

Get Started with Plandisc

 **VISMA** | plandisc



Welcome to Plandisc!

You've invested in a planning tool to help improve your planning process. In this user manual we've gathered guides and best practices to help you achieve just that. We hope it will help you get started with your Plandisc account, improve your usage, and boost the way you plan. Come back to it when you run into an issue or want a refresher on how things work.

All the best,
The Plandisc team



Get Started

- **Structure in Plandisc**

- Get to know the dashboard

- **Create your Plandisc**

- Create a Plandisc
- Plandisc setup
- Add rings
- Create activities
- Working with activity groups

- **Share & Work Together in Plandisc**

- How to share your Plandisc

- **Connect & Integrate with Your Calendar**

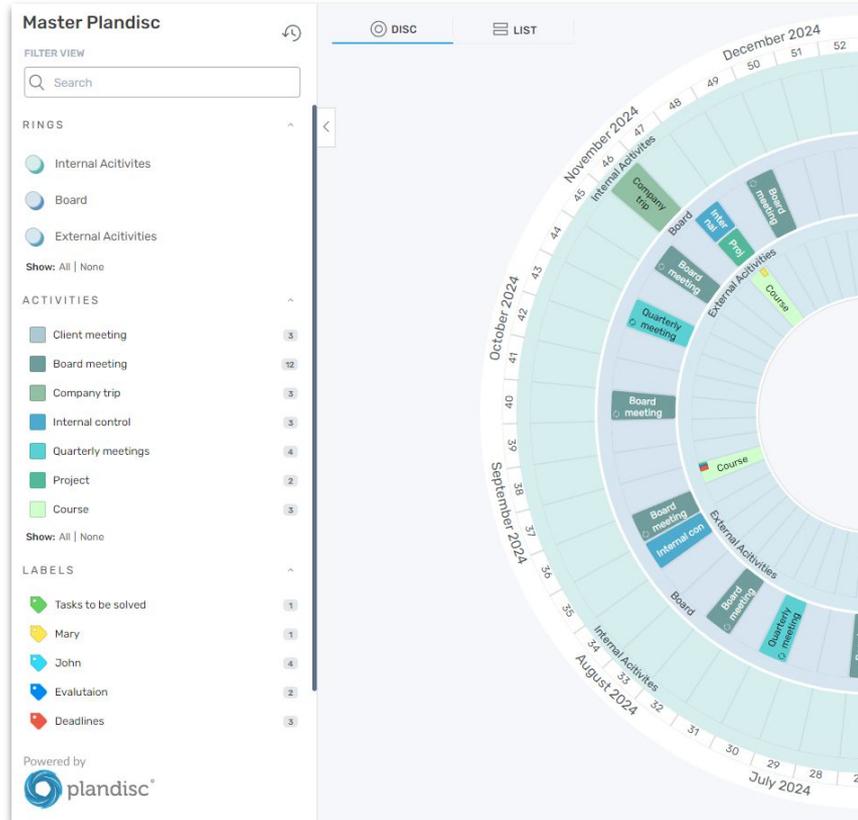
- Sync from Plandisc to your Calendar
- Sync from Calendar to Plandisc
- Extra features

- **Integrate Plandisc with Microsoft 365**

- **E-Learning & Support**



How Does the Structure in Plandisc work?



The structure of a plandisc consists of 3 parts:

- **Rings**

Rings are used to separate the areas you want to plan.

They can represent different departments, levels of responsibility, or target groups for your information.
E.g.: Internal, Budget, Processes & Projects.

- **Activities**

Activity groups help determine what kind of activity it is. It can be client meetings, business trips, etc.

The groups create a content list and give you the ability to filter the view based on which activities you need to focus on.

- **Labels**

Labels give an extra level of information about an activity. They can be used to show the status of a project, or which person/team is responsible for it.

Get to Know the Dashboard

The screenshot shows the Plandisc dashboard interface. On the left is a dark sidebar with the Plandisc logo and various navigation icons. The main area is titled 'Dashboard' and contains several circular charts. A blue box labeled '1' highlights a '+ -' button in the top right corner. A blue box labeled '2' highlights a 'RECENTLY VIEWED' tab above the first row of charts. A blue box labeled '3' highlights a search bar with a dropdown menu set to 'All plandiscs'. A blue box labeled '4' highlights a folder navigation bar with folders for 'Marketing', 'HR', 'Management', 'Leadership', and 'Project management'. The dashboard displays a grid of circular charts, each representing a different plandisc.

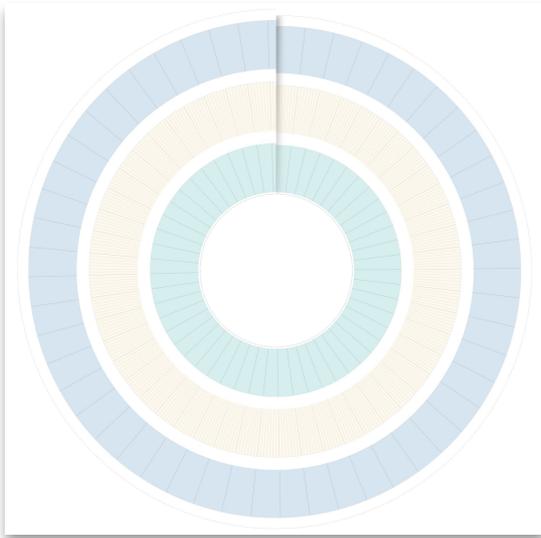
1. Click here to create a new plandisc.
2. Here you can see your recently viewed plandiscs.
3. Create folders to sort your plandiscs. If you have the Collaboration add-on, you can also filter to see your own plandiscs, or the ones your colleagues have shared with you.
4. Here you can view your folders and plandiscs.

Create a Plandisc

Start from Scratch

Choose this option if you want a fully **clean slate** to build from.

You will get a blank plandisc with three rings that you can adapt and edit to fit your needs.



Build from a Template

Choose this option if you like a **predefined structure** to build out from

There are many different templates, sorted by industry, included in the tool. Once you've found a suitable one, click on it and choose one of the below options.

Use pre-filled template

Use empty template

We suggest picking the empty version. That way, you can fill in your plans right away and don't have to delete existing content.

The prefilled templates are a great source of inspiration, and if the content matches your needs they can be a nice shortcut in your planning.

Template center

FROM SCRATCH

ALL TEMPLATES

BUSINESS

CLUB/ASSOCIATION

COLOR PALETTES

EDUCATION

GDPR

HOLIDAYS AND IMPORTANT DAYS

MARKETING

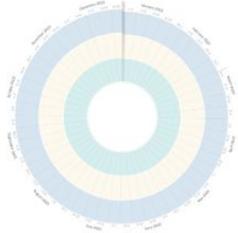
MUNICIPALITY

Start from Scratch

Recommended

Plandisc

A plandisc follows the year.



- Built with calendar rings, it lets you visualize annual plans.
- Displays the whole year in a single image for a quick and easy overview.
- Create recurring activities and repeat your activities for next year.

Select the plandisc option and start from a blank slate.

You can edit everything in a plandisc to make it fit your needs.

To get the best possible result, here is a suggested order to follow when setting up a plandisc.

1. Build the structure

Set up the skeleton framework of the plandisc. This includes rings, headlines, and how you want to display time. We suggest using months and week dates, but find the combination that suits your planning.

2. Set up the activity groups and labels that you want to use

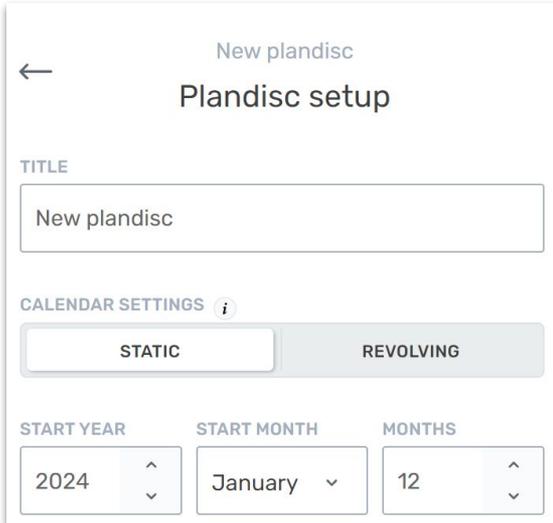
This is where you create a content list for your plandisc. Set up activity groups for your plans, so they are ready when you start filling out your plandisc.

Plandisc Setup

New plandisc



← Click on this icon to start **setting up your plandisc**.



The screenshot shows the 'New plandisc' setup screen. At the top, there is a back arrow and the text 'New plandisc' and 'Plandisc setup'. Below this is a 'TITLE' field containing 'New plandisc'. Underneath is the 'CALENDAR SETTINGS' section, which includes an information icon and two buttons: 'STATIC' (selected) and 'REVOLVING'. At the bottom, there are three input fields: 'START YEAR' with a dropdown set to '2024', 'START MONTH' with a dropdown set to 'January', and 'MONTHS' with a dropdown set to '12'.

This is your **plandisc setup**.

Start by giving your plandisc a title.

Next, set your time preference.

A **static disc** will always show your start month at the top of the plandisc.

A **revolving disc** rotates as time progresses and will always show the current month at the top.

Both discs will display the number of months you pick. In this example, 12 months will be shown in the plandisc.

NB: You continue with the **same plandisc year after year**. At the start of a new year, simply change the year setting to display the next one.

Add Rings

+ Add ring

Calendar ring

Date header ring

Header ring

There are 3 different rings to add.

1. Calendar rings

The colored rings. This is where you add your planned activities.

2. Date Header rings

Here you can add time preferences: Quarters, months, weeks, and dates.

3. Header rings

Place these on top of your calendar rings. They make it easier to quickly see what is planned in each ring.

Month names

Header ring

Calendar ring

Each ring will be represented by a box in your setup.

You can move the boxes around until they are in your preferred order. Simply **click and hold, then drag and drop** it into the desired position.

When you want to **edit a ring**, click on the corresponding box and it will fold out into a menu where you can edit the aspects of the chosen ring.

Calendar ring

ACTIVE



NAME

COLOR



UNIT i

Week

The menu allows you to give the ring a name and change things like the height, ring color, and font size.

BONUS:

Under unit, you can choose how time shall be displayed in the ring. You can choose between days, weeks, months, and quarters. This affects the view, not the length of the added content, so choose the one that fits your planning best.

Create Activities in the Plandisc

New activity ■

📅 Mon 29 Jan 2024 - Sun 04 Feb 2024

🔄 Repeat activity

☰ Add description

🏷️ Add labels

📎 Attach file or link

📍 Add location

👤 Invite attendees

🕒 Add reminder

☑️ Add tasks

Create tasks

 MS Planner Board

Here you can define the time frame of your activity. It can be as specific as 1-hour meetings, or projects that cover several months.

You can also repeat recurring activities on any day, like the second Monday each month, or date.

Here you can add important details that everyone should know. You can also add labels, which are useful for filtering the plandisc content.

Files: Add documents, PDFs, PowerPoints, images, etc.

Links: Shortcuts to Teams folders, Sharepoint, or other online sources.

Invite attendees:

Invite anyone, including yourself, to send out calendar invites.

This is our one way integration with calendar. You can invite attendees without a plandisc license.

If you pick "Add reminder", Plandisc will also send an email reminder for the event.

Connect to **Microsoft Planner** or use the Plandisc task in-tool function.

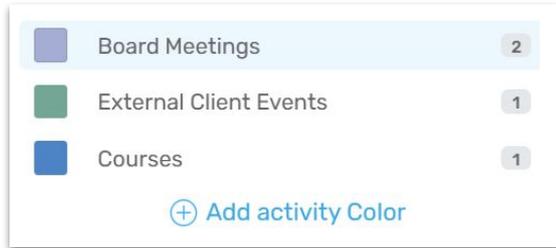
How to Create and Use the Activity Groups

It is recommended that you create **some colors and labels** for your plandisc early on.

They help you maintain the structure and visual overview as you plan.

You can always add more colors and labels as you continue to plan.

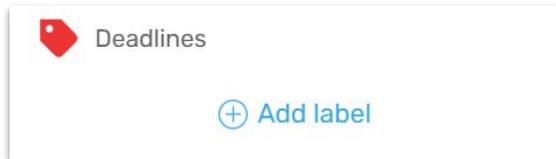
When a new type of activity comes up, assign it its own color.



A screenshot of a list of activity groups. The list contains three items: 'Board Meetings' with a purple square icon and a count of 2, 'External Client Events' with a green square icon and a count of 1, and 'Courses' with a blue square icon and a count of 1. Below the list is a button with a plus sign and the text 'Add activity Color'.

Board Meetings	2
External Client Events	1
Courses	1

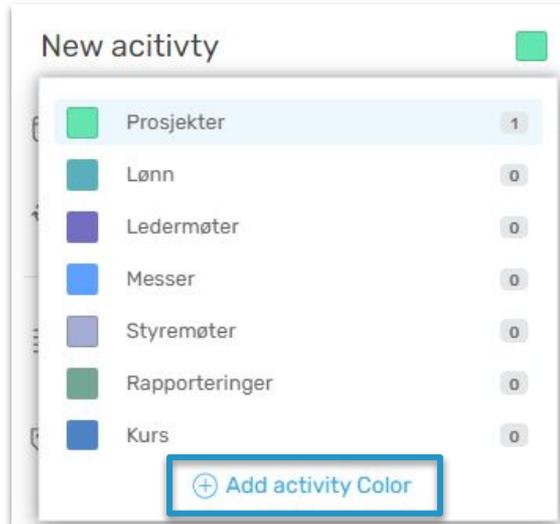
+ Add activity Color



A screenshot of a single activity label. It features a red tag icon followed by the text 'Deadlines'. Below the label is a button with a plus sign and the text 'Add label'.

Deadlines

+ Add label



A screenshot of a 'New activity' dialog box. The title is 'New activity' with a green square icon to its right. The dialog contains a list of activity types, each with a colored square icon and a count: 'Prosjekter' (green, 1), 'Lønn' (teal, 0), 'Ledermøter' (purple, 0), 'Messer' (blue, 0), 'Styremøter' (light purple, 0), 'Rapporteringer' (green, 0), and 'Kurs' (blue, 0). At the bottom of the dialog is a button with a plus sign and the text 'Add activity Color', which is highlighted with a blue border.

New activity

Prosjekter	1
Lønn	0
Ledermøter	0
Messer	0
Styremøter	0
Rapporteringer	0
Kurs	0

+ Add activity Color

Share & Work Together in Plandisc

Requires Enterprise subscription

Share within the Enterprise

- Work together in Plandisc.
- Create & merge Plandisc between departments & teams.
- One ring can be synchronized to multiple discs.



Share with Anyone

- Interactive read-only plandisc for unlimited viewers in MS Teams, Sharepoint, on intranets, and online.
- The viewer can access attached files and links, and read all the information available in the plandisc.
- Always updated to the latest version.



Share Your Plandisc

Create an interactive view of a plandisc.

Create a direct link or an embed code to share you plans.

It will be a **read only** view, but the plandisc is fully interactive. This means that people who receive the plandisc can click, filter, and download files from it.

Create a view of the Plandisc:

[Click here for guide - Publish a disc online](#)

How people will use the shared disc:

[Click here for guide - View a disc online](#)



Share it using Microsoft 365.

The view can be shared in Microsoft programs.



Publish it in a channel, team, or chat.

[Click here for guide - Share in Teams](#)



Integrate into a Sharepoint site.

[Click here for guide - Publish in Sharepoint](#)

Extra:



Export and share in PowerPoint.

[Click here for guide - Export to PowerPoint](#)



Print and export to PDF.

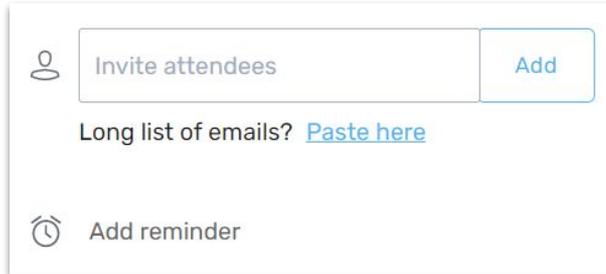
[Click here for guide - Export in other formats](#)

Connect & Integrate with Your Calendar

There are 2 ways to connect to your calendar:

Plandisc → Calendar

One way



A screenshot of the 'Invite attendees' interface. It features a text input field with the placeholder text 'Invite attendees' and an 'Add' button to its right. Below the input field, there is a link that says 'Long list of emails? [Paste here](#)'. At the bottom left, there is a clock icon followed by the text 'Add reminder'.

- Plandisc acts as the master
- 100% updated from plandisc
- Anyone can be invited, including those without a license

Calendar → Plandisc

One way



A screenshot of the 'One-way synchronization' interface. It has a title 'One-way synchronization' with a blue arrow icon. Below the title is the label 'RING EMAIL ADDRESS' and a text input field containing the address 'plandisc-ring-ybndaxq99'. To the right of the input field is a 'Copy' button. At the bottom, there are two buttons: 'Disconnect' and 'Setup'.

- Calendar acts as the master
- 100% updated from your Calendar
- Anyone with a license can add activities from their calendar to the same ring

From Plandisc to Calendar

When you click on an activity in the plandisc, you have the option to "Invite attendees" to it.

You can add mailing lists, contact groups, or individual email addresses.

Everyone invited will receive a calendar invitation to the activity, and can view it in their calendar.

Updated invitation : Meeting

Administrator 1 (Plandisc)

Meeting
View on Google Calendar

When: Mon 20 Feb - Sun 26 Feb 2023 (CET)

Where

Who: Administrator 2 (Plandisc)

Yes | Maybe | No | More options

Agenda
Mon 20 Feb 2023

No earlier events

All day Meeting

9:30am Plandisc Intro

12:30pm User Presentation

plandisc

This activity has been changed

Meeting

When: 20-02-2023 - 26-02-2023 Europe/Copenhagen

Who: info@plandisc.com, administrator1@plandisc.com

This is a test, here you can read the description of the activity.

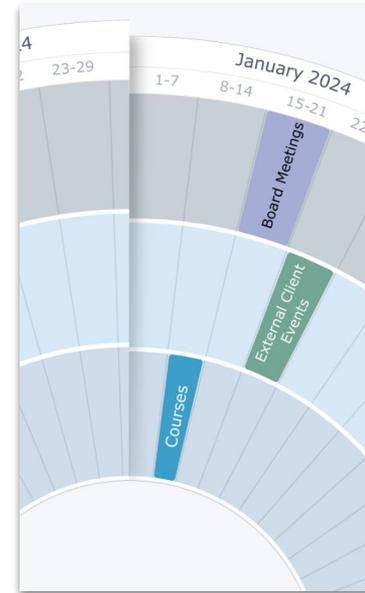
Best regards,
Administrator 1

plandisc

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info@plandisc.com
www.plandisc.com

Søren Frøbe Vaj
DK-1620 Århus
Denmark
CVR 37004654

Facebook | LinkedIn | YouTube | Email



Meeting

Mon 20 Feb 2023 - Sun 26 Feb 2023

Never repeat

This is a test, here you can read the description of the activity.

Add labels

Attach file or link

PowerPoint - Plandisc
793 KB

This is a link to the meeting teams file

Add location

Invite attendees

Add

Plandisc is private. Make it public and accessible to attendees? [Yes](#) [Don't show again](#)

Long list of emails? [Paste here](#)

info@plandisc.com

Add reminder

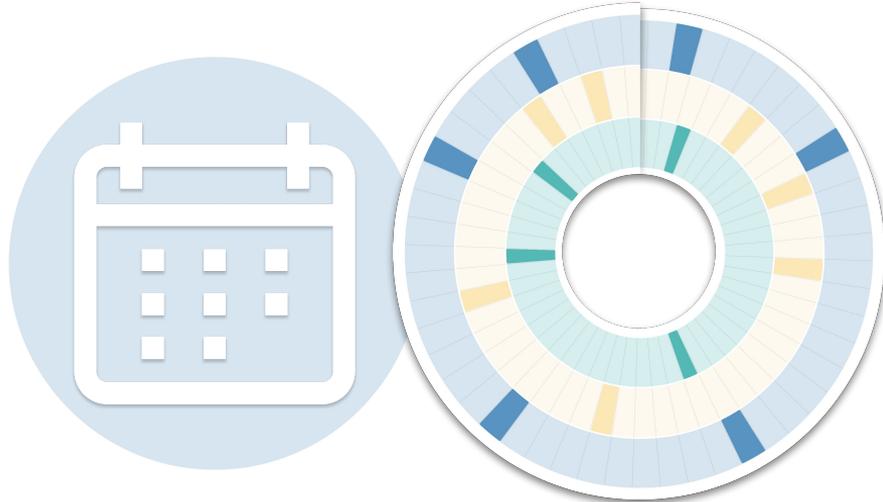
Add tasks

From Calendar to Plandisc

You create a unique email address for each ring you want to send activities to. [Click here for guide - One way sync](#)

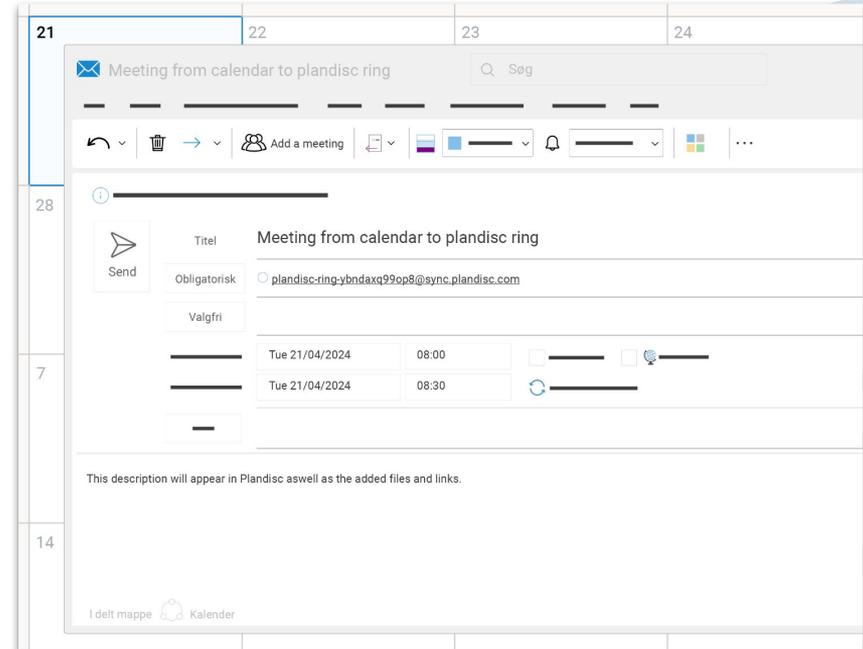
This email will work as a meeting room / person:
If you invite the ring-email to your calendar activities they will appear in Plandisc.

The **creator of the specific ring** has to set up the synchronization, but after that any plandisc users who has the address can send calendar activities to it.



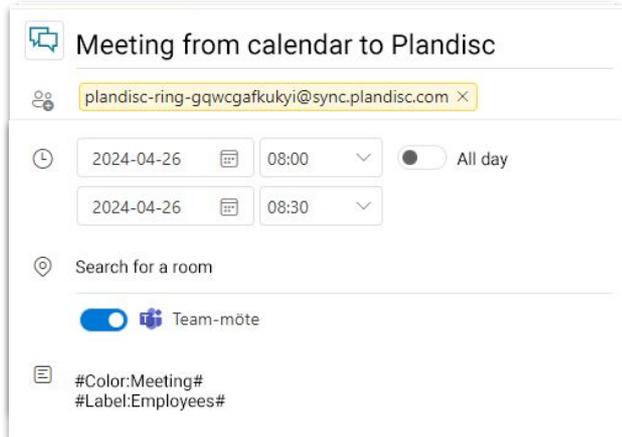
In your calendar, just make sure you invite the correct ring and the event will appear in your plandisc ring.

The event will **always** be updated with the latest **changes**.



From Calendar to Plandisc (Extra)

Set activity groups and labels from your calendar



Meeting from calendar to Plandisc

plandisc-ring-gqwcgafkuky@sync.plandisc.com

2024-04-26 08:00 All day

2024-04-26 08:30

Search for a room

Team-möte

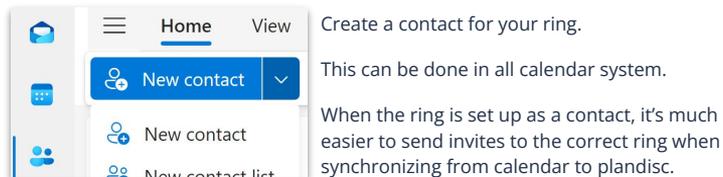
#Color:Meeting#
#Label:Employees#

Ex:
#Color:Board Meetings#
#Label:Deadlines#

Write the name of the activity group you want to use under Color, and any labels under Label. Choose from the options available in the plandisc you're working on.

This will make the activity you synchronize from calendar to plandisc appear in the plandisc with the correct activity group and label.

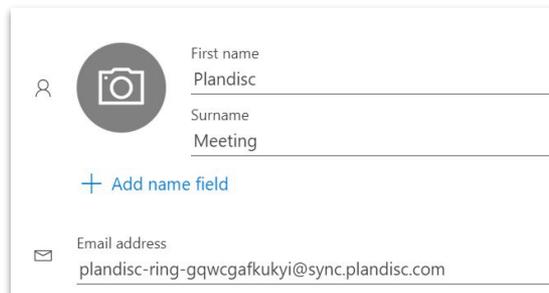
Give the ring's unique email address a name



Create a contact for your ring.

This can be done in all calendar system.

When the ring is set up as a contact, it's much easier to send invites to the correct ring when synchronizing from calendar to plandisc.



First name
Plandisc

Surname
Meeting

+ Add name field

Email address
plandisc-ring-gqwcgafkuky@sync.plandisc.com



Plandisc
plandisc-ring-gqwcgafkuky@sync.plandi... He

Integrate with Microsoft 365

There are multiple ways to connect and integrate Plandisc to Microsoft.



Outlook can be connected with one-way sync (See page 16) and two-way sync. We recommend the one-way synchronization to keep the information from your calendar up to date. The two-way synchronization creates a new Outlook calendar for the ring in question.

[Click for guide - Two-way sync](#)



Excel have both an export and an import function with Plandisc.

[Click for guide - Import from Excel](#) - Use our Excel template to import data from Excel and insert it into rings in your plandisc.

[Click for guide - Export to Excel](#) - Choose a time frame and filter which specific data you want to export from plandisc into an Excel document.



We have created a Teams in-app for Plandisc users. You can also integrate a plandisc view in your channels, teams, and chats.

[Click for guide - Download the full Teams app](#)

[Click for guide - Integrate a view in Teams](#)



Integrate an interactive view in Sharepoint.

This view can't be edited from Sharepoint but it's fully updated to the latest version.

[Click for guide - Sharepoint integration](#)



Connect a Planner plan (to-do in Teams) to an activity in Plandisc.

This means you can create tasks from Plandisc in a Planner plan and set deadlines for everyone in your Microsoft tenant.

[Click for guide - Planner integration](#)

E-Learning & Support



FAQ

- <https://plandisc.com/en/faq/>



Mail

- info@plandisc.com



Live-chat

- In-tool and on [Plandisc.com](https://plandisc.com)



Phone

- +45 42 42 14 42



Other Support

- Read about your [service package](#)

Online E-Learning

[11 minute video introduction to Plandisc](#)
[Click for Online Guides](#)

 <p>Create a Plandisc Everything you need to know to get started with Plandisc.</p>	 <p>Share your Plandisc Review your options for sharing Plandiscs</p>
 <p>Export and import in Plandisc Review options for downloading and uploading data in Plandisc</p>	 <p>Integration and add-ons We are fully integrated with many systems and offer plenty of add-ons</p>
 <p>Manage your Enterprise Make the most of your Enterprise license</p>	 <p>New releases in Plandisc</p>