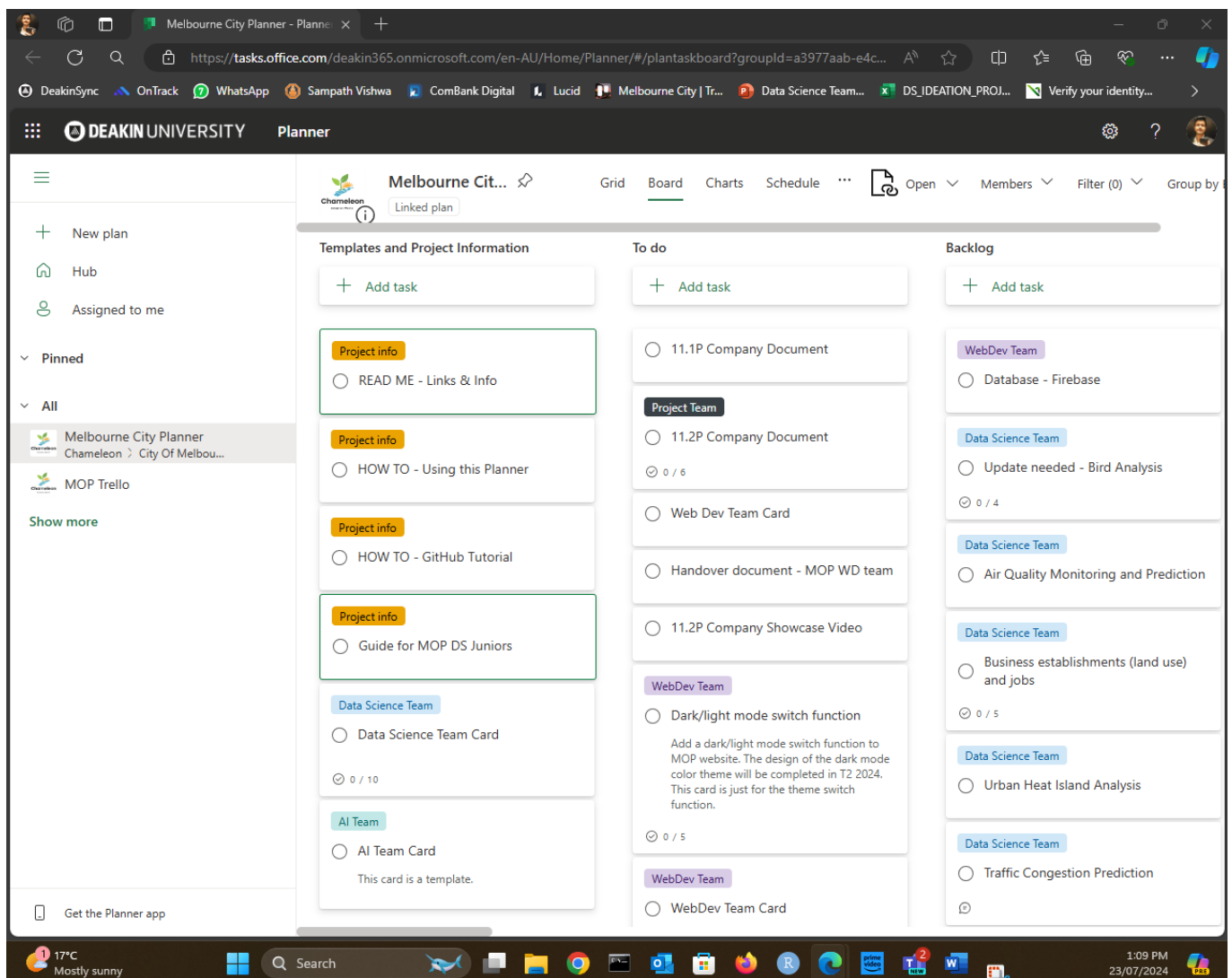


# Guide: How to create a card in planner

This guide will walk you through the process of creating a card on a Planner. Follow the steps below to ensure your card is properly set up and organized.

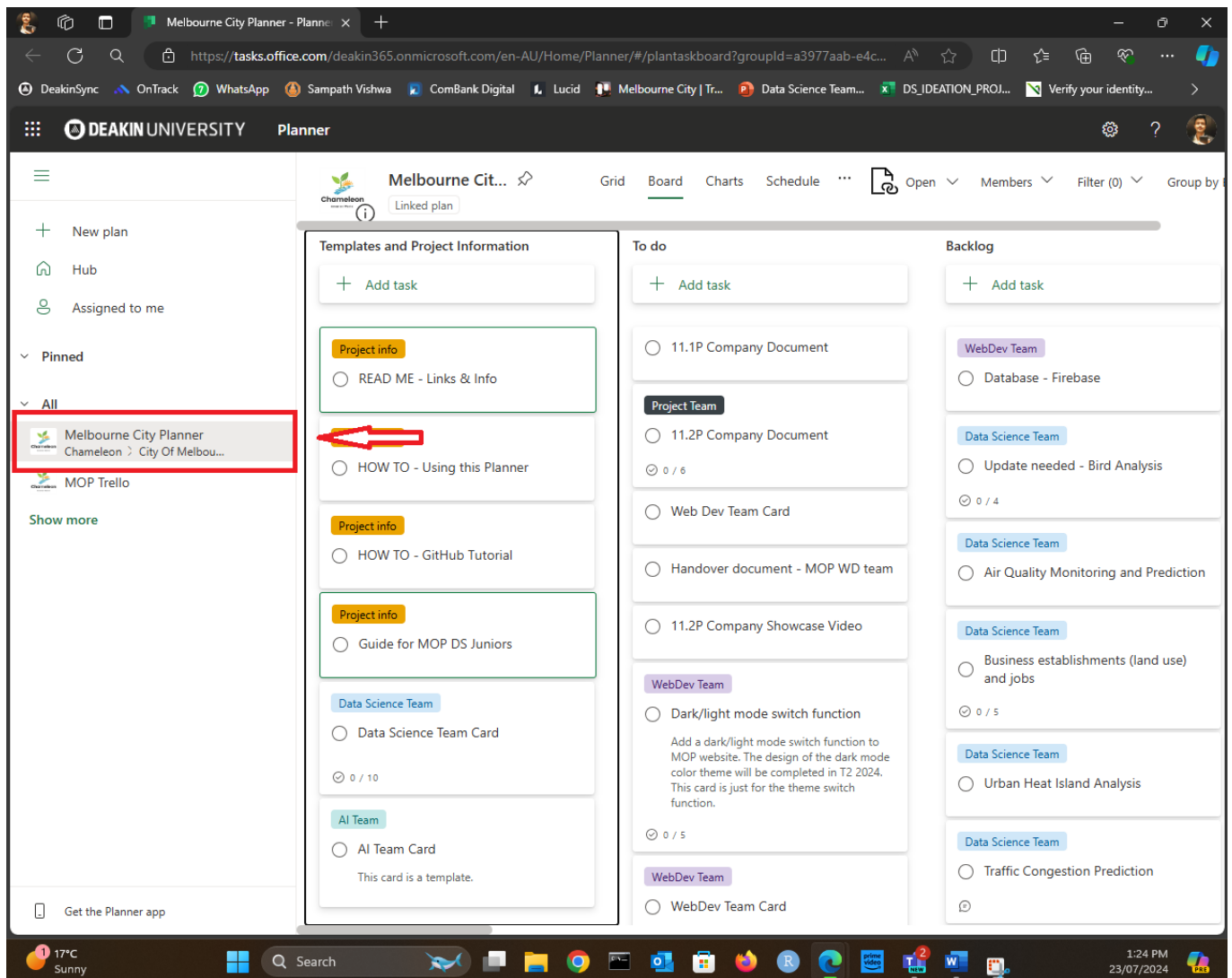
## Step 1: Access the Planner

Click [here](#) to open the planner application in your web browser, you will then see the planner opened as below.



## Step 2: Select the Appropriate Plan

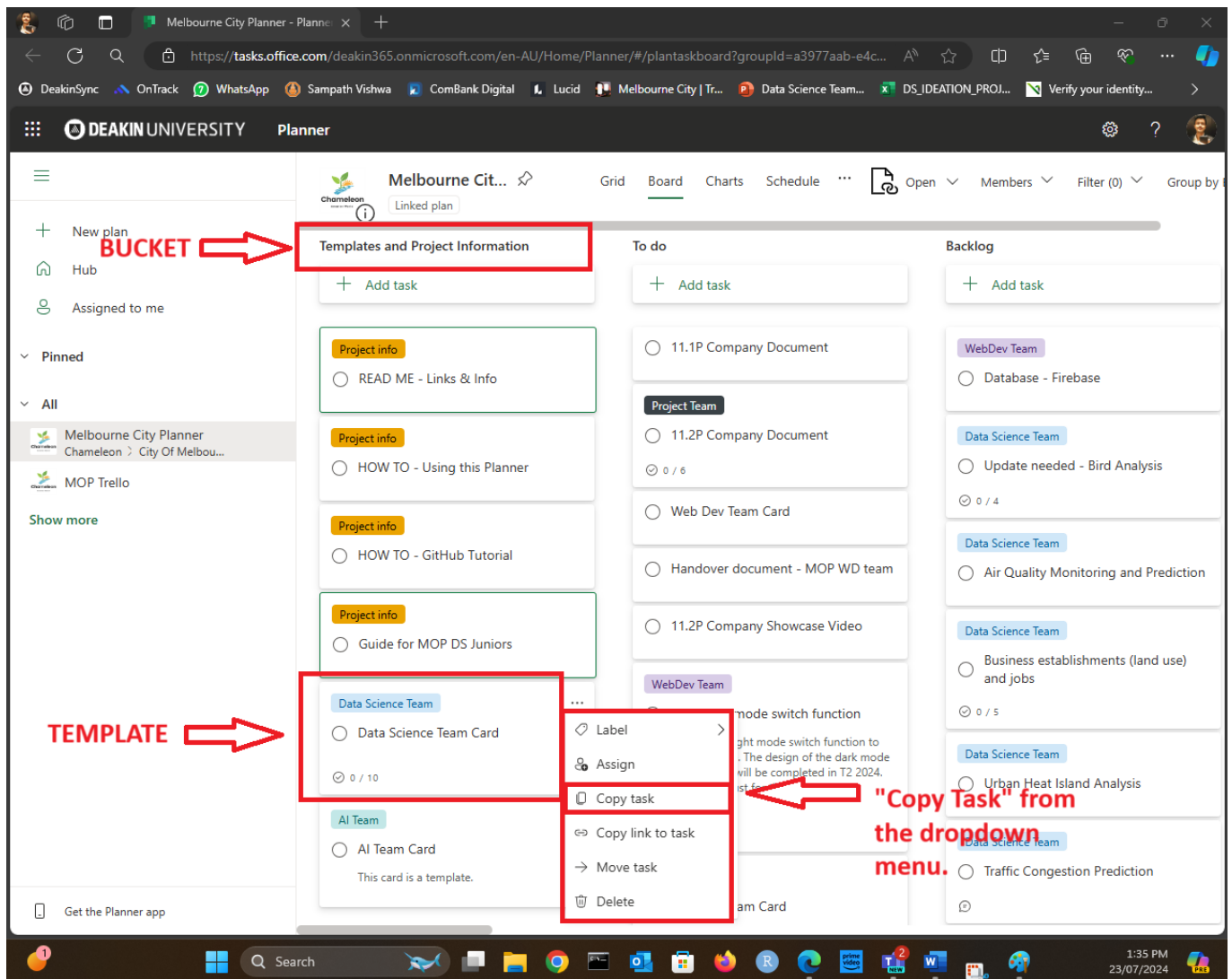
As shown in the below figure make sure you in the **Melbourne City Planner**.



The screenshot displays the Microsoft Planner web application interface. The browser address bar shows the URL: <https://tasks.office.com/deakin365.onmicrosoft.com/en-AU/Home/Planner/#/plantaskboard?groupId=a3977aab-e4c...>. The top navigation bar includes the Deakin University logo and the word 'Planner'. The left sidebar contains a list of plans, with 'Melbourne City Planner' (Chameleon > City Of Melbou...) highlighted by a red rectangle. The main area shows the 'Melbourne City Planner' board with a 'Linked plan' status. The board is divided into three columns: 'Templates and Project Information', 'To do', and 'Backlog'. The 'To do' column lists tasks such as '11.1P Company Document', '11.2P Company Document', 'Web Dev Team Card', 'Handover document - MOP WD team', '11.2P Company Showcase Video', 'Dark/light mode switch function', and 'WebDev Team Card'. The 'Backlog' column lists tasks such as 'Database - Firebase', 'Update needed - Bird Analysis', 'Air Quality Monitoring and Prediction', 'Business establishments (land use) and jobs', 'Urban Heat Island Analysis', and 'Traffic Congestion Prediction'. The bottom status bar shows the date and time: 1:24 PM, 23/07/2024.

### Step 3: Copy the Template

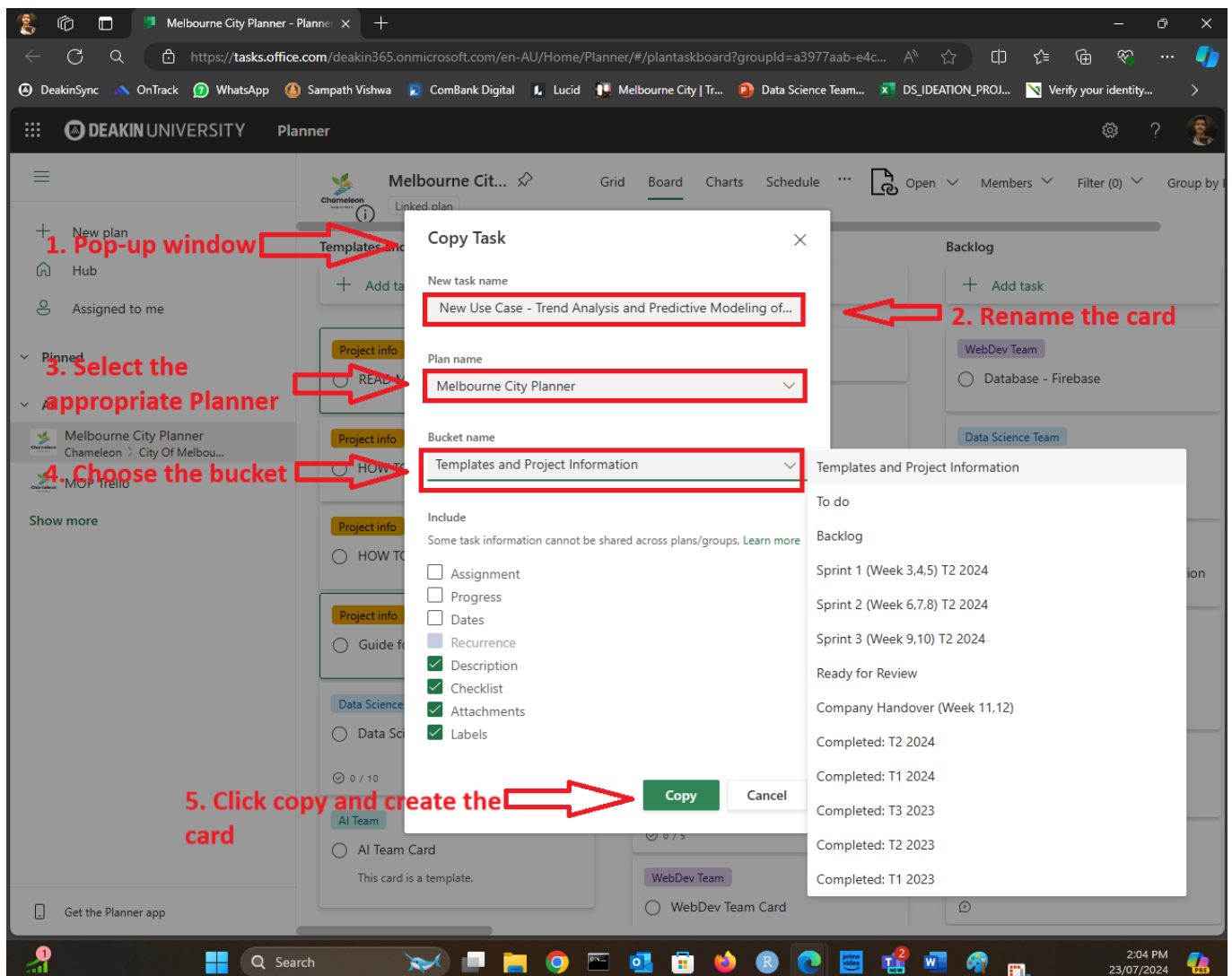
- Go to the bucket **Template and Project information**
- Click on the three dots (ellipsis) on the right side of the **template card**.
- Select "Copy Task" from the **dropdown menu**.



The screenshot shows the Microsoft Planner interface for the 'Melbourne City Planner' plan. The left sidebar shows the 'All' bucket with a 'Template and Project Information' bucket highlighted by a red arrow labeled 'BUCKET'. The main area shows the 'Template and Project Information' bucket with several task cards. One task card, 'Data Science Team Card', is highlighted by a red arrow labeled 'TEMPLATE'. A dropdown menu is open on the right side of this card, showing options: 'Label', 'Assign', 'Copy task', 'Copy link to task', 'Move task', and 'Delete'. A red arrow points to the 'Copy task' option, with the text 'Copy Task from the dropdown menu.' next to it. The top of the interface shows the 'Planner' tab and various navigation options.

## Step 4: Configure the New Card

1. A pop-up window for the new card will appear.
2. Rename the card by entering a new title in the provided field. For new use cases please make sure to start the title by mentioning as **New Use Case** – Following up with the use case title
3. Select the appropriate Planner from the dropdown menu. (keep the default **Melbourne City Planner**)
4. Choose the bucket where the card should be placed.
  - If no one is working on the use case, put it in the **Backlog** bucket
  - Or if you are working on it, put it to the **Sprint 1 (Week 3,4,5) T2 2024** bucket
5. Then click copy and create the card.
  - After that the card will appear in appropriate bucket. (in this case it will be in the **Sprint 1 (Week 3,4,5) T2 2024** bucket)



The screenshot shows the 'Melbourne City Planner' interface with a 'Copy Task' pop-up window. Red arrows and text annotations highlight the steps:

- 1. Pop-up window**: Points to the 'Copy Task' window.
- 2. Rename the card**: Points to the 'New task name' field containing 'New Use Case - Trend Analysis and Predictive Modeling of...'.
- 3. Select the appropriate Planner**: Points to the 'Plan name' dropdown menu showing 'Melbourne City Planner'.
- 4. Choose the bucket**: Points to the 'Bucket name' dropdown menu showing 'Templates and Project Information'.
- 5. Click copy and create the card**: Points to the 'Copy' button.

The 'Copy Task' window includes the following fields and options:

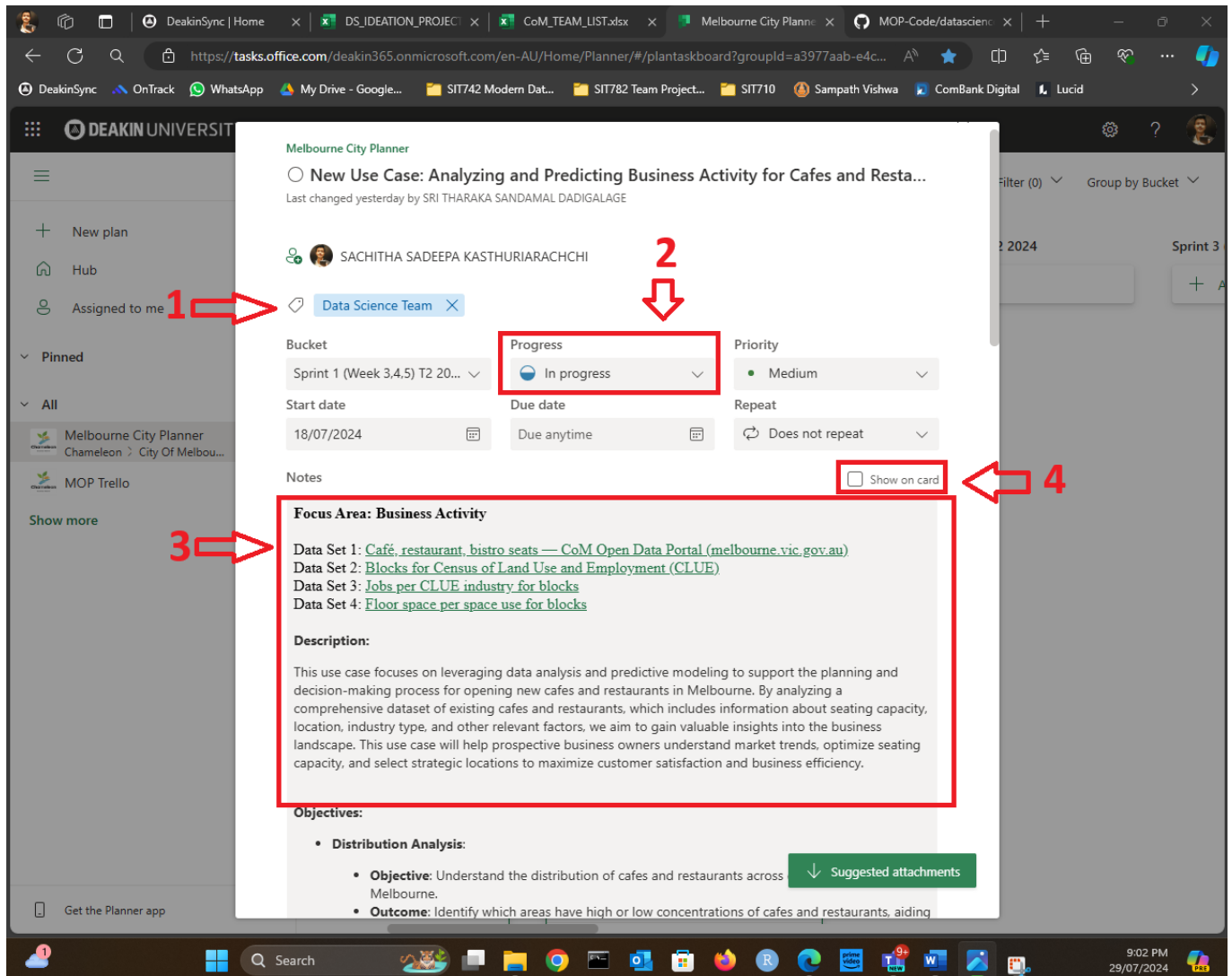
- New task name**: New Use Case - Trend Analysis and Predictive Modeling of...
- Plan name**: Melbourne City Planner
- Bucket name**: Templates and Project Information
- Include**:
  - ☐ Assignment
  - ☐ Progress
  - ☐ Dates
  - ☒ Recurrence
  - ☒ Description
  - ☒ Checklist
  - ☒ Attachments
  - ☒ Labels

The background interface shows a 'Backlog' list with tasks like 'WebDev Team', 'Database - Firebase', and 'Data Science Team'.

## Step 4: Add Task Information

Go to appropriate bucket and select the created card

1. **Labels:** Select or create labels to categorize your card.
2. **Progress Status:** This is the section where you can see the current progress of the task. In the image, it is marked as "In progress." **Note:** Please do not set it to "Completed." Instead, update your checklist because if you mark it as complete, it will disappear from the planner. It is strongly recommended to keep it "In progress" or not to touch it.
3. **Notes:** In the notes section, first indicate the focus area of your use case (**Business Activity, Environment & Wellbeing, or Transport & Safety**). Then, include the links to the data sets (you can find them in the Project [IDEATION](#) list). Finally, provide a description of the use case.
4. **Show on Card Option:** This is a checkbox option labeled "Show on card," which allows you to choose whether to display the detailed information on the card overview.



The screenshot displays the Deakin University Planner interface. A task card titled "New Use Case: Analyzing and Predicting Business Activity for Cafes and Restaurants" is shown. The card is assigned to the "Data Science Team" (indicated by a red arrow labeled 1). The progress status is set to "In progress" (indicated by a red arrow labeled 2). The notes section includes a focus area of "Business Activity", data sets, and a description (indicated by a red arrow labeled 3). The "Show on card" checkbox is visible (indicated by a red arrow labeled 4).

**Melbourne City Planner**

**New Use Case: Analyzing and Predicting Business Activity for Cafes and Restaurants**  
Last changed yesterday by SRI THARAKA SANDAMAL DADIGALAGE

**Assigned to:** SACHITHA SADEEPA KASTHURIARACHCHI

**Labels:** Data Science Team

**Bucket:** Sprint 1 (Week 3,4,5) T2 20...

**Progress:** In progress

**Priority:** Medium

**Start date:** 18/07/2024

**Due date:** Due anytime

**Repeat:** Does not repeat

**Notes:**

**Focus Area: Business Activity**

Data Set 1: [Café, restaurant, bistro seats — CoM Open Data Portal \(melbourne.vic.gov.au\)](#)  
Data Set 2: [Blocks for Census of Land Use and Employment \(CLUE\)](#)  
Data Set 3: [Jobs per CLUE industry for blocks](#)  
Data Set 4: [Floor space per space use for blocks](#)

**Description:**

This use case focuses on leveraging data analysis and predictive modeling to support the planning and decision-making process for opening new cafes and restaurants in Melbourne. By analyzing a comprehensive dataset of existing cafes and restaurants, which includes information about seating capacity, location, industry type, and other relevant factors, we aim to gain valuable insights into the business landscape. This use case will help prospective business owners understand market trends, optimize seating capacity, and select strategic locations to maximize customer satisfaction and business efficiency.

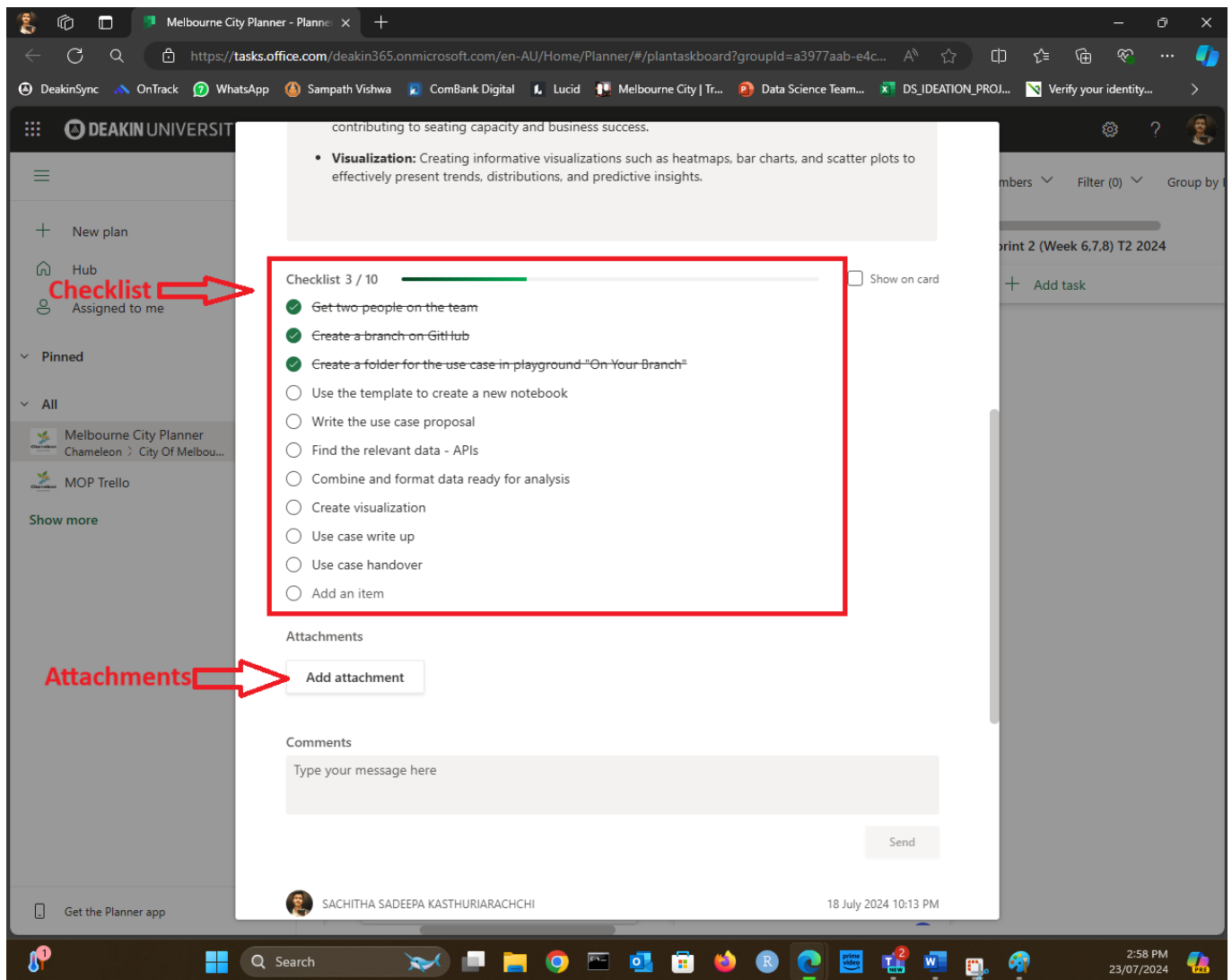
**Objectives:**

- Distribution Analysis:**
  - Objective:** Understand the distribution of cafes and restaurants across Melbourne.
  - Outcome:** Identify which areas have high or low concentrations of cafes and restaurants, aiding

**Show on card:** ☐

**Suggested attachments:** [Download](#)

1. **Checklist:** Add the necessary steps by entering each item and pressing Enter.
2. **Attachments:** Click on "Add attachment" to upload files or add links.



The screenshot displays the Microsoft Planner application within a web browser. The interface is for a task board titled "Melbourne City Planner - Planner". The left sidebar shows a navigation menu with options like "New plan", "Hub", "Assigned to me", "Pinned", and "All". The main area shows a task card for "Checklist 3 / 10". The checklist items are:

- Get two people on the team (checked)
- Create a branch on GitHub (checked)
- Create a folder for the use case in playground "On Your Branch" (checked)
- Use the template to create a new notebook (unchecked)
- Write the use case proposal (unchecked)
- Find the relevant data - APIs (unchecked)
- Combine and format data ready for analysis (unchecked)
- Create visualization (unchecked)
- Use case write up (unchecked)
- Use case handover (unchecked)
- Add an item (unchecked)

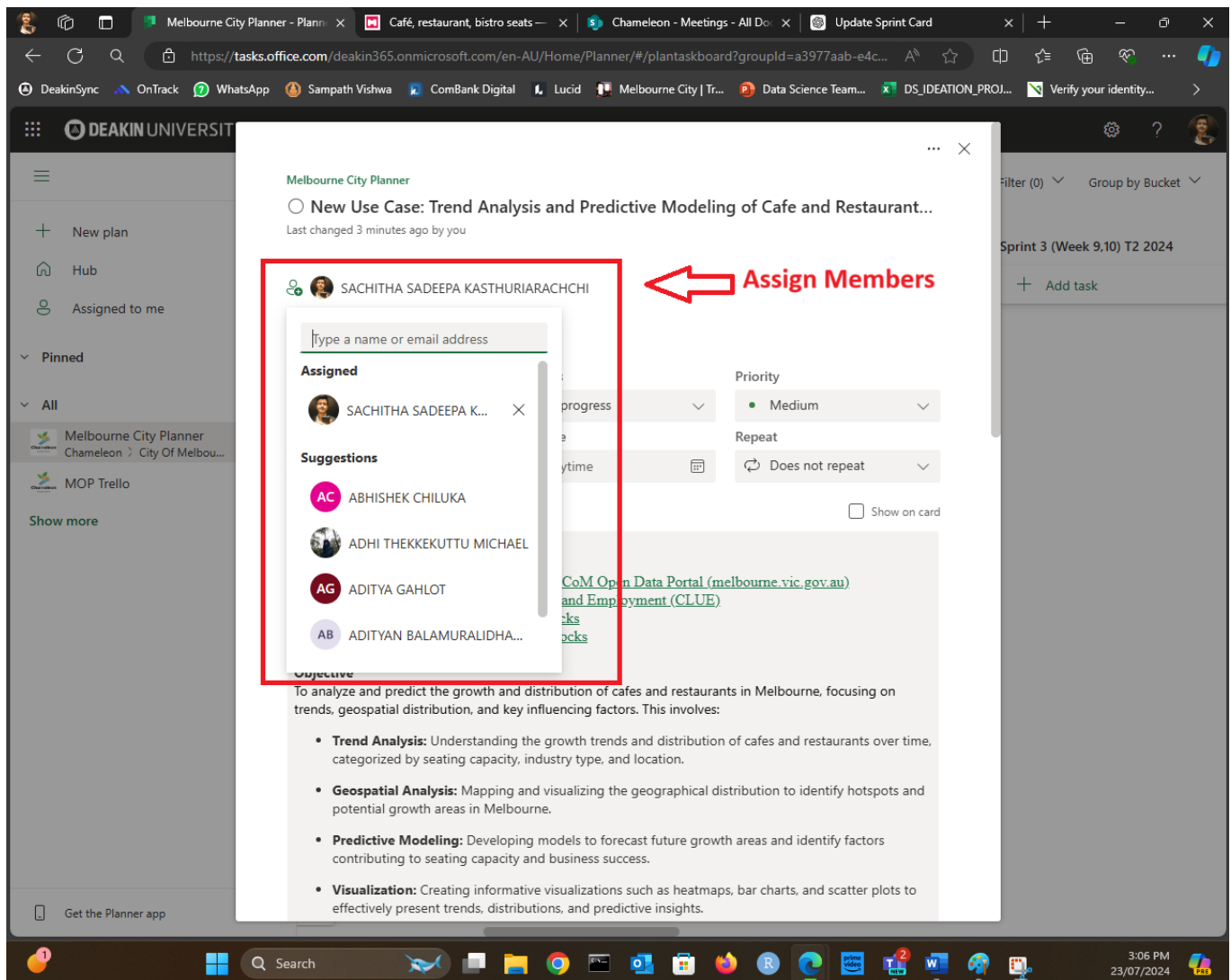
Below the checklist is the "Attachments" section, which includes a button labeled "Add attachment". Below that is the "Comments" section with a text input field and a "Send" button. The bottom of the screen shows the Windows taskbar with various application icons and the system clock indicating 2:58 PM on 23/07/2024.

## Step 5: Assigning Team Members to Active Tasks

### Ensure Active Tasks Have Assigned Users

#### 1. Assign Members:

- Open the task card that is in progress.
- Click on the "Assign" button.
- Select the team members who will be working on this task.



The screenshot shows the Deakin University Planner interface. A task card titled "New Use Case: Trend Analysis and Predictive Modeling of Cafe and Restaurant..." is open. The card is assigned to "SACHITHA SADEEPA KASTHURIARACHCHI". A red box highlights the "Assign" dropdown menu, which lists "SACHITHA SADEEPA K..." under "Assigned" and several team members under "Suggestions":

- ABHISHEK CHILUKA
- ADHI THEKKEKUTTU MICHAEL
- ADITYA GAHLOT
- ADITYAN BALAMURALIDHA...

A red arrow points to the "Assign Members" button. The task card also shows a "Priority" of "Medium" and a "Repeat" setting of "Does not repeat". The task description includes a link to the "CoM Open Data Portal (melbourne.vic.gov.au) and Employment (CLUE) packs" and a list of objectives: Trend Analysis, Geospatial Analysis, Predictive Modeling, and Visualization.

## Tips for Effective Task Management

- **Regular Updates:** Update the status of the card as the task progresses.
- **Communication:** Use the comments section within the card to communicate with team members.
- **Deadlines and Reminders:** Set due dates and reminders to keep tasks on track.
- **Review:** Regularly review all active and backlog tasks to ensure proper assignment and progress.

## Conclusion

By following these steps, you can efficiently create and manage tasks on Planner, ensuring that all tasks are properly documented and assigned. Regular updates and communication will help maintain a productive workflow.

## Author

Sachitha 2024.v1