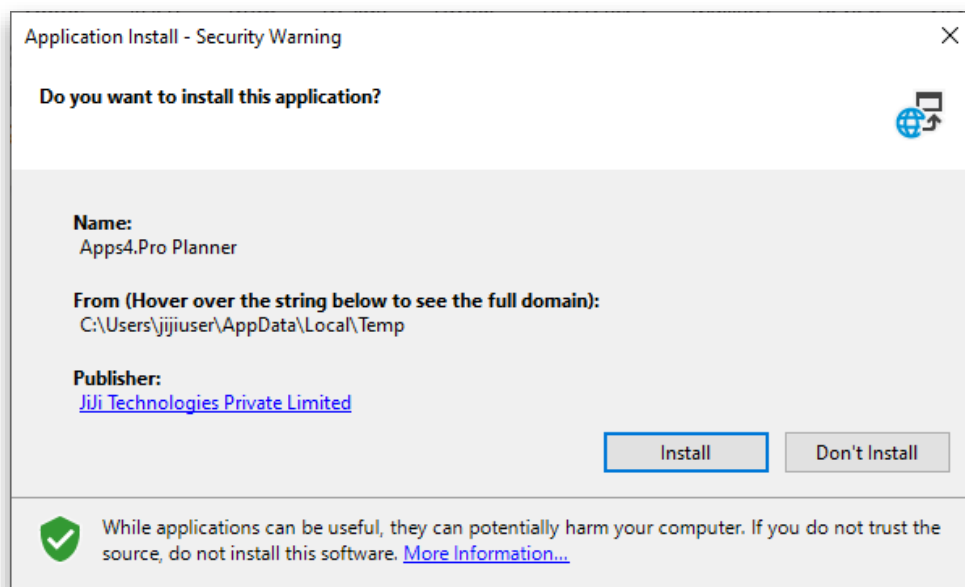
Download the app using the below link.

<https://cdn.apps4.pro/setup/apps4pro-planner-desktop-v1000.exe>

(Website URL - <https://apps4.pro/office365-planner-addin-gantt-chart/#freetrial>)

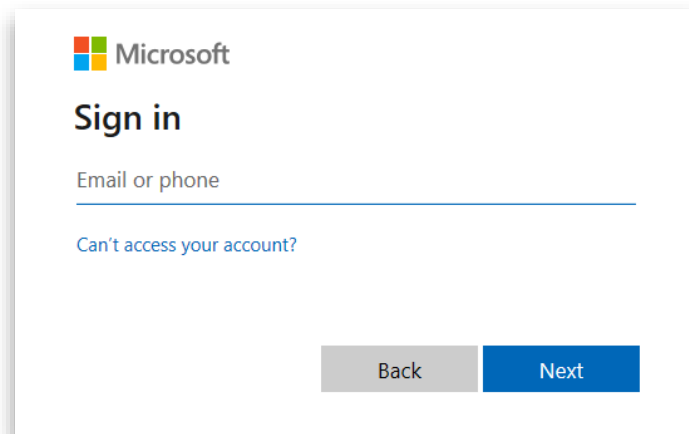
Steps:

1. Open the app.
2. The app will run the pre-installation check and install the prerequisites.
3. Click **Install** button to launch Apps4. Pro Planner app to your system



4. Sign-in to the app

Sign in your office 365 work account in the app to start using the app.

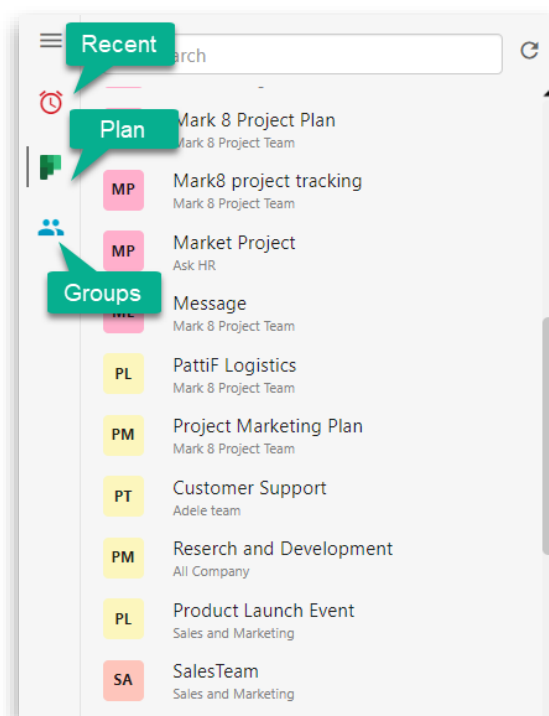


5. Viewing plans

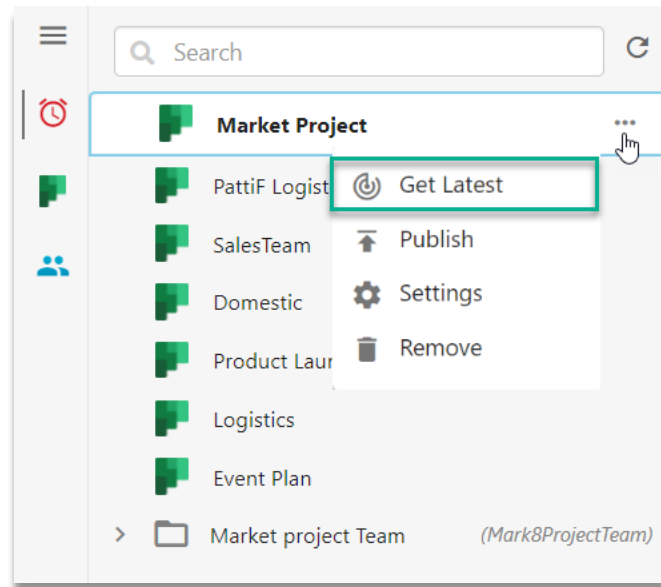
Once logged in all the plans you are owner / member of is listed in Plan tab. You can also explore plans via groups tab. Select any one of the plans and its tasks will be shown in the app.

You can also view multiple plans and make changes in all plans at a time. The multiple plans are stored as a collection and later you can edit the plans in the collection.

Besides Gantt chart, you can view the overall view of the plan with the help of Dashboard view.



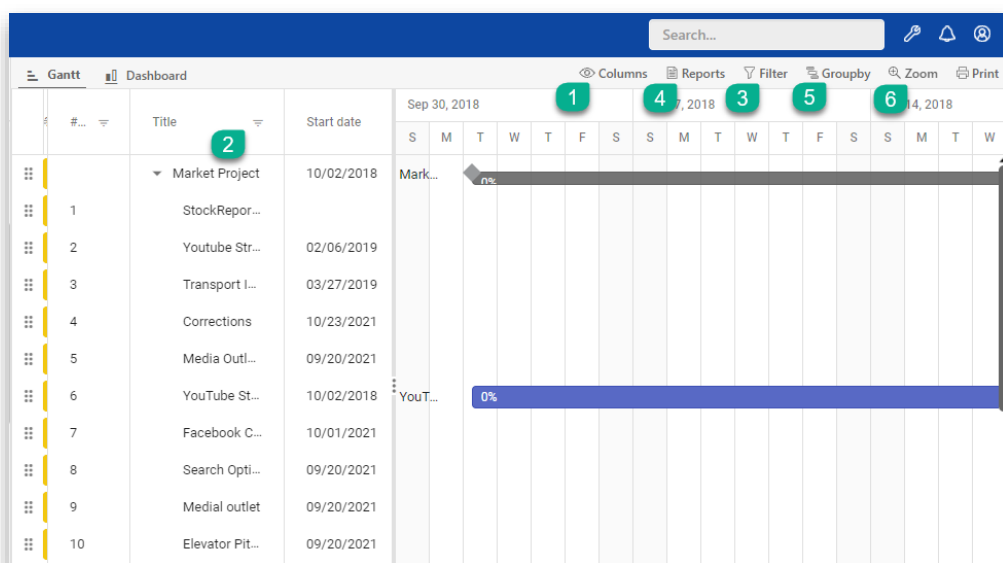
At any point of time, you can get the latest data of the plan / collection by clicking the Get Latest from plan / collection more option.



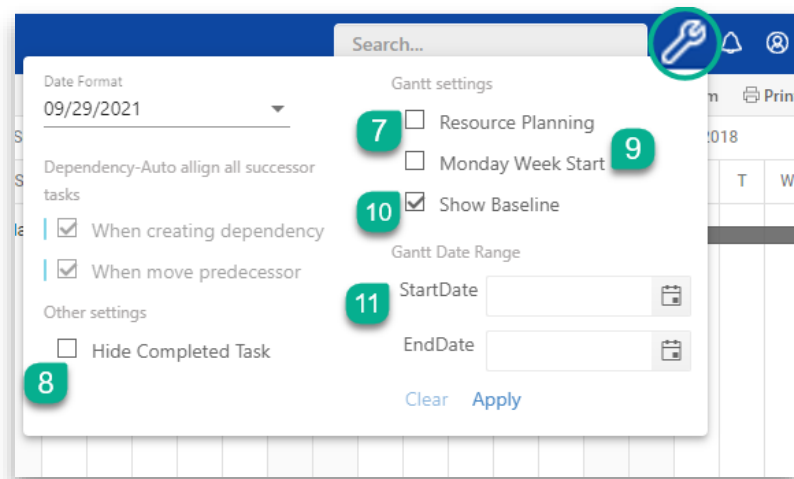
6. Plan / collection settings

For every plans / collection have its own settings.

1. **Columns** – Choose the columns you want to view in Gantt columns
2. **Column filter** – Every column has its own filter, and you can filter task by clicking the filter icon in column header.
3. **General Filters** – It's a common filter for the whole Gantt
4. **Reports** – Save the current view as a report (including filters and sorting). You can create n number of reports for a plan / collection.
5. **Group by** – Group the tasks based on Status, Bucket, Priority, Label and Assignment.
6. **Zoom** – Change the Gantt view to from year, month, date and to hours



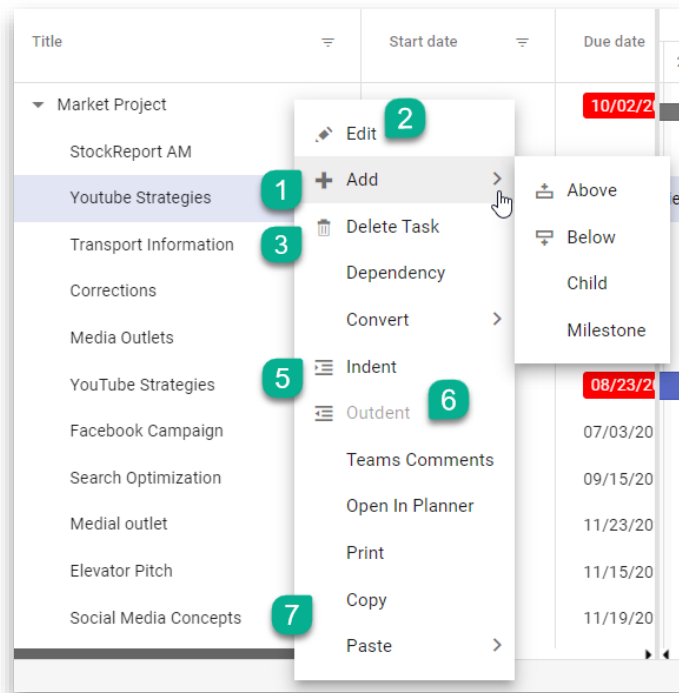
7. **Resource planning** – By enabling this option you can assign workhours to task assignees.
8. **Hide completed tasks** – It will hide the completed task from the view
9. **Monday weeks start** – It will make the week view of Gantt timeline to start from Monday.
10. **Show Baseline** – It will show / hide the baseline indication from the Gantt timeline
11. **Gantt Date Range** – It will cut down the Gantt timeline base on given dates



7. Task management

Here, it is possible to view and customize every task you need.

1. **Add** – You can add a task as above, below and the child of another task by clicking right on the line of tasks and clicking **Add**.
2. **Edit** – You can edit task fields directly in columns or edit windows by clicking right on the task line and clicking **Edit**.
3. **Delete** – You can delete the task by clicking the task row and clicking **Delete**.
4. **Parent-child hierarchy**–You can drag and drop tasks as parent-child.
5. **Indent** – This will make a task as a child to the very next sibling above it.
6. **Outdent** – This will make a child come out of its parent.
7. **Copy** – Copy a task or task group and make it duplicate by clicking right on the task line to open more options and click **Paste**.

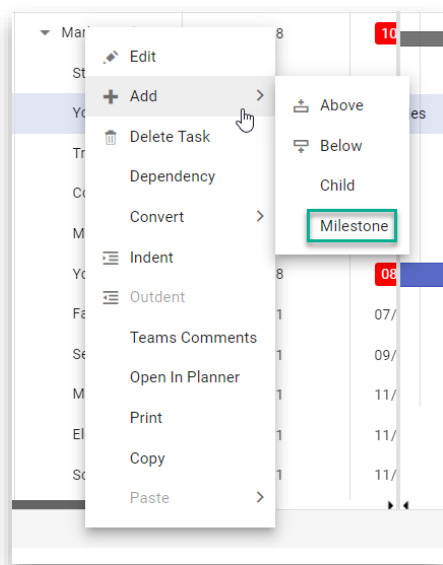


8. Milestone

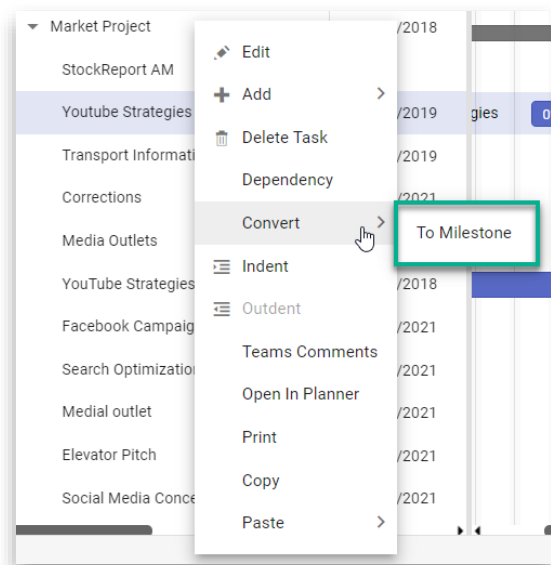
A milestone is any significant moment or event in a plan. With this feature, important project targets cannot be lost.

Milestones are easy to add by right clicking the task row to open more option then choose Add and click **Milestone**.

You can also convert an existing task into a milestone or vice versa by using the conversion option in the pop-up of the task.



i. Create milestone



ii. Convert to milestone

9. Dependencies and Auto scheduling

One of the important needs in project management is connected tasks and connections are called dependencies. Apps4.Pro allows you to determine the dependencies between tasks.

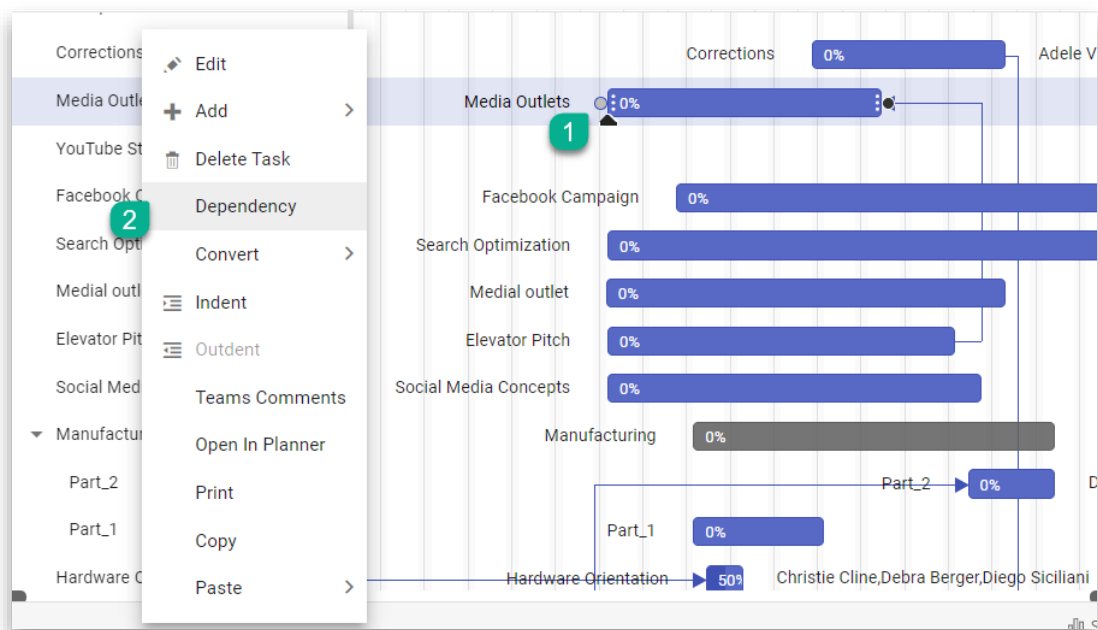
1. Simply drag it and connect to the event or action you need.

There are four types of dependencies supported.

- Finish – Start
- Start – Finish
- Finish – Finish
- Start – Start

2. In other ways, dependencies can be created via dependency window by choosing **Dependency** in task more option.

When you create dependencies, the successor task is automatically scheduled based on the previous task.



10. Duration and auto scheduling

Each task has duration and the start and due of the task is calculated based on the duration.

If a task has duration and you set the start of that task, the due date will automatically set based on duration.

11. Filters

Apps4.Pro supports multiple filters, and this can be stored in reports. It supports column and general filters.

- 1. Column filters** – Every column has its own filter, and you can filter task by clicking the filter icon in column header.
- 2. General Filters** – It's the common filter for the entire Gantt (even with multiple plans).

#...	Title	Start date	Progress
4	Corrections	10/23/2021	0%
5	Media Outlets	09/20/2021	0%
6	YouTube Strategies	10/02/2018	0%
7	Facebook Campaign	10/01/2021	0%
8	Search Optimization	09/20/2021	0%
9	Medial outlet	09/20/2021	0%

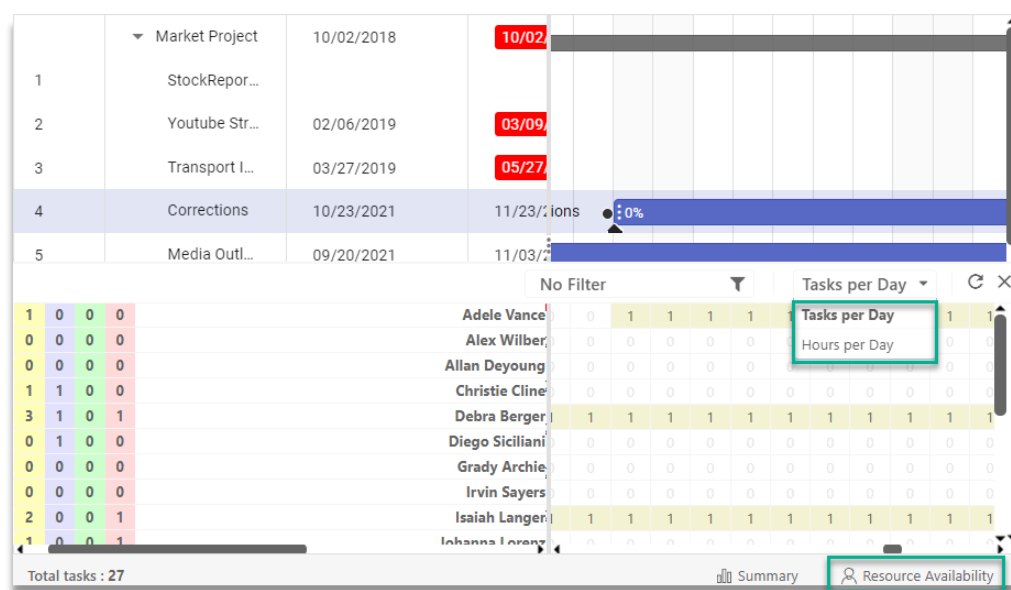
12. Resource workload and Resource management

Apps4.Pro is also an effective project resource management tool. You can set workload for any assignee in hours. This will make the manager plan properly and manage the resources efficiently.

The workload can be found in the Resource Availability section. Here you can see the overall workload of the assignees. Click on the workload count to see a detailed view.

Here, it is possible to view two types of workloads.

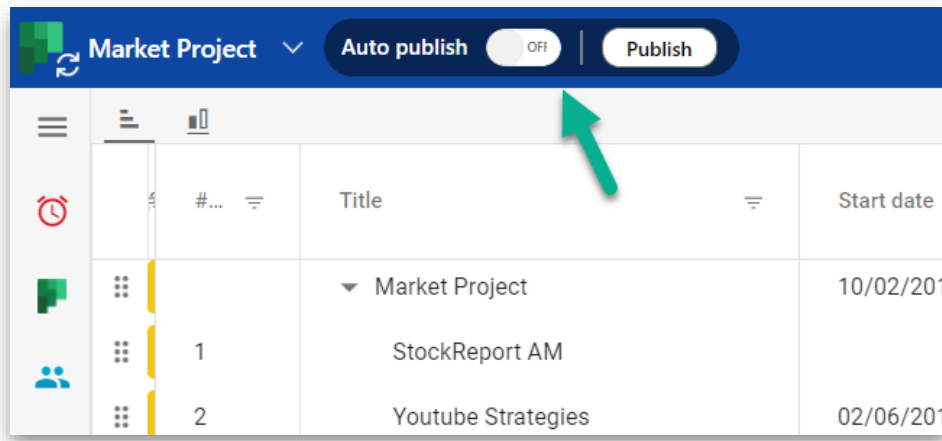
- Tasks per Day
- Hours per Day



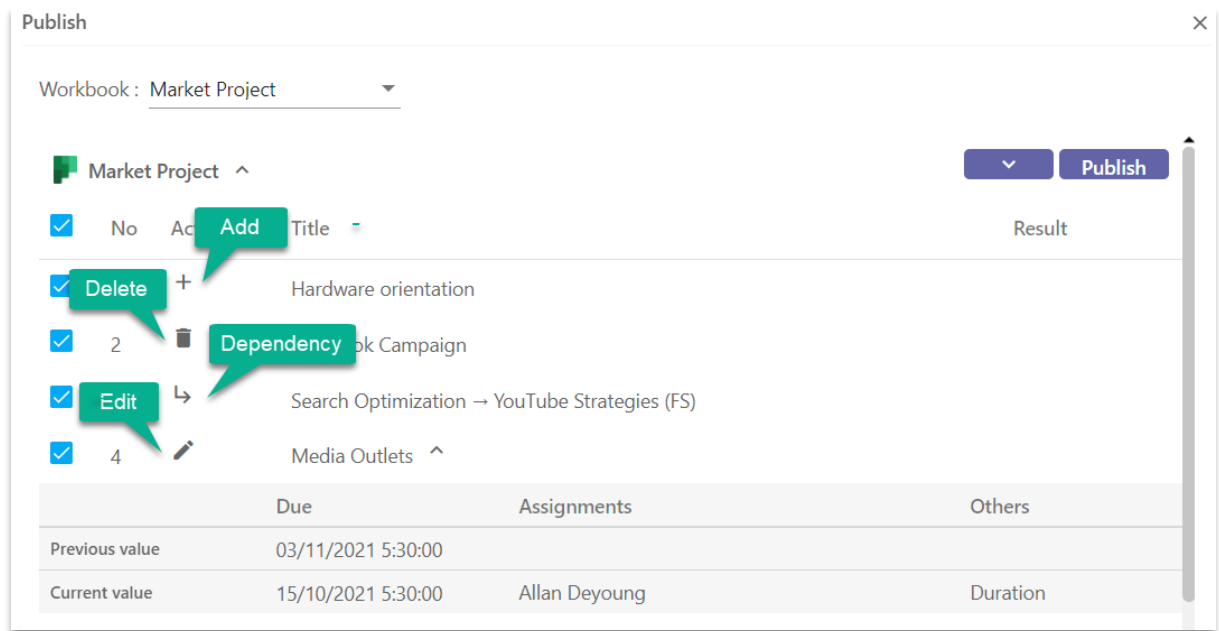
13. Planning mode

Every plan will be created based on pre-planned and the project manager doing pre-planned work roughly either in notes or drawing. Apps4.Pro introduces a new feature that allows you to roughly plan a project without reflecting changes in Office 365 Planner.

To enable this feature, turn off the Auto publish mode in top bar and make the changes you want. These changes will not be reflected in Office 365 Planner until the changes are manually published.



To publish the changes, simply click the Publish in the top bar, and a popup will show you all the changes. You can review the changes and publish them.



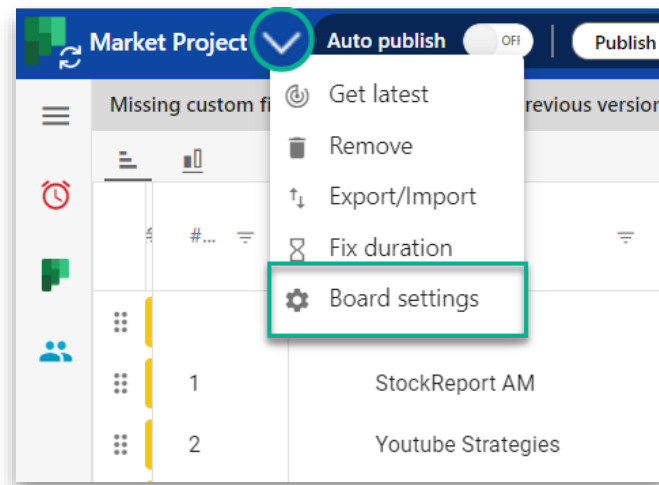
14. Microsoft Teams comments integration

This new feature let users discuss task comments in Microsoft Teams. This allows team users to respond to task comments directly from the Teams channel.

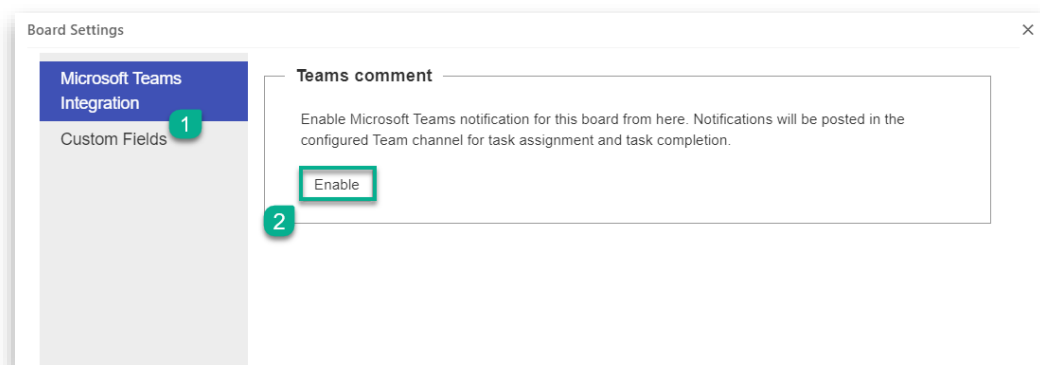
When you complete a task or assign a member, a comment is automatically posted in the conversation of that task.

Steps to enable Teams comments:

1. Go to board settings

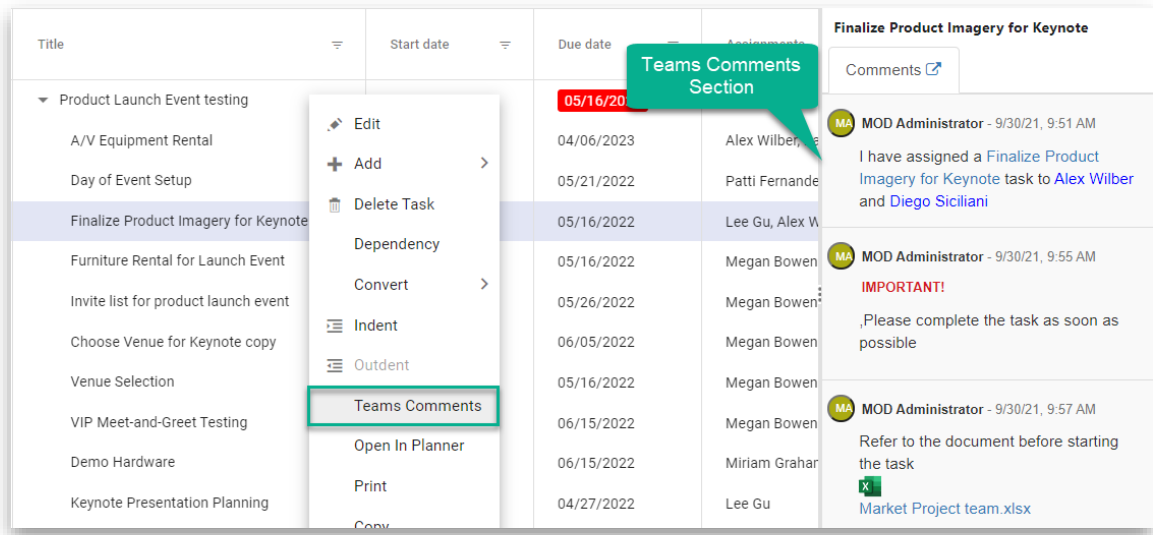


2. Choose Microsoft Teams Integration
3. Click Enable button
4. Choose the channel for posting Teams conversation and the teams comments feature will enable successfully.

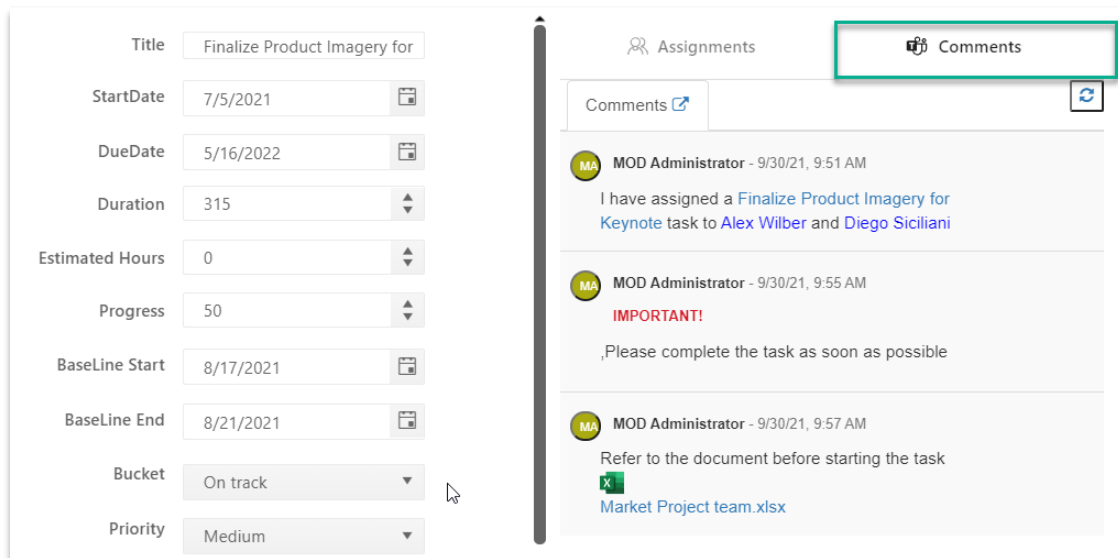


How to post Teams comments?

You can view comments of the task posted in Microsoft Teams by choosing **Teams Comments** from tasks more option.



In other way you can also view Teams comments in task edit window.

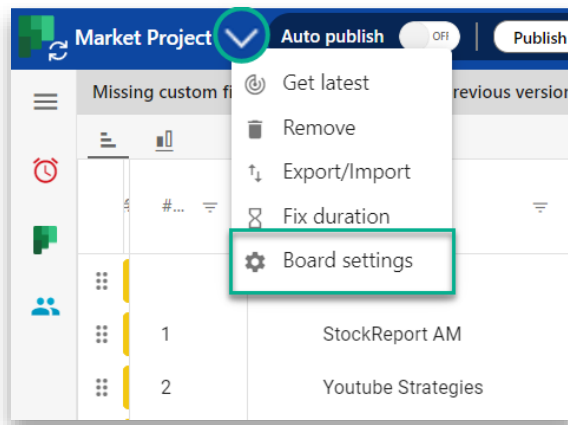


15. Custom fields

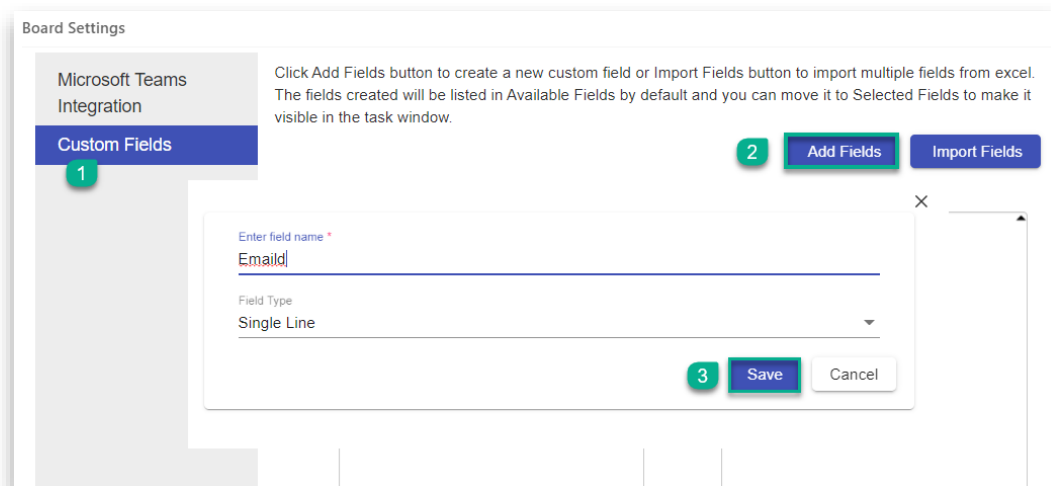
Beyond the Tasks field, we can add our own fields as custom fields. You can edit custom fields in the Gantt columns or in the editing window. Below steps let you create custom fields in this app.

Steps to add custom fields:

1. Go to board settings

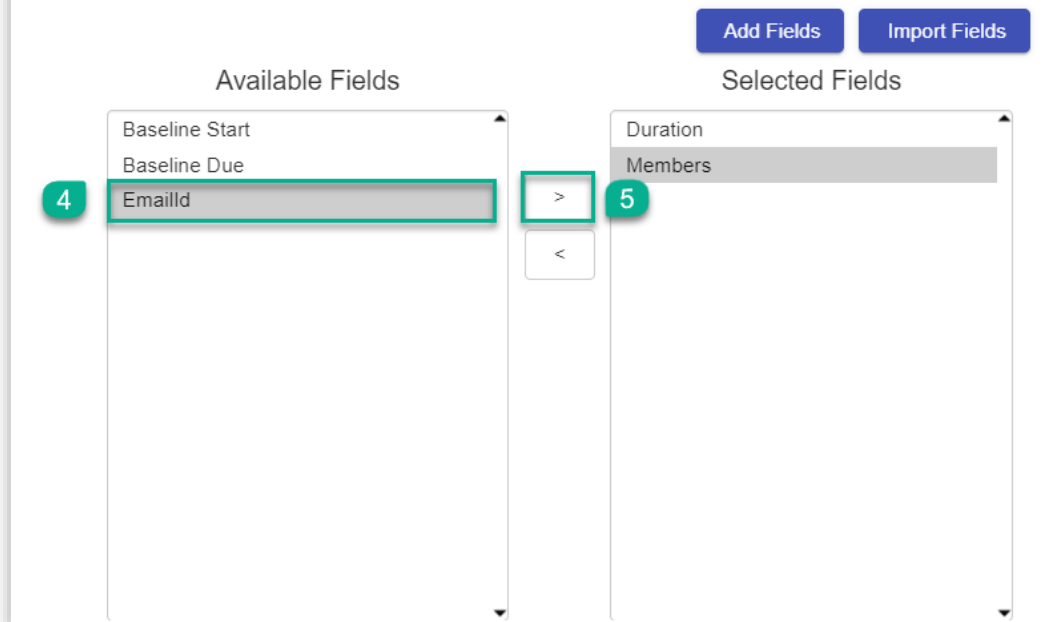


2. Choose Custom Fields
3. Click **Add Fields** button and Enter the Custom Field name and Select the Field type.



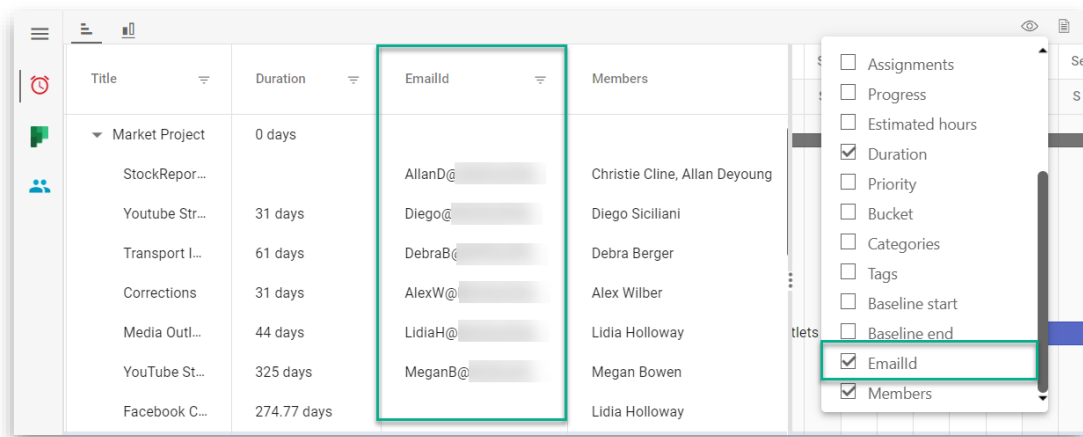
4. The fields created in the above step will be listed in Available Fields by default, and it must be moved to Selected Fields to make it visible in the columns and edit task window.

Click Add Fields button to create a new custom field or Import Fields button to import multiple fields from excel. The fields created will be listed in Available Fields by default and you can move it to Selected Fields to make it visible in the task window.



How to view and edit custom fields:

You can view and edit custom fields in the Gantt columns and edit the window.



i. Custom fields in columns

ii. Custom fields in edit window

16. Reports

You can store you customized settings as a report. You can create reports for a plans/ collection. This report saves the settings such as Columns, filters, group by, zoom and other settings.

17. Export / Import

This will export the plan / collection data as excel file. Later, you can use this template to import or a backup file.

The screenshot shows the 'Export / Import' dialog box with the 'Export' radio button selected. The 'Select workbook' dropdown is set to 'Market project Team'. The 'Select boards to export' field contains three boards: 'Mark 8 Project Plan', 'Mark8 project tracking', and 'Market Project'. The 'Enter file name' field contains 'Market Project team.xlsx'. An 'Export' button is located at the bottom right.

i. Export

The screenshot shows the 'Export / Import' dialog box with the 'Import' radio button selected. The 'Import Type' is set to 'Workbook'. The 'Choose your excel file' field shows a 'Choose File' button and the filename 'Market Project team.xlsx'. The 'Select boards to import' field contains three boards: 'Mark 8 Project Plan', 'Market Project', and 'Mark8 project tracking'. The 'Select workbook' dropdown is set to 'Market Project'. There are 'Create workbook' and 'Add' buttons next to it. An 'Import' button is located at the bottom right.

ii. Import

18. Pdf export

You can use PDF to share your projects with customers and colleagues and customize the Gantt chart before export.

PDF Settings

Collections
Market Project

Boards
Market Project

GroupedBy
None

Date Format
09/29/2021

Range : Start : 10/2/2018 End : 9/15/2022

Paper Size : Letter

Sort By : None

Columns :

<input checked="" type="checkbox"/> #	<input checked="" type="checkbox"/> Title	<input checked="" type="checkbox"/> Start
<input checked="" type="checkbox"/> Due	<input checked="" type="checkbox"/> Assignments	<input type="checkbox"/> Bucket
<input type="checkbox"/> Progress	<input type="checkbox"/> Priority	<input type="checkbox"/> Baseline Start
<input type="checkbox"/> Baseline End		

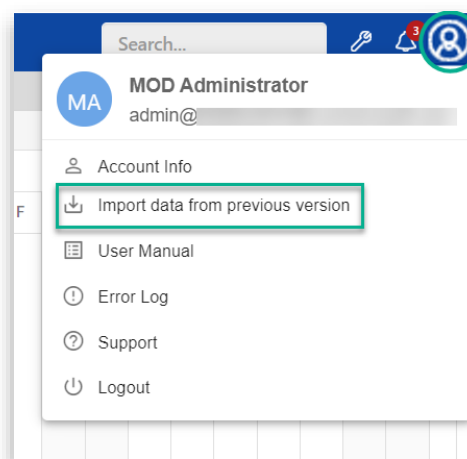
Display :

<input checked="" type="checkbox"/> Task Dependency	<input checked="" type="checkbox"/> Tasks Assignments
<input checked="" type="checkbox"/> Task Title in Timeline	<input checked="" type="checkbox"/> Completed Tasks
<input checked="" type="checkbox"/> Baseline Start-End	

Preview **Export**

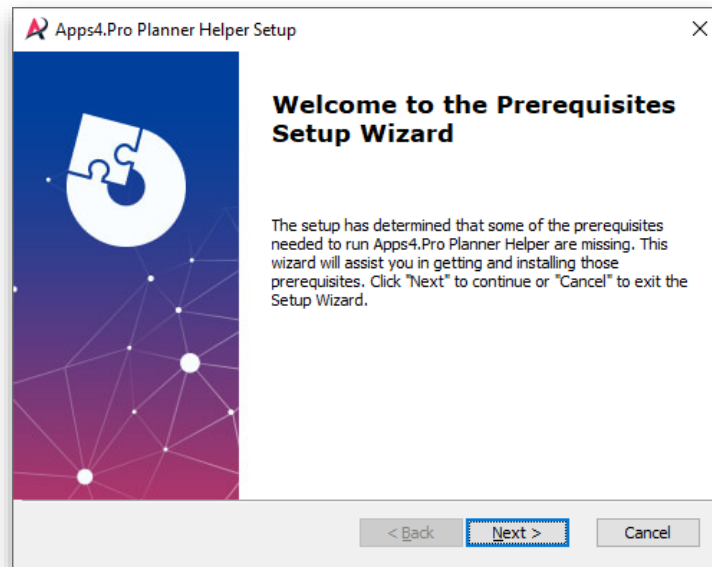
19. Migrate fields from previous version (Browser extension)

To migrate the task fields (Dependency, Ordering, Parent-child relationship, estimated hours and assigned hours) from the previous version (Planner Gantt extension), you need to import those custom fields by selecting the **Import data from previous version** option, and this will list the plans you have.



Install the Apps4. Planner Help App to work with it. Before installing the app, the app will run the pre-check before installation and it will automatically install the pre-requisites and complete the installation.

- ASP.NET core runtime 5.0.0
- .NET runtime 5.0.0
- .net desktop runtime 5.0.0
- node-v12.18.3



After installed the helper application, just choose the plans and click publish.

