

plandisc

User Manual

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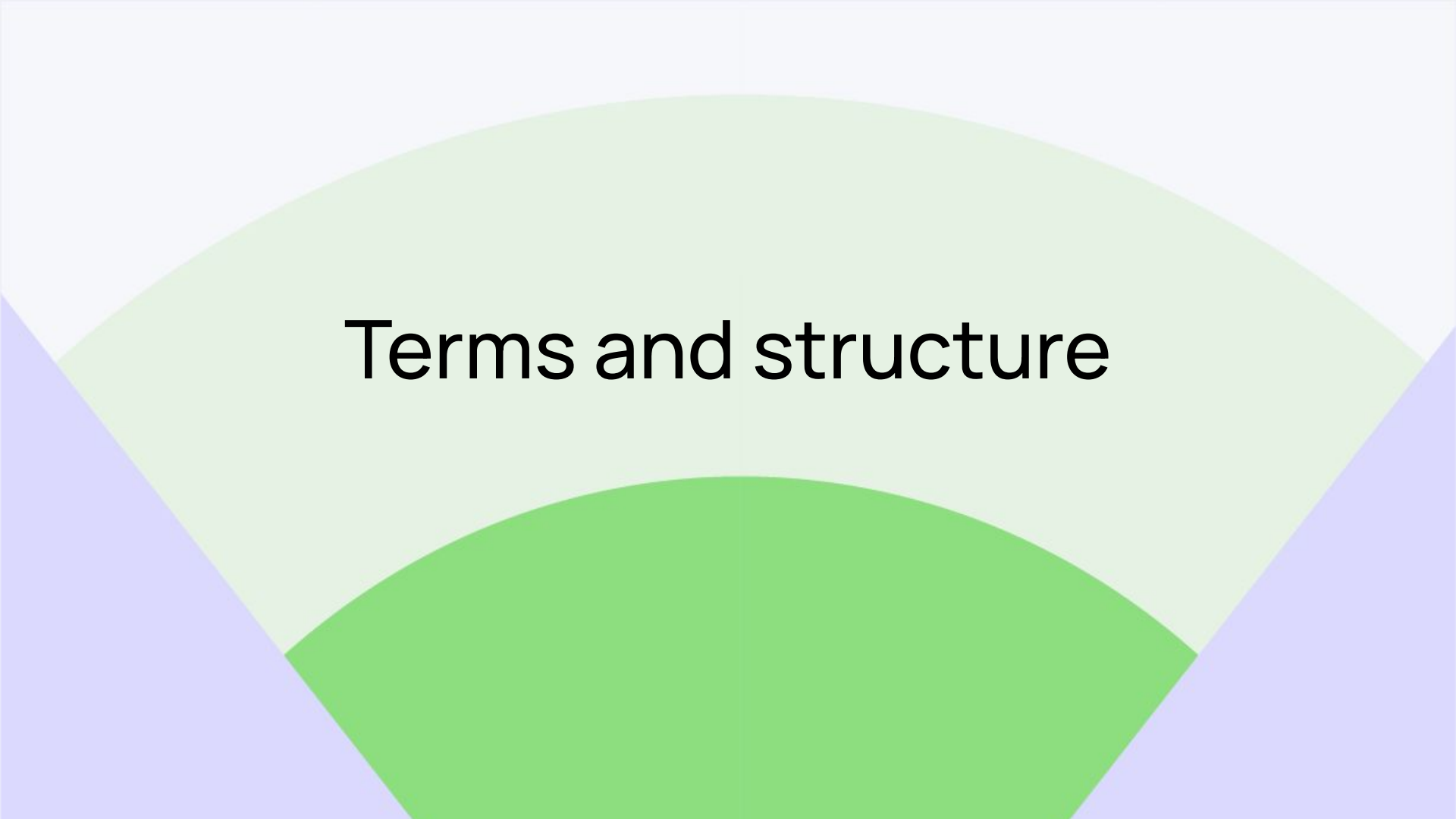
Export the disc

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MS365 integration

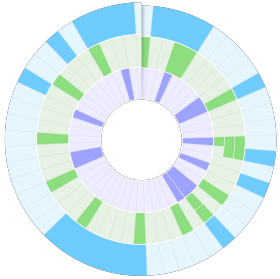
Outlook, Teams, Planner,
Sharepoint and Excel

Support



Terms and structure




How does the structure in Plandisc work ?



Discs

The first level of organization of the areas you want to plan in Plandisc.




Different discs can represent different departments, one can be for the whole organization, and another for your personal plans.

-  Calendar Ring
-  Calendar Ring
-  Calendar Ring

Rings

The rings form the basis of a plandisc. They help you sort and structure your plans into different areas.




Each ring can represent different departments, processes, work areas, or target groups that need specific information.

-  Report
-  Meeting
-  Event

Activities groups

Activity groups should define what type of activity it is.

They are used to create a table of contents for your plandisc and allows you to filter the view by activity type.

-  Deadline
-  Done
-  Ongoing

Labels

Labels provide extra information about an activity.

They can show the status of a project or which person/team is responsible for an event.

User terminology in an Enterprise



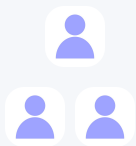
Enterprise

Refers to all users with a license in the Plandisc agreement.



Admin

One or more people responsible for the user administration and deciding the structure in Plandisc.



User

A person with a Plandisc license.

Users can use the program but can't access the admin functions.



Reader

A users without a plandisc license who can view discs, read the content, and use the interactive functions outside the Plandisc tool.

Readers can't edit plandiscs.

The background features a central light green semi-circular shape with a darker green semi-circular shape nested inside it. The bottom corners of the image are filled with a light purple color.

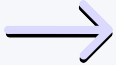
For the admin

Access you Enterprise settings

The admin role gives you access to user administration, allowing you to select roles for different users. You can also create a coherent Plandisc structure for your Enterprise.

The screenshot shows the Plandisc dashboard. At the top left is a navigation sidebar with icons for home, search, and other functions. The main area is titled "Dashboard" and features a "RECENTLY VIEWED" section with four circular charts. A search bar and "Add folder" button are at the bottom. A blue box highlights the home icon in the sidebar, with an arrow pointing to it from the text "Find the Enterprise settings".

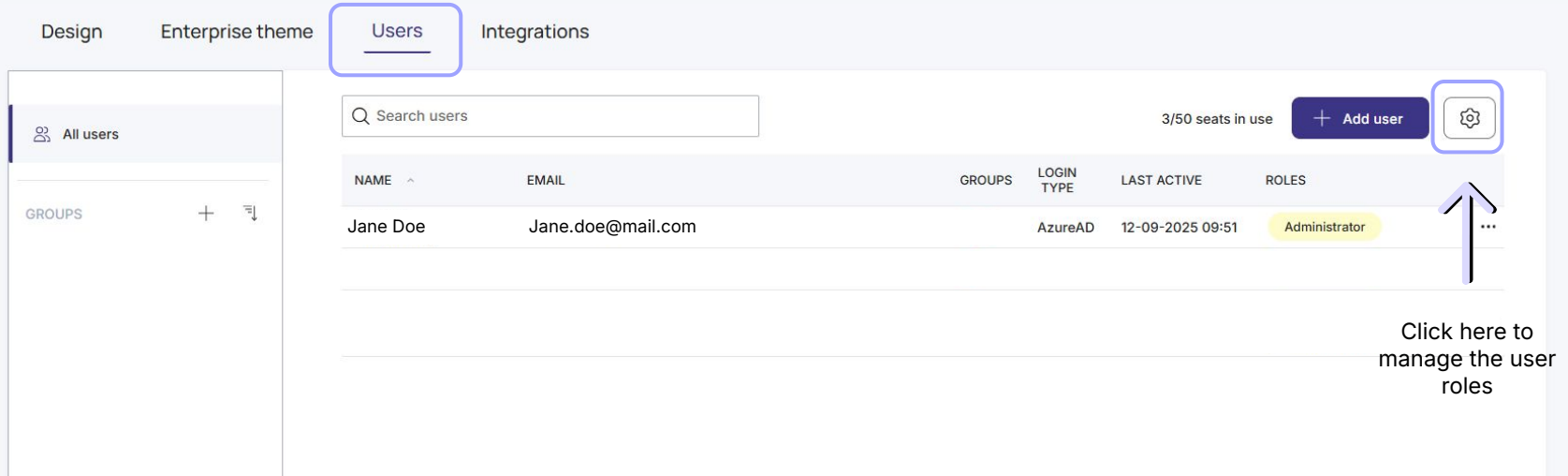
Find the Enterprise settings



Setting up the correct user roles

Why do we create user roles ?

It's a way to control what the users in your Enterprise can do in the tool. To ensure each user has the correct permissions, it's important to setup the desired standard role before adding users. You can adjust the permissions for individual users at any point.



The screenshot shows a user management interface with a navigation bar at the top containing 'Design', 'Enterprise theme', 'Users' (highlighted with a blue box), and 'Integrations'. Below the navigation bar is a search bar labeled 'Search users' and a status indicator '3/50 seats in use' next to an 'Add user' button. A table lists users with columns for NAME, EMAIL, GROUPS, LOGIN TYPE, LAST ACTIVE, and ROLES. The first user is Jane Doe with email Jane.doe@mail.com, login type AzureAD, last active 12-09-2025 09:51, and role Administrator. A settings icon (gear) is circled in blue, and a blue arrow points to it from the text 'Click here to manage the user roles'.

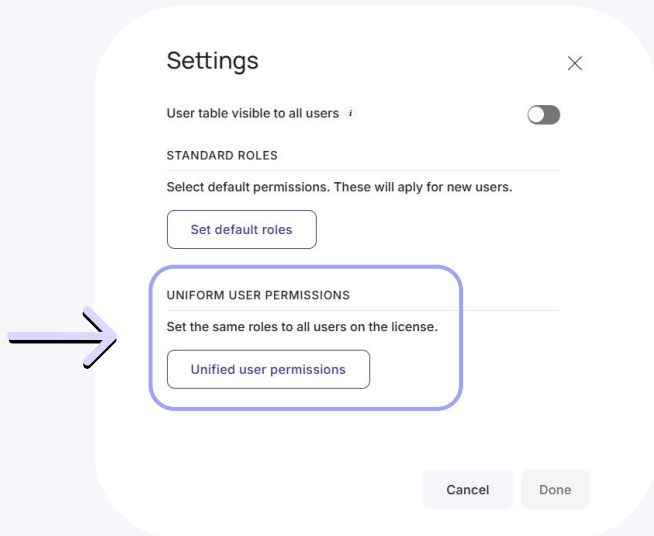
NAME ^	EMAIL	GROUPS	LOGIN TYPE	LAST ACTIVE	ROLES
Jane Doe	Jane.doe@mail.com		AzureAD	12-09-2025 09:51	Administrator

How to edit the user roles



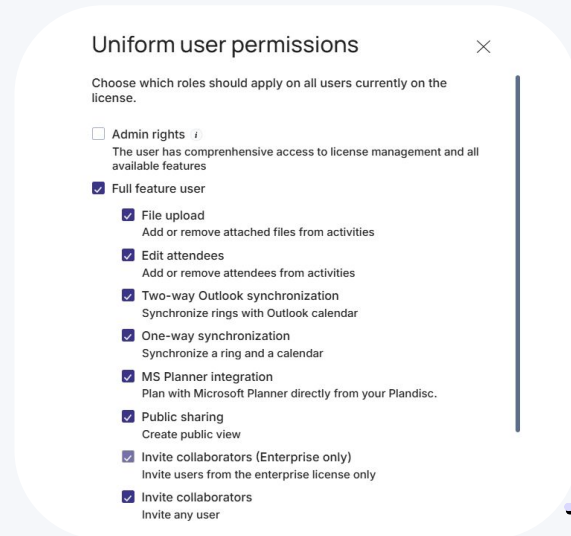
Once you access the user role settings, select **“Uniform user permissions”**

The permissions you select here will apply to both your current users and users you add in the future.



The new window will display a list off all the functions you can assign the users.

The Plandisc default is for all of them to be ticked.



See next page for more info

Uniform user permissions



Choose which roles should apply on all users currently on the license.

- Admin rights i
The user has comprehensive access to license management and all available features
- 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
- 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

Our recommendations

Full feature user settings

We recommend keeping the “Full feature user” settings ticked. This ensures that users have access to all functions in Plandisc.

Depending on your organization, it might be worth reconsidering the “file upload” if you want to control what kind of files people upload to Plandisc.

Most of the time, people don't upload things to their plandisc, but rather link to their own drives, teams folders, etc.

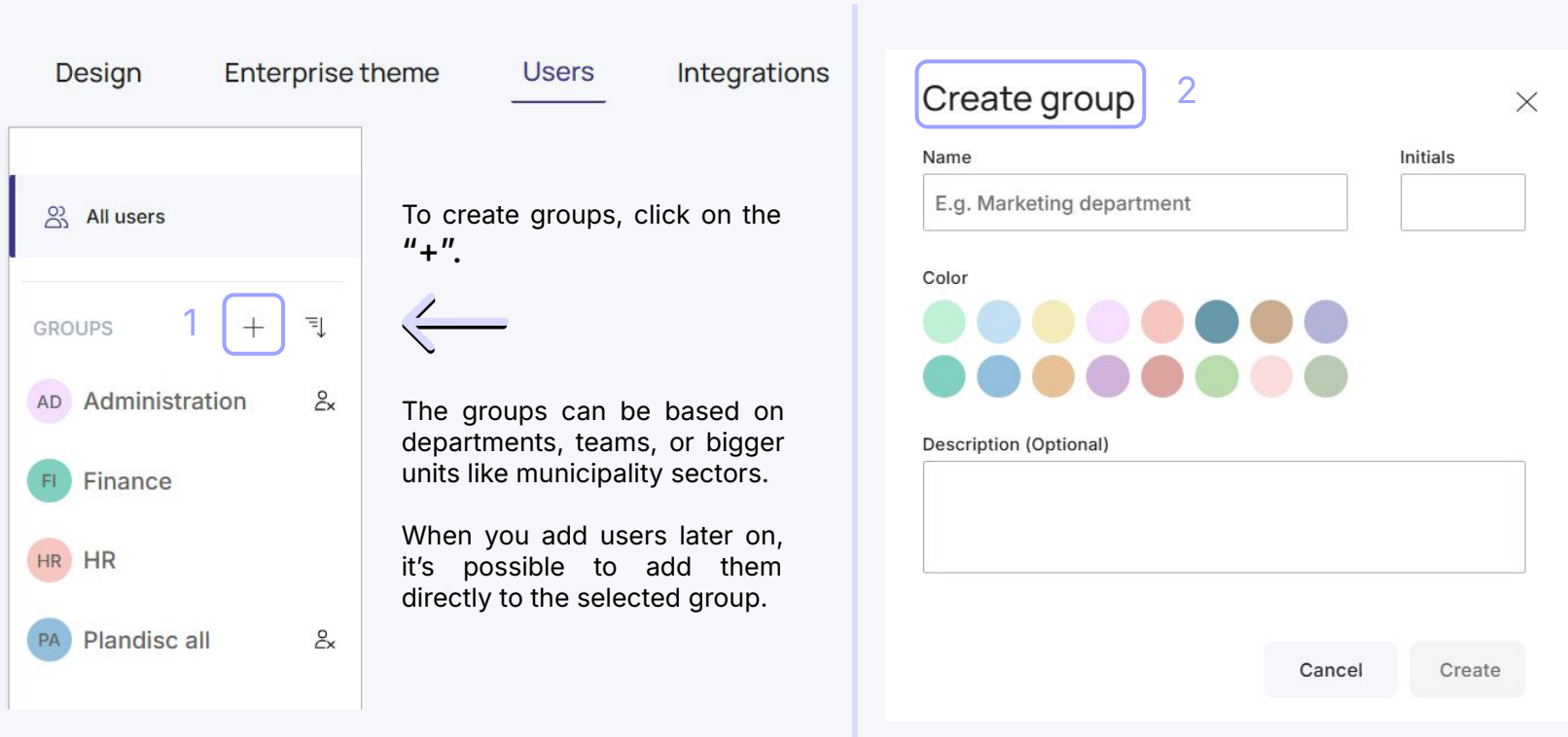
Enterprise manager settings

We recommend ticking off all boxes, since these settings are meant for the admin or a selected group of superusers.

Consider keeping the “Share with Enterprise” box ticked, because it gives the users a quick and easy option to share read-only plandiscs with everyone in your Enterprise.

Set up user groups for sharing

User groups makes sharing easier, since you're no longer limited to sharing with each user individually.



The image shows a user management interface with a 'Users' tab selected. On the left, a sidebar lists user groups: 'All users', 'Administration', 'Finance', 'HR', and 'Plandisc all'. A blue box highlights a '+' icon next to the 'GROUPS' header. A purple arrow points from this icon to the 'Create group' dialog box on the right. The dialog box has a title 'Create group' with a '2' next to it and a close button. It contains a 'Name' field with the placeholder 'E.g. Marketing department', an 'Initials' field, a 'Color' selection area with 16 colored circles, and a 'Description (Optional)' text area. At the bottom are 'Cancel' and 'Create' buttons.

Design Enterprise theme Users Integrations

All users

GROUPS 1 +

AD Administration

FI Finance

HR HR

PA Plandisc all

To create groups, click on the "+".

The groups can be based on departments, teams, or bigger units like municipality sectors.

When you add users later on, it's possible to add them directly to the selected group.

Create group 2

Name

Initials

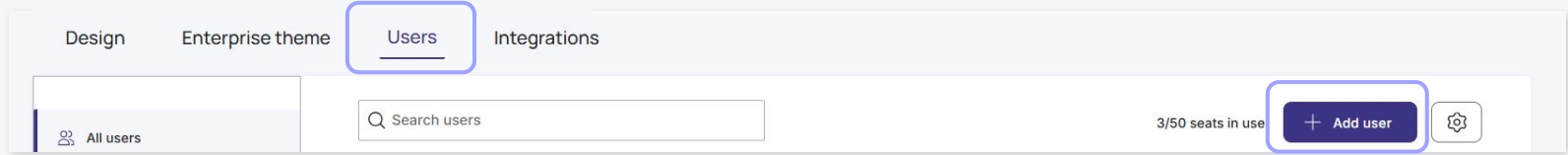
E.g. Marketing department

Color

Description (Optional)

Cancel Create

Add / edit users



1 Start by clicking on the users tab in you Enterprise settings.

2 Then click on "Add user".

Add users to license

Email

Group (Optional)

HR HR

FI Finance

AD Administration

PA Plandisc all

Adding users

Here you register a specific user, who will then get a plandisc license.

You can simultaneously add that person to the appropriate user groups.

Remove users

Design Enterprise theme **Users** Integrations

3/50 seats in use + Add user ⚙️

NAME ^	EMAIL	GROUPS	LOGIN TYPE	LAST ACTIVE	ROLES	
Jane Doe	Jane.doe@mail.com		AzureAD	12-09-2025 09:51	Administrator	1 ...

- User info
- Edit roles
- Edit groups
- 2 Remove user

When you remove users in your Enterprise, you have the option to take over their plandiscs.

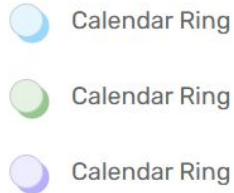
Their plandiscs will then be transferred to your account. Later, you can transfer them to new owners.

What is the Enterprise theme ?

The Enterprise theme is where you set up a predefined structure for colors, categories and content. This ensures everyone in the Enterprise is working with the same structure.

An Enterprise theme can be set up on 3 different levels:

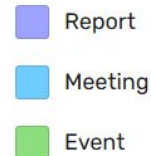
Ring colors



The rings are where you sort the content in your discs. They divide your information into different colored areas.

The rings colors should be based on the intended target group for the information.

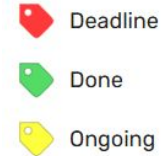
Activity groups



Activity groups help determine what kind of activity it is.

They help create a table of content and provides the ability to filter the plandisc based on activity type.

Labels



Labels provide extra information about an activity.

They can be used to indicate the status of a project, or which person/team is responsible for it.

Design

Enterprise theme ¹

Users

Integrations

Enterprise theme

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

RING COLORS

#dcd9ff #eeecff #caedff #e6f6ff

Manage ring colors ²

ACTIVITY GROUPS

Arrangement Prosjekter Møter Kurs

Manage activity groups ³

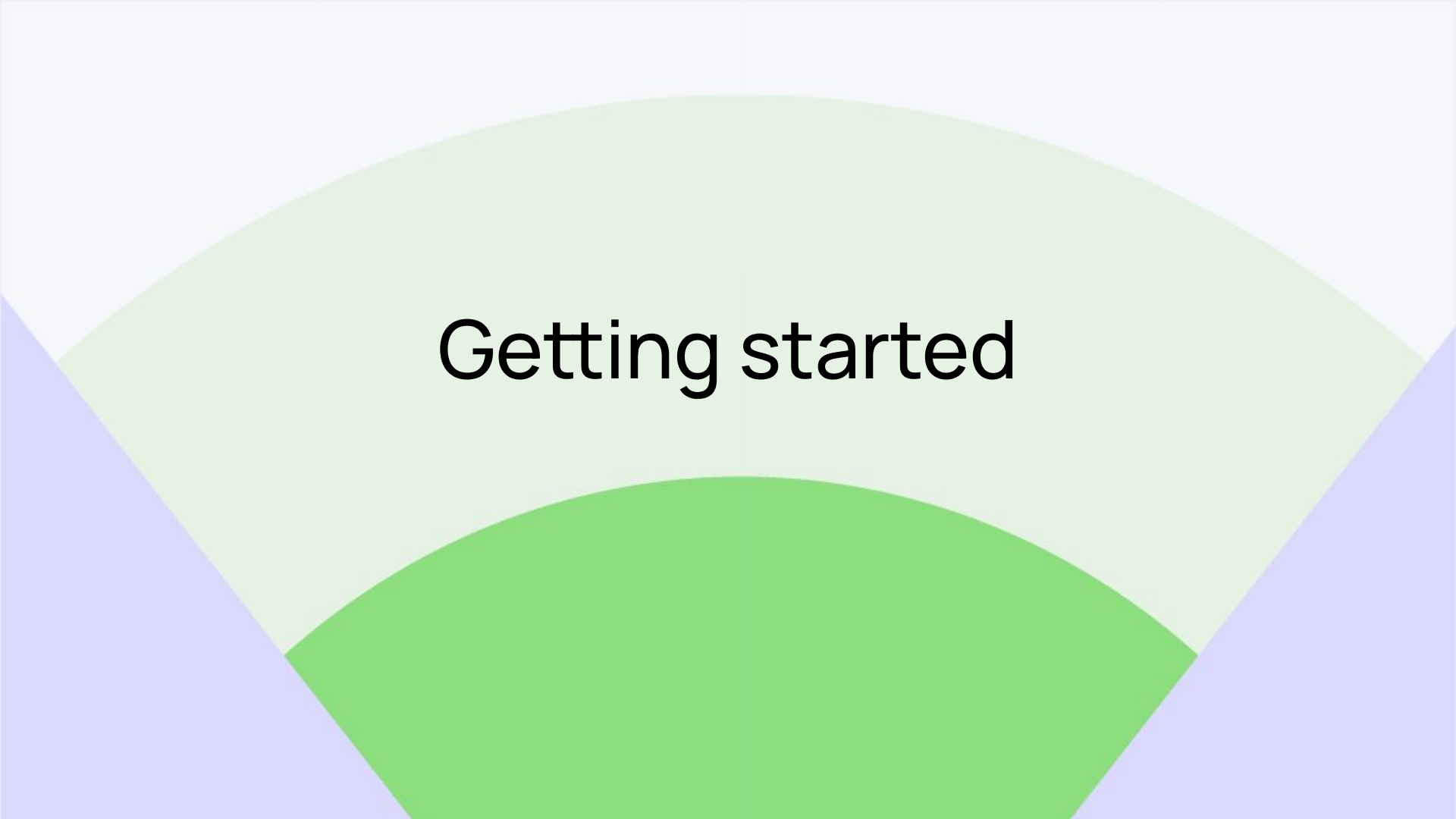
LABELS

Fullført Frister

Manage labels ⁴

Set up the Enterprise Theme

- 1 Click on “Enterprise theme” in the menu. Here you can set up the structure for usage in Plandisc. These settings affect all users in your Enterprise.
- 2 The ring colors are the background color in the plandisc. It's often preferable to use a faded color template here. Ring colors can also aid in visualising the difference between different departments.
- 3 The activity groups are the most important structure you preset. This is where you determine how the content will be categorized. Keep the categories relevant for everyone. Choose whether you prefer to be able to sort very specifically, or if a simple overview fits your organization better.
- 4 Labels can be defined in the Enterprise theme. Users often want freedom to create their own labels, but general ones should be decided at the top level.

The background features a large, light green semi-circular shape at the top, a smaller, darker green semi-circular shape below it, and two light purple triangular shapes on the left and right sides. The text "Getting started" is centered in the light green area.

Getting started

Plandisc Dashboard

The screenshot shows the Plandisc Dashboard interface. At the top left, there is a navigation sidebar with icons for home, search, and other functions. The main area is titled "Dashboard" and features a "RECENTLY VIEWED" section containing four circular plandisc visualizations. Below this is a search bar and a row of folders: "Kommune", "Utdanning", and "Intern". On the right side, there are buttons for "+ Add plandisc" and "Add folder". Numbered callouts (1-4) highlight these key elements: 1 points to the "+ Add plandisc" button, 2 points to the "RECENTLY VIEWED" section, 3 points to the "Add folder" button, and 4 points to the folder list.

Get to know your dashboard

- 1 Create a plandisc.
- 2 Your recently viewed plandiscs.
- 3 Create folders to sort your plandiscs. You can also filter to see plandiscs shared with the Enterprise, those shared by your colleagues, or just your own.
- 4 Your folders and plandiscs.

The Template center

Everything in Plandisc is customizable, no matter how you choose to start building your disc. Layout, time frame and content can all be adjusted to fit your needs.

- 1 Create a new plandisc with AI. Use the AI function to create a setup for your disc.
- 2 Here you'll find templates picked by your Enterprise admin. If the field is empty, it means that there are no specific Enterprise templates.
- 3 A collection of real examples from other users to inspire you. Pick one and use it as a starting point.
- 4 Start with an empty plandisc and build it from scratch.

The screenshot shows the 'Template center' interface. At the top right, there is a '+ Start from scratch' button with a close icon (X). Below this, the interface is divided into two main sections: 'From Scratch' and 'Business'. The 'From Scratch' section contains a vertical list of options: 'AI Generate Plandisc', 'My Enterprise', 'All Templates', 'Business' (highlighted), 'Club/Association', 'Color Palettes', 'Education', 'GDPR', 'Holidays And Important Days', 'Marketing', and 'Municipality'. The 'Business' section displays a grid of eight template cards, each featuring a large grey circular icon and a title: 'Plandisc Board of Directors', 'Plandisc Financial Governance', 'Plandisc Organization', 'Plandisc Rhythm of Business', 'Plandisc Across departments', 'Plandisc HR', 'Plandisc The company', and 'Plandisc Overview of Projects and Activities'. Blue callout boxes with numbers 1 through 4 are overlaid on the interface to highlight specific features: 1 points to 'AI Generate Plandisc', 2 to 'My Enterprise', 3 to the 'Business' category in the 'All Templates' list, and 4 to the '+ Start from scratch' button.

How do you want to start?

Get AI assistance

Plandisc has an AI function that can help you generate a base layout to start with.

Don't make it too detailed. See it as an opportunity to create a custom template, or a framework, to build on.

The AI is perfect when you want to quickly set up a structure so you can move on and start adding activities without spending too much time on the layout.

Please enter a details description of your work and planning requirements.

 We recommend using English for the best performance.



Clear chat

Generate plandisc

Use a template

My Enterprise

All Templates

Business

Club/Association

Color Palettes

Education

GDPR

Holidays And Important Days

Marketing

Municipality

Choose this option if you want a **predefined structure** to continue build out from.

If there is a specified Enterprise template, select that one

If not, pick one from the other categories.

When choosing your template, you have two options:

Use pre-filled template

Use empty template

Select "empty" if you want to fill the plandisc your own content.

Start from scratch

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

NB: If your Enterprise has a theme with predefined colors, these be the default colors in your blank plandisc.

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.

Keep this in mind when creating your plandisc

Once you've selected how to start (AI, template or from scratch), you can edit and customize almost everything in your plandisc.

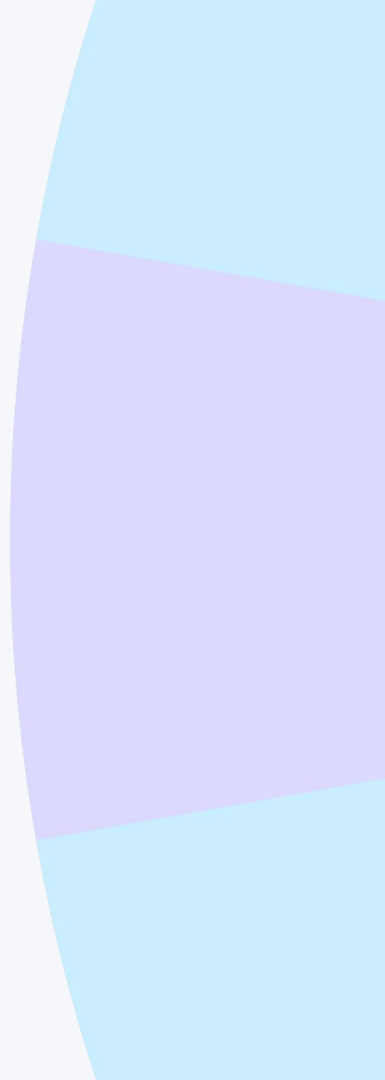
There is a correct order of operations when setting up a plandisc. Follow the steps below to generate the best possible result.

1. **Build the structure**


This means setting up the skeleton framework with the rings and headers you want in your plandisc. It also includes the time settings with dates, weeks, etc.

1. **Set up your activity groups and labels**

This is where you set up a table of contents for your plandisc by creating the color coded activity groups you want to use.



Plandisc setup

New plandisc 



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

Title

HR Department disc

Calendar Settings 

Static

Revolving

Disc Direction

Clockwise

Counter Clockwise

Start Year

2025

Start Month

January

Months

12

This is your **Plandisc setup**.

Start by giving your plandisc a title.

Next, set your time preferences.

In a **static plandisc**, your chosen start month will always be shown at the top of your plandisc.

A **revolving plandisc** rotates as the year progresses, meaning the current month will always be at the top.

PS: You continue using the **same plandisc year after year**. Simply change the year setting when the time comes and to display the new year instead.

Add / edit rings

+ Add ring

Calendar ring

Date header ring

Header ring

You can add 3 different rings to a plandisc:

1. Calendar rings

This is where you add your activities.

1. Date header rings

Here you can add time preferences: quarters, months, week numbers & dates.

1. Header rings

These can be placed on top of the calendar rings. They're used as a header for the ring, making it easier to see what's in the disc.

Month names

Header ring

Calendar ring

Each ring will be represented by a box.

The boxes can be moved into your preferred order, simply **drag and drop** them into place.

Higher up in the list = further out in the disc.

To edit a ring, click on the corresponding box and it will fold out into a menu. Here you can edit the various aspects of the ring.

Calendar ring

Active



Name

Color



Unit *i*

Week

In the menu, you can give the ring a name and change aspects such as height, ring color, and font size.

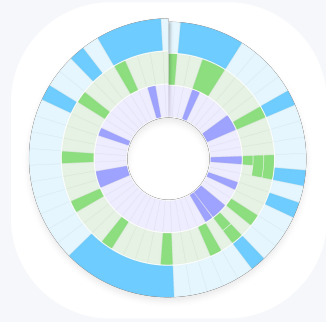
BONUS:

Select a time unit for each calendar ring to decide what layout you want it to display. We offer days, weeks, months and quarters. This affects the view, not the time of the content.

The background features a stylized design with two overlapping semi-circular shapes. The upper shape is a light green color, and the lower shape is a darker green color. These shapes are set against a light purple background that is visible at the bottom and sides. The text "Work in Plandisc" is centered within the light green area.

Work in Plandisc

How to work in Plandisc



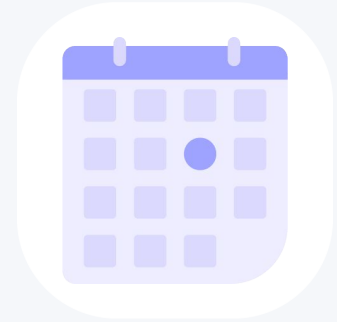
Create content
directly from Plandisc

See next page for more
information



You can import
data from Excel

[Click here to see page 27
for more information](#)



Synchronize activities from
your **calendar to Plandisc**

[Click here to see page 31
for more information](#)

Adding activities in plandisc

Add title




Click in the ring where you want to add an activity.

 Wed 22 Jan 2025

A menu will open, here you can specify the time frame of your activity. It's possible to plan down to 1-hour meetings and projects spanning over months.

 Repeat activity

You can also repeat an activity on any day or date.

 Add description

Here you can add all the details people need to know.

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

 Add labels

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

 Attach file or link


 Add location

Invite attendees:

Invite anyone, yourself included, and receive a calendar invite.

This is our one-way sync with calendar and you can invite attendees without a Plandisc license.

 Invite attendees

 Add reminder

If you add a reminder, you can also get an email reminder for the event.

 Add tasks

Connect to **Microsoft Planner** or use Plandisc tasks in-tool

Create tasks

 MS Planner Board

How to use and create activity groups

Add title 1 ■ ← Here you can access the activity groups.

■ Meetings 🏠 5
■ Projects 🏠 4
■ Events 🏠 2
■ Courses 🏠 2

Your admin might have created **some predefined colors and labels** for the Enterprise.

They are marked with an Enterprise icon, and exist to **align** the overall use, making sure everyone in the Enterprise uses colors and labels in a coherent manner.

The Enterprise icon means the item **locked and can't be changed.**

■ Activity group 1

■ Webinar 0

2 + Add activity Color

You can add additional color groups.

Pick a unique color and give it a group name. This will only be viable in the specific plandisc you are currently in.

🏠 Add labels

🏠 Done 🏠

🏠 Deadlines 🏠

3 + Add label

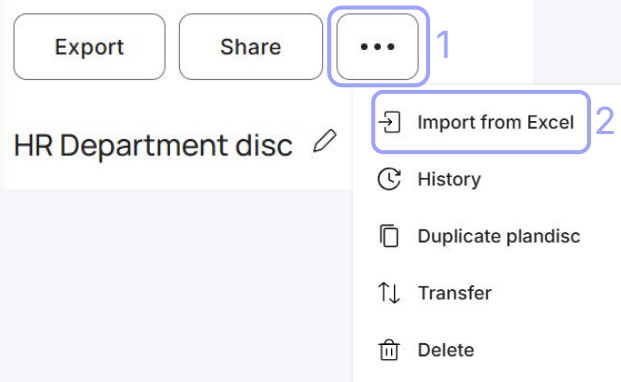
Same principle applies to labels.

Use the Enterprise decided ones, or add your own for personal use.

Import data from Excel

Importing data from Excel is a great way to kickstart the content of your plandisc.

Our Excel template ensures that Plandisc reads your data correctly.



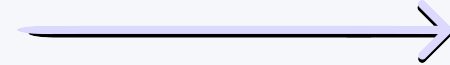
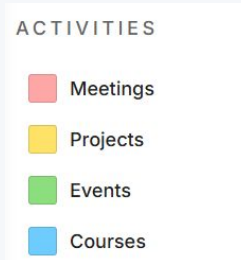
- 1 Click on the three dots and select Import from Excel.
- 2 Follow the steps to download our Excel-template. Use it to import data to Plandisc.

The template works like this:

You need to use one Excel template per ring.

You need to add both a start and an end date – if they're the same, simply write the same date in both fields. "Title" will be the activity name that shows up in Plandisc.

	Start date	Start time (optional)	End date	End time (optional)	Title	Description (optional)	Color group (optional)	Labels (optional)
1								
2	06/03/2025		06/03/2025		Strategy Meeting			
3	20/03/2025		20/03/2025		Budget Planning			
4	11/03/2025		11/03/2025		Follow-up			
5	10/03/2025		10/03/2025		Budget Planning			
6	27/02/2025		27/02/2025		Team Meeting			
7								
8								



If you want to be super effective, add the colored activity group and labels to the template too.

They color and labels need to exist in the specific plandisc before you can add them to the template.

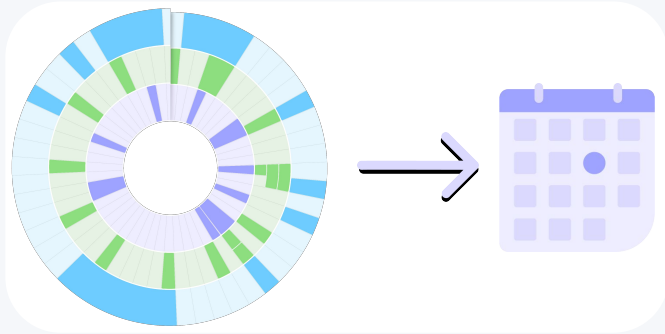
The background features a light green semi-circular shape at the top, a darker green semi-circular shape at the bottom, and light purple triangular shapes on the left and right sides.

Sync with the calendar

Connect and integrate with your calendar

There are 2 ways to connect Plandisc to your calendar:

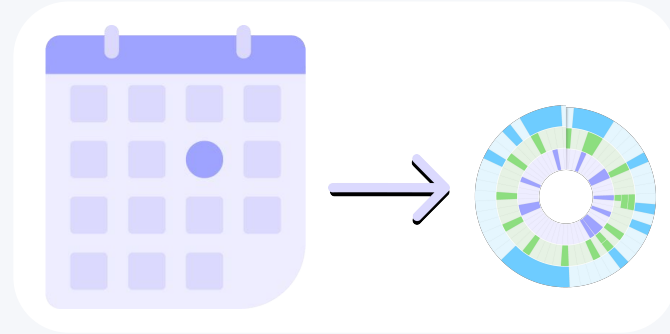
Plandisc → Calendar
One-way



Great for sending reminders.

Often used for activities where an attendance report isn't required.

Calendar → Plandisc
One-way



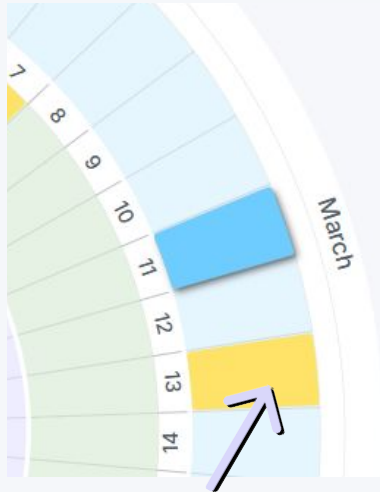
Perfect to avoid double registrations.

Select the events from you calendar that you want to show in your plandisc.

From Plandisc to Calendar

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

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



"Click"

☰ ☱ ☲ ☳ ☴ ☵ ☶ ☷

🔍

Add title

📅 Wed 12 Mar 2025

🔄 Repeat activity

☰ Add description

🏷️ Add labels

📎 Attach file or link

📍 Add location

👤 Invite attendees

🕒 Add reminder

📅 Add tasks

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

The invited will receive a calendar invitation to the activity and can see it in their calendar.

Updated invitation: Meeting 👤 Administrator 1 (Plandisc)

Administrator 1 (Plandisc)
to: info

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.

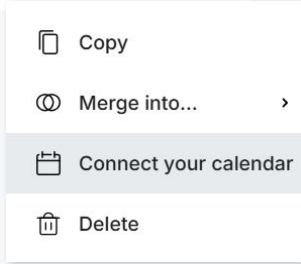
Best regards,
Administrator 1

plandisc

+45 4342 1442
info@plandisc.com
www.plandisc.com

Søren Frichs Vej
DK-8250 Åbyhøj
Denmark
CVR 37204854

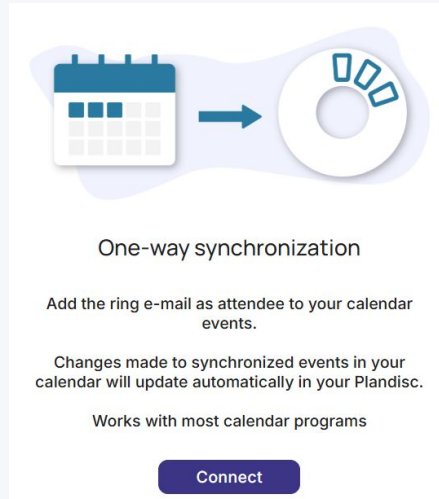
From Calendar to Plandisc



- 1 Go to your Plandisc setup and find the ring you want to set up a synchronization with.

Hover your cursor over the ring's and click on the three dots next to it.

- 2 In the pop up menu, click "connect to your calendar".



- 3 In the new window, select the one-way synchronization option and follow the steps.

From Calendar to Plandisc, part 2

You have now generated an email address connected to the ring you selected.

This email works the same as a meeting room or a person. Each ring in Plandisc will have a unique email address.

Success

You are ready to synchronize

To synchronize an event from your calendar into the ring, add the ring e-mail address as an attendee to the event in your calendar.

RING EMAIL ADDRESS

plandisc-ring-dtcxctzz7ofe@syncplandisc.comCopy

You can find the ring e-mail address in the ring panel.

OK

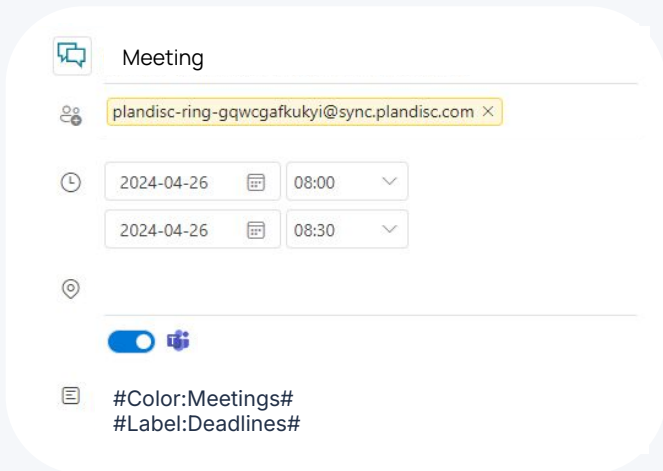
Open your calendar and invite the ring's email address to your activities.

The activities you invite will be shown in the plandisc ring connected to the email address.

The screenshot shows a calendar interface with a meeting invitation titled "Meeting from calendar to plandisc ring". The invitation is for a meeting on Tuesday, 21/04/2024, from 08:00 to 08:30. The email address "plandisc-ring-ybndaxq99op8@sync.plandisc.com" is highlighted in the "Obligatorisk" field. The interface includes a "Send" button, a "Valgfri" field, and a "Copy" button. The meeting is scheduled for Tuesday, 21/04/2024, from 08:00 to 08:30. The interface also shows a "Send" button, a "Valgfri" field, and a "Copy" button. The meeting is scheduled for Tuesday, 21/04/2024, from 08:00 to 08:30. The interface also shows a "Send" button, a "Valgfri" field, and a "Copy" button.

From Calendar to Plandisc, recommendations

Set the activity group and labels from your calendar



A screenshot of a calendar event creation form. The title is "Meeting". The email field contains "plandisc-ring-gqwcgafkuky@sync.plandisc.com". The date and time are set to 2024-04-26 from 08:00 to 08:30. There are two labels at the bottom: "#Color:Meetings#" and "#Label:Deadlines#".

Write the names of your chosen activity group and labels from the plandisc your working on.

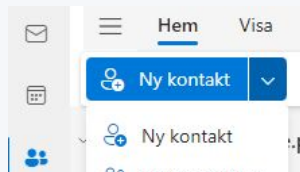
The code is:

#Color:___# ← Add activity group here

#Label:___# ← Add labels here

This will ensure the activity you sync from calendar to plandisc appear with the correct color and labels added.

Give the ring's email a name in calendar.

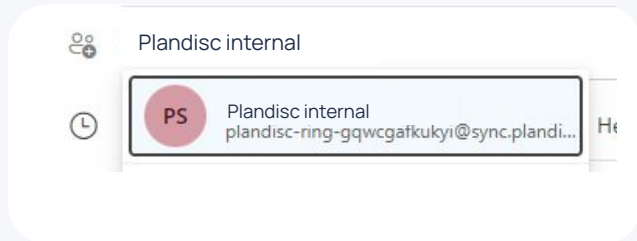


Create a contact for your ring.

This makes it much easier for people to find the correct ring when sending invites from calendar to Plandisc.



A screenshot of a contact card for "Plandisc". The name is "Plandisc" and the internal name is "Internal". The email address is "plandisc-ring-gqwcgafkuky@sync.plandisc.com".



A screenshot of a calendar event card for "Plandisc internal". The card shows a pink circle with "PS" and the email address "plandisc-ring-gqwcgafkuky@sync.plandi...".



Sharing and working together

Sharing terminology in Plandisc

 Embed / Link

Create a view outside of Plandisc

This is where you generate a tailored, interactive view.

This view can be integrated in Teams, Sharepoint, and in intranets or on websites.

It can also be sent as a link for online viewing.

Recipients can't edit the view.

 Invite Collaborators

Collaborate with colleagues in-tool

Collaborate with people who have a Plandisc license.

You can give access to individual people or user groups created in Plandisc.

Decide if they should have permission to read or edit, and adjust permissions for each person, group, and ring.

 Share With Enterprise

Give everyone in the Enterprise read access

Give everyone in your Enterprise a read only access to your plandisc in-tool.

This allows everyone in the Enterprise to view the disc, click around and read.

Use it to break down silos and share information.

Share and work together

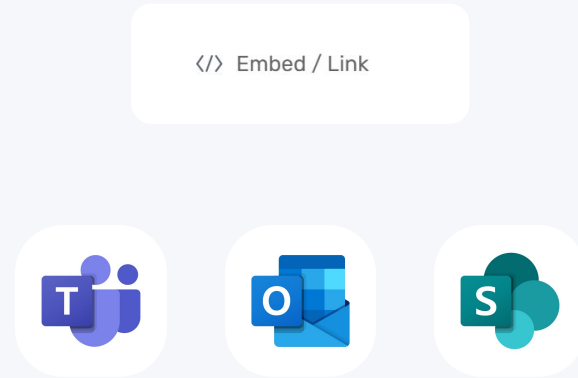
Share within the Enterprise

- Work and plan together in Plandisc.
- Create and merge Plandisc across departments and between teams.
- One ring can be synchronized into multiple plandiscs.



Share outside of the Enterprise

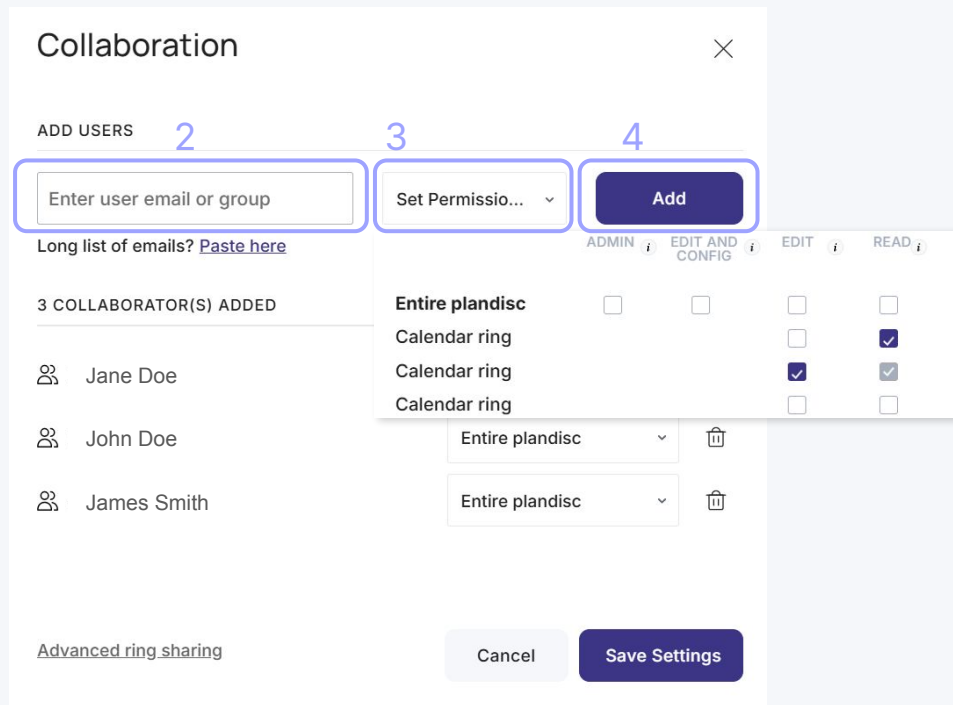
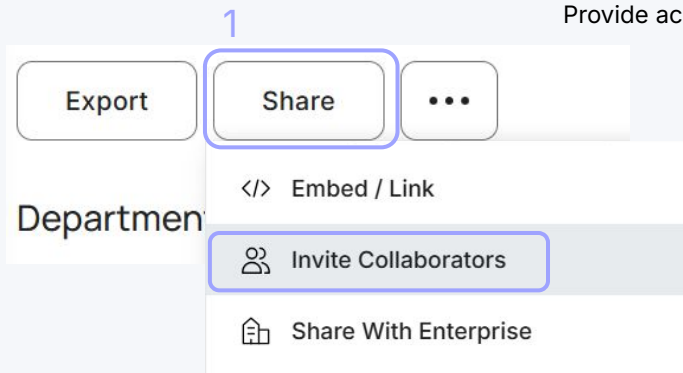
- Display an interactive read-only plandisc in Teams, Sharepoint, on your website, or online via a link.
- The recipient can access files and links, and read all the information provided in the plandisc.
- Always updated with the latest information.



Share within the Enterprise

“Invite Collaborators”

You can collaborate with colleagues directly inside the tool.
Provide access to entire plandiscs or specific rings.

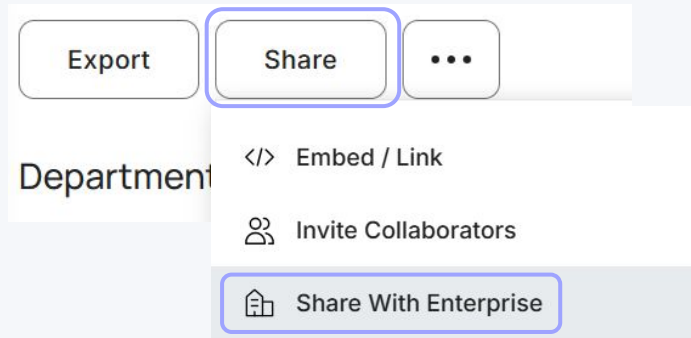


- 1 Go to “Share” and then “Invite Collaborators”
The popup window you see on the right will open.
- 2 Start by adding the people or groups you want to collaborate with.
- 3 Next, decide whether you want to provide a read-only access, or allow the collaborators to edit, each ring.
- 4 Lastly, click “Add” and then “Save Settings”.

Share within the Enterprise

“Share With Enterprise”

Give everyone in your Plandisc Enterprise read-only access to your plandisc, allowing them to see it on their dashboard.



This is a great way to keep the plandiscs created in the Enterprise visible to everyone.

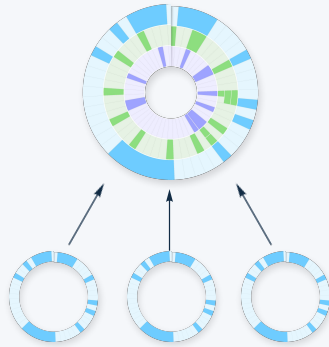
Other users will never be able to edit your plandiscs unless you give them access to do so during “Invite Collaborators”.

They can read its content and insert rings from shared plandiscs and into their own.

Altogether, it's a great way of keeping a open planning internally in the Enterprise and the organization.

Ways of working together

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

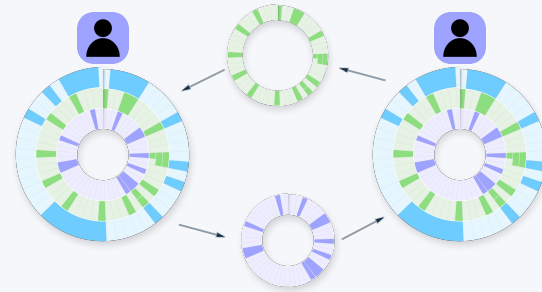


The departments need to agree on the structure and what they want to visualize in the plandisc.

The information in the rings should concern the entire organization, not just individual departments.

One user compiles the master plandisc and shares it with the other users. Each individual user can get permission to either read or edit the content.

Share rings between users
But be selective with the information you share



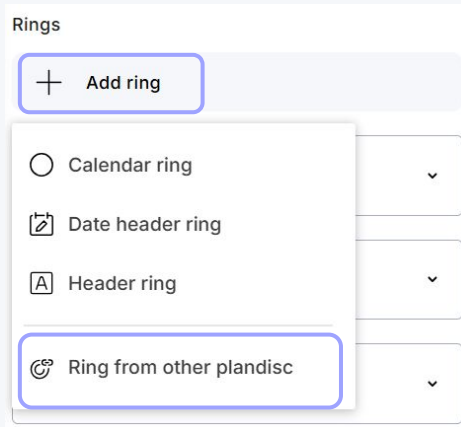
Choose the group or person you want to share rings with. It's possible to keep it internal in your team.

It's completely up to you if you grant other users a read only permit, or if they get editing access as well.

The Enterprise admin can create groups to facilitate sharing between teams and/or departments.

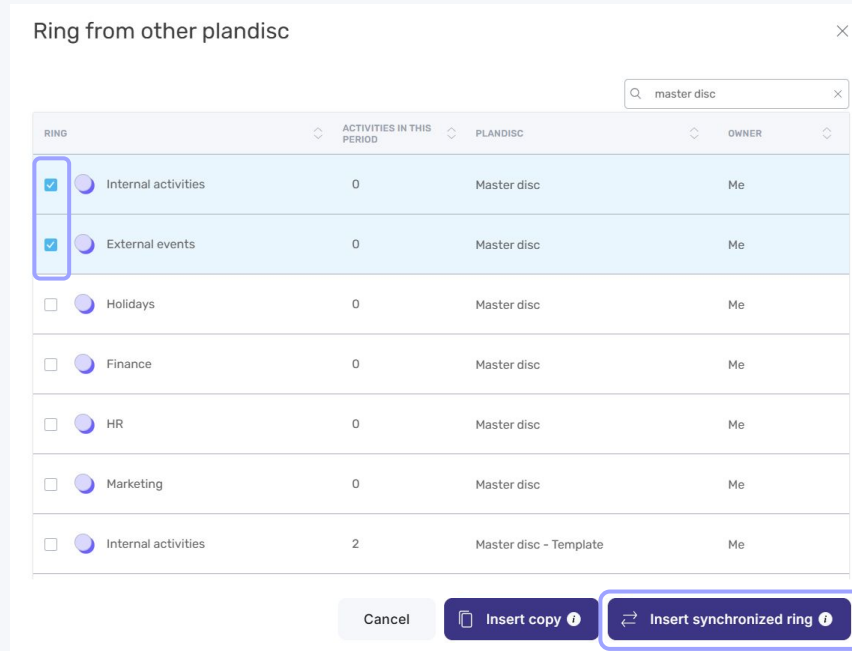
Ways of working together

There's a smart way of working together in Plandisc, where rings can be mixed together across people, departments and organizations.



1 In your Plandisc setup, select "Add ring".

2 Then select "Ring from other plandisc".



Here you can see an overview over all your plandiscs and rings, the ones shared with the Enterprise, and rings collaborators have shared with you.

Select one or more rings and insert them into your own plandiscs.

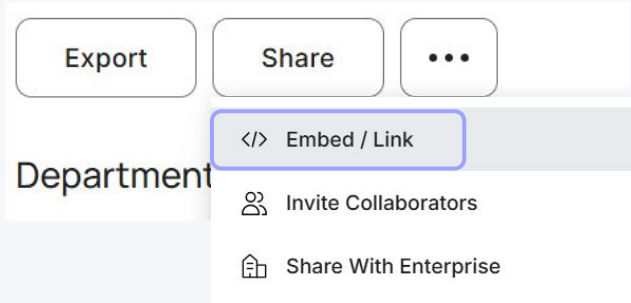
If you want the ring to remain synchronized with the original, select "Insert synchronized ring."



This icon means the ring is originally from another plandisc.

Share outside of the Enterprise

Create an interactive view of a plandisc



Go to "Share" and select "Embed / link".

The window to the right is where you create a view that you can share internally or externally.

Give your view a title, choose which rings you want to display, and if you want to protect the view in any way.

See next slide for the next step.

A screenshot of a configuration window titled 'Embed / Link'. The window contains the following elements:

- Title:** A text input field containing 'Department disc'.
- Display:** A dropdown menu with 'Entire plandisc' selected.
- Protection:** A list of radio buttons: 'No protection' (selected), 'Microsoft 365 login protected', 'API Token protected', and 'Protect with password'.
- Default Viewing Mode:** A dropdown menu with 'Disc' selected.
- Enable navigation:** A toggle switch that is currently turned off.
- Custom display-range:** A toggle switch that is currently turned off.
- Create:** A blue button at the bottom left.

Select which rings you want to share.

Select which view they see first: Disc, List, or Calendar.

Enable if you want users to be able to rotate the disc.

Enable if you want to determine the displayed time frame, e.g. 3 or 6 months.

Share outside of the Enterprise

Next step

Once you've made your choices, click "Create" to set up your view.

Embed / Link

Creating a view is a great way to share your plandisc with others. A view is public and all people with the link have access to see the plandisc. However, there are multiple ways of restricting access to fit your needs.

Format

Title: Department disc

Display: Entire plandisc

Default Viewing Mode: Disc

No protection

Microsoft 365 login protected

API Token protected

Protect with password

Enable navigation:

Custom display-range:

Create

Department disc

↳ Link

<https://create.plandisc.com/6rAFunM>

<> Embed

```
<div style="max-width:1000px;width:100%;border-radius: 16px"><div style="position: relative;padding-bottom: 117%;padding-top: 35px;height: 0;overflow: hidden;"><iframe src="https://create.plandisc.com/wheel/embed/6rAFunM" scrolling="no" frameborder="0" title="Department disc" style="position:absolute;top:0;left:0;width:100%;height:100%;"></iframe></div></div>
```

This URL can be sent to others and the recipients will be able to see the plandisc, click around in it, and read the content.

Often used for external sharing, since it can be sent in a chat or email.

See an example link below:

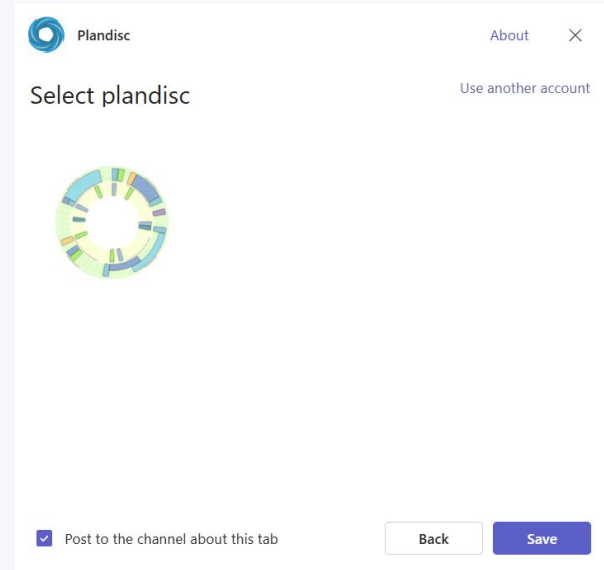
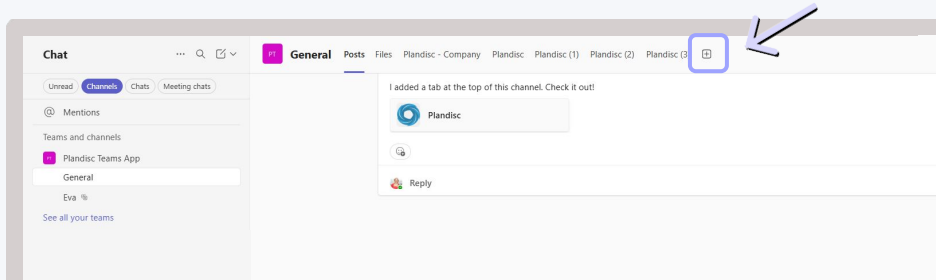
<https://create.plandisc.com/wheel/showPublic/6TUfqtq>

Use this embed link when you want to share a plandisc on intranets, webpages, in Sharepoint, etc.

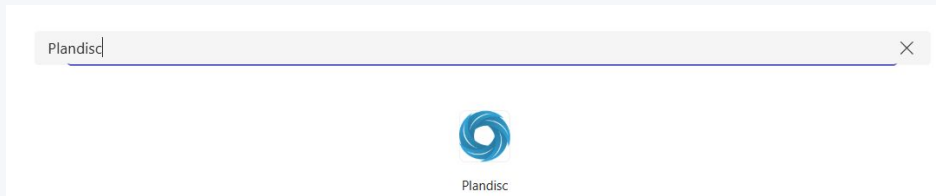
Share outside of the Enterprise

Share a plandisc in Teams

Click the "+" in your selected channel or team.



Search for the "Plandisc" in-tool app and click on it. You'll need to log in.

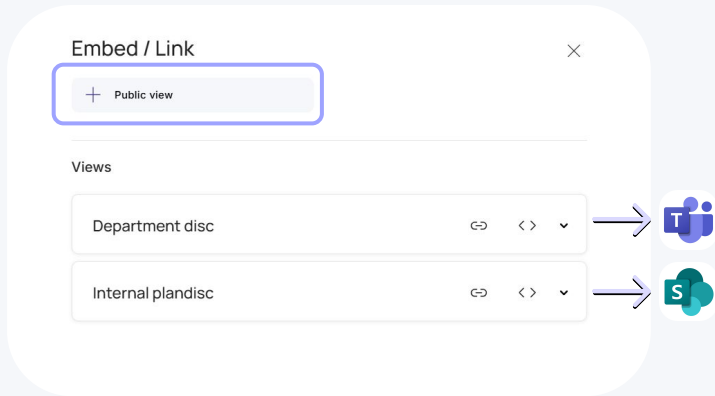


Select the plandisc you want to publish, and it will appear interactively in Teams. Repeat the steps to publish another plandisc.

Share outside of the Enterprise (Extra)

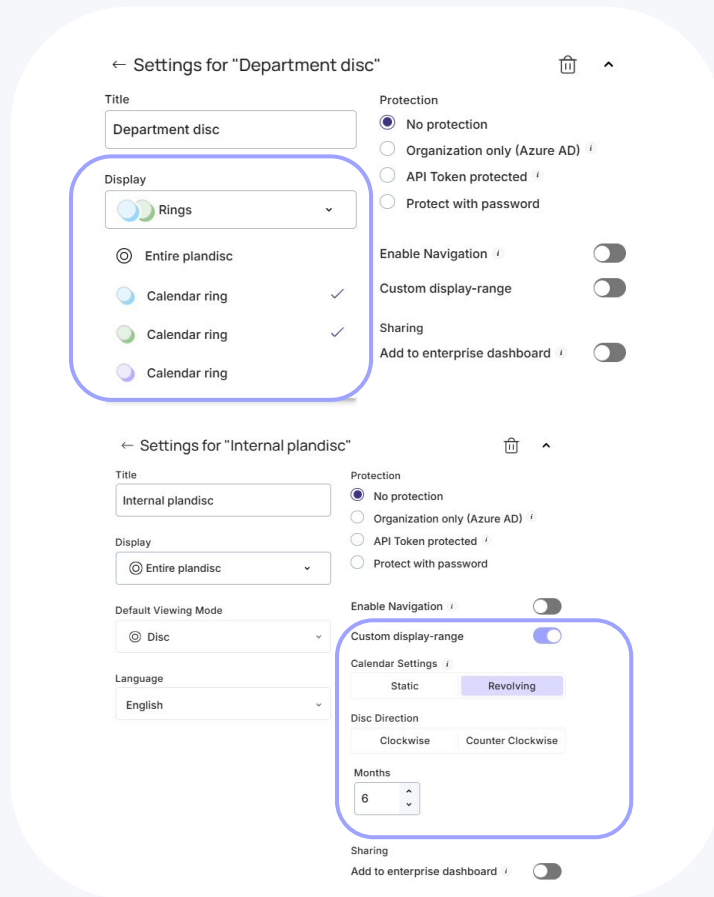
Create multiple public views for a plandisc

This is useful when different rings contains different information that needs to be sorted and shared in different places.



You can generate multiple views in the settings.

This allows you to customize what information should be combined and shared, both internally and externally.



For each view, select rings that contain the right information for the recipients. You can also set a time frame for the period you want to display.

The background features a central light green curved shape with a darker green curved shape below it. Purple triangular shapes are positioned at the bottom corners, partially overlapping the green shapes.

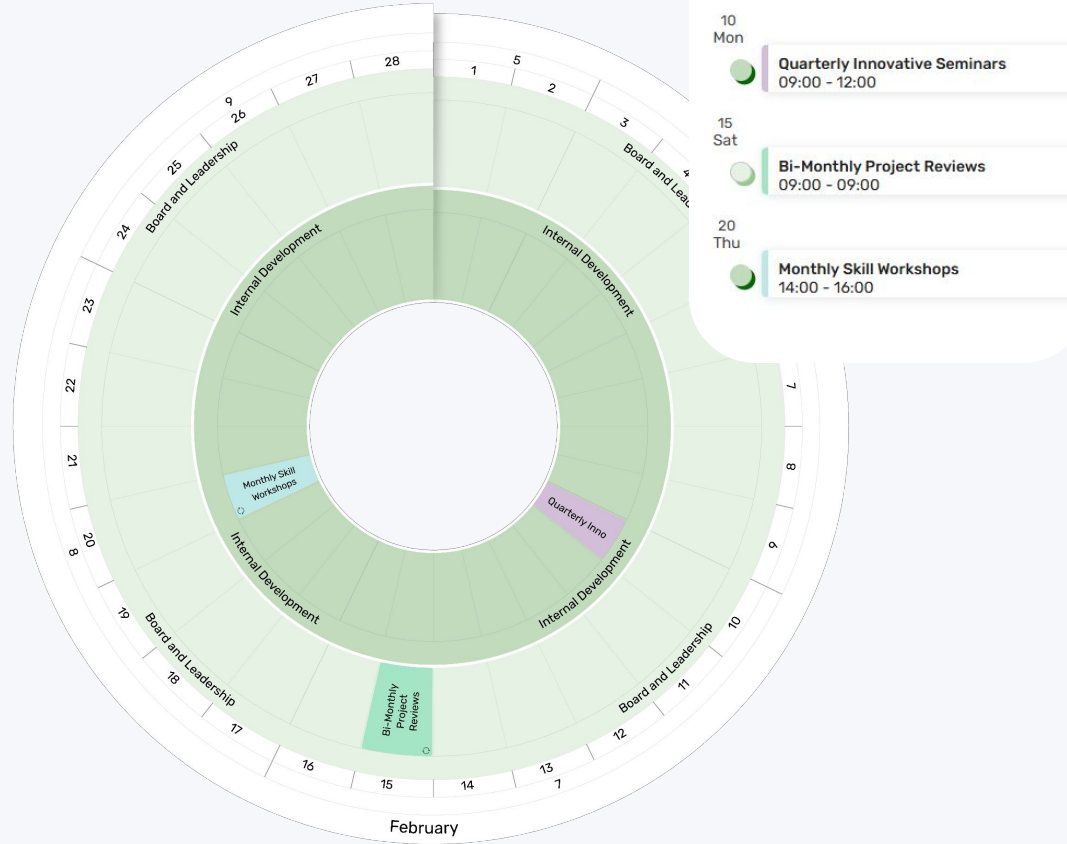
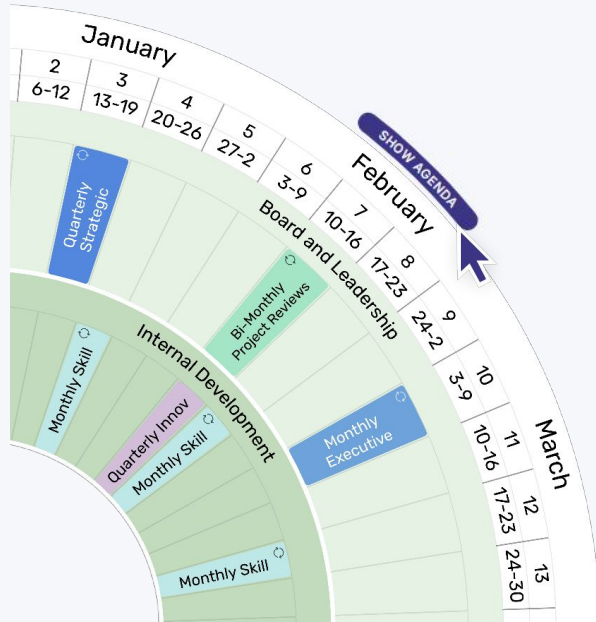
Tips

Zoom in from 12 months to 1 month

This function lets you zoom in to a 1 month disc view.

Hold the cursor over the month you want to see, then click on "Show Agenda".

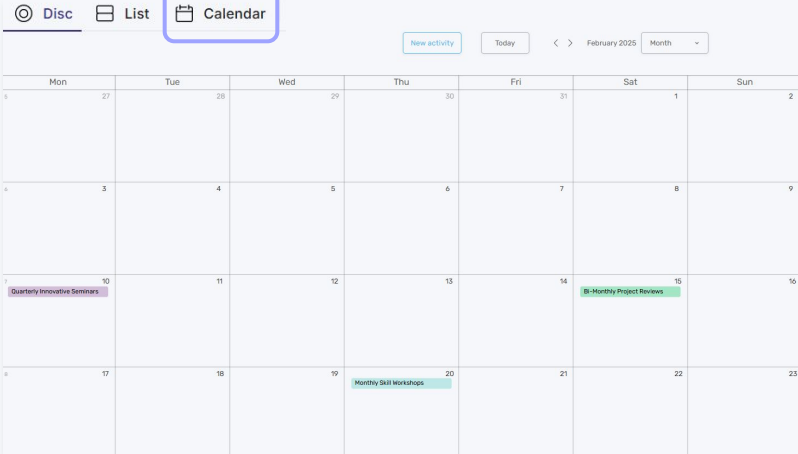
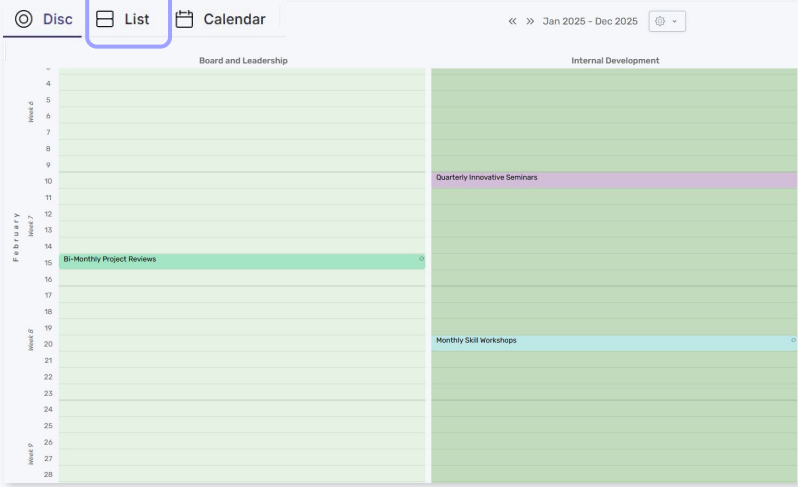
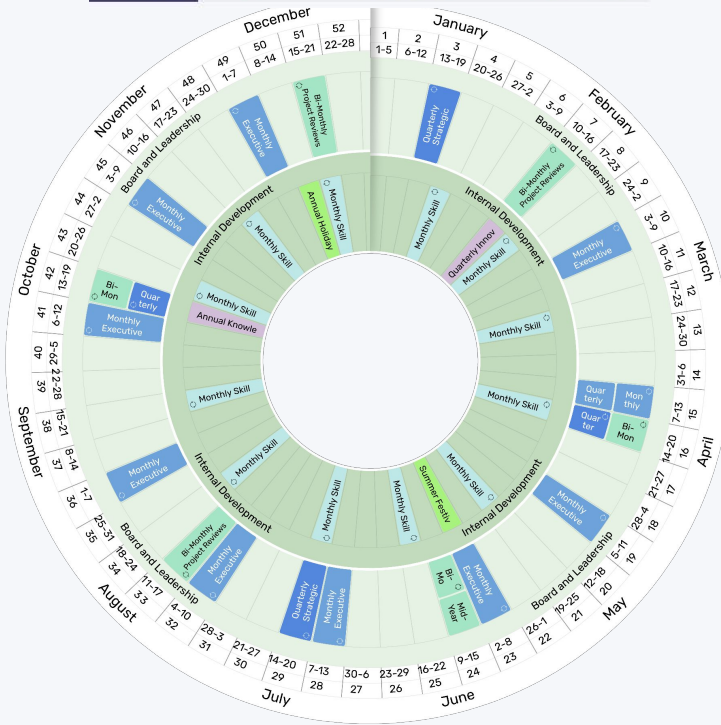
On the right side you will see a list view of the planned activities, and then you can zoom in by clicking "Zoom in month".



Work in different views

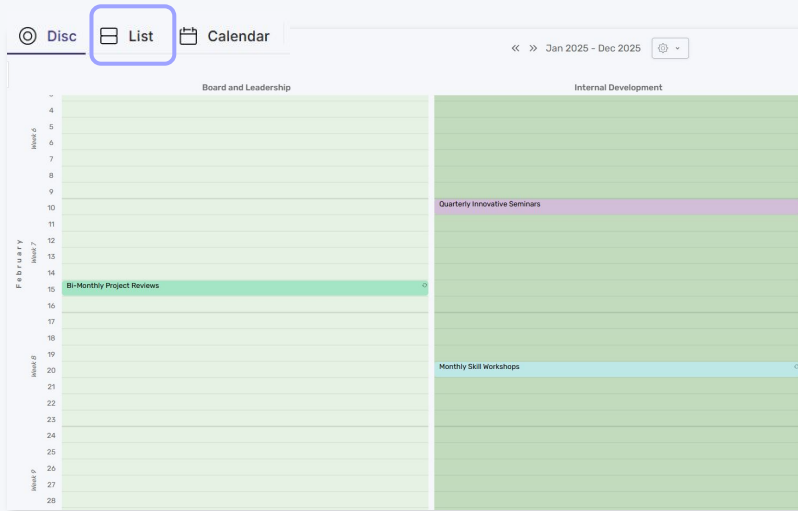
You can change the view and work in, or read, your plan/disc in different views.

Disc
List
Calendar
Plan Again

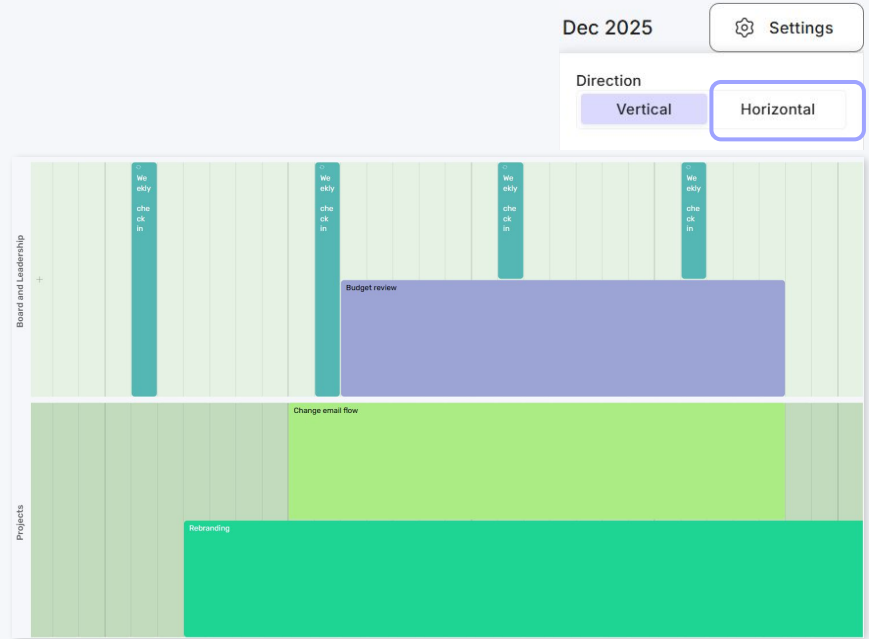


Bonus view

The horizontal list view



The list view can be seen in two formats. The **vertical list** view is recommended for a more linear overview.



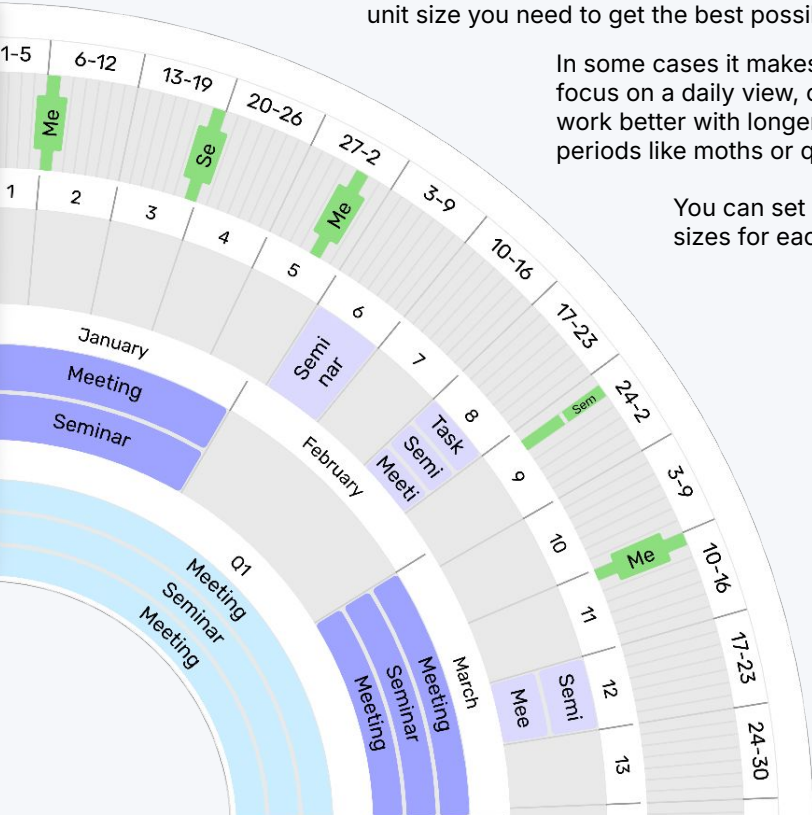
The **horizontal list** view is very effective to create an overview over long-term activities like projects and processes.

Using the rings and unit sizes smartly

Each ring in Plandisc can be customized to show the unit size you need to get the best possible overview.

In some cases it makes sense to focus on a daily view, other cases work better with longer time periods like months or quarters.

You can set different unit sizes for each ring.



New plandisc 



Click on Plandisc setup.

Scroll down to your list of rings and select one of them.

Calendar ring

Active

Name

Color

Unit *i*
Week

Height *i*
27

Font Size *i*
10

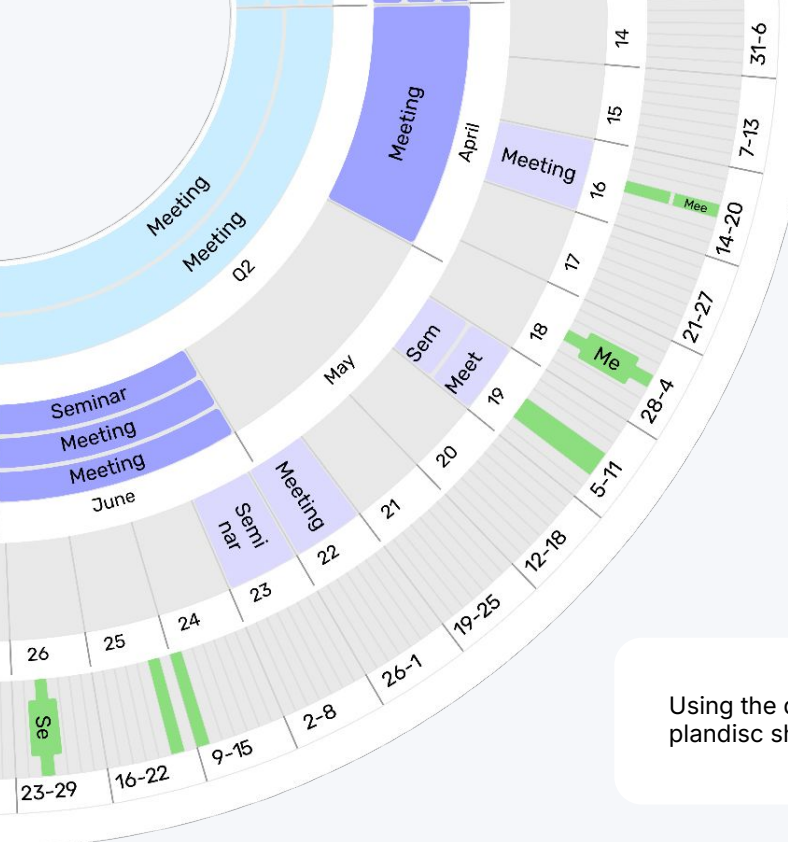
Open the ring and you'll see all the ring's settings.

Click to open the drop-down menu in the "Unit" field.



Select the unit size for the ring.


NB:
The time and date you set for your activity won't change. This is a visual setting for the ring as a whole.

See next page for more



Change the time layout for even better overview

New plandisc  

Calendar Settings 

Static Revolving

Disc Direction

Clockwise Counter Clockwise

Start Year: 2025

Start Month: January

Months: 12

Click on Plandisc setup

Find your calendar settings.

Change the number of months for a more detailed, or a more long-term, plandisc.

Your plandisc can display 1–24 months.

Using the daily unit size is not recommended in a plandisc showing more than 5 months.

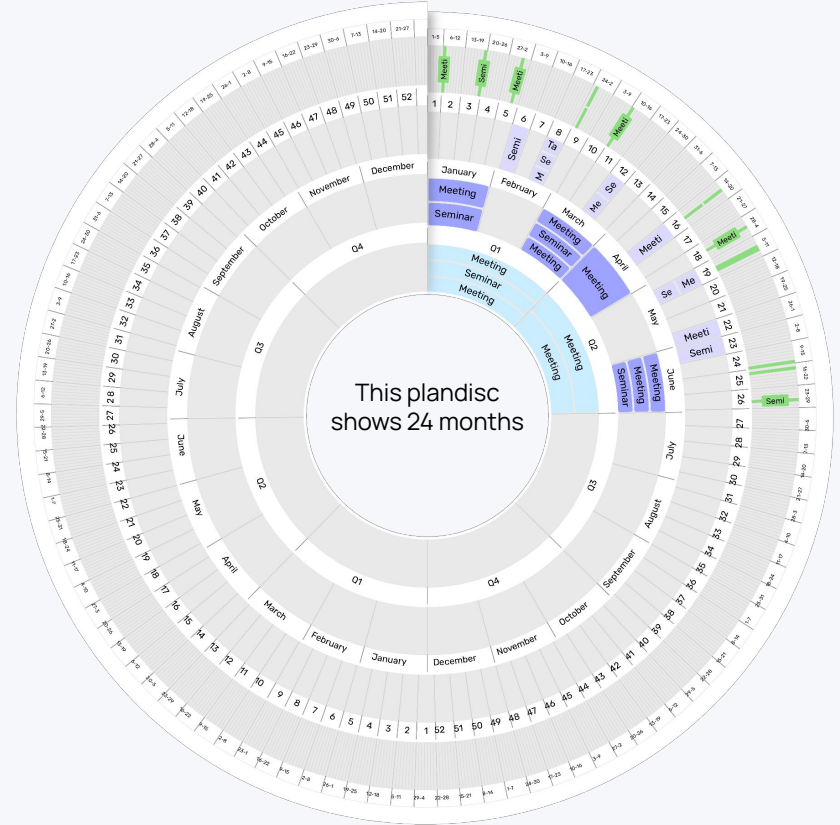
The names of the activities will be displayed differently depending on the number of activities in each unit and what unit size you have selected for the ring.

See next page for more

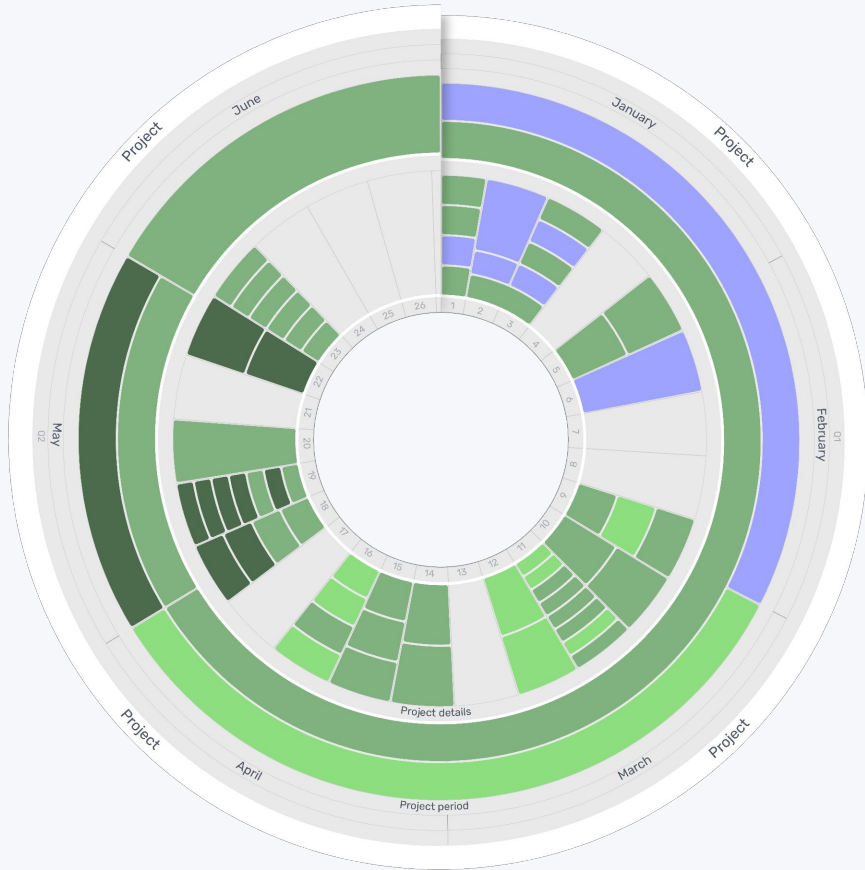
Monthly plandiscs are useful for focusing on details and short-term planning. It can be a content plan, the social activities of a department, or detailed weekly plans.



Working in a scaled up plandisc, showing 12 months or more, will give you a better overview over yearly processes and long-term projects.



Use separate rings for one process



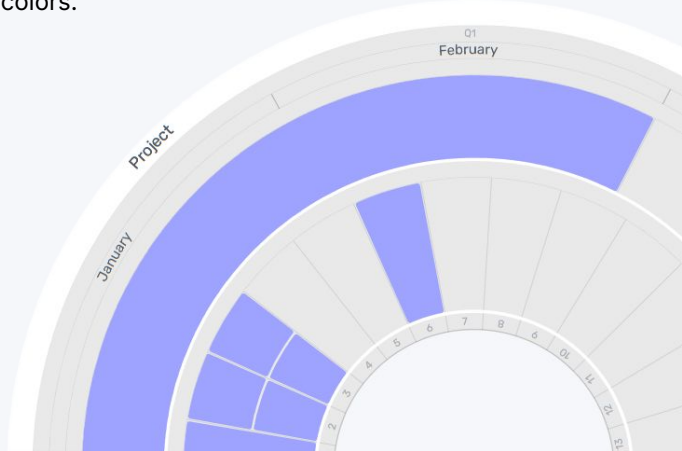
Don't be afraid to think outside the box when using Plandisc.

If you work with long term projects or processes, but also need to see the underlying tasks connected to these periods, multiple rings might will often do the trick.

Create a ring with months or quarters as its unit size. Here you place the long-term periods.

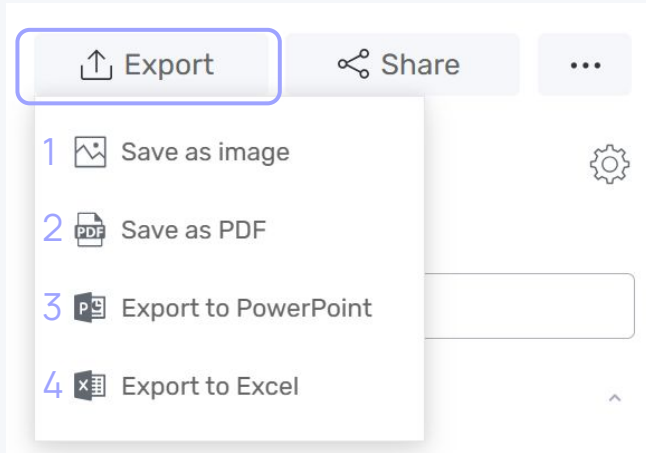
Add a second ring, where you put in week-by-week tasks, events and activities connected to these projects.

The two rings, and their activities, will be connected by the colors (activity groups) you set up. If you need to isolate and focus on one project, you can easily filter out the other colors.



Tips for exporting data

You can export data from Plandisc in several different ways.

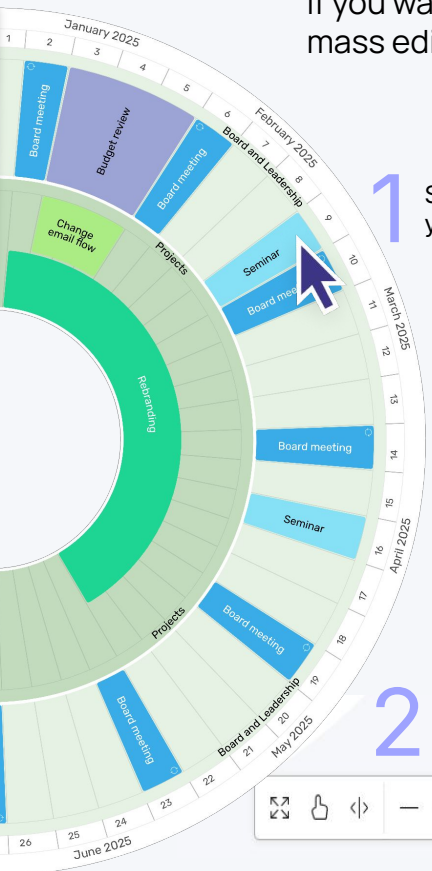


- 1 This exports the current view in your plandisc as a PNG file. It's a large scale image, making it suitable for various uses.
- 2 You can export different types of PDF files. The most popular is the detailed PDF, which is often used in reports.

Consider changing the time frame in your plandisc to 6 or 3 months if you want a more close up picture.
- 3 The PowerPoint export is a great way of presenting every month, including the planned activities, in a slide each.
- 4 The Excel export will gather all the data in your plandisc and compile it in spreadsheet.

Mass editing

If you want to edit activities in Plandisc in a way more effective way, mass editing is the solution.



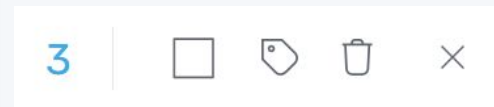
1 Start by clicking on the first activity you want to edit.



Click on this box, then select multiple activities to mass edit them.



3 Once you have selected your activities, there are three editing options you can use:



Here you can change the activity group



Here you can select or remove labels



Here you can delete the activities

The background features a large, light green semi-circular shape at the top, a smaller, darker green semi-circular shape below it, and a light purple background at the bottom corners.

MS365 integration & support

Integrate with Microsoft 365

There are multiple ways to connect Plandisc to Microsoft.



Synchronize with Outlook

[One-way sync \(See page 28 \)](#)
[Click for guide - Two-way sync](#)



Integrate a view in Sharepoint

It's interactive and can be used by everyone.
[Click for guide - Sharepoint integration](#)



Export/Import with Excel

[Click for guide - Import from Excel](#)
[Click for guide - Export to Excel](#)



Upload a plandisc to a channel

[Click for guide - Download the full Teams app](#)
[Click for guide - Integrate a view in Teams](#)



Connect a Planner plan or bucket

Manage tasks under an activity in Plandisc.
[Click for guide - Planner integration](#)

E-Learning & Support



Online help

- [Plandisc FAQ](#)
- [Click for Online Guides](#)
- [15 min video intro to Plandisc](#)



Mail

- info@plandisc.com



Live-chat

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



Phone

- +45 42 42 14 42