



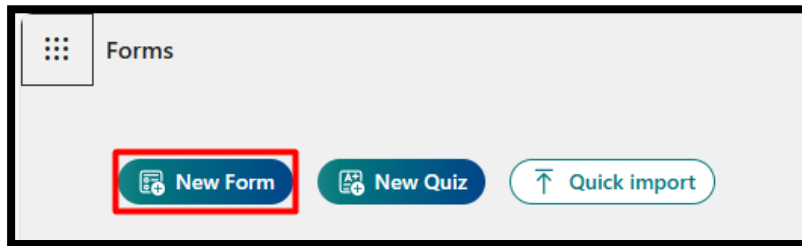
Automate New Task in Planner from MS Forms Submission

Table of Contents

Create an MS Forms	2
Planner.....	3
Creating a Planner	3
Sharing A Planner.....	5
Power Automate.....	7
Testing the flow	13
Cleaning up the privacy settings	13



Create an MS Forms



Go to <https://forms.office.com/>

Select New Form

Request for Support

1. Name *

Enter your answer

2. Email *

Enter your answer

3. What's the problem? *

Enter your answer

4. Has this caused you to stop your work? *

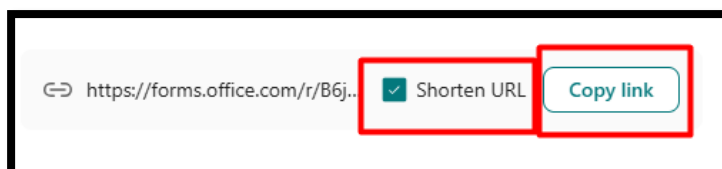
Enter your answer

+ Add new question

Create your form



Select Collect responses



Select Shorten URL then Copy link

e.g. of shorten link: <https://forms.office.com/r/B6jWdyDbEF>



Empower Your Automation

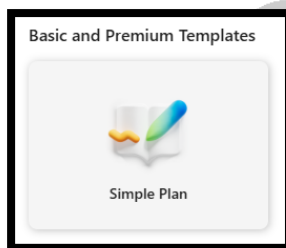
Planner

Creating a Planner

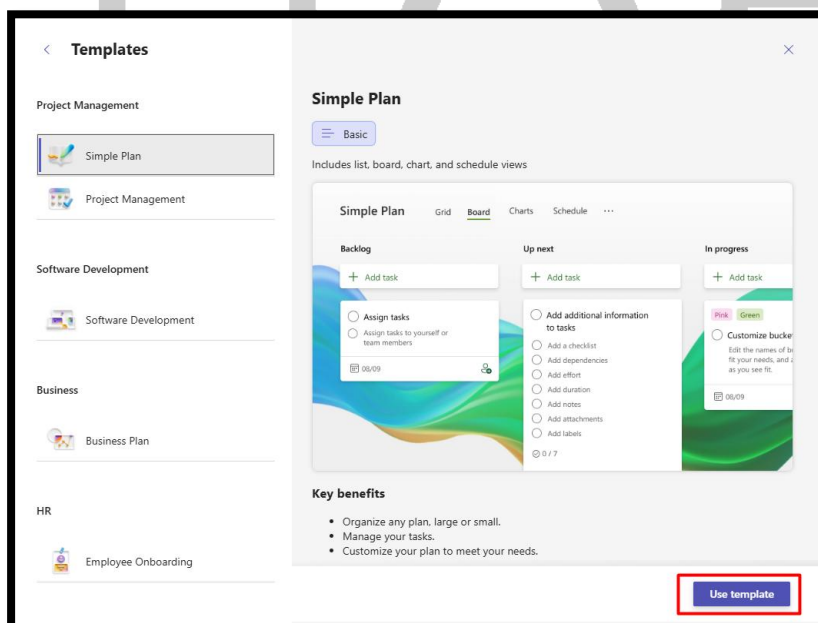


Navigate to <https://planner.cloud.microsoft/>

Click on '+ New plan' on the top right



Select Simple Plan



Select Use template



< Create a plan from a template ×

Name *

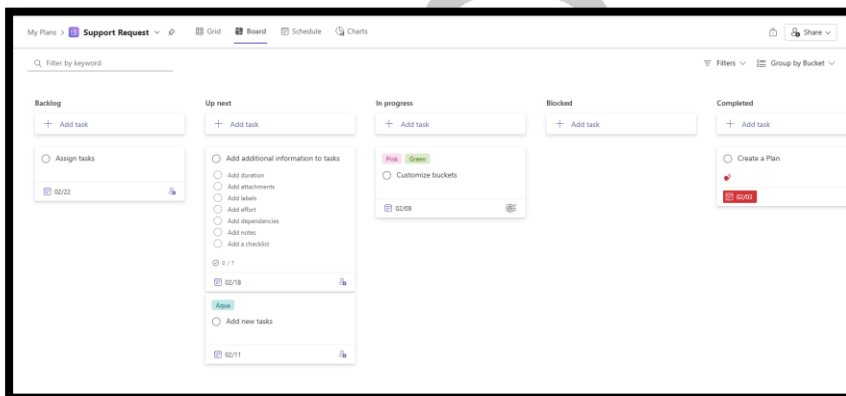
Support Request

☐ Add to my pinned plans

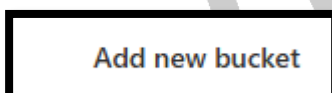
Add to a group (optional) ▾

Create

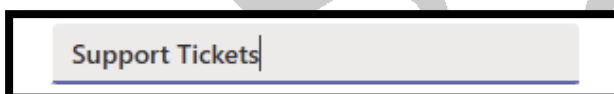
Give your planner a name and click Create



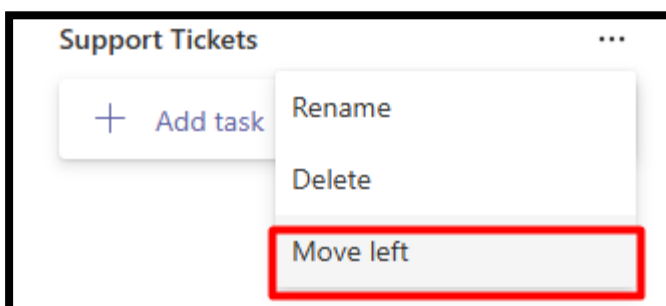
You will see all the buckets created.



Scroll the list to the left and select Add new bucket



Call the new bucket Support Tickets



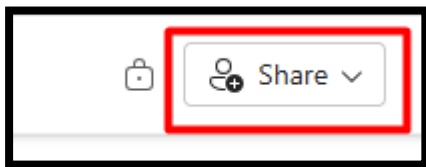


Empower Your Automation

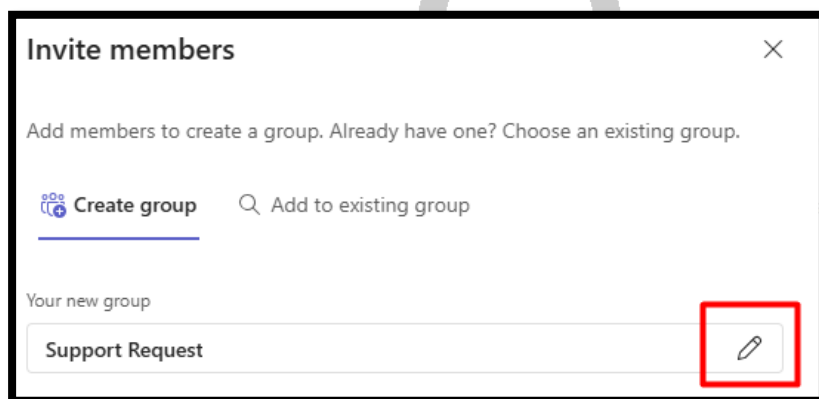
Right click on the 3 dots and select Move left. (You can select and drag as well) Move it to the first column.

Author's Note: This is just for KANBAN. Make sure new items are in the front and move right to completion.

Sharing A Planner



On the top right hand, click Share



Select the pencil



Invite members

Add members to create a group. Already have one? Choose an existing group.

[Create group](#) [Add to existing group](#)

Your new group

Support Request

Group name

Support Request

Description

Privacy

Public

Add members to create a new group

Enter name

Create group

Give your Group a name

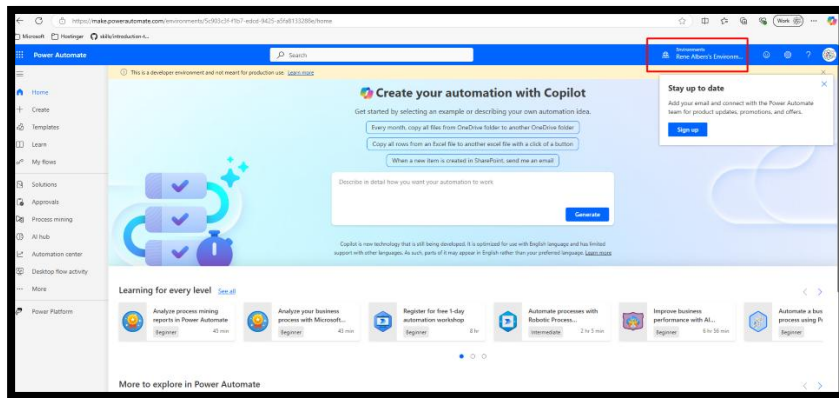
Select Public under Privacy (Note: You will change this later [here](#))

Add all your members, Could be a Microsoft teams as well

Click 'Create group'

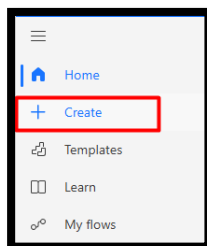


Power Automate

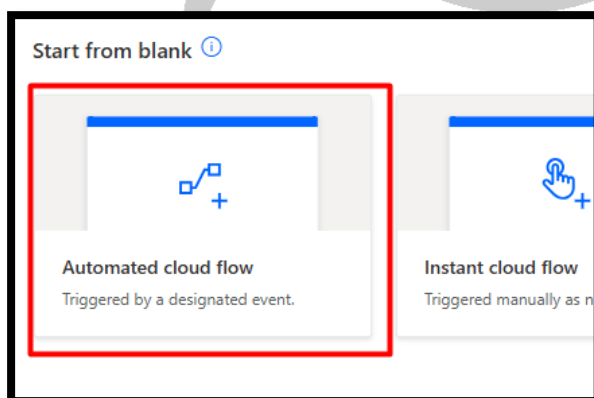


Navigate to <https://make.powerautomate.com/>

Note: Make sure you are not in a developer environment else others cannot access your automation



Select Create from the left panel



Select Automated Cloud flow



Flow name
Request for Support Flow

Choose your flow's trigger * ⓘ
Search or select a trigger from the list below to create a flow. (Required)

Search all triggers

- ☒ When a new response is submitted
Microsoft Forms ⓘ
- ☐ When an item is created
SharePoint ⓘ
- ☐ When an item is created or modified
SharePoint ⓘ
- ☐ When a file is created
OneDrive for Business ⓘ
- ☐ When a task is assigned to me
Planner ⓘ

Give your flow a name

Select trigger 'When a new response is submitted'

Click Create

When a new response is submitted

Invalid parameters

Click on the trigger

Form Id *

Request for Support

Choose your form from the left panel

When a new response is submitted

+

Click the '+'

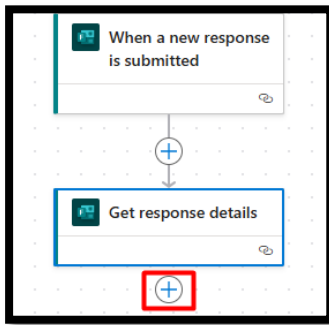


Choose 'Get response details' under Microsoft Forms

Get the Form ID, then click the lightning bolt (Dynamic Content)

Select 'Response Id' from the list

You will see it added



Select the '+'



Select Create a task under Planner

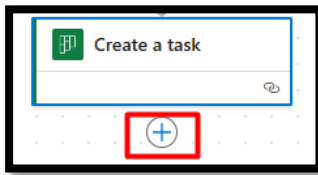
You can set this up as shown

Click the show all below

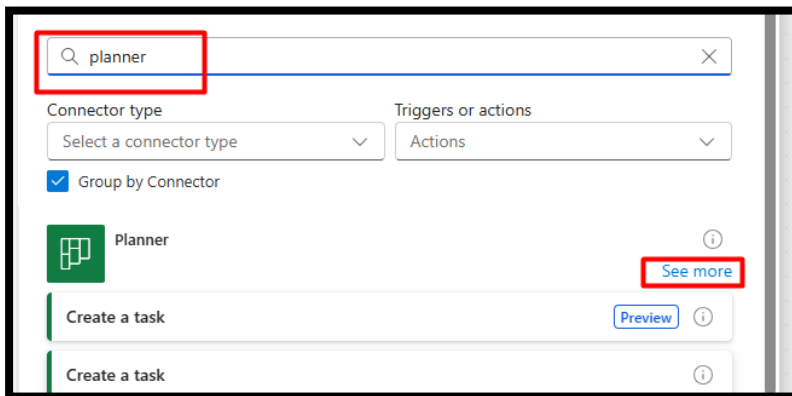
Under Bucket ID select 'Support Tickets'



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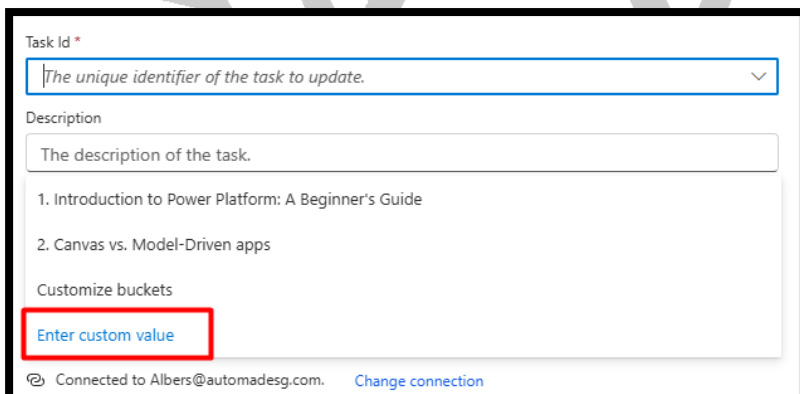
Click the '+'



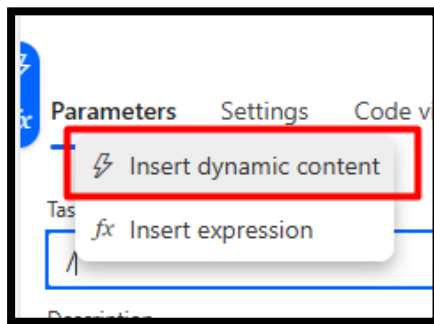
Under the left panel, search planner and click see more



Scroll all down to 'Update task details'

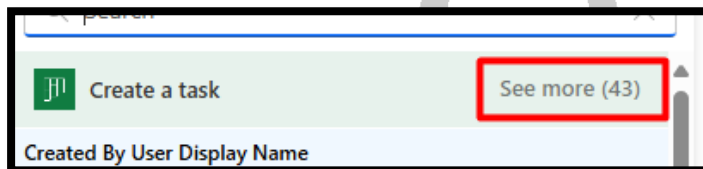


Select the Task Id and select 'Enter custom value'

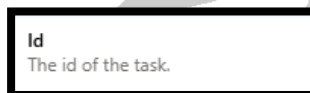


Select Dynamic Content.

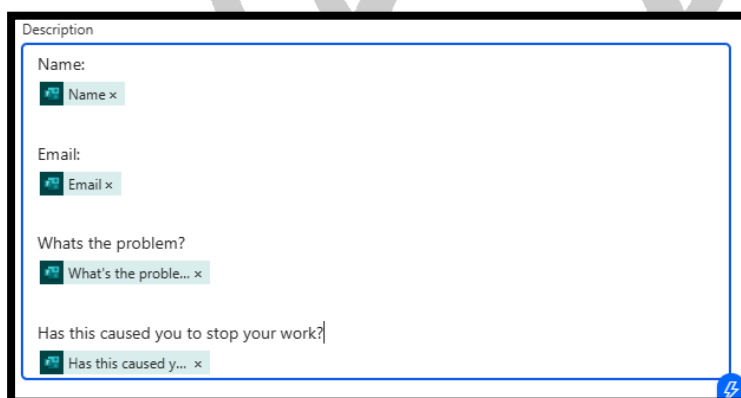
Note: If you have the problem of the button being hidden from view as shown, type '/' and select 'Insert dynamic content'



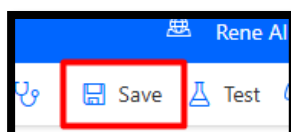
Under 'Create a task', select See more



Select Id



For the description, ensure you format the ticket as shown



Click Save



Testing the flow

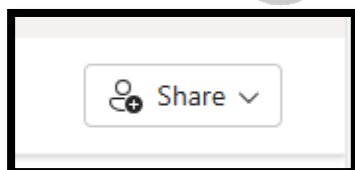
Go back to your form, copy the IRL and do a live test

Go to planner and see if a task is created (It would take up to 30 seconds for the task to be created after the form is submitted)

The screenshot shows a 'Support Request' form within a planner interface. At the top, it says 'Ticket 1 from Albers@automadesg.com'. Below this are options to 'Assign' and 'Add label'. The form is divided into several sections: 'Bucket' (Support Tickets), 'Progress' (Not started), 'Priority' (Medium), 'Start date' (Start anytime), 'Due date' (Due anytime), and 'Repeat' (Does not repeat). There is a 'Notes' section with a 'Show on card' checkbox. The notes contain the following text: 'Name: Rene', 'Email: albers@automadesg.com', 'Whats the problem? I can't open power apps', and 'Has this caused you to stop your work? Yes, definitely!'. At the bottom, there is a 'Checklist' section with an 'Add an item' button.

Ensure the formatting is created correctly

Cleaning up the privacy settings



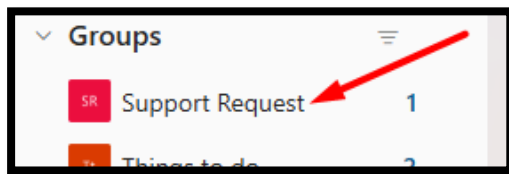
In Planner, Click on Share



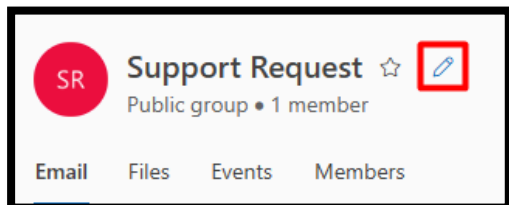
Click on your group



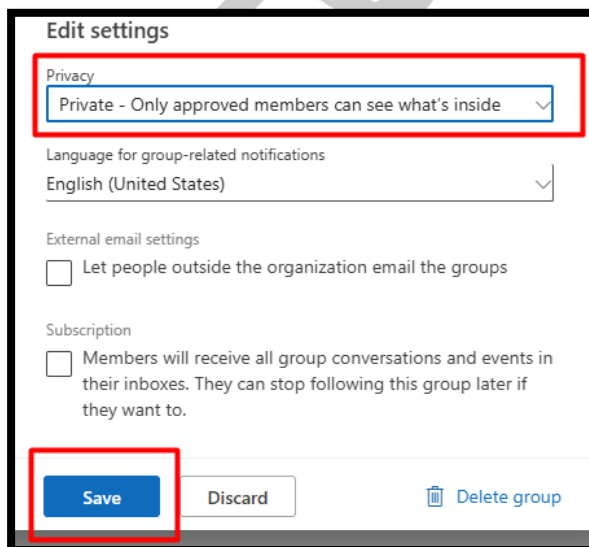
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Click on your group

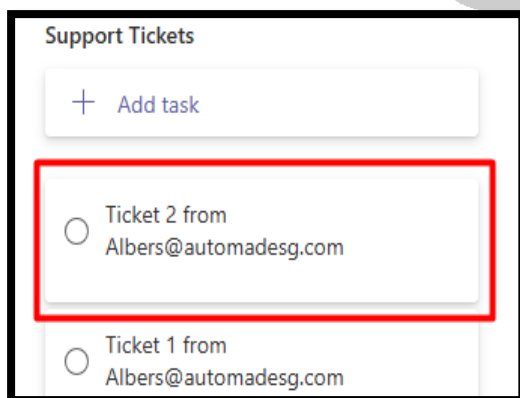


Click on the pencil



Select 'Private' under privacy and click Save.

Note: This ensures others cannot see your plan



Run the [test](#) again and ensure that the tickets are being created.