

Welcome to Your New  
Enterprise at

 **VISMA** | plandisc



# Welcome to Your Enterprise!

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 Enterprise, 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 with Your Enterprise

- **Enterprise User Management**

- User Roles
- User Groups
- Synchronization Settings

- **Enterprise Theme**

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- Finalizing the Theme

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- Use the Enterprise Template

- **Share & Work Together in Plandisc**

- How to share within your Enterprise
- How to share outside of your Enterprise

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

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- **E-Learning & Support**

# Enterprise User Management

In the Enterprise, it's possible for you as the **administrator** to manage your users. Users can be added, deleted, and put into groups for easier sharing and to create an overview.

## Enterprise License

Eva enterprise


Design Enterprise theme Users Integrations

All users

Admins

GROUPS +

- HR HR
- MA Marketing

[+ Add user](#) 2/50 seats in use |< < Page 1 of 1 > >| 

NAME	EMAIL	LOGIN TYPE	LAST LOGIN	ROLES
Administrator 1	info@plandisc.com	AzureAD	31-01-2024 14:34	Administrator
Administrator 2	contact.person@plandisc.com	Standard	26-01-2024 13:33	Administrator

# User Roles

It's important to determine roles in the Enterprise to avoid confusion.

Most of the time it's correct to give users the standard roles. If you want to limit file sharing in your Enterprise, turn off this feature.

[Read the full Enterprise administration guide here](#)

## Settings

User table visible to all users

### STANDARD ROLES

Select default permissions. These will apply for new users.

- Full feature user
  - File upload  
Add or remove attached files from activities
  - Edit attendees  
Add or remove attendees from activities
  - Two-way Outlook synchronization  
Synchronize rings with Outlook calendar
  - One-way synchronization  
Synchronize a ring and a calendar
  - MS Planner integration  
Plan with Microsoft Planner directly from your Plandisc.
  - Public sharing  
Create public view
  - Invite collaborators (Enterprise only)  
Invite users from the enterprise license only
  - Invite collaborators  
Invite any user

The "Enterprise manager" roles should only be available for **administrators**, the **project group**, and **super-users**. Unmark them for all other users.

- Enterprise manager
  - Enterprise dashboard  
Add or remove plandiscs from the Enterprise dashboard
  - Enterprise color palette  
Create a custom color palette for your enterprise
  - Enterprise template  
Create custom templates for your enterprise
  - Enterprise logo  
Upload a logo for your enterprise
  - Share with enterprise  
Share plandiscs with the other enterprise users
- Embed token protection  
Protect public view with a token that's fetched from the API

Cancel

# User Groups

Make sharing things in the Enterprise easier by creating user groups.

[Click here for guide - Enterprise groups](#)

To receive access to a plandisc you must be added to the correct user group or groups.

## Create group ×

**NAME** **INITIALS**

**COLOR**

● ● ● ● ● ● ● ●  
● ● ● ● ● ● ● ●

**DESCRIPTION (OPTIONAL)**

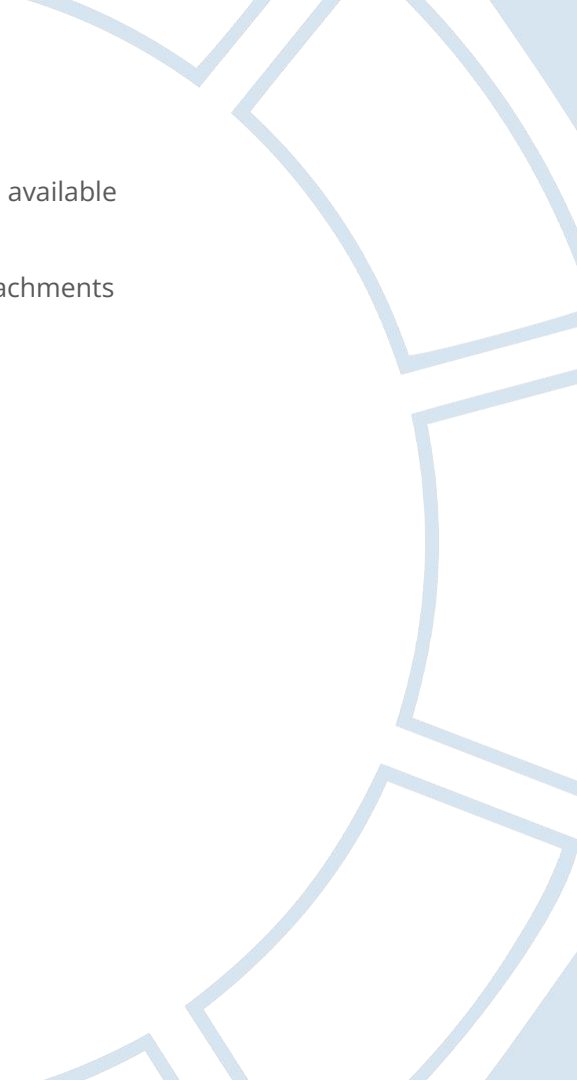
Cancel Create

# Synchronization Settings

As the **administrator**, you can customize the synchronization settings to determine which fields are available to your users. Under the Integrations tab, choose which fields you want to include.

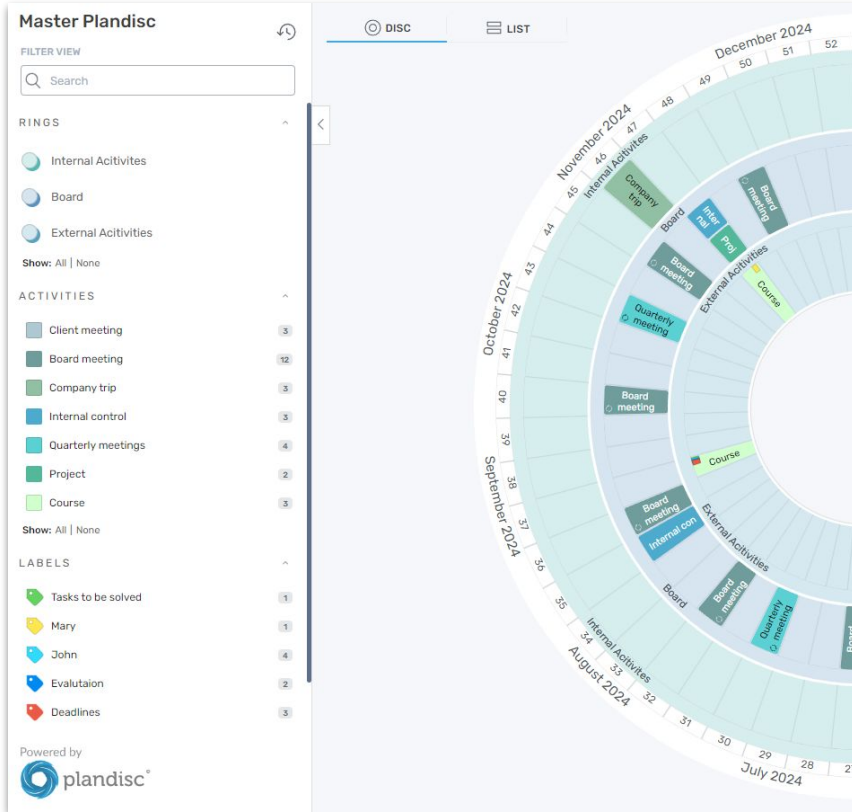
In this example, description, location, and Teams meeting link are included, while attendees and attachments are excluded to maintain confidentiality.

The settings can be locked for all users, to ensure uniform policies.



# Enterprise Theme

Create a custom theme for Plandisc in your organization.



The structure of a plandisc consist of 3 parts:

- **Rings**

Pick colors. (E.g., the colors could match the company's brand manual)

The ring names should be determined by the user in their own plandisc.

- **Activities**

Activity groups should tell what type of activity it is.

The groups form a content list and makes it possible to filter the view according to activity.

- **Labels**

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



# Creating the Theme

As the Enterprise **administrator**, you will be able to create the theme and lock it once it's done

Enterprise License

Design Enterprise theme Users Integrations

### Enterprise theme

Create colors, groups and labels for your enterprise to ensure using the same colors and groups across the enterprise

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#### RING COLORS

Rings are typically used for separating departments or other higher level hierarchy.

[Manage ring colors](#)

#### ACTIVITY GROUPS

Activity groups are the second hierarchy level to separate the different types of activity within the department.

[Manage activity groups](#)

#### LABELS

Activities can be marked with one or more labels. Labels are very versatile, but are typically used for making the status of an activity, or for assigning people to the activity.

[Manage labels](#)

Define every color in the theme by writing in HEX color codes, or simply click in the color picker.

Color picker interface showing a gradient bar and a hex code input field with the value #000000. The interface includes a 'Cancel' button and a 'Save' button.

Ring Colors dialog box showing a color selection area with a blue circle and the hex code #ace0eb. The dialog includes a 'Cancel' button and an 'OK' button.

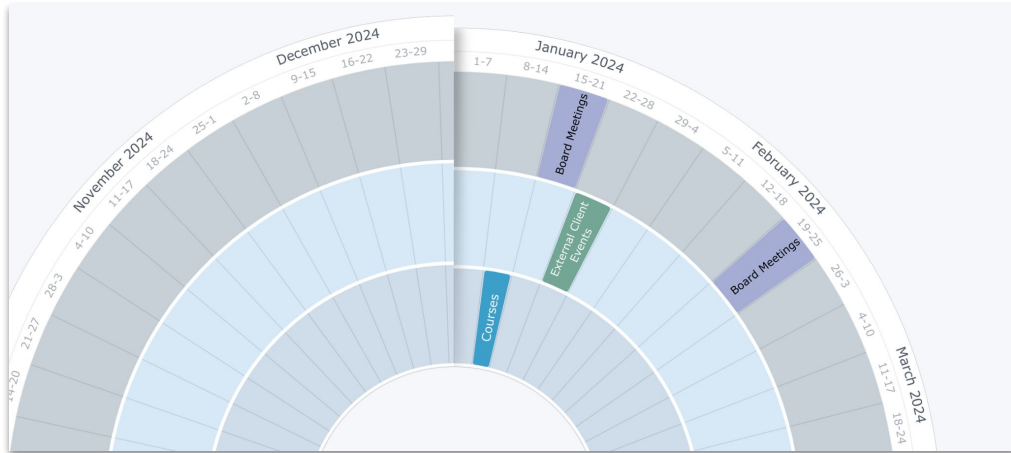
Activity groups dialog box showing a list of activity groups: Courses, External client events, and Board Meetings. The dialog includes a 'Cancel' button and an 'OK' button.

Activity labels dialog box showing a list of activity labels: Deadlines. The dialog includes a 'Cancel' button and an 'OK' button.

# Finalizing the Theme

When the theme is finalized – hit the save button.

Now the structure is decided and your users will be able to use Plandisc with the chosen theme.



However, users will be able to add colors for their departments' internal use, or for personal use on an individual level.

The Enterprise icon means that the **element is locked & can't be changed.**

Board Meetings	2
External Client Events	1
Courses	1

+ Add activity Color

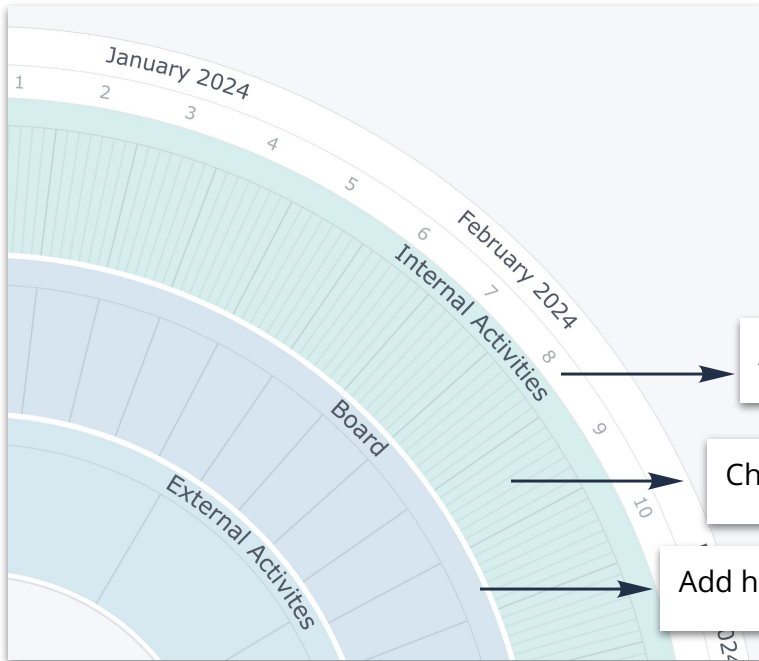
Deadlines	1
-----------	---

+ Add label

# Enterprise Templates

Enterprise templates are a way of pre-designing **layouts** and setting a **ring content structure**.

This is a step further than defining an Enterprise Theme. Use it to create more **specific templates** for a department or sector.



Add different time indicators, like dates, week numbers, and quarters.

Choose the unit size for each ring: Day, week, month, or quarter.

Add headers to make it more visually clear.

# Create the Enterprise Template

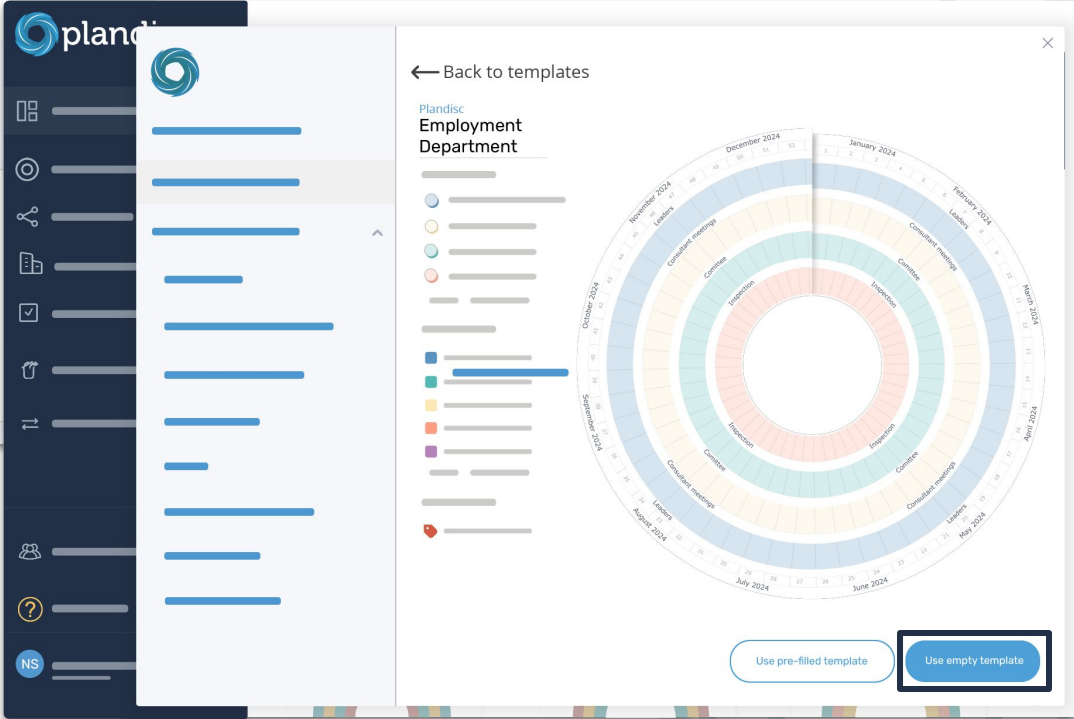
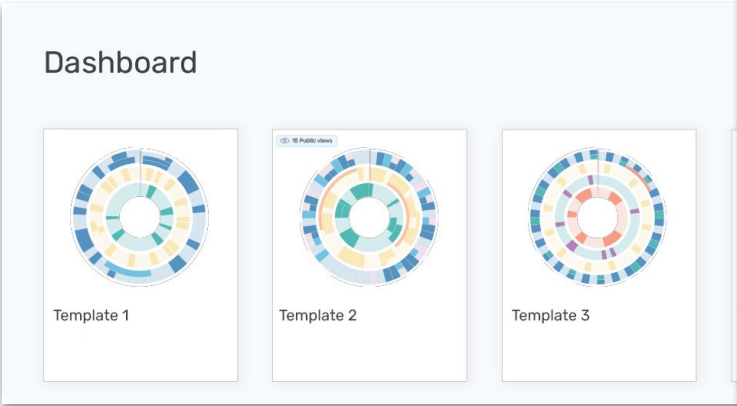
Build a plandisc with the Enterprise theme as the base, then add all the additional rings, header rings, colors, and labels you may need.

The image shows a software interface for creating a plandisc. On the left, there is a sidebar with sections: 'Copy of Master', 'FILTER VIEW' (with a search bar), 'RINGS' (listing Internal, Board, and External Activities), 'ACTIVITIES' (listing Client meeting, Board meeting, Company trip, Office Events, and Quarterly meetings), and 'LABELS' (listing Deadlines, Tasks to be solved, John, and Evalutaion). The main area displays a circular plandisc with concentric rings and segments, labeled with months from July 2024 to February 2024. A 'Share' button is highlighted in the top toolbar. A white callout box points to the 'Share' button with the text: 'Click "Share" and then "Add as Enterprise template"'. A dialog box titled 'Add as Enterprise template' is open in the center, containing the text: 'Add Copy of Master Plandisc as an Enterprise template? Every user on your Enterprise license will be able to use a copy of this plandisc as a template.' The dialog has 'Cancel' and 'Add template' buttons.

# Use the Enterprise Template

Select a template that matches **your specific need** and choose the “use empty template” option.

The layout and all the correct colors will be there, and you can continue to build your own plandisc accordingly.



# Share & Work Together in Plandisc

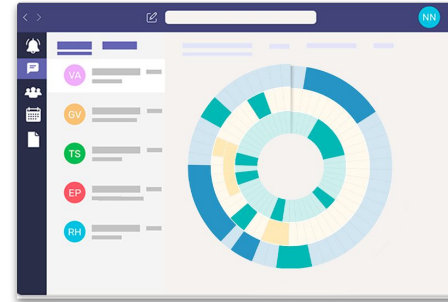
## Share within the Enterprise

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



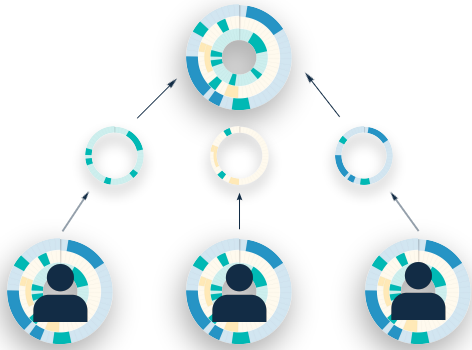
## Share outside of the Enterprise

- 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.



# Multiple Ways To Share Within Your Enterprise

Create a **Master Disc** based on the most important information from each department.



Each department needs to agree on the ring structure.

Sort information in each ring with the intent of collecting some rings in a master one.

The master disc will be owned by one person, but can be shared with the entire Enterprise.

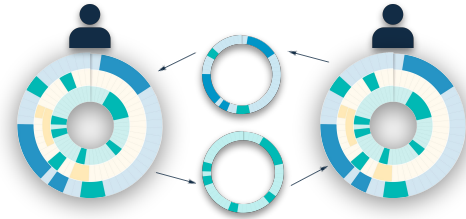
Click to see guides:

[Guide - Invite collaborators](#)

[Guide - Share With Enterprise](#)

[Guide - Create Enterprise user-groups](#)

Be selective with what information you share. It's possible to keep it internal in teams.



Here you pick the relevant group or person to give access too.

It's completely up to you if you give a read only permit, or editing access as well.

It's possible for the Enterprise admin to create groups to make sharing per team easier.

# Share outside of the Enterprise

## Create an interactive view of a plandisc.

The view can be shared both internally and externally.

It will be a **read only** view, but fully interactive. This means people receiving 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 plandisc 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](#)

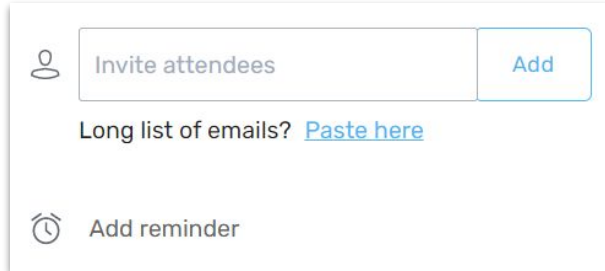


# Connect & Integrate with Your Calendar

There are 2 ways to connect to your calendar:

## Plandisc → Calendar

One way

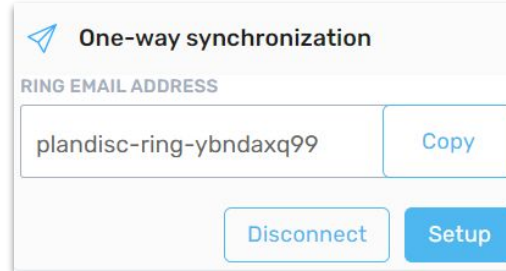


A screenshot of the 'Invite attendees' interface. It features a text input field with the placeholder text 'Invite attendees' and an 'Add' button to its right. Below the input field, there is a link that says 'Long list of emails? [Paste here](#)'. At the bottom left, there is a clock icon followed by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

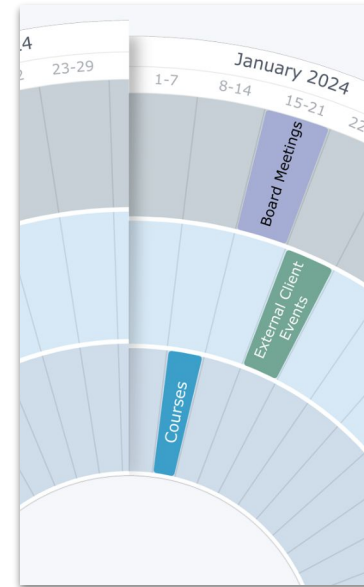
Best regards,  
Administrator 1

**plandisc**

+45 4242 1442  
info@plandisc.com  
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Søren Frøbe Vaj  
DK-1620 Århus  
Denmark  
CVR 37004654

Facebook | LinkedIn | Instagram | 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

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

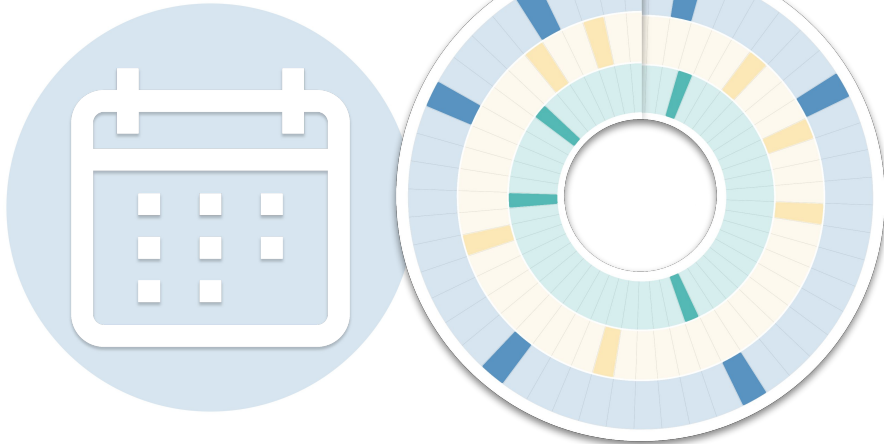
Add tasks

# 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](#)

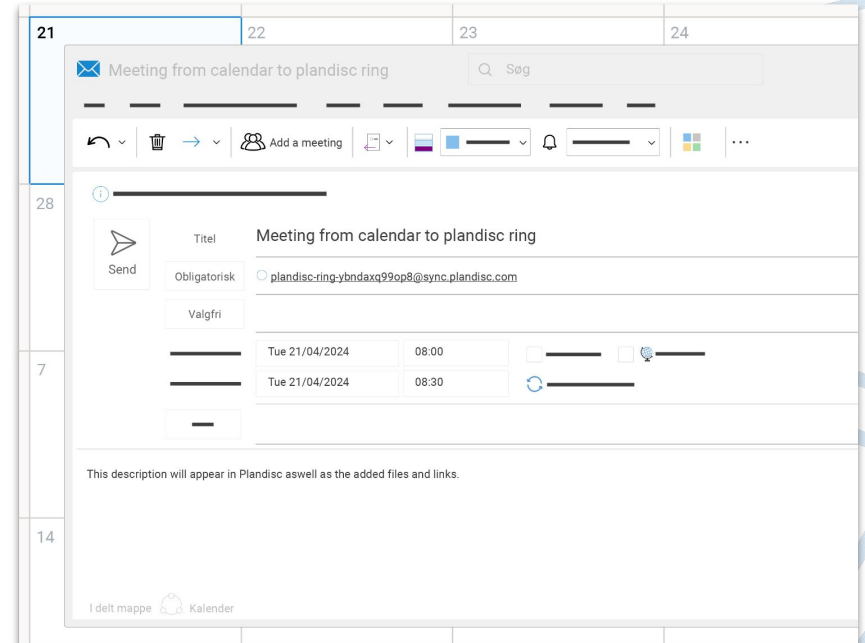
This email will work as a meeting room / person:  
If you invite the ring-email to your calendar activities, they will appear in Plandisc.

The **creator of the specific ring** has to set up the synchronization, but everyone in the enterprise can send their calendar activities to that ring.



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-gqwcgafkukyi@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

Home View

New contact

New contact

New contact list

Create a contact for your ring.

This can be done in all calendar programs.

When the ring is set up as a contact, it's much easier for you and your users 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-gqwcgafkukyi@sync.plandisc.com

Plandisc

plandisc-ring-gqwcgafkukyi@sync.plandi...

# 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 19 ) 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](mailto: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 here 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>