

## Apps4.Pro Trello to Planner Migrator Guide

Apps4.Pro Trello Migrator is a web-based Edge Extension that can be installed in Edge browser. This app helps you to successfully migrate Trello board details into Microsoft Planner.

# **Microsoft Partner** Gold Application Development



You can migrate following Board details from Trello to Microsoft Planner Plan.



- Lists
- Cards
- Archived Cards
- Board Members

You can migrate following Card details from Trello to Microsoft Planner tasks

- Card Name, Due Date and Assigned Members
- Comments, Files (Attachments) and show on card (Cover images)
- Labels, Checklists and Description

### Installing the App: A Quick Guide

- 1. **Download** the unpacked extension source file from the Apps4.Pro website.
- 2. **Extract** the zip file (e.g., "apps4.pro\_trello\_to\_planner\_migrator\_X.X.X.X") that you downloaded.
- 3. Open the Extensions Page in your browser:
- In Microsoft Edge, type `edge://extensions` in the address bar.
- Alternatively, click the menu icon (top right of the browser), then select Extensions under More Tools.

Note: If you have an older version of the extension, make sure to remove or disable it.

4. Enable **Developer Mode** by checking the box at the bottom left of the Extensions page.

mail 🗅 YouTube 🗅 Maps 🚼 Graph	ctensions 🕦			-
Extensions	Installed extensions From Microsoft Store	3 🖬 Load unpact	ed 🛛 Pack extension	on 🖒 Update
𝒫 Search installed extensions	😨 Select the extension directory.			3
C Extensions	← → → ↑ 🗉 > This PC > Downloads > apps4.pro_trello_to_	planner_migrator >	v U P Sea	ch apps4.pro_trello_to_p
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Developer mode				
Allow extensions from other stores. Learn more			5 Select Fold	ler Cancel

5. Click on Load unpacked extension... to open a file selection dialog.

6. Locate the Folder where your extension files are extracted (e.g.,

"apps4.pro\_trello\_to\_planner\_migrator\_X.X.X.X") and select it to complete the installation.

## 1. Steps to get started

Before proceeding to work with this app features, go to Account tab and sign-in with your Office 365 account under both Account & Graph API Account sections.

#### 1.1 Account



Click Sign In button under Account tab to sign-in to Microsoft Planner with your Office 365 user account.

Trello Import Account	Gettings		
Account			
Sign In	Microsoft Planner	- 0	×
Graph Api Account		ß	
	Microsoft Planner		- 1
	A simple, visual way to organize teamwork.		
	2 Sign In		

#### 1.2 Graph Api Account

To use some of the features in this app, you should also sign-in to Graph Api Account with the same account that you used in previous step. Click on **Copy & Open** button. It will copy the code shown in the console and opens new window.

Trello Import Account Settings
CAccount
You have signed-in as : admin@ .onmicrosoft.com Manage License
Sign Out 也
Graph Api Account
To sign in, click Copy & Open and paste the copied code in authentication window
Code: H64NPMJTB C Copy & Open
You can also use a web browser to open the page https://microsoft.com/devicelogin and enter the above code to authenticate.
Done

Paste the copied code in the new window and click the **Next** button.

Sign in to your account		-	×
Enter coo			
Enter the code	e displayed on your app or de	evice.	
H64NPMJTB			
		Next	



If already signed-in accounts listed, select the Office 365 account that you used in previous Step (2.1). If the accounts not listed, you can complete the sign-in process with the same user account.

Sign in to your accoun	t		-	×
Mi				
Pick	an account			
Å	Sundar Ganesan admin@onmicrosoft.com Signed in		:	
+	Use another account			
		Back		

Once you completed the sign-in process, you will see the below confirmation window. You can close the sign-in confirmation window to complete the sign-in process.

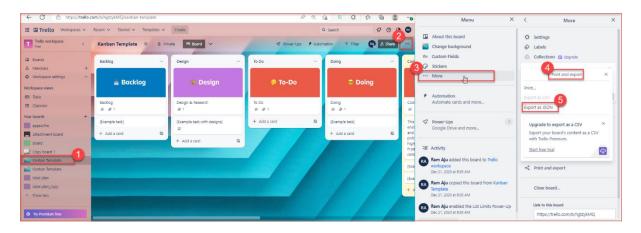
#### 2. Migration Steps

Follow the below steps to complete your migration work.

#### Step 2.1 : Export your board as JSON file

Please go to (https://trello.com). Open the board to be migrated and follow the below steps to

save the board as a JSON file.



**Note :** To export all boards within a Workspace into JSON format, you would require **Trello Premium**.



### Step 2.2 : Select your Trello JSON file

In this step you can select Trello JSON file that was exported in the previous step.

Account	Settings			
e your json file				
20_C3iAPVR1.jsc	on			Browse
ard Member Map	pings M	lap Trello Labels	Include Archived Cards	
	e your json file 20_C3iAPVR1.jso	e your json file 20_C3iAPVR1.json	e your json file 20_C3iAPVR1.json	e your json file 20_C3iAPVR1.json

### Step 2.3: Map Trello Board members with Planner users

When you migrate a Trello board, some of the board members may not be available in Planner or they may be available with different name, you can easily map the board members with Planner users.

Trello Import Account Setti	ngs					
1 Choose your json file						
Sept20_C3iAPVR1.json						Browse
Board Member Mappings	Map Trello Labels	lı lı	nclude Archived Cards			
			Board Member	Mapped Planner User	×	
Import 'Facilities' to the	New Plan 🔻	+	Gayl Shute	Sundar Ganesan	- 2	
			Jason	Jackson Sartre	<b>.</b> +	
			Keith	Administrator	<b>•</b> +	Next
2 Tasks to Import			Roger Page	Alex Wilber	<b>e</b> +	
				3 Sav	e 🔒	
a Import Docult					-	

#### Step 2.4: Select Target Plan

In this step you can provide target plan to migrate data. You have following three options to choose target plan.

- Migrate into new plan in new group
- Create new plan in existing group
- Copy all cards into existing Plan



trello.json		Brows
Board Member Mappings Map Trelio Labels Includ	Archived Cards	
Import 'check board' to New Plan V New Plan		0
¢€ New Plan Settings X Add new plan:	¢\$ New Group Settings Add new group:	Next
Ta: New Plan	Group Manne Malificiname Test Group Test Group	
Label1,Label2,	Private  Pri	
4 Save Cancel		Apps4.Pro ye Su Cancel

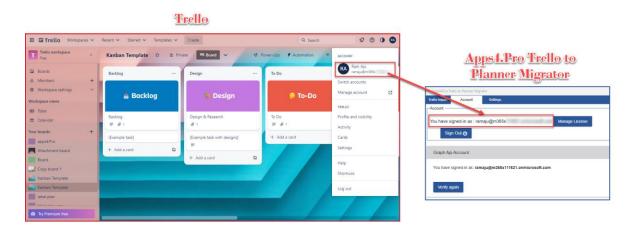
#### Step 3: Import tasks

#### **Pre-requisite :**

Step 1 : From a Web Browser, log in to trello.com with the Office 365 Account used in Step 1.1. Make sure you log in the same browser from where you have added the extension.

Step 2 : Open a board that you have used for importing.

The above steps are mandatory to get your attachments migrated to the target.



Now you can click **Import Tasks** button to migrate Trello cards into Planner plan.



Trello I	mport	Accol	Settings									
1	Choose yo	our jsoie										
2	Tasks to Ir	nport									Export to Exc	el
	Task Titl	e	Description	Plan Name	Butter	Assigned to	Due date	Categories	Checklist	ShowOnCard	Attachments	
		T	T	T	T	T	T	T	T	T	T	
	task 1		task 1 descrip	check board	card 1					Attachment	"introducing-o	^
	task 2		details	check board	card 1				"two","False"	NoPreview		
	task 4			check board	card 2				"1","False";"3	NoPreview		
	task 3			check board	card 2			Label4,Label3	"one","False";	NoPreview		
	H 4	1	▶ 5 •	items per page							1 - 4 of 4 items	
3	Import Res	sult								Back	Import Tasks	5

## Step 4: Import Result

Once the process completed, you can export the result to Excel file and ensure all the required Trello cards are successfully migrated or not.

3	Import Result			
			\$	Export to Excel
	Plan Name	Task Title	Status	
	T	T		T
	Gold Plan	task 1	Task imported successfully	*
	Gold Plan	task 2	Task imported successfully	
	Gold Plan	task 4	Task imported successfully	
	Gold Plan	task 3	Task imported successfully	
	H  ◀ 1  ► H 5  ▼ items per page			1 - 4 of 4 items
			B	ack Done