



The Guide of the first 10 Steps

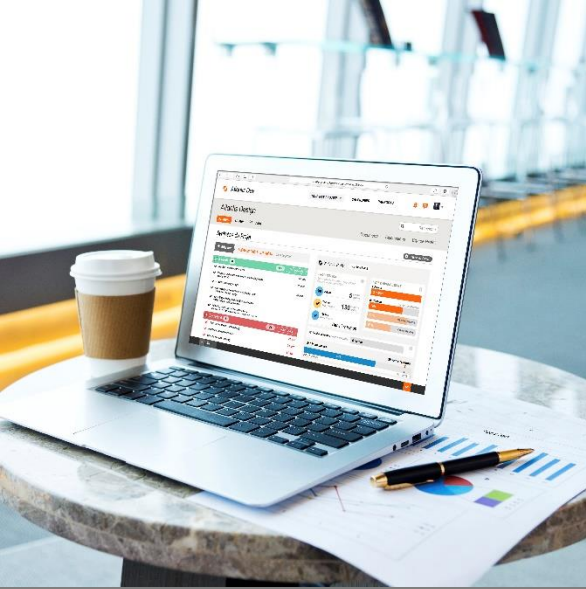
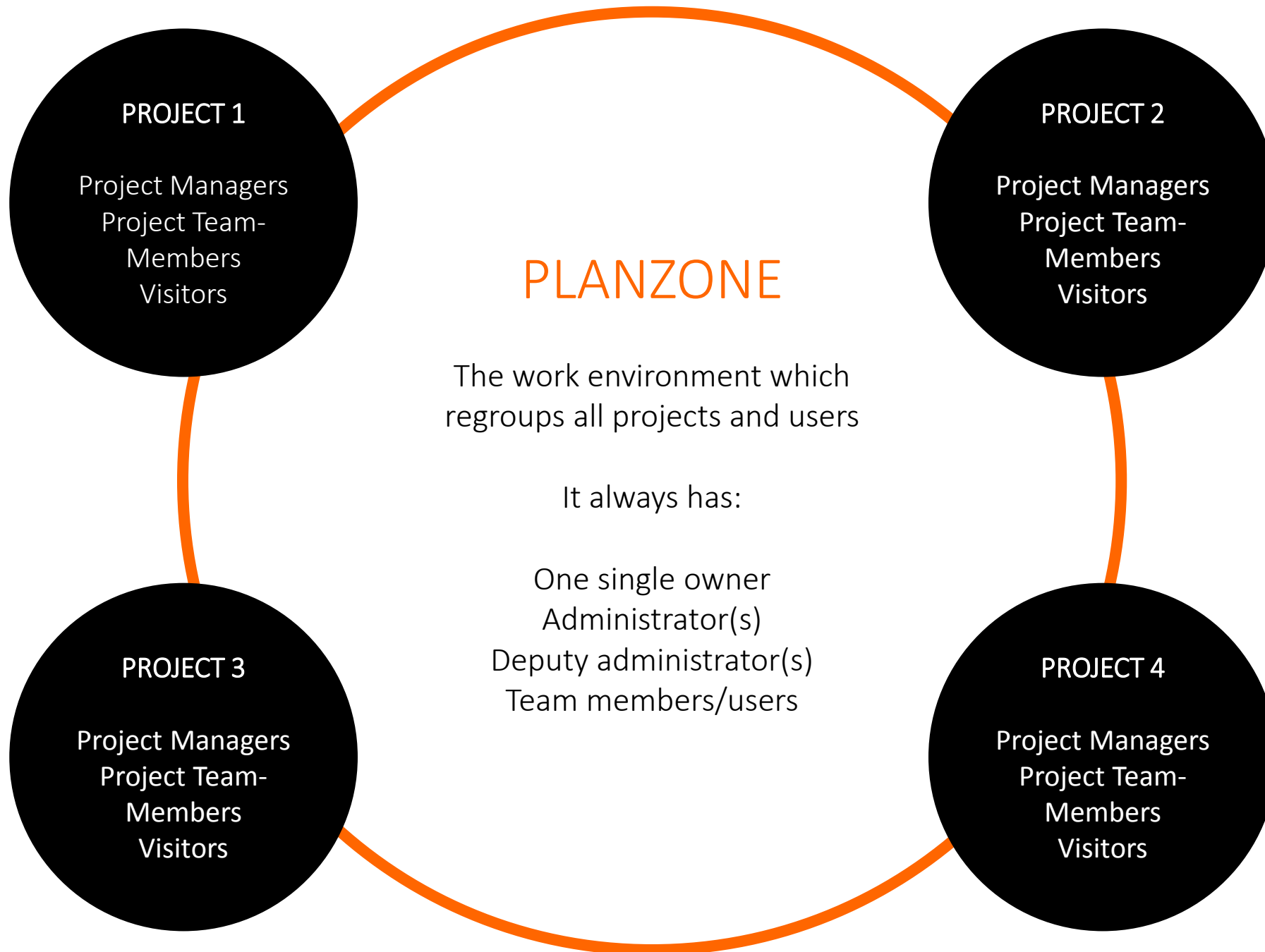


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A close-up photograph of a person's hands typing on a laptop keyboard. The hands are positioned over the keyboard, with fingers pressing down on the keys. The keyboard is black with white lettering. The background is blurred, showing a wooden desk and a laptop screen.

Overall Ergonomics



Zoom on user rights

A Planzone contains



Planzone Owner

He administers the Planzone, the users, the invoicing parameters. He can create, modify or delete projects as well as project templates



Administrators

They have the same rights as the Planzone owner but do not have access to invoicing parameters



Deputy-Administrators

They have neither rights to administer the Planzone nor the users. They cannot delete projects or project templates

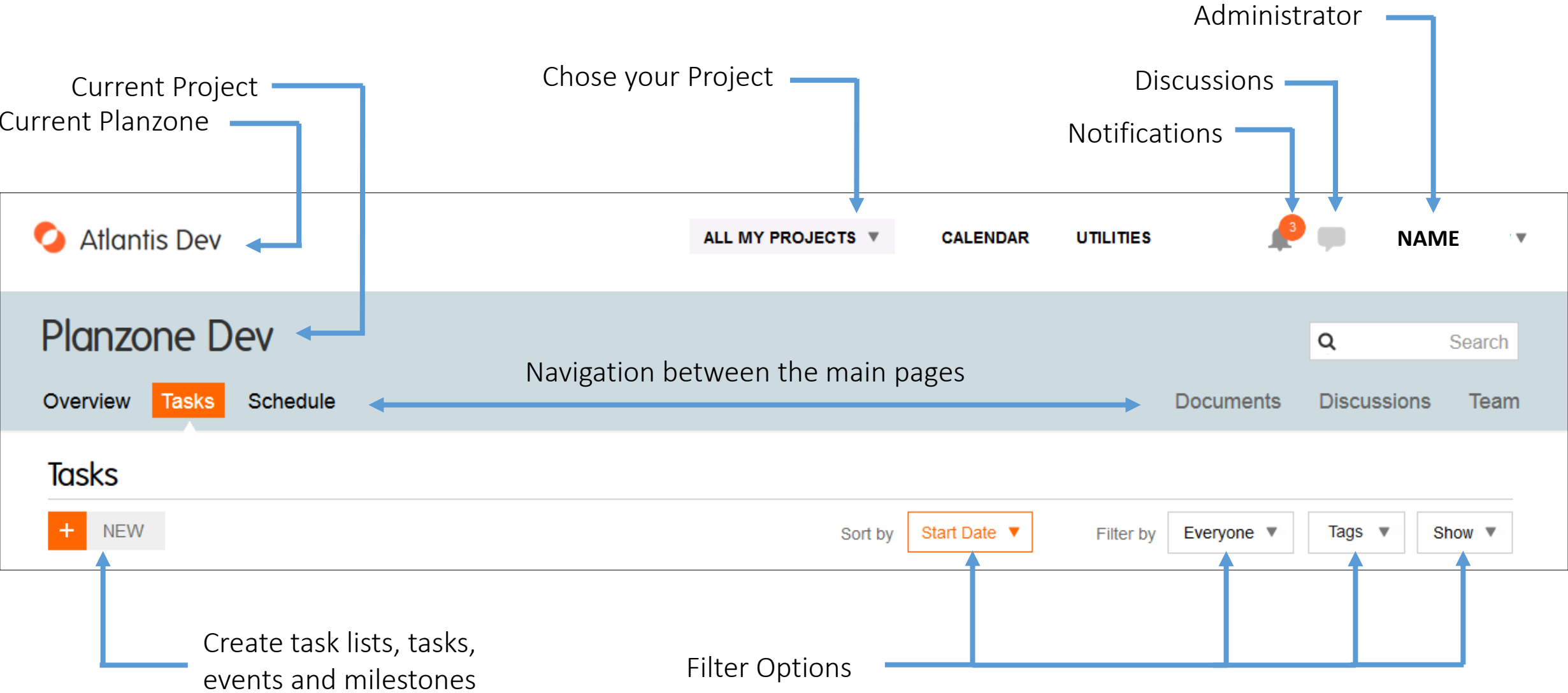


Team Members

They can only access the list of users and of projects but cannot make any changes

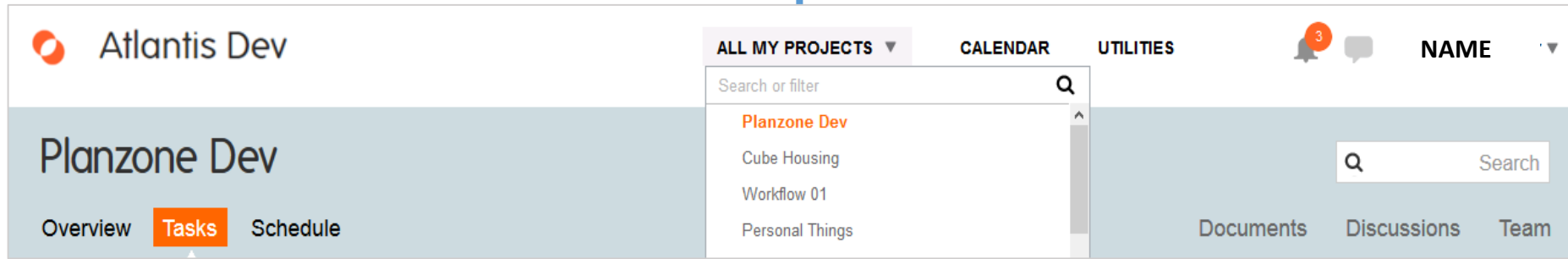
→ To manage the users of a Planzone, click on « All my Projects », then go to « Users »

Main Planzone Menu



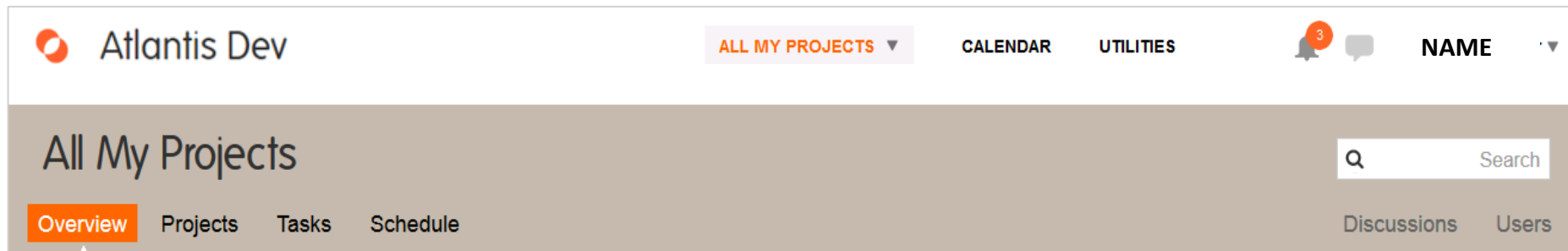
Navigation between a «Project» and «All My Projects»

« Project » View



Position your mouse over the « All My Projects » drop-down menu and select the corresponding project

« All My Projects » View



Click directly on « All My Projects »

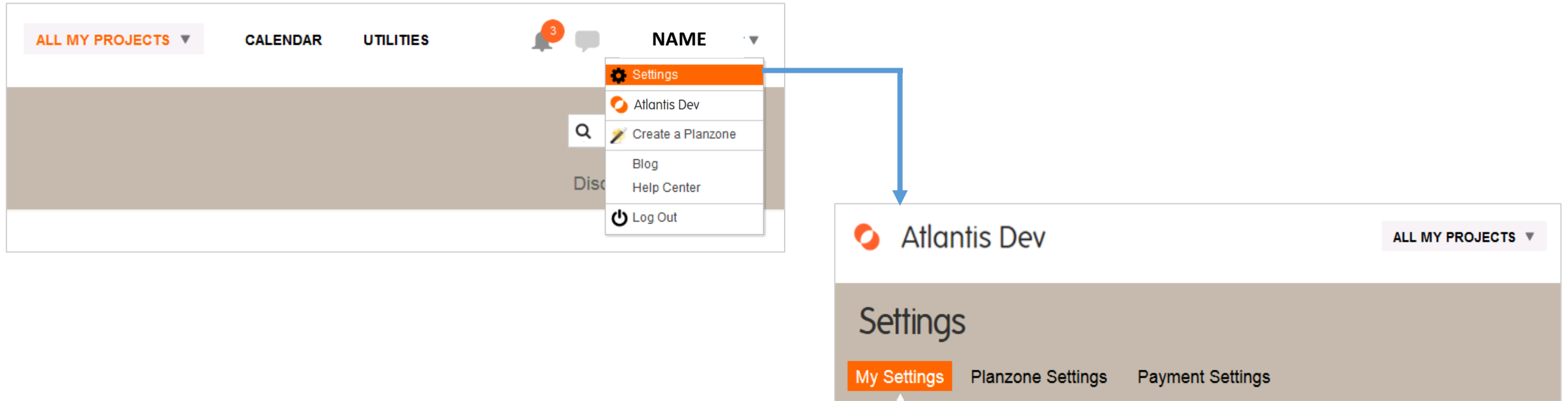
The background colour changes, based upon the menu hierarchy

No multi project documents

A close-up photograph of a person's hands typing on a laptop keyboard. The keyboard is silver with black keys. The word "Configuration" is written in a large, orange, sans-serif font across the center of the image, overlaid on a semi-transparent white rectangular background. The background image is slightly blurred, focusing attention on the text and the typing action.

Configuration

The different Parameters



This section gives you access to 3 configurations panels :

1. **My Parameters** (your profile with contact information and picture, your preferences, your password...)
2. **Planzone Parameters** (confidentiality, security, calendar...)
3. **Invoicing Parameters** (address, payment information...)

Zoom on the Calendar

My Parameters

☰ My Preferences

Language setting

English (United Kingdom)

Timezone

GMT

Calendar Week

Monday

Preferred time format

7:45 PM

Preferred date format

2016.07.14 or Jul 14, 2016

By default, sort people by

First name

📅 When I Work

Weekly calendar

☒ Stay synchronized with the weekly calendar of your Planzone

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Sunday

hours

8

8

8

8

8

0

0

Parameters of the Planzone

Calendar Settings

Default weekly calendar:

Standard (5 days per week, Mon-Fri)

Default holiday calendar:

No holiday calendar selected

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Sunday

hours

8

8

8

8

8

0

0

Only visible to the Owner. Define the default values of daily working hours which will be applicable to all projects

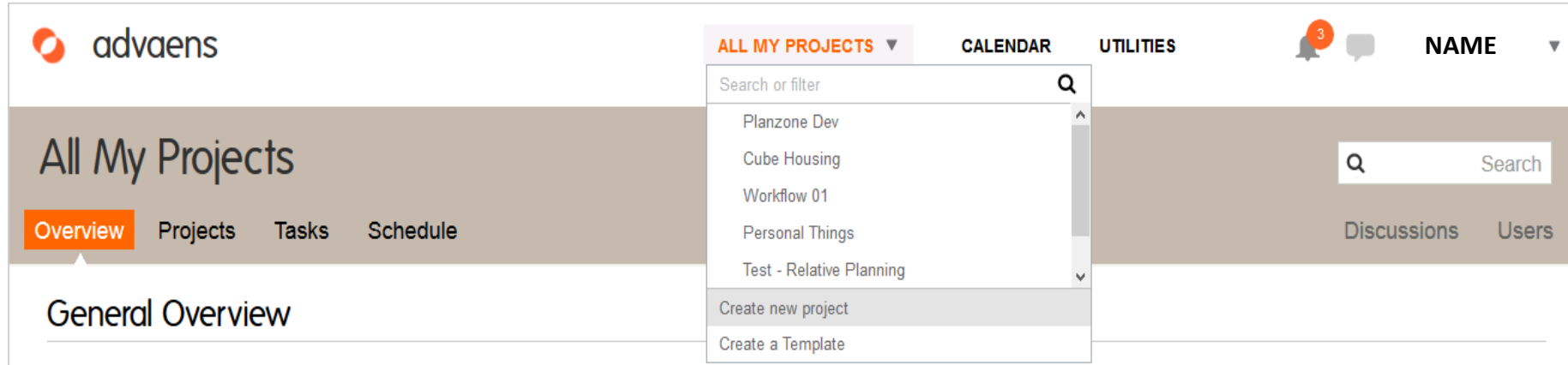
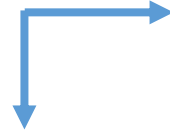
Be sure to specify your time zone and daily working hours. This information has a direct impact on your events, your timesheets and your planning.

A close-up photograph of a person's hands typing on a laptop keyboard. The focus is on the right hand, with fingers pressing down on keys. The background is blurred, showing the rest of the keyboard and the left hand. A semi-transparent white rectangular box is overlaid in the center of the image, containing the text "Creation of a Project" in orange.


Creation of a Project

The types of Projects


Position your mouse over "All My Projects" and then click on « Create a new project »




Create a new project




Create a simple project
Track the work to do. Recommended to get started!



Create a project with a schedule
Track and schedule the work to do. For project managers.



Create a project from a template
Save time and get started quickly by using an existing project template.



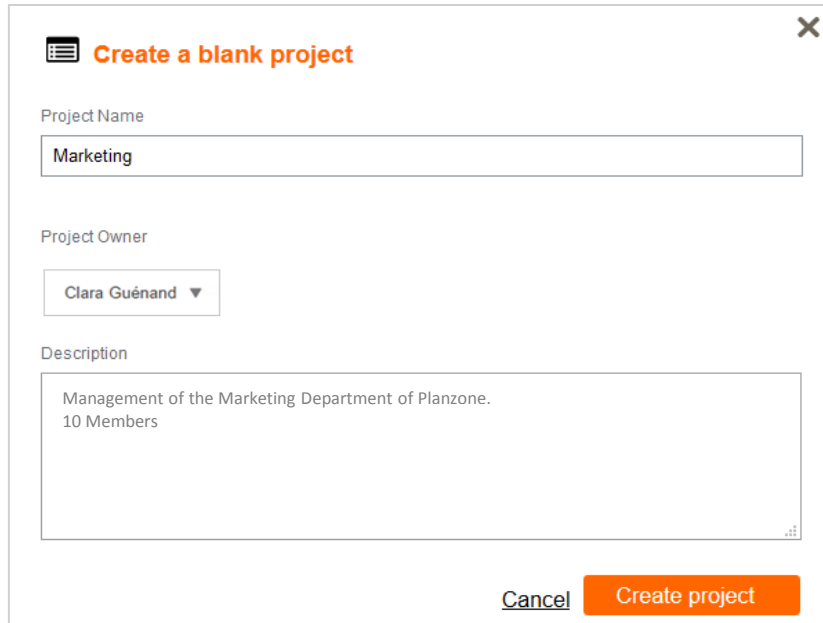
Import from Microsoft Project.
Import Microsoft Project file.

Choose the type of project you want to create:

- Simple (without planning : Gantt, Time Sheets, Resource Management)
- With Planning
- From a template you have already created or which has been proposed by the community
- From a MS Project File

The types of Projects

Simple Projects



Create a blank project

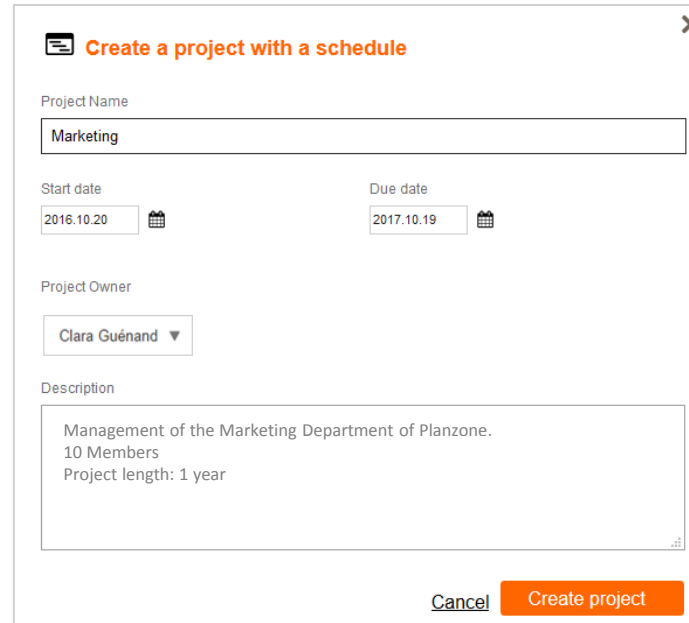
Project Name
Marketing

Project Owner
Clara Guénand ▼

Description
Management of the Marketing Department of Planzone.
10 Members

[Cancel](#) [Create project](#)

Project with planning



Create a project with a schedule

Project Name
Marketing

Start date
2016.10.20

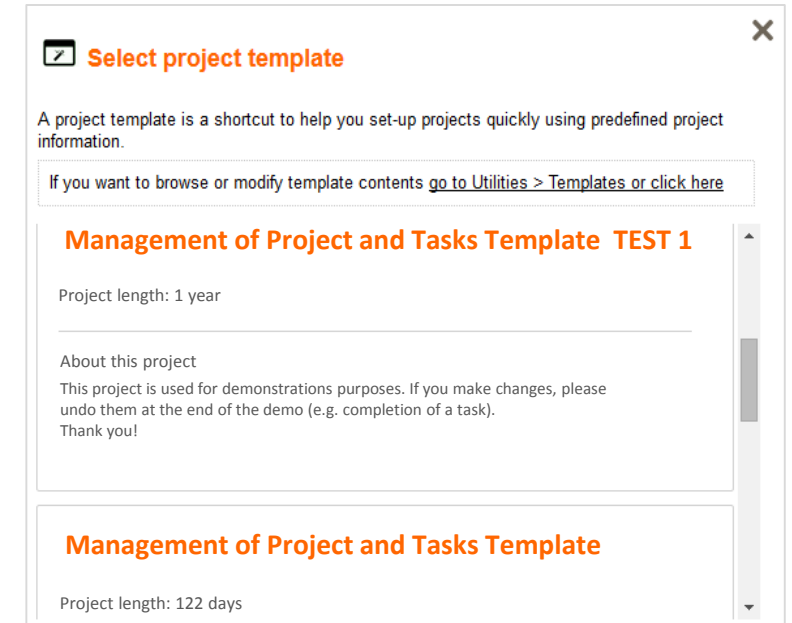
Due date
2017.10.19

Project Owner
Clara Guénand ▼

Description
Management of the Marketing Department of Planzone.
10 Members
Project length: 1 year

[Cancel](#) [Create project](#)

Project created from a template



Select project template

A project template is a shortcut to help you set-up projects quickly using predefined project information.

If you want to browse or modify template contents [go to Utilities > Templates or click here](#)

Management of Project and Tasks Template TEST 1

Project length: 1 year

About this project
This project is used for demonstrations purposes. If you make changes, please undo them at the end of the demo (e.g. completion of a task).
Thank you!

Management of Project and Tasks Template

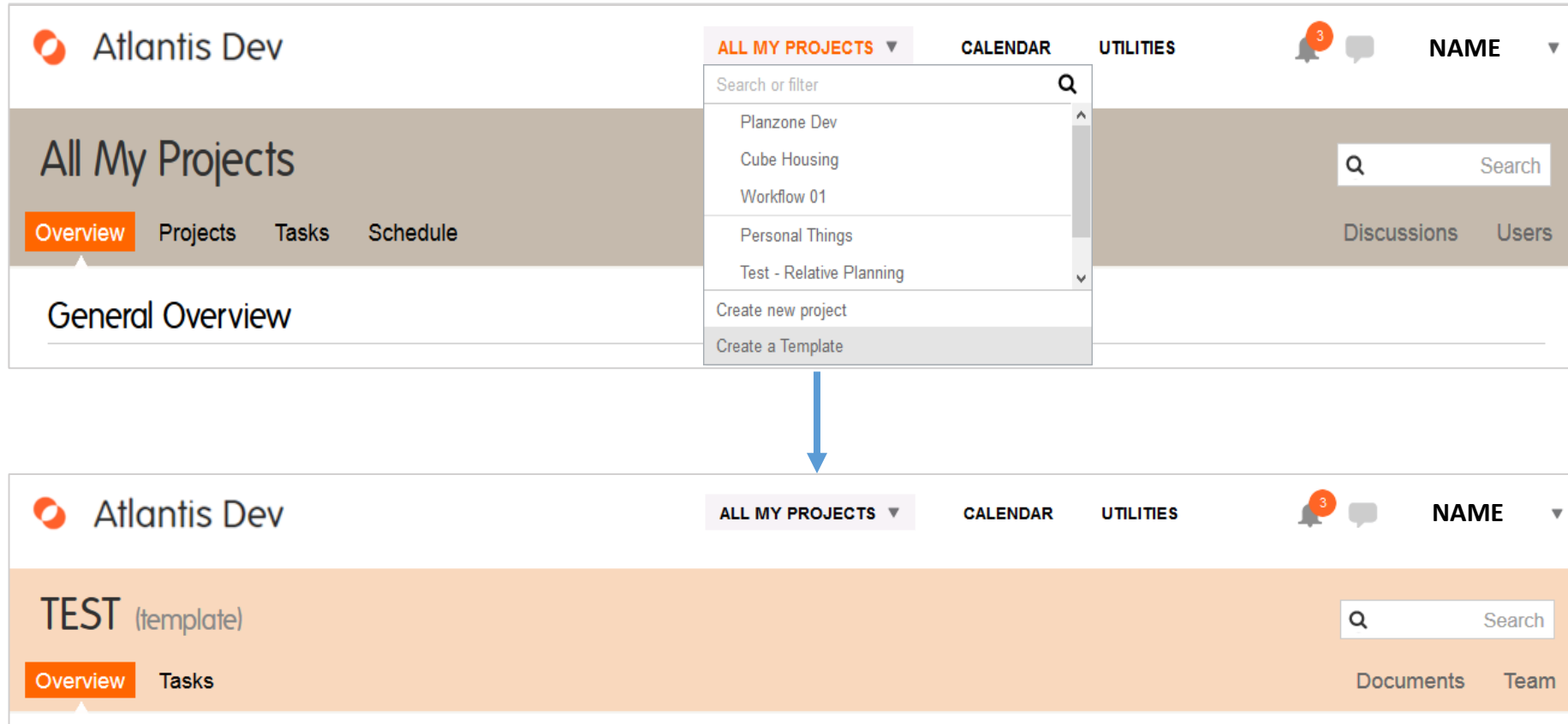
Project length: 122 days

⇒ For a project with planning, you will define its start and end date, thus allowing you **to model its planning in a Gantt chart**.

⇒ When you create a project from a template, you can use an existing project structure, thus saving time when creating a new project.

Project Templates

Creation of a Project Template



Creation of a Standard Template.

Reuse it for the creation of all similar projects.

Share your templates with other Planzone users.

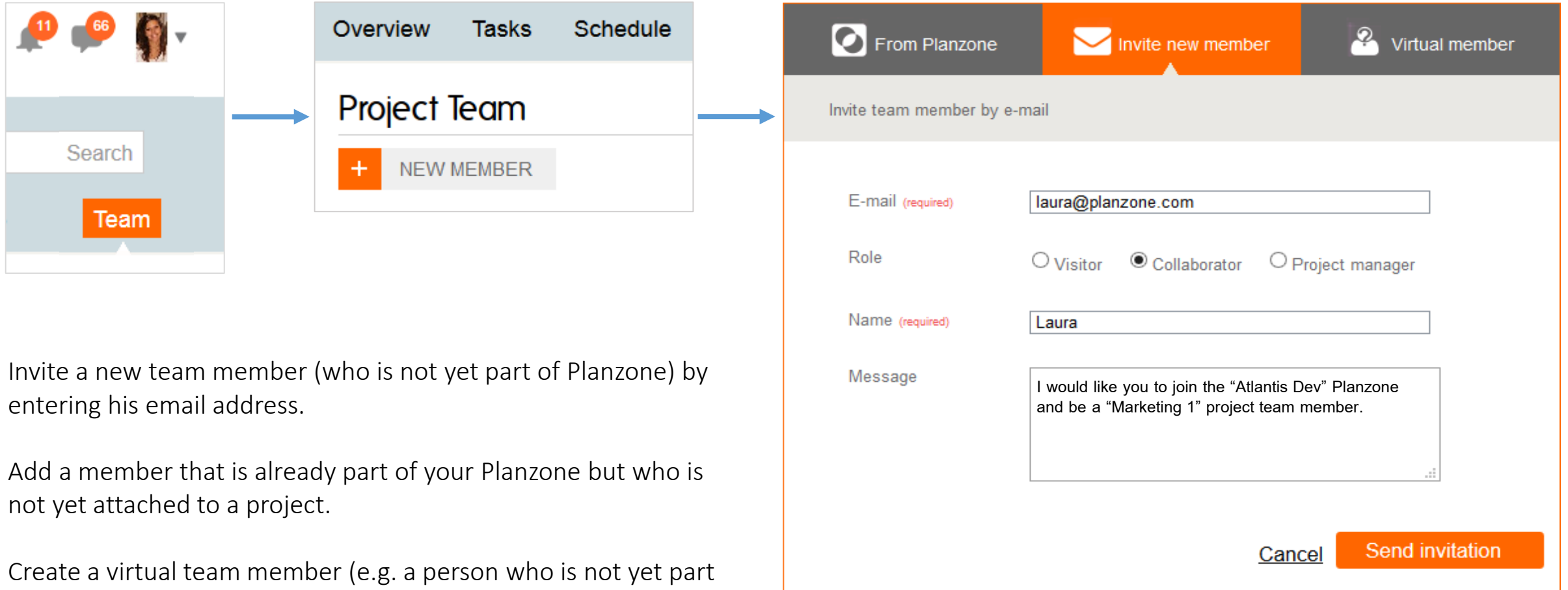


The project template differs in their background colour.

A close-up photograph of hands typing on a laptop keyboard. The keyboard is silver with black keys. A semi-transparent rectangular box is overlaid on the center of the image, containing the text "Project Team" in orange. The background is blurred, showing more of the laptop and the person's hands.

Project Team

Inviting Team Members



The process of inviting a team member is shown in three steps:

- Click on the **Team** button in the sidebar.
- Click on the **+ NEW MEMBER** button in the **Project Team** section.
- Fill out the **Invite new member** form.

The **Invite new member** form includes the following fields and options:

- From Planzone** (selected)
- Invite new member** (selected)
- Virtual member** (unselected)
- Invite team member by e-mail**
- E-mail (required)**:
- Role**: ☐ Visitor ☒ Collaborator ☐ Project manager
- Name (required)**:
- Message**:
- Cancel** (link)
- Send invitation** (button)

Invite a new team member (who is not yet part of Planzone) by entering his email address.

Add a member that is already part of your Planzone but who is not yet attached to a project.

Create a virtual team member (e.g. a person who is not yet part of your enterprise).

Zoom on user rights

In a Project

[Click here to see the details of user rights by type of user.](#)



Project Manager

He has full rights over the project and can create, change and delete whatever he wants.



Team Member

He has full visibility on the project, he cannot change or delete the project structure.



Visitor

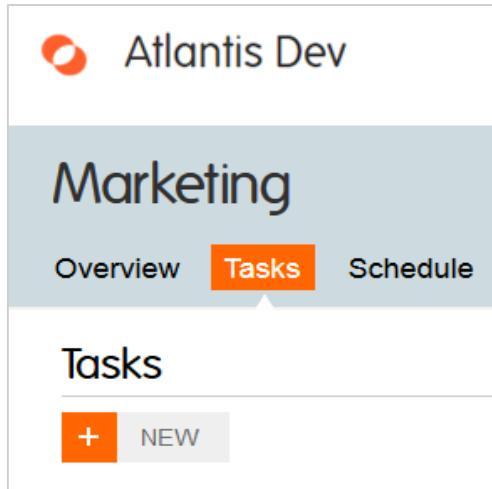
He has limited visibility on the project, restricted to certain information, he cannot create, change or delete anything.

⇒ There is no hierarchical relationship among the users of a Planzone and of a project.
A Project Team Member in Planzone can perfectly be a Project Manager of a project.

A close-up photograph of a person's hands typing on a laptop keyboard. The focus is on the right hand, with fingers pressing down on keys. The background is blurred, showing the rest of the keyboard and the left hand. A semi-transparent white rectangular box is overlaid in the center of the image, containing the text "Project Phasing" in orange.

Project Phasing

Creation of Lists and Sub-lists



The Lists will allow you to sequence your Project into phases and to organize your Tasks. The depth of the lists is limited.

In your Project, go to the menu « Tasks » or « Planning » based upon the type of project you have created.

In both cases click on the button « New ».

A screenshot of the 'List' creation form in the Atlantis Dev application. The form has a top navigation bar with four tabs: 'List' (selected, orange background), 'Task' (checkmark icon), 'Event' (calendar icon), and 'Milestone' (flag icon). Below the tabs, the form fields are as follows: 'Name' with the value 'SEO'; 'Dates' section with 'Start date' set to '2016.10.20' and 'Due date' set to '2017.10.19', both with calendar icons; 'Part of' section with a dropdown menu showing 'Marketing' and a sub-menu also showing 'Marketing'; a 'More...' link; and at the bottom right, 'Cancel' and 'Create' buttons.

Click on the « List » tab, determine its start and end date and store them in your Project.

This action is to be repeated for all lists and sub-lists that you want to create.

Create Lists and Sub-lists

Focus on Planning

Move your Lists and Sub-lists with a simple drag and drop.

Create new lists in your Planning by using the menu which is located next to each label.

Reduce or extend the depth of your lists for improved visibility.

And a lot of more options to be discovered !!

The screenshot displays a software interface for planning. At the top, there are buttons for 'Collapse' (minus icon) and 'Expand' (plus icon), both highlighted with a red box. Below these is a header bar with 'Name' on the left and a calendar grid on the right with columns for 'Mai', 'Juin', and 'Juil.'. The main content area is titled 'Marketing' in orange. It contains a list of items, each with a collapse/expand icon and a label: '18146: Marketing', '18147: Product Management', '18151: Communications', '18152: Newsletter', '12843: Infographies', '18153: Blog', '13601: SEA', '18154: Adwords', '13603: Retargeting', and '18156: SMO'. A context menu is open next to '12843: Infographies', also highlighted with a red box. The menu options are: 'Create inside' (with a plus icon), 'Create after' (with a plus icon), 'Rollup dates', 'Reorder by date' (with a plus icon), and 'Activate sequence' (with a plus icon).

Create Tasks – level 1

Next steps

The screenshot displays a task management interface with a 'Marketing' header. Below the header, there is a list of tasks. A red box highlights a task row, and a blue arrow points to a '+' icon on the right side of the interface.

Marketing		96%	Date butoir
- 18146: Marketing		96%	16 avr. 2020
+ 18147: Product Management		75%	14 mars 2017
- 18151: Communications		98%	6 déc. 2016
- 18152: Newsletter		97%	6 déc. 2016
<input type="checkbox"/> 11775: Looking for new marketing automation software	Me	6 oct. 2015	
<input type="checkbox"/> 18097: Send email White Paper GP + SBN - LB1 tag filter	Me	16 févr.	
<input type="checkbox"/> 17491: Prepare promo campaign for the last 15 days of June	Me	7 juin	
<input type="checkbox"/> 17492: Prepare promo campaign for the last 15 days of September	Me	9 août	
<input type="checkbox"/> 17493: Prepare promo campaign for the last 15 days of December	Me	6 déc. 2016	

- ⇒ Move your mouse to the right side of an already created task and click on the « + » icon.
This way, you can quickly create a new task which, by default, will have the same criteria as the selected one.
Move your tasks with a simple « drag and drop ».

Create Tasks – level 2

Atlantis Dev

Marketing

Overview **Tasks** Schedule

Tasks

+ NEW

List Task Event Milestone

Name Create the page to download the white paper

Assignee Me Stephanie Clear all

<Add a user> Allocate hours

Dates Start date Due date 2016.11.02

Part of Web site & SEO

Less... ☐ Very important

Add a description

No tags + Add tag

Cancel Create

Specify a label, the assigned team members and a target date, but also :

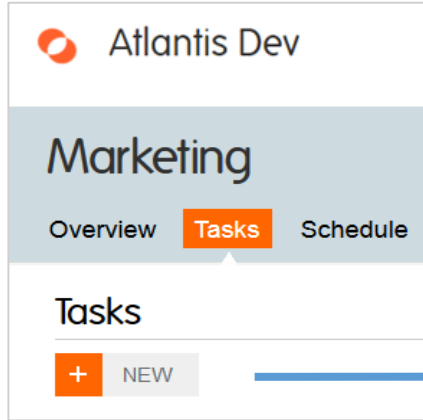
Allocate time/hours

Set a start date

Store the task in a (sub)-list

Add a tag and description

Create Milestones



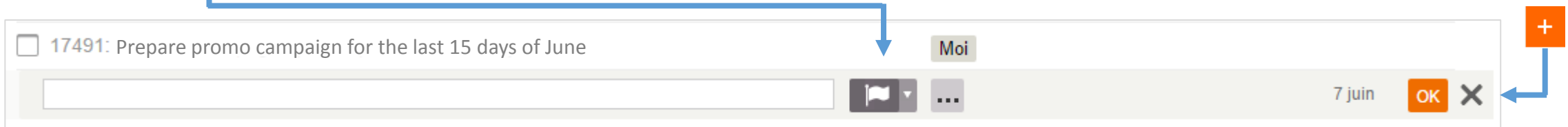
Specify at least a label and a forecast date.

The previous steps as explained above for Tasks apply also for the Milestones.

Select just the right icon in the dropdown menu.

The 'Milestone' form is shown with the following fields and options:

- Header: List, Task, Event, **Milestone**
- Name:
- Due date:
- Part of:
- Less...
- Tags: news promo + Add tag
- Buttons: Cancel **Create**



A close-up photograph of a person's hands typing on a laptop keyboard. The hands are positioned over the keyboard, with fingers pressing down on the keys. The keyboard is black with white lettering. The background is blurred, showing a wooden surface. A semi-transparent white rectangular box is overlaid on the center of the image, containing the text "Planning & Resources" in orange.

Planning & Resources

Planning / Gantt Chart

Adjust the depth of the lists

Tasks completed

Tasks delayed or overdue

Filters and Sorting

Chose the type of Display

Drag the mouse to change the date

Constraints : Y cannot start as long as X is not finished

Today's date

Name	Estimated	Allocated	% Complete
Workflow 01	72.00	1628.00	8%
4: Phase 0 - Initiation	72.00	84.00	100%
<input checked="" type="checkbox"/> 10: Start Up Project	24.00	20.00	100%
<input checked="" type="checkbox"/> 12: Initiate Project	48.00	48.00	100%
<input checked="" type="checkbox"/> 11: Manage Stage Boundary	0.00	16.00	100%
7: Phase 1 - Development	0.00	504.00	8%
<input type="checkbox"/> 14: Controlling Stage	0.00	76.00	0%
<input type="checkbox"/> 19: Manage Development	0.00	380.00	11%
<input type="checkbox"/> 13: Manage Stage Boundary	0.00	48.00	0%
8: Phase 2 - Implementation	0.00	816.00	0%
9: Phase 3 - Completion	0.00	224.00	0%

Workload

OverviewTasksScheduleDocumentsDiscussionsTeam

WorkloadGanttWorkloadTimesheet

Sort byLast nameFilter byProject ManagerTagsShowClear all

CompactTimesheetJump toToday

Name	Estimated	Allocated	Spent	Remaining
Project Manager	32.00	518.00	40.00	478.00
Phase 0 - Initiation	32.00	48.00	40.00	8.00
Start Up Project	8.00	8.00	8.00	0.00
Initiate Project	24.00	24.00	24.00	0.00
Manage Stage Boundary	0.00	16.00	8.00	8.00
Phase 1 - Development	0.00	118.00	0.00	118.00
Controlling Stage	0.00	76.00	0.00	76.00
Manage Stage Boundary	0.00	16.00	0.00	16.00
Manage Development	0.00	26.00	0.00	26.00
Phase 2 - Implementation	0.00	272.00	0.00	272.00
Phase 3 - Completion	0.00	80.00	0.00	80.00

September 2016October 2016

Phase 0 - Initiation

Start Up Project

Initiate Project

Manage Stage Boundary

Phase 1 - Development

Controlling Stage

Manage Development

Modify workload by simply « drag and drop »

Filters and Sorting

Overall user workload

Still available

Close to overload

On overload

The workload is calculated based upon the number of hours worked per day versus the number of tasks (with allocated time/hours) during a specific period.

Type of display

Task

List or Sub-list

Timesheet

OverviewTasksScheduleDocumentsDiscussionsTeam

TimesheetGanttWorkloadTimesheet

Sort byLast nameFilter byProject ManagerTagsShowClear all

Jump toTodaySep 2016 - Oct 2016Time shown in hoursBasicFull

	Mon 26	Tue 27	Wed 28	Thu 29	Fri 30	Sat 1	Sun 2	Spent	Remaining	% complete
<div><div>-</div><div>2</div><div>Project Manager</div></div>	8	9	0	8	0	0	0	40.00	478.00	0
<div><div>+</div><div>Phase 0 - Initiation</div></div>	8	9	0	8	0	0	0	40.00	8.00	100
<div><div>-</div><div>Phase 1 - Development</div></div>	0	0	0	0	0	0	0	0.00	118.00	6
<div><div><input type="checkbox"/></div><div>Controlling Stage</div></div>								0.00	76.00	0
<div><div><input type="checkbox"/></div><div>Manage Stage Boundary</div></div>								0.00	16.00	0
<div><div><input type="checkbox"/></div><div>Manage Development</div></div>								0.00	26.00	0
<div><div>+</div><div>Phase 2 - Implementation</div></div>	0	0	0	0	0	0	0	0.00	272.00	0
<div><div>+</div><div>Phase 3 - Completion</div></div>	0	0	0	0	0	0	0	0.00	80.00	0

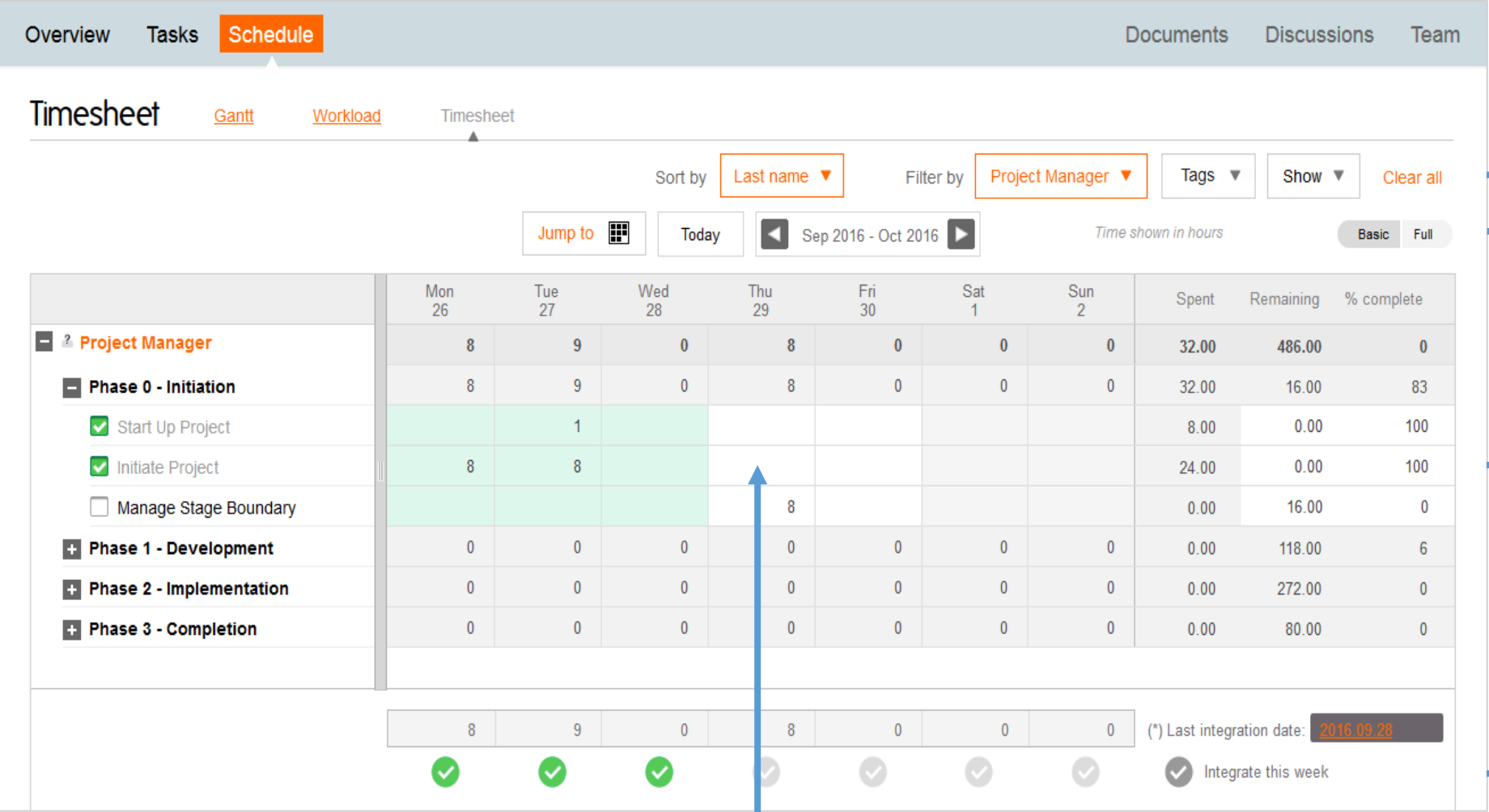
Filters and Sorting

Type of display

Summary of time spent, remaining time and % of achievement of objectives

Click on a cell containing a task to add additional hours

Timesheet



Filters and Sorting

Type of display

Summary of time spent, remaining time and % of achievement of objectives

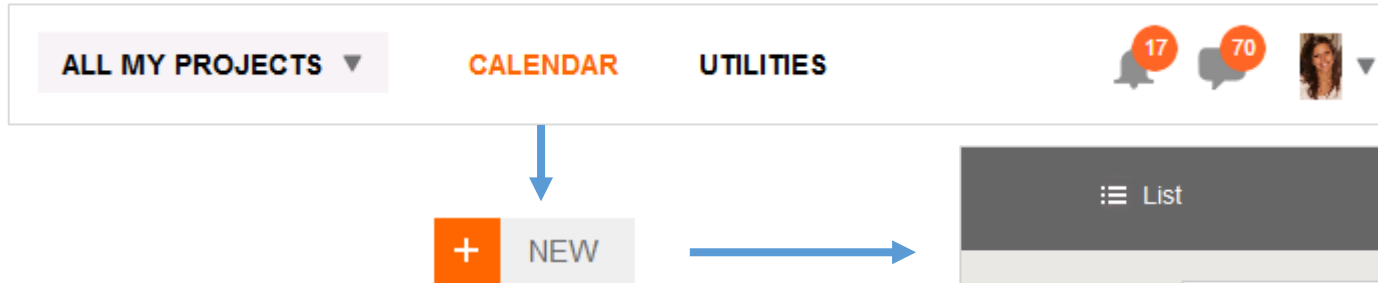
Daily validation of timesheets and weekly integration

Click on a cell containing a task to add additional hours

A close-up photograph of a person's hands typing on a laptop keyboard. The keyboard is silver with black keys. A semi-transparent white rectangular box is overlaid on the center of the image, containing the text "Calendar Management" in a bold, orange, sans-serif font. The background is softly blurred, showing more of the keyboard and the person's hands.

Calendar Management

Creation of Events



The creation of an event in Planzone is akin to all known calendar apps (Google, Outlook) ...

Create your event, set its frequency, invite participants and store them in a project.

The screenshot shows the 'Event' creation form in Planzone. The top navigation bar has four tabs: 'List', 'Task', 'Event' (highlighted in orange), and 'Milestone'. The form fields are as follows:

- Name:** A text input field containing 'Weekly Marketing Meeting'.
- Project:** A dropdown menu showing 'Marketing'.
- Dates:** A section with two date pickers. The first is '2016.10.27' and the second is '2016.10.27'. Between them are time pickers for '9:00 AM' and '9:30 AM'. There is an 'All Day' checkbox which is unchecked.
- Repeat:** A checkbox labeled 'Repeat' which is checked.
- Reminder:** A checkbox labeled 'Reminder' which is checked.
- Reminder Settings:** A dropdown menu showing '10' and a unit dropdown showing 'minutes'. The text 'before the event starts' is to the right.
- Frequency:** A dropdown menu showing 'weekly', followed by 'Every' and a dropdown showing '1', and then 'weeks'.
- On:** A row of checkboxes for days of the week: M, T, W, T (checked), F, S, S.
- Ends:** A section with three options: 'Automatically' (selected with a radio button), 'After' (with a dropdown showing '10' and the word 'times'), and 'on' (with a date picker showing '2016.11.21').
- Guests:** A section showing 'Patricia BOYER' and 'et 2 autres'.
- Part of:** A dropdown menu showing 'Marketing'.
- Buttons:** At the bottom right, there are two buttons: 'Cancel' (text link) and 'Create' (orange button).

Calendar Display Management

The screenshot displays the Planzone calendar interface for October 2016. At the top, there are navigation and filter options: a '+ NEW' button, a 'Jump to' calendar icon, and a 'Filter by' section with dropdowns for 'All projects', 'Everyone' (highlighted with an orange border), 'Tags', and 'Show' (highlighted with an orange border). A 'Clear all' button is also present. Below the filters, the calendar view shows a timeline from Monday 17th to Friday 21st. On the left, 'Your calendars' are listed: Workflow 01 (green), Cube Housing (blue), Marketing (red), Personal Things (yellow), Holidays (light green), Weekends (light grey), and Unavailabilities (dark grey, highlighted with a red border). Below the 'Unavailabilities' list is a button labeled 'Add unavailabilities'. The main calendar area shows various events and unavailability blocks. On the right, a sidebar menu allows toggling different views: Tasks (checked), Lists, Events (checked), Milestones, Unavailability (checked), Completed Work (checked), and an 'Apply changes' button. Blue arrows point from the 'Everyone' and 'Show' filters to the explanatory text on the right, and from the 'Add unavailabilities' button to the explanatory text at the bottom.

The Planzone calendar is multi-project. You can see all or part of the information depending on the filter of your choice and for one or several projects

Your Planzone calendar can be synchronized with Google calendar. Make sure to enable this option in « Configurator > My Settings > External Applications »

The creation and management of unavailability is done only here.

A close-up photograph of a person's hands typing on a laptop keyboard. The hands are positioned over the keyboard, with fingers pressing down on the keys. The keyboard is black with white lettering on the keys. The background is blurred, showing a wooden surface. A semi-transparent white rectangular box is overlaid on the center of the image, containing the text "Documents & Discussions" in orange.

Documents & Discussions

Creation of a Notes Page (Wiki)

The screenshot displays the Planzone interface for creating a new note. The top navigation bar includes 'Marketing', 'Overview', 'Tasks', and 'Schedule'. A modal window titled 'Create a new note in Planzone' is open, showing the 'New note name' field with the text 'They speak about us!'. The background shows the 'Documents' section with a '+ NEW' button.

They speak about us!

< Back | Save and continue | Preview

(New note)

Title (required)
They speak about us!

Note

Switch to text editor

Font name and size: Arial 13 | Font style: B I U | Paragraph: Normal | List: | Alignment: | Insert: | TOC

MEDIAS

Extrait de tous les articles web datés : <https://f10-team.planzone.com/pz/project/210/document/63552758/view>

- 22/11/13 : Comment ça marche : article ayant pour thème "Choisir un logiciel de gestion de projet"
- 10/12/13 : BestCloud : "Un logiciel SaaS de gestion de projets français séduit la Chine"
- 20/01/14 : 20 Minutes : article ayant pour thème : "Quatre sites qui vous feront gagner un temps précieux"
- 11/02/14 : AllWeb2 : "Planzone, outil de gestion de projet collaboratif"
- 28/02/14 : l'Echo : "Le gestionnaire de projet qui veut tout faire"
- 16/03/14 : Outils Collaboratifs : "Outil complet de gestion de projet en mode collaboratif"
- 24/03/14 : WebMarketing & Com' : "Maîtriser sa gestion de projet grâce à Planzone"
- 31/03/14 : Blog de Nicolas Hachet : "Planzone : l'outil pour faciliter la gestion de projets"
- 04/04/14 : l'Echo (article 2) : "Mon beau gestionnaire de projet"
- 24/04/14 : i-Entreprise : Mieux maîtriser sa gestion de projet avec Planzone
- 07/05/14 : Maddyness : Organisez votre travail en équipe avec l'outil de gestion de projets Planzone
- 13/05/14 : DantotsuPM : DantotsuPM accueille Planzone, un logiciel de travail collaboratif fort de 20 années d'expérience en gestion de projet
- 15/05/14 : 1min30 : 5 outils pour mieux gérer vos projets et votre travail quotidien
- 20/05/14 : PowerPress / Presse Citron : Planifier simplement ses projets et mieux travailler en équipe avec Planzone

Comment

Cancel Save

Available under
« Documents > New >
Create a note ».

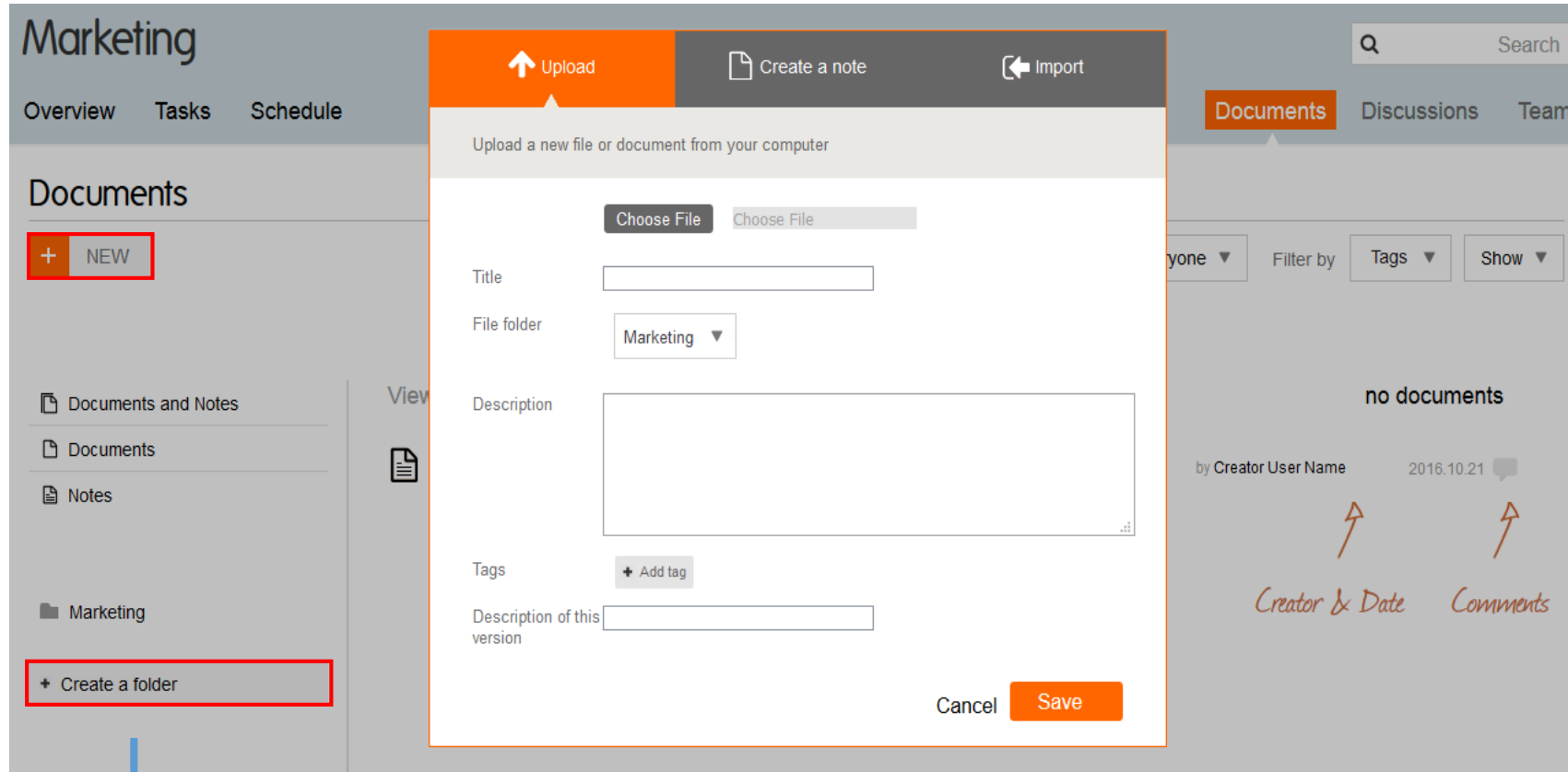
Use the visual editor or text
mode

Multi-purpose: document
best practices, create a
database of links, share
your knowledge, ...

Add comments

Versioning

Create a document



All your documents can be organized in folders and subfolders, which you can make public or visible only to specific users.

Download a document from your Computer

Import a document from your Google Drive (this has to be enabled under « My Settings »)

Create a notes page

Add a tag to make the document easier to be found

Document Management

By clicking on the document label, several options are made available

Download the document

Create a new version

Retrieve and older version

Change the document's name and folder

Add a comment

Add a tag

Project Plan

[< Back to Documents](#)

In folder [Marketing](#) Modified now by [Flavien Bertin](#) [+ Add tag](#)

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[160822 Prince 2 Templates - from Prince2.wiki - Project Plan.doc](#)
Size: 82 kB
Source Prince2.wiki

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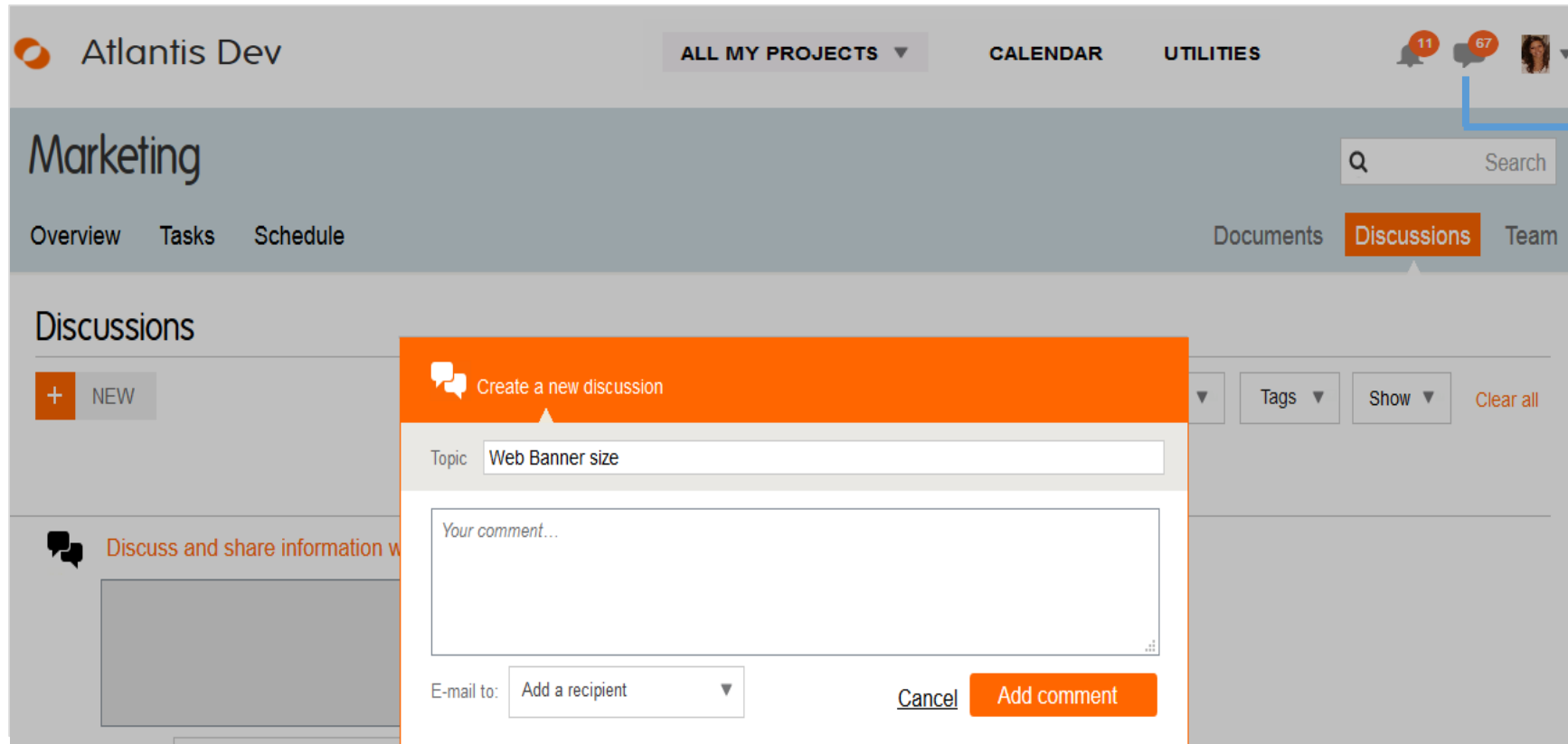
Comments

E-mail to: [Add a recipient](#) ▼

[Cancel](#) [Add comment](#)

There are no comments on this file.

Start a discussion



Notification of a new comment in the discussions you participate in.

⇒ The discussions in Planzone reduce the number of emails sent regarding an action to be carried out in a project. Each new discussion triggers a notification in this interface which may also be sent by email for more skeptical users.

Linking to other project elements

To tasks, lists and milestones

Click on the label of a task or a list, then on « Attach a document » or « Comments ».

You can easily identify these two additions by their icons in this interface.

The screenshot displays a project management interface with a top navigation bar containing 'Overview', 'Tasks' (highlighted), 'Schedule', 'Documents', 'Discussions', and 'Team'. Below the navigation bar, the 'Tasks' section is visible, featuring a '+ NEW' button, 'Sort by' (set to 'Due Date'), 'Filter by' (set to 'Everyone'), 'Tags', 'Show', and 'Clear all' buttons. A task titled 'Marketing 1 (0)' is shown, with a sub-task '57: Looking for new marketing automation software'. This sub-task has a progress bar showing 'Me 0%' and 'Rene 0%', and a 'Mark all as completed' button. A 'Discussion on task "57: Looking for new marketing automation ..."' window is open, showing a comment input field and a 'No comments' status. A blue arrow points from the 'Comments' icon in the task's action bar to the discussion window. Another blue arrow points from the '+ Add attachment' button to an 'Add an attachment' dialog box. The dialog box shows a list of files to attach, including '2014 bookings', '2014 12 KPI+St', '2015 Daily Sale', '2015 KPI Sales', 'Analyse source', 'Analyse Trials 2', 'Chiffres clés et g', 'Customers Man', 'Goals Q3 Marke', 'KPI+Sales+Fin', 'KPI+Sales+Fin', 'New customers', 'New Customers', 'Rapprochemen', 'Synthese client', 'Tableau Ratio V', 'Trials 2015', and 'TRIALS 23 déc'. The dialog box also includes an 'Upload file' button, 'Cancel', and 'Attach' buttons.

Linking to other project elements

To events

As before, click on the label of the event, then on « Attach a document » or « Comments »

The screenshot displays a project management application interface. At the top, there are tabs for 'ALL MY PROJECTS', 'CALENDAR', and 'UTILITIES'. Below these, there are filters for 'Jump to', 'Filter by' (All projects), 'Everyone', 'Tags', 'Show', and 'Clear all'. The main calendar view shows the month of October 2016, with a specific event '1: Defining themes for customer webinar' selected. This event is shown in a detailed view at the bottom, which includes a title bar, a description, a time slot (Today 1:30 PM-2:30 PM), and a list of actions: 'Add attachment', 'Comments', 'Duplicate', 'Copy Link', 'Download ICS', 'Move', 'History', 'Delete', and 'Edit'. The 'Add attachment' button is highlighted with a red box, and the 'Comments' button is also highlighted with a red box. A blue arrow points from the 'Add attachment' button in the event detail view to the 'Add attachment' button in the 'Add an attachment' modal window. Another blue arrow points from the 'Comments' button in the event detail view to the 'Add comment' button in the 'Discussion on event' modal window.

ALL MY PROJECTS **CALENDAR** **UTILITIES**

Jump to Filter by All projects Everyone Tags Show Clear all

October 2016 Today

Mon 17 Tue 18 Wed 19 Thu 20 Fri 21 Sat 22 Sun 23

09:00 10:00 11:00 12:00 13:00 14:00 15:00 16:00 17:00 18:00 19:00 20:00

1: Defining themes for customer webinar

Today 1:30 PM-2:30 PM

Created by: [Flavien Bertin](#) Now

Part of: [Marketing](#)

No tags Add tag

Add attachment

Comments Duplicate Copy Link Download ICS Move History Delete Edit

Add an attachment

Sort by Name Date

Documents and Notes

Documents

Notes

Marketing

2014 bookings 2014.12 KPI+St 2015 Daily Sale 2015 KPI Sales Analyse source Analyse Trials 2

Chiffres clés et 1 Customers Man Goals Q3 Marke KPI+Sales+Fin KPI+Sales+Fin New customers

New Customers Rapprochemen Synthèse client Tableau Ratio V Trials 2015 TRIALS 23 déc

Upload file

Cancel Attach

Discussion on event "1: Defining themes for customer webinar"

1: Defining themes for customer webinar No comments

E-mail to: Add a recipient

Cancel Add comment



Dashboard

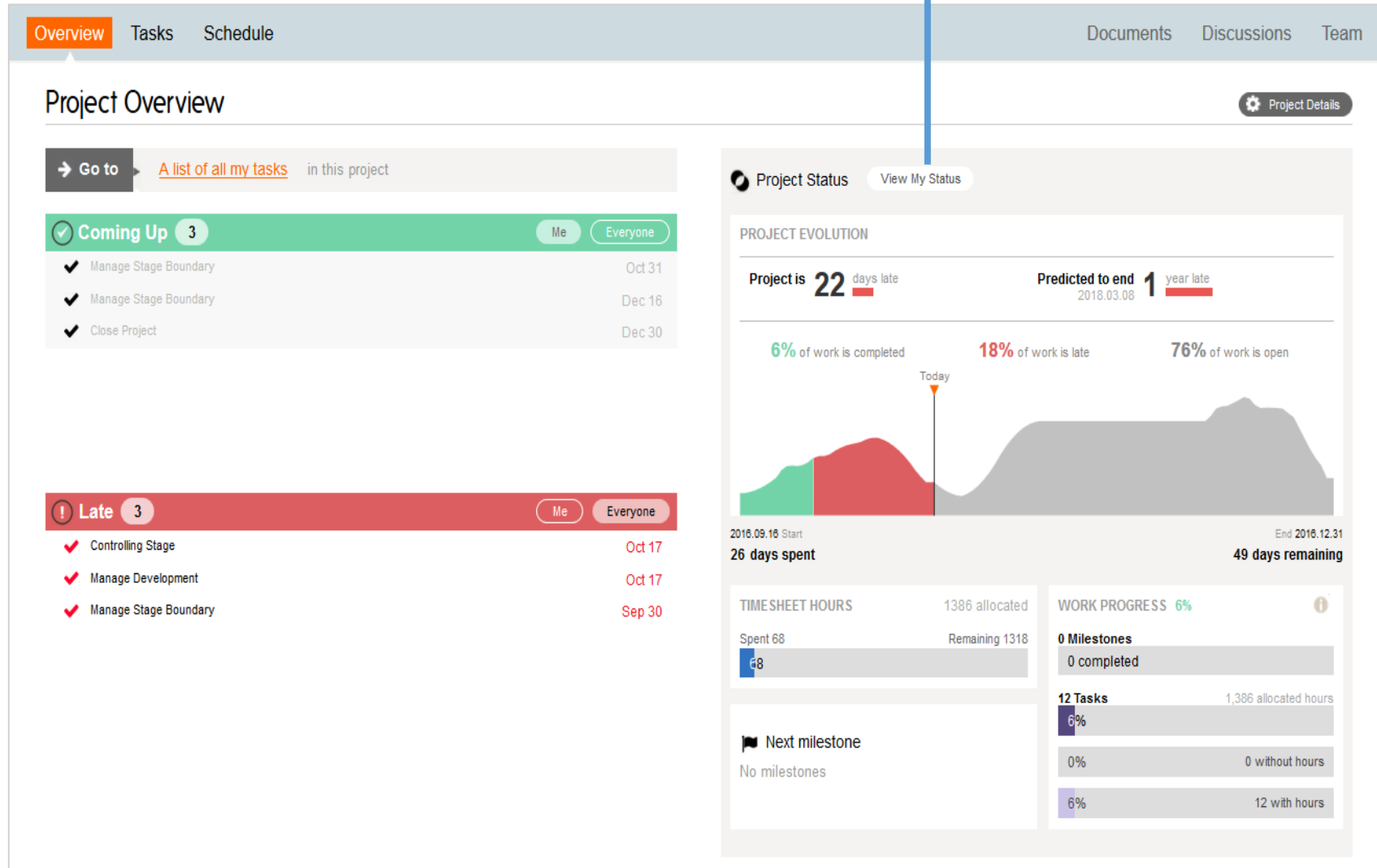
Project Summary

Click here to see your status in this project.
Number of tasks completed or late, weekly
calendar, upcoming tasks

Shortcut →

Your upcoming
tasks or those
of all users →

Your late tasks
or those of all
users →



Overview of « All My Projects »

Shortcut →

→ Your upcoming tasks for all your projects

→ Your late tasks for all your projects

OverviewProjectsTasksScheduleDiscussionsUsers

General Overview

→ Go to

A list of all my tasks

in all projects

✓ Coming Up13

📅 Defining themes for customer webinar
in project Marketing

Today 1:30 PM – 2:30 PM

^

✓ Manage Stage Boundary
in project SW Implementation 01

Oct 31

✓ Manage Stage Boundary
in project SW Implementation 01

Dec 16

✓ Acceptation et Transfert
in project Cube Housing

Dec 23

✓ Close Project
in project SW Implementation 01

Dec 30

▼

! Late1

✓ Definition Projet
in project Cube Housing

Oct 14

My Status

MY TASKS

✓

3Completed

7Open

1Late

MY NEW TASKS

Due

Today

Looking for new marketing automation software

(Nov 18)

^

Oct 19

Definition Projet

Oct 14

Oct 19

Acceptation et Transfert

Dec 23

Sep 19

Task 2

(Feb 21, 2017)

Sep 19

Task 1

(Feb 13, 2017)

▼

MY WEEK

Yesterday

Today

Sat 10.22

Sun 10.23

Mon 10.24

Tue 10.25

Wed 10.26

→ Same information as under « Show my Status » in the project overview, but this time for all your projects

→

List of « All My Projects »

Simplified View

Overview

Projects

Tasks

Schedule

Discussions

Users

Projects

+

NEW

Sort by

Last visited

Filter by

All projects

Everyone

Show

Clear all

Showing all 5 projects

SW Implementation 01

Owned by [Flavien Bertin](#)

1 document
12 tasks
2 members

Project is 22 days late

Predicted to end 1 year late
2018.03.08

Last modified on 2016.10.20

Cube Housing

Owned by [Chris Immel](#) :

1 document
6 tasks
2 members

Project is 7 days late

Predicted to end 109 days late
2017.04.11

Last modified on 2016.10.19

Marketing

Owned by [Peter Michael Benninga](#)

1 document
1 task
2 members

Project is 2 days late

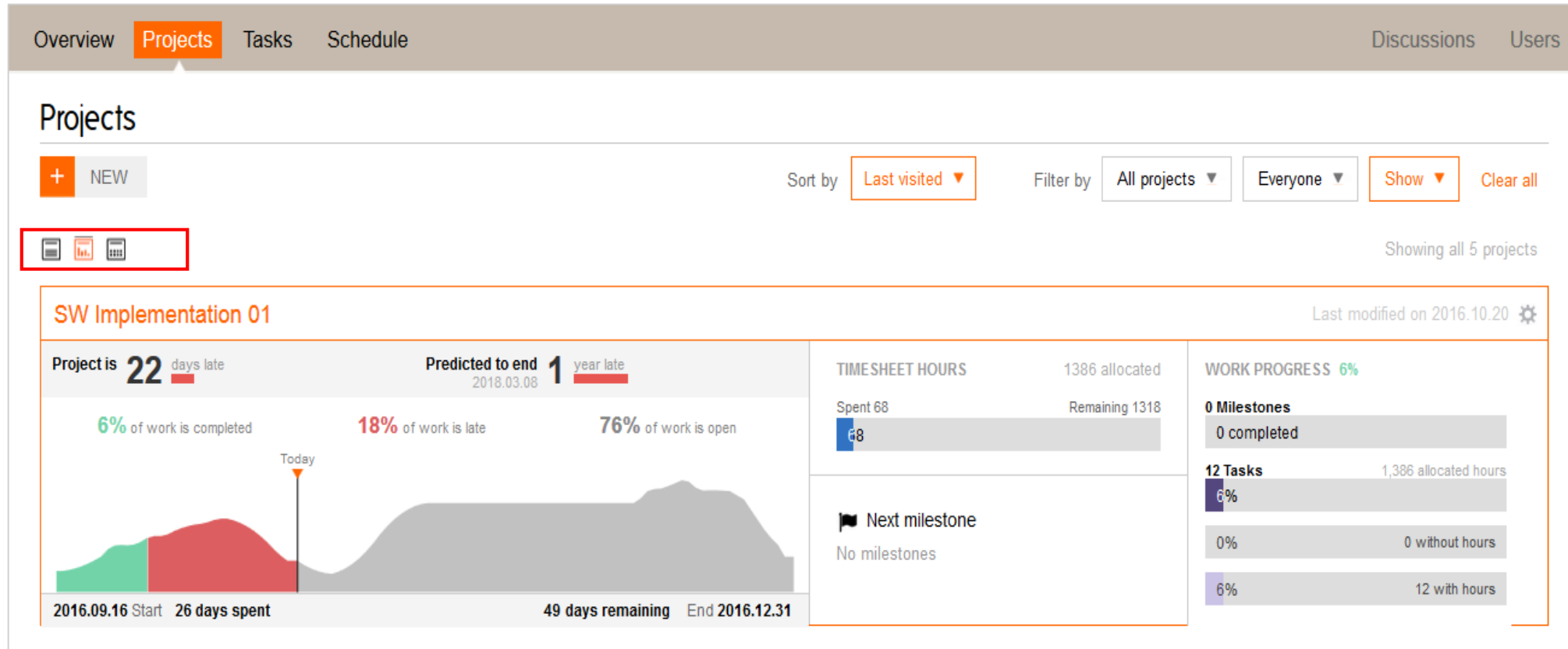
Last modified on 2016.10.21

→ Filters and Sorting

→ Project status and estimate

List of « All My Projects »

Statistical View



→ Filters and Sorting

→ Progress of tasks and milestones

→ Project status, progress and forecast



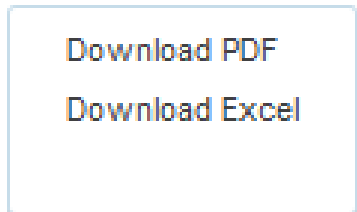
Tips & Tricks

Project Reports

The project reports are Excel and PDF files which can be generated from any available screen view in Planzone : lists, project planning, allocation of resources...

The available filters and sorting options in each screen view allows you to export a very specific set of data, thus responding to precise analysis needs.

Objectives : to analyse the performance indicators of projects according to your own criteria (individual or collective workload, project delays...)



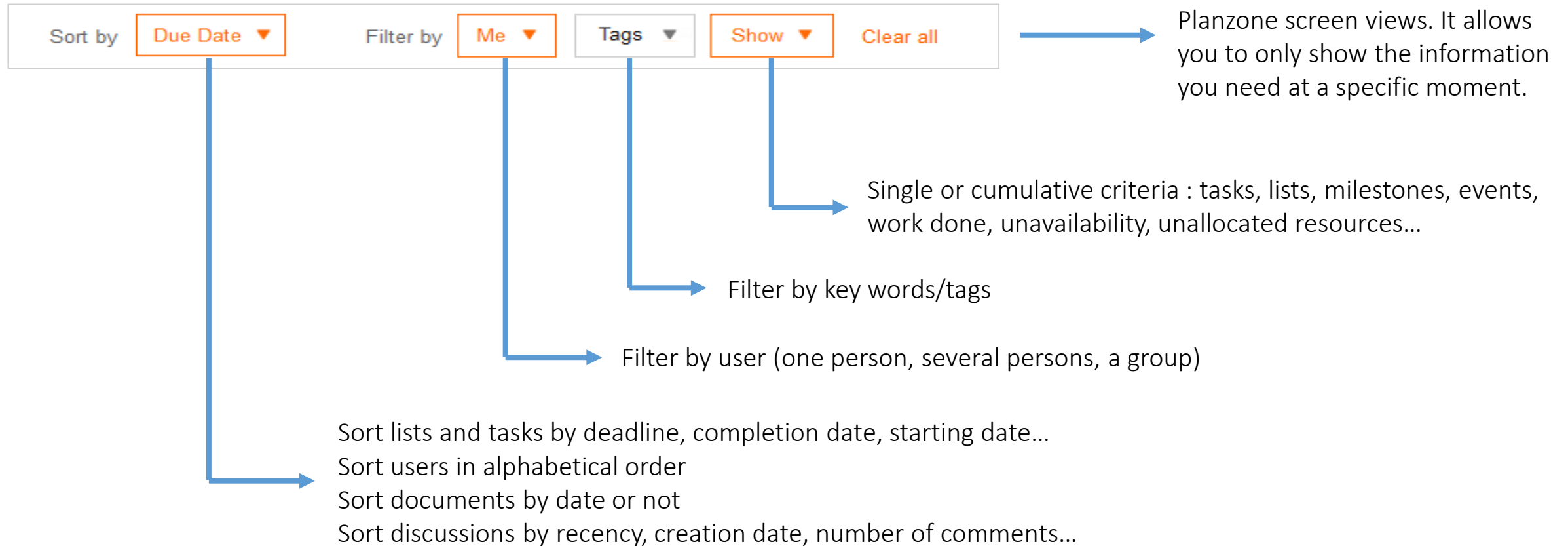
See bottom left on your Planzone screen

Download reports in PDF or Excel format

The screenshot shows an Excel spreadsheet titled "Book1 - Excel" with a green ribbon. The data is organized into columns: Type, Participants, %, and Date de fin. The tasks are listed in rows, with some rows highlighted in orange. The tasks include "Atlantis Design", "14018: UI Revamp Design", "14019: Design Considerations", "14020: Mail templates", "5245: Redesign and upgrade content of the monthly email activity report", "7610: Modify attachment popup", "4190: PDF (export) mail definition", "4191: PDF (export) cleanup to B&W", "7277: Acces Denied message when PM goes to Team in All my Project (without access permission)", "7611: Modify add attachment popup", "3484: One page project summary", "7283: Clean up the project creation dialog", and "13080: The All My Projects selector is unusable on a touch screen." The status bar at the bottom indicates "tasklist" and "100 %".

Type	Participants	%	Date de fin
Atlantis Design		81	30/11/2015
14018: UI Revamp Design		81	30/11/2015
14019: Design Considerations		74	30/11/2015
14020: Mail templates		57	28/05/2015
5245: Redesign and upgrade content of the monthly email activity report	Me and 2 others	0	28/05/2015
7610: Modify attachment popup		0	15/04/2015
4190: PDF (export) mail definition	Me	5	20/03/2015
4191: PDF (export) cleanup to B&W	Me	0	24/03/2015
7277: Acces Denied message when PM goes to Team in All my Project (without access permission)	Me and 2 others	33	25/03/2015
7611: Modify add attachment popup	Me and 2 others	0	21/04/2015
3484: One page project summary	Me and 2 others	16	21/04/2015
7283: Clean up the project creation dialog	Me and 2 others	0	30/04/2015
13080: The All My Projects selector is unusable on a touch screen.	Me and 2 others	0	31/07/2015

Sorting, Filter, Show



- ⇒ The milestones are only visible by applying the filter « All users », they are never linked to a particular user
- ⇒ Select/check « Work completed » in the filter « Show » in order to see the tasks, events and milestones which already completed
- ⇒ Click on « Clear all filters » to reset all filters with their default values

Shortcuts



This button is available practically all screen views of Planzone. No matter where you are, you can create a task, a list, an event or a milestone with just one click

Drag-and-Drop

Only possible when sorting « by default » In the « Tasks » or « Planning » views, select in the filter « Show » the items you want to see in order move them (selecting « Lists » is mandatory)

CTR + SHIFT + left click

Create a Planning constraint

SHIFT + left click

In a discussion, position your mouse over the « + » button on the left side of the labels to unfold all comments at once



Located at the top right of your Planzone, this icon indicates all your new notifications (updates of events, invitation of a member...)



All new discussions which relate to you and which are still unread



Located at the bottom left of your Planzone, this button allows you to access with just one click the list of all your tasks, in a given project or for all your projects



Finally....

Services and Support



« FEEDBACK » BUTTON

Use the « Feedback » button at the bottom right of your Planzone to quickly get in contact with our support team

Feedback



« HELPDESK » BUTTON

FAQs, tutorials and other tips and tricks are available in our help center. Also accessible at the bottom right of your Planzone.

 Helpdesk >



« TRAINING » BUTTON

Get trained by our experts to optimize your time and return on investment. Performance guaranteed !

More infos >



Thank you
for your attention !