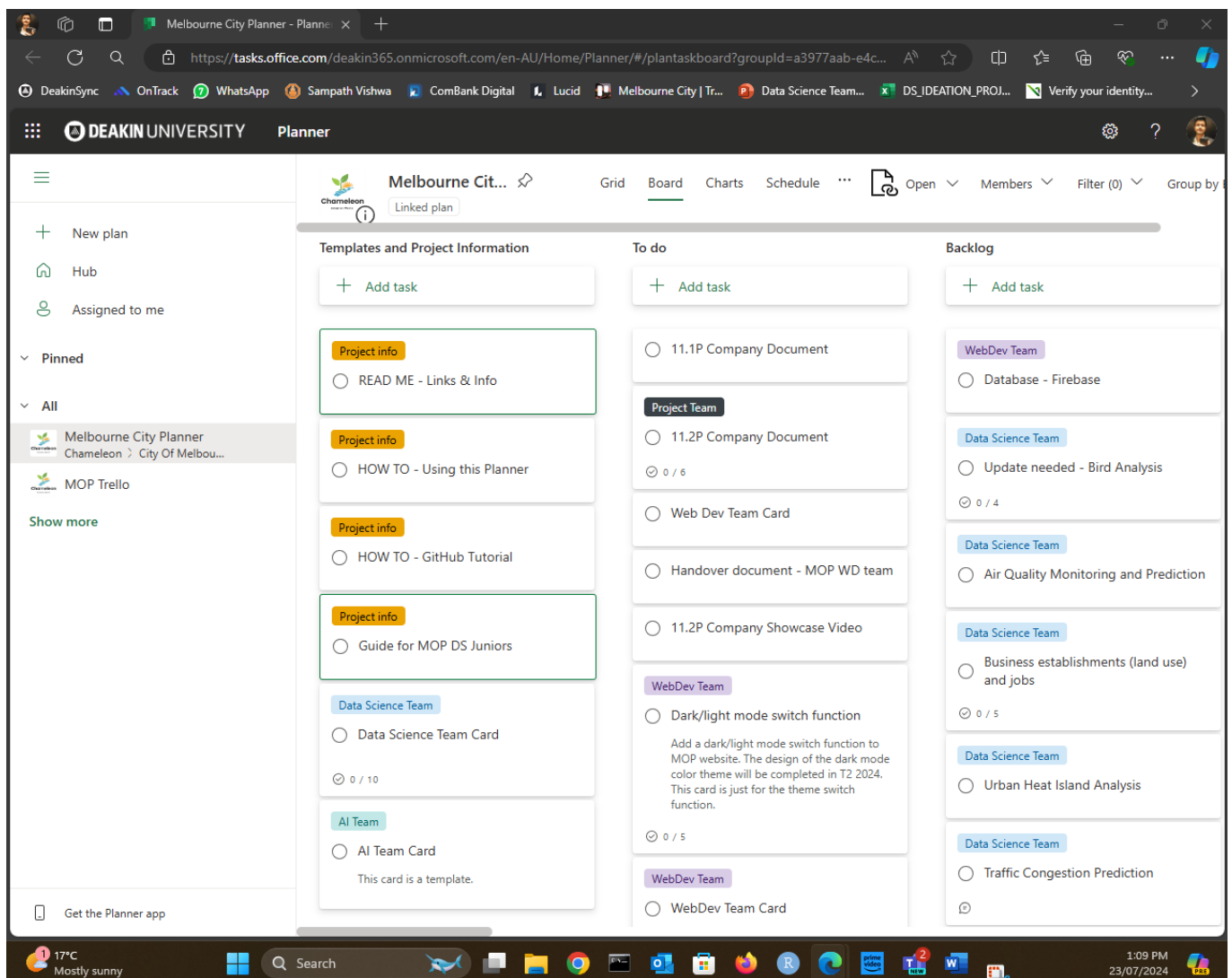


# Guide: How to create a card in planner

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.

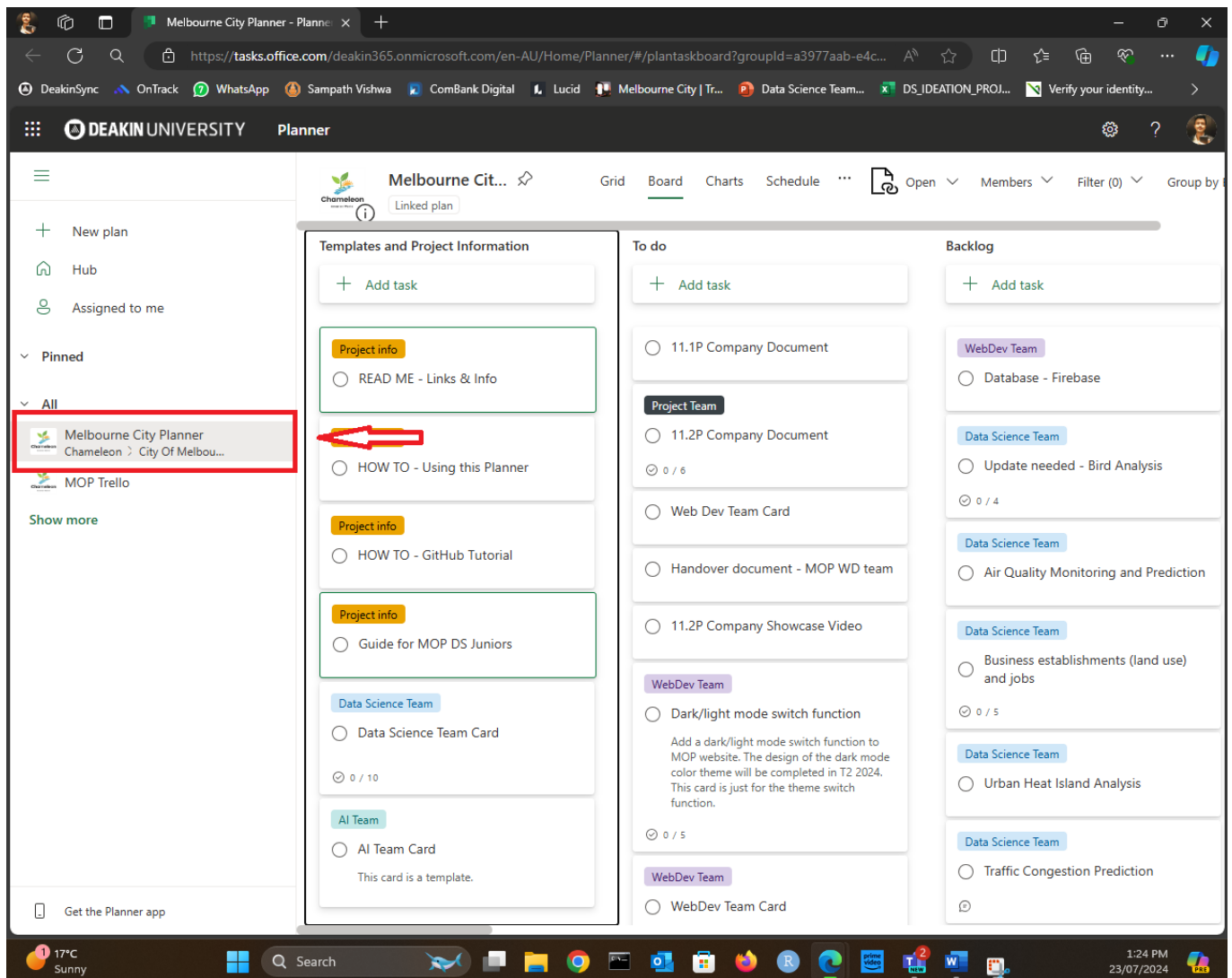
## Step 1: Access the Planner

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

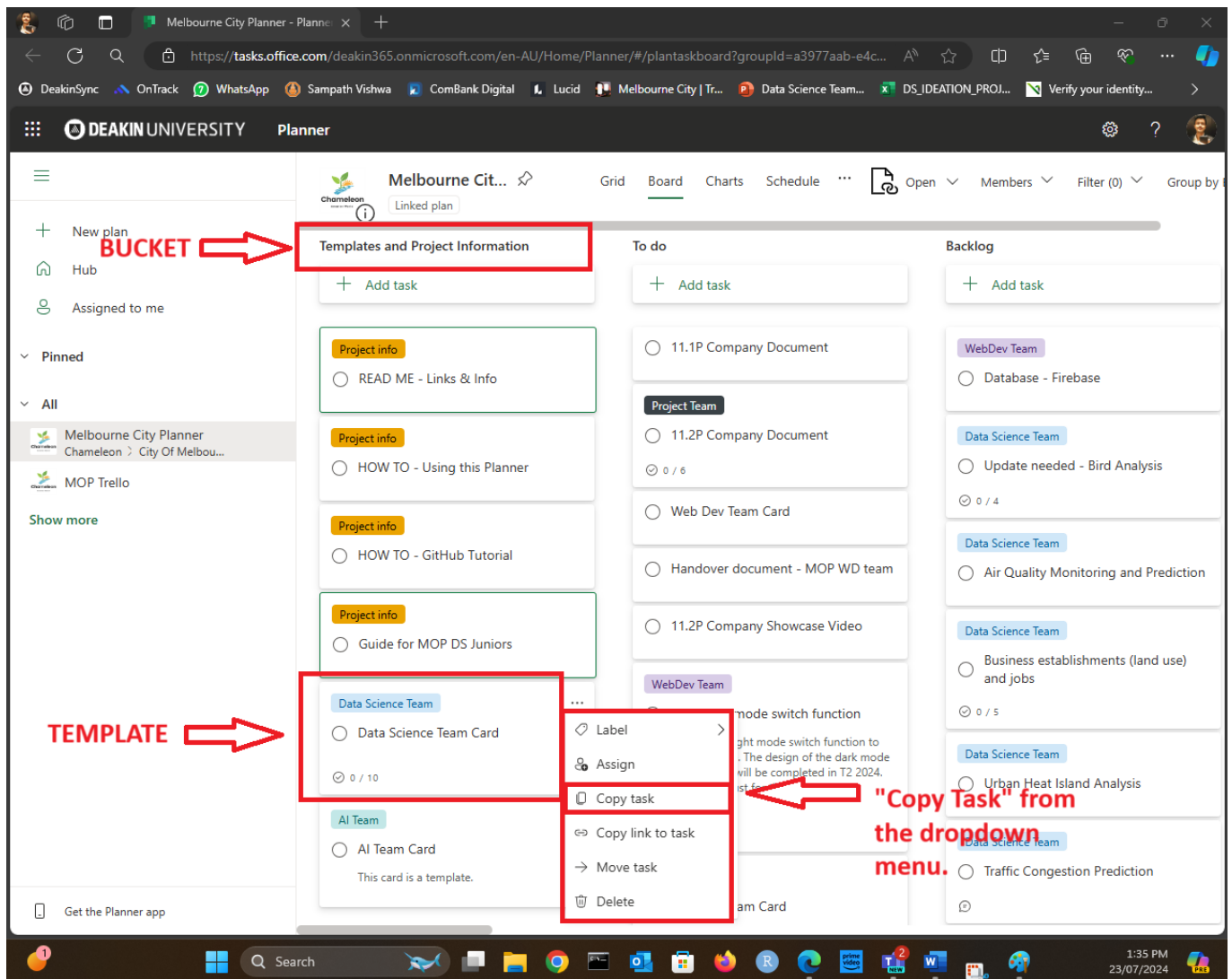
As shown in the below figure make sure you in the **Melbourne City Planner**.



The screenshot displays the Microsoft Planner interface for the 'Melbourne City Planner' plan. The left sidebar shows the 'All' plan list, where 'Melbourne City Planner' is highlighted with a red box and a red arrow. The main area shows the 'Board' view with three columns: 'Templates and Project Information', 'To do', and 'Backlog'. The 'To do' column contains a list of tasks, including '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 contains a list of tasks, including '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'.

### Step 3: Copy the Template

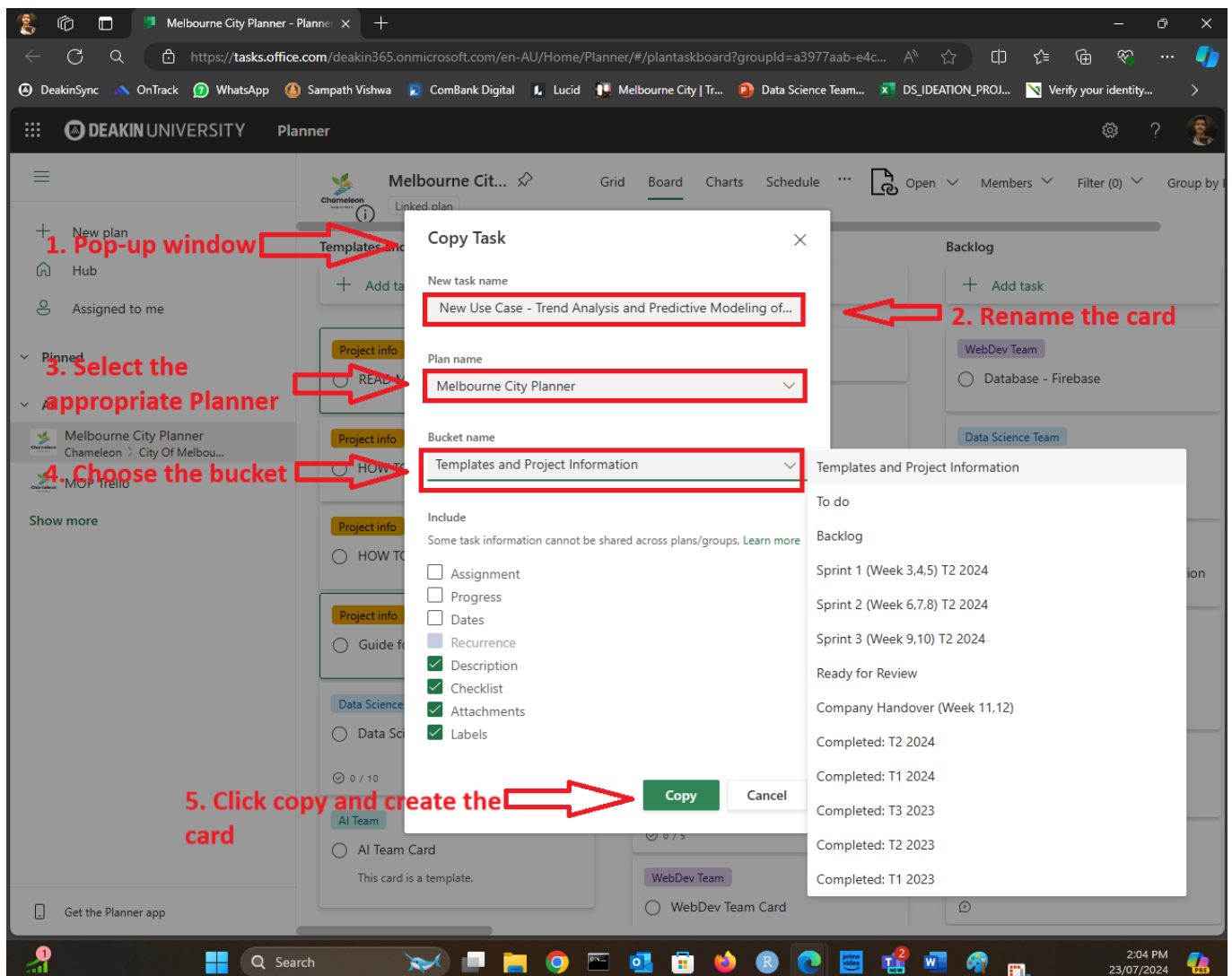
- Go to the bucket **Template and Project information**
- Click on the three dots (ellipsis) on the right side of the **template card**.
- Select "Copy Task" from the **dropdown menu**.



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 interface also shows other buckets like 'To do' and 'Backlog'.

## 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:

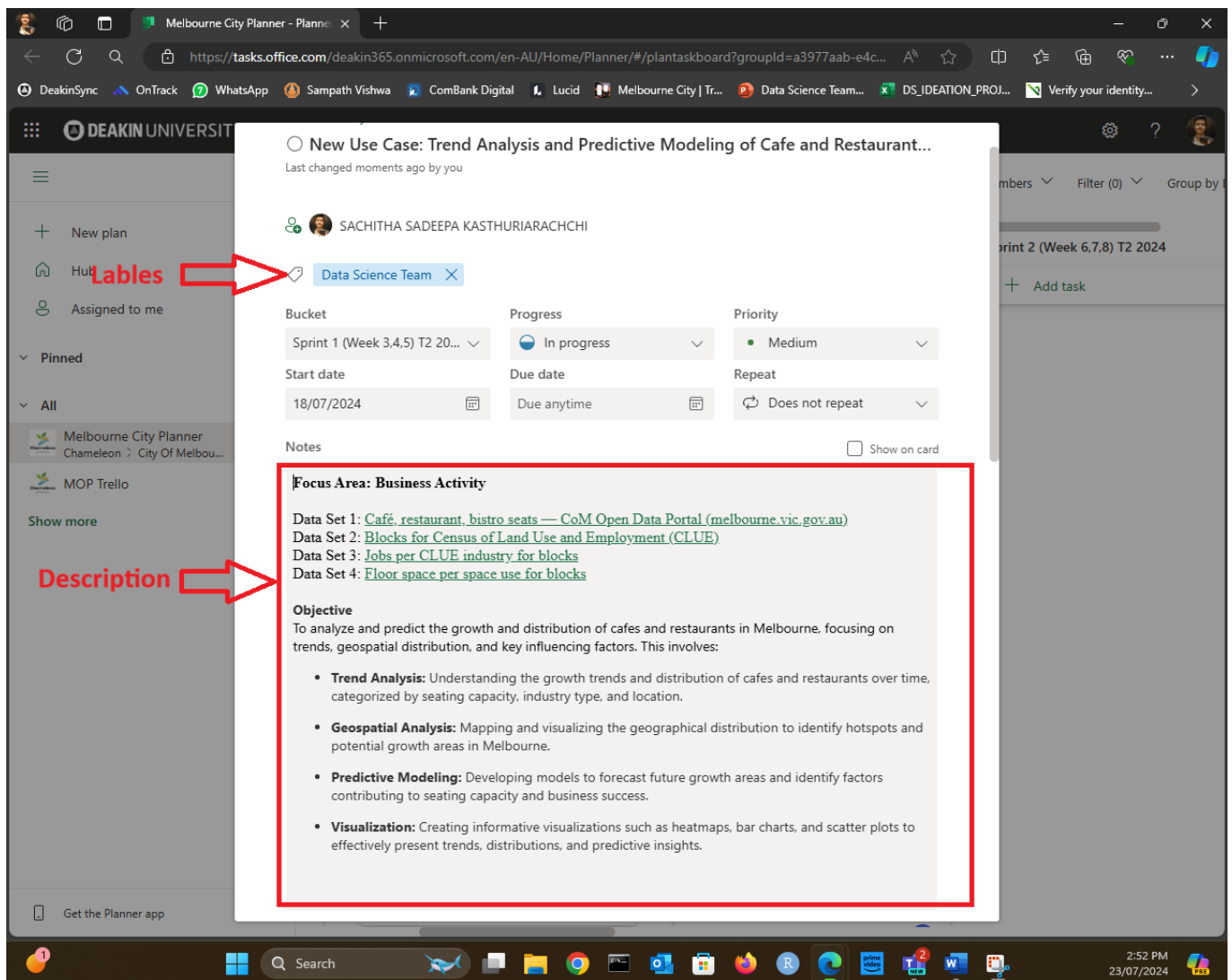
- New task name**: New Use Case - Trend Analysis and Predictive Modeling of...
- Plan name**: Melbourne City Planner
- Bucket name**: Templates and Project Information
- Include**:
  - ☐ Assignment
  - ☐ Progress
  - ☐ Dates
  - ☒ Recurrence
  - ☒ Description
  - ☒ Checklist
  - ☒ Attachments
  - ☒ Labels

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. **Description:** Enter a detailed description of the task in the **Notes** section
2. **Labels:** Select or create labels to categorize your card.



**Labels**

**Description**

**New Use Case: Trend Analysis and Predictive Modeling of Cafe and Restaurant...**  
Last changed moments ago by you

SACHITHA SADEEPA KASTHURIARACHCHI

**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 \(CLUE\)](#)

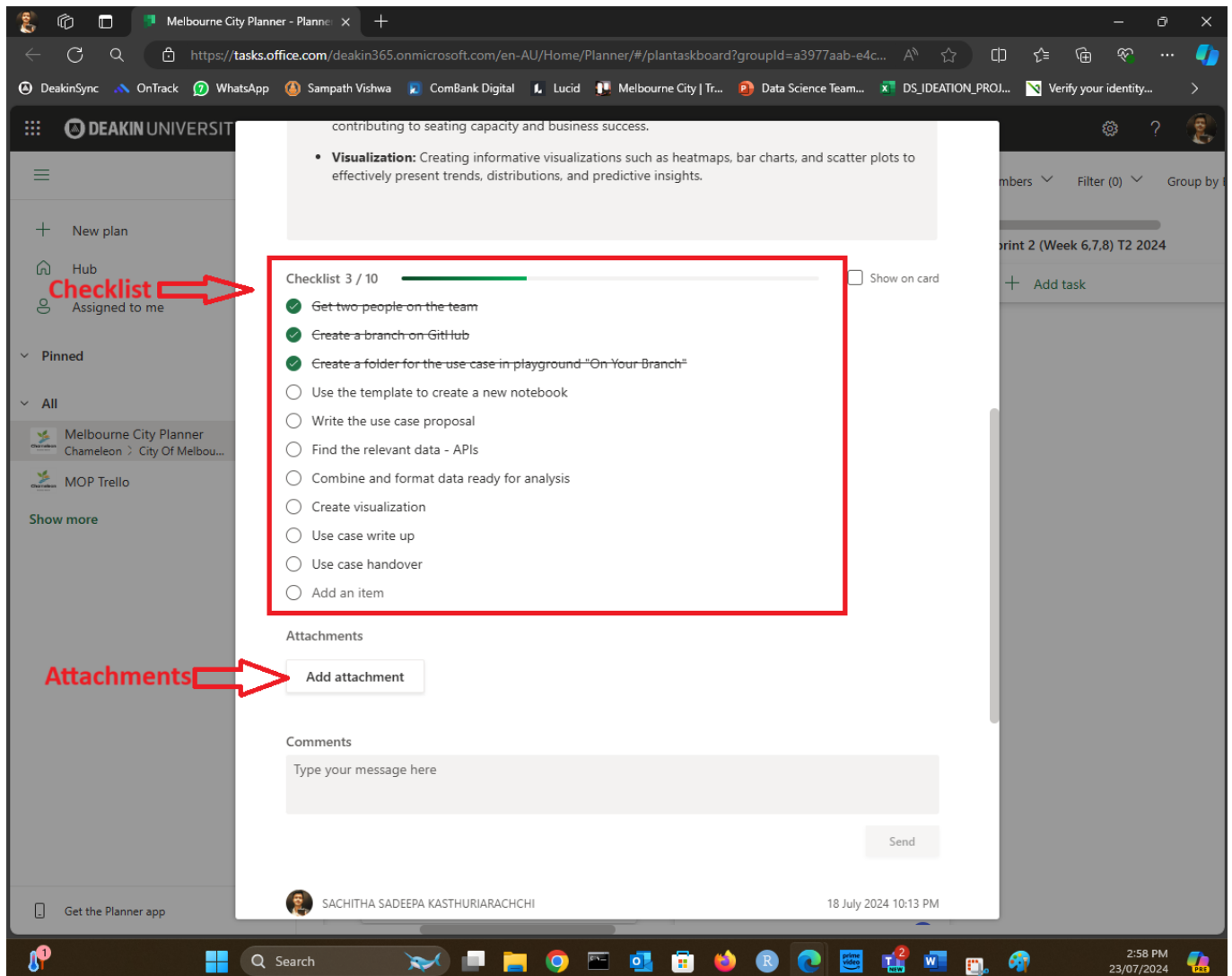
Data Set 3: [Jobs per CLUE industry for blocks](#)

Data Set 4: [Floor space per space use for blocks](#)

**Objective**  
To analyze and predict the growth and distribution of cafes and restaurants in Melbourne, focusing on trends, geospatial distribution, and key influencing factors. This involves:

- Trend Analysis:** Understanding the growth trends and distribution of cafes and restaurants over time, categorized by seating capacity, industry type, and location.
- Geospatial Analysis:** Mapping and visualizing the geographical distribution to identify hotspots and potential growth areas in Melbourne.
- Predictive Modeling:** Developing models to forecast future growth areas and identify factors contributing to seating capacity and business success.
- Visualization:** Creating informative visualizations such as heatmaps, bar charts, and scatter plots to effectively present trends, distributions, and predictive insights.

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 Melbourne City Planner web application. The interface includes a sidebar with navigation options like 'New plan', 'Hub', and 'Assigned to me'. The main content area shows a task card for 'Melbourne City Planner' with a checklist titled '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), and 'Add an item' (unchecked). Below the checklist is an 'Attachments' section with an 'Add attachment' button. A red arrow points to the 'Checklist' label, and another red arrow points to the 'Attachments' label. The bottom of the screen shows a Windows taskbar with various application icons and the system clock indicating 2:58 PM on 23/07/2024.

contributing to seating capacity and business success.

- **Visualization:** Creating informative visualizations such as heatmaps, bar charts, and scatter plots to effectively present trends, distributions, and predictive insights.

Checklist 3 / 10

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

Attachments

Add attachment

Comments

Type your message here

Send

SACHITHA SADEEPA KASTHURIARACHCHI

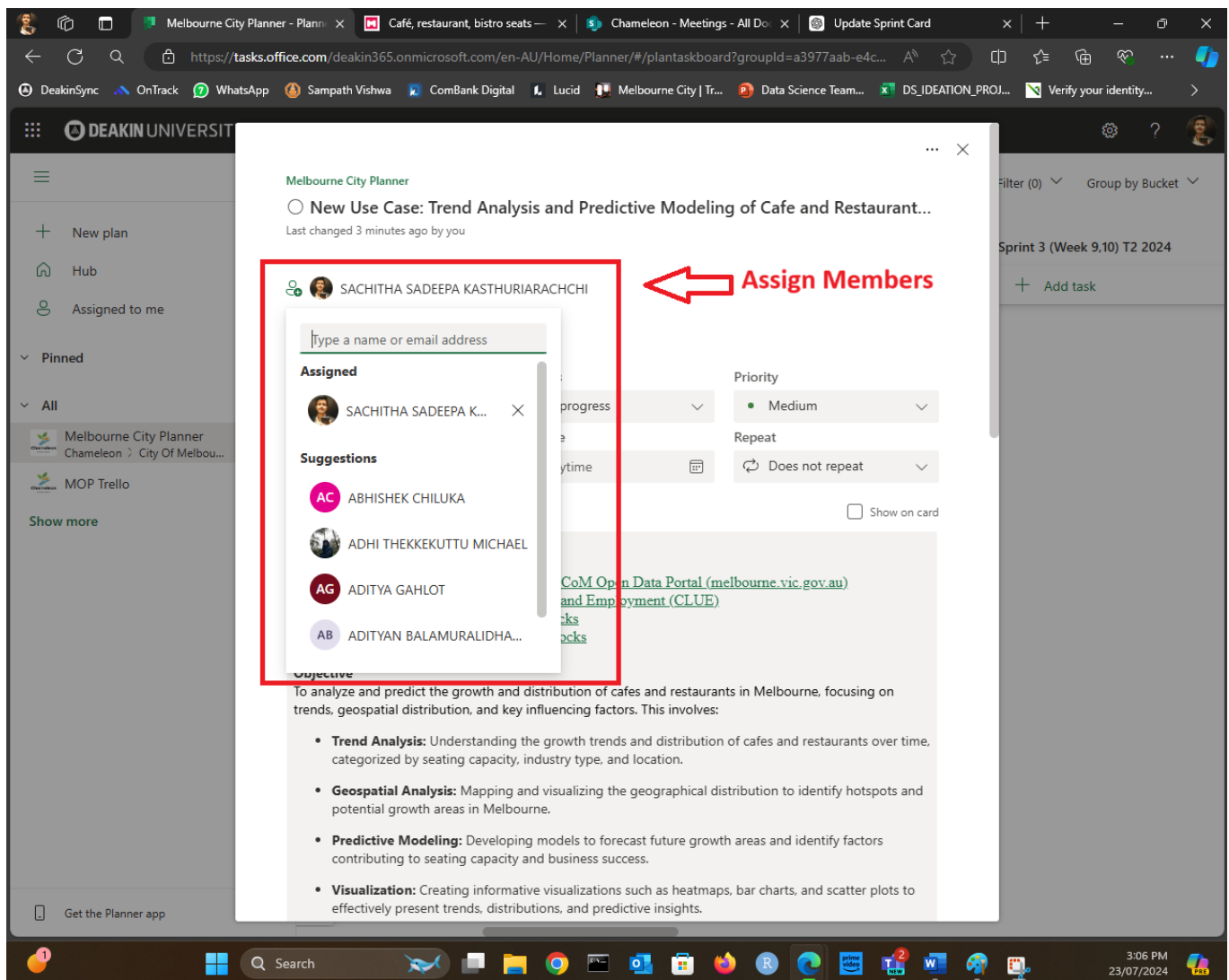
18 July 2024 10:13 PM

## 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 Microsoft Planner interface. A task card titled "Melbourne City Planner" is open, showing a "New Use Case: Trend Analysis and Predictive Modeling of Cafe and Restaurant..." with a status of "In progress". A dropdown menu is open, showing a search bar "Type a name or email address" and a list of assigned and suggested members. A red box highlights the "Assigned" and "Suggestions" lists. A red arrow points to the "Assign Members" button.

**Assigned Members:**

- SACHITHA SADEEPA KASTHURIARACHCHI

**Suggestions:**

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

**Task Details:**

- Priority:** Medium
- Repeat:** Does not repeat
- Objective:** To analyze and predict the growth and distribution of cafes and restaurants in Melbourne, focusing on trends, geospatial distribution, and key influencing factors. This involves:
  - Trend Analysis:** Understanding the growth trends and distribution of cafes and restaurants over time, categorized by seating capacity, industry type, and location.
  - Geospatial Analysis:** Mapping and visualizing the geographical distribution to identify hotspots and potential growth areas in Melbourne.
  - Predictive Modeling:** Developing models to forecast future growth areas and identify factors contributing to seating capacity and business success.
  - Visualization:** Creating informative visualizations such as heatmaps, bar charts, and scatter plots to effectively present trends, distributions, and predictive insights.

## 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