

Get productive with Planio in 10 Minutes

Planio is a powerful set of collaboration and project management tools which is flexible enough to adapt to almost every situation in the workplace.

Especially if your company hasn't used a tool like Planio before, we recommended to start small and add more features as you go.

{{>toc}}

Keep it simple stupid

Nobody likes complicated -- and neither do we. If you're just starting, why not take a radical approach: **Let's strip your Planio down to the bare minimum!**










Don't worry - we aren't burning any bridges here. All bells and whistles will still be there when you need them later on.

Start with only one project

For starters, we recommend you only use one single project. Not more. Sure, you'll have a lot of stuff to do organise with Planio, and you can create as much content as you like. But have only one project in the beginning. Add more later if you need them.

Let's create a super simple project, shall we?

- Navigate to **Administration**, then **Projects**.
- Have projects you created but don't use anymore? **Archive** all of them. Don't worry, you can always unarchive them later.

ATED			
24/2016	 Archive	 Copy	 Delete
15/2017	 Archive	 Copy	 Delete
02/2017	 Archive	 Copy	 Delete

Archive unused projects

- On the upper right, find the **New project** link in the contextual area and click it.
- Select a **Name** for your project. How about the name of your company or the name of your team? Let's not settle for *My project* or *Test project*. We're in it for the real deal, this time - actually getting stuff done.
- Don't bother with **Identifier**, **Homepage**, **Subproject of**, etc. You can skip those and have a look at the **Apps** section.
- Activate the following apps for a clean and simple project: **Issue tracking**, **Documents**, **Forums**, **Blog**, and **Wiki**.
- Be sure that the *Task* tracker is selected and click **Create**.

New project

Name * ACME Widgets

Description **B I U S C** H1 H2 H3 [List Icons] [Link] [Code] [Image] [Info]

This is the main project for ACME Widgets. We'll start with only this one project and go from there, creating more only if we need them.

Identifier * acme-widgets
Length between 7 and 100 characters. Only lower case letters (a-z), numbers, dashes and underscores are allowed, must start with a lower case letter.
Once saved, the identifier cannot be changed.

Homepage [Empty Field]

Public
Public projects and their contents are available to all logged-in users.

Subproject of [Dropdown]

Inherit members

APPS

<input checked="" type="checkbox"/> Issue tracking	<input type="checkbox"/> Time tracking	<input checked="" type="checkbox"/> Blog
<input checked="" type="checkbox"/> Documents	<input type="checkbox"/> Files	<input checked="" type="checkbox"/> Wiki
<input type="checkbox"/> Repository	<input checked="" type="checkbox"/> Forums	<input type="checkbox"/> Calendar
<input type="checkbox"/> Gantt	<input checked="" type="checkbox"/> Agile	<input checked="" type="checkbox"/> Team Chat
<input checked="" type="checkbox"/> Help Desk	<input type="checkbox"/> Pldoco	

TRACKERS

<input checked="" type="checkbox"/> Task	<input type="checkbox"/> Support
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Create Create and continue

Use only one project for everything in the beginning

If you've already invited other colleagues to Planio, be sure to add them to your new project using the **Members** tab. When selecting a role, choose *Manager*. If you haven't invited anyone yet, don't worry, we'll do that later.

One Workflow to track them all

Trackers let you define a unique workflow for recurring tasks like handling an incoming invoice or approving a purchase order according to predefined steps in a business process.

That's not what you were after when we said simple, right?

- If all you want to do for now is manage, assign, and work together on tasks, head over to **Administration** -> **Trackers** and simply delete all but the *Task* tracker.
- Now, still in **Administration**, navigate to **Issue statuses** and delete all but the default *New* and *Closed* statuses. For the sake of consistency, rename *New* to *Open*.

Flatten your hierarchies

Roles are a powerful way to manage access control in Planio. They give you fine-grained control over the "who can do what" in your project.

Our hypothesis: Forget roles for now.

- Navigate to **Administration** -> **Roles and Permissions** and delete all roles but the *Manager* role.
- Be sure to edit the *Manager* role and assign all available permissions. We want everybody on the team to be able to do everything for now. You can always restrict permissions later.

Less numerous enumerations

Getting the hang of it? Let's remove some more unused stuff for now.

- Already in **Administration**, click on **Enumerations**. This where you define custom document categories, issue priorities and activities for time tracking.
- Delete all document categories and create a new one called *General*.
- Delete the *Urgent* and *Immediate* priority. *High*, *Normal*, and *Low* should be enough for now.
- Delete all activities and create a new one called *General*.

Enumerations

Activities (time tracking)

NAME	DEFAULT VALUE	ACTIVE	
General	✓	✓	: Delete

[New value](#)

Document categories

NAME	DEFAULT VALUE	ACTIVE	
General	✓	✓	: Delete

[New value](#)

Issue priorities

NAME	DEFAULT VALUE	ACTIVE	
Low		✓	: Delete
Normal	✓	✓	: Delete
High		✓	: Delete

[New value](#)

Use only a few numerations

Feels good, doesn't it?

Get rid of unused fields

Don't feel like selecting **trackers**, **categories**, **milestones**, and **% done** for a simple task? Let's get rid of them and simplify our workflow.

- Still in **Administration**, click on **Workflow**.
- Leave the select boxes to *Manager* and *Task* (our only role and our only tracker) and click **Edit**.
- Make sure that all six check boxes are checked, this will let everyone switch a task's status from *Open* to *Closed* and back.

Workflow

Status transitions

Fields permissions

Select a role and a tracker to edit the workflow:

Role: Tracker:

Only display statuses that are used by this tracker

✓ CURRENT STATUS	NEW STATUSES ALLOWED	
	✓ Open	✓ Closed
✓ New issue	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
✓ Open	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
✓ Closed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

▶ ADDITIONAL TRANSITIONS ALLOWED WHEN THE USER IS THE AUTHOR
▶ ADDITIONAL TRANSITIONS ALLOWED WHEN THE USER IS THE ASSIGNEE

A basic workflow

- Click **Save**.
- Now, select the **Fields permissions** tab, and - in both columns - set all select boxes to **Read-only**, except for the rows **Subject**, **Description**, **Priority**, and **Assignee**.

Status transitions Fields permissions

Select a role and a tracker to edit the workflow:

Role: Tracker:

Only display statuses that are used by this tracker

ISSUE STATUS	Open	Closed
Standard fields		
Project *	<input type="text" value="Read-only"/>	<input type="text" value="Read-only"/>
Tracker *	<input type="text" value="Read-only"/>	<input type="text" value="Read-only"/>
Subject *	<input type="text"/>	<input type="text"/>
Description	<input type="text"/>	<input type="text"/>
Priority *	<input type="text"/>	<input type="text"/>
Private *	<input type="text" value="Read-only"/>	<input type="text" value="Read-only"/>
Assignee	<input type="text"/>	<input type="text"/>
Category	<input type="text" value="Read-only"/>	<input type="text" value="Read-only"/>
Sprint/Milestone	<input type="text" value="Read-only"/>	<input type="text" value="Read-only"/>
Parent task	<input type="text" value="Read-only"/>	<input type="text" value="Read-only"/>
Start date	<input type="text" value="Read-only"/>	<input type="text" value="Read-only"/>
Due date	<input type="text" value="Read-only"/>	<input type="text" value="Read-only"/>
Estimated time	<input type="text" value="Read-only"/>	<input type="text" value="Read-only"/>
% Done	<input type="text" value="Read-only"/>	<input type="text" value="Read-only"/>

Reduce issue form fields to a healthy minimum

- Click **Save** again.

Got it? By setting the fields to **Read-only**, we've actually removed them from the forms that are used to create and update tasks. It

will make those forms much simpler and easier to fill out.

Afraid you'll miss a field later on? No problem, just switch it back from **Read-only** to the empty selection and the field will be visible again in forms.

Get to work!

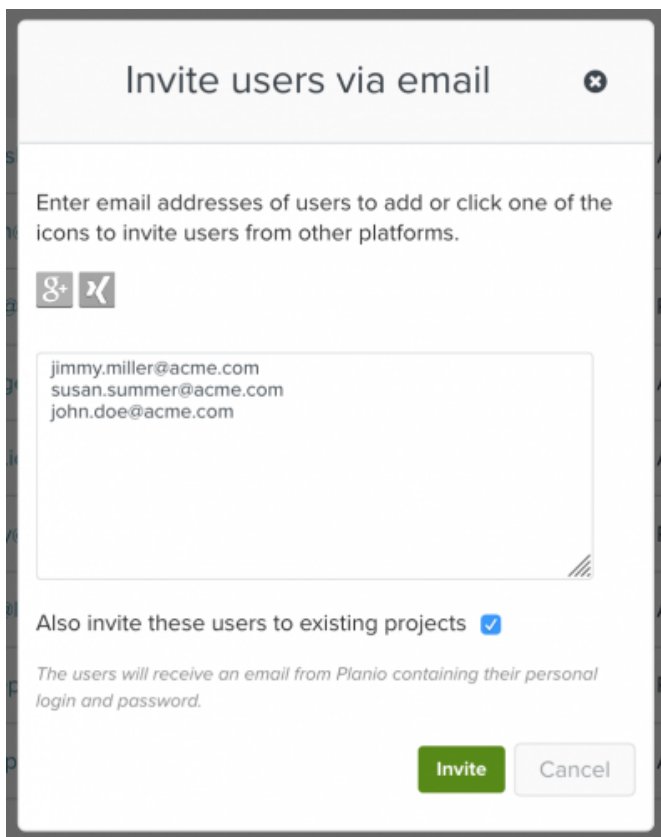
That's it, you're done. Welcome to the most simple Planio setup.

What to do next? Here are some ideas:

Invite some colleagues

If you haven't, invite your team members to Planio.

- Navigate to **Administration**, then **Users**.
- Click on **Invite users via email** and enter a couple of email addresses. If you're still learning how to use Planio, maybe invite only one or two colleagues at first. You can always add more later.
- Be sure that the checkbox next to **Also invite these users to existing projects** is checked and click on **Invite**.

The screenshot shows a web form titled "Invite users via email" with a close button in the top right corner. Below the title, there is a text instruction: "Enter email addresses of users to add or click one of the icons to invite users from other platforms." Underneath this instruction are two icons: a Google+ icon and a social media icon. A text input field contains three email addresses: jimmy.miller@acme.com, susan.summer@acme.com, and john.doe@acme.com. Below the input field, there is a checkbox labeled "Also invite these users to existing projects" which is checked. A small note below the checkbox states: "The users will receive an email from Planio containing their personal login and password." At the bottom of the form, there are two buttons: a green "Invite" button and a grey "Cancel" button.

Invite colleagues to Planio

Create some content

Navigate to your project via the **Projects** menu at the top and check out the different sections.

But what are they for? Let's see:

- **Overview** and **Activity** show you what's going on in your project. Skip them for now and come back a little later.
- **Issues** are single action items that need to be done. Some people say "tasks" or "work packages". A more technical term is "ticket". No matter what you call them, issues define work that can be assigned to people on your team. Their progress will always be tracked in Planio.
- The **Blog** is great for announcements. Have a new member join the team? Signed a new client? Have an important milestone to celebrate? Write a blog article and keep everybody in the loop.
- Within **Documents**, you can upload important office documents like Texts, Spreadsheets, Presentations, etc. The documents section is great for publishing finalized documents. While you still work on unfinished documents, you might want to use issues instead and attach current versions as you update them.
- The **Wiki** is your project's Wikipedia. You can create wiki pages with important content that you'd like to work on with the team,

like a glossary, meeting minutes, process descriptions, you name it. A wiki is never finished. Everybody can and should be encouraged to add, update, restructure, and even remove (old) content. Updates to wiki pages are tracked and you can always jump back in time to see and compare older versions.

- The **Forums** can be used to discuss project related topics. Whenever you'd like feedback on an idea or would like to spark a conversation, write a forum post. You can select to **watch** interesting conversations and receive email updates about them. Or you can check in from time to time and read up on the latest posts when you feel like it.

Think twice before you send an email!

Now, what's the best way to adopt Planio in your everyday life? It's really simple actually. It all comes down to one easy habit to adopt: **Think twice before you send an email!**

Know that reflex to open up your email client and add all your colleagues in CC? Don't do that anymore!

Think about what it is you're writing. If you're looking to get work done, create an issue. If you want to announce something, use the blog. Have a PDF file to share, upload it to documents. Want to write meeting minutes or describe the new workflow for [submitting a vacation request](#), update the wiki. Finally, if you just had an awesome idea and want feedback, write a forum post.

Encourage your colleagues to do the same, and enjoy less email, a better structure, and incredibly improved productivity!

Files

a_basic_workflow@2x.png	112 KB	10/15/2018	Gregor Schmidt
archive_projects@2x.png	34.1 KB	10/15/2018	Gregor Schmidt
create_a_new_project@2x.png	212 KB	10/15/2018	Gregor Schmidt
invite_colleagues_to_planio@2x.png	90.3 KB	10/15/2018	Gregor Schmidt
only_a_few_enumerations@2x.png	95.4 KB	10/15/2018	Gregor Schmidt
reduce_issue_form_fields@2x.png	202 KB	10/15/2018	Gregor Schmidt