

Plan your Pro rollout

Pro rollout guide

Who to bring into Onplana first on the Professional plan, how to set up sign-in and access, which integrations and apps to switch on, and how to keep AI under your control, with a page per role.

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Plan your Pro rollout

<https://docs.onplana.com/getting-started/plan-your-pro-rollout/>

The short version: bring people in from the top down (the Owner, then the people who run the work across projects, then project managers, then members and guests), and have sign-in, roles and visibility decided before each group arrives. Turn integrations on when the group that uses them is in. AI is safe on day one; decide who may connect agents and what they may do before agents become part of daily work.

This is the Professional plan's version of the rollout guide. It covers only what Pro includes. Portfolios, goals, custom roles and webhooks come with Business (see Plan your Business rollout (<https://docs.onplana.com/getting-started/plan-your-business-rollout/>)). Single sign-on, SCIM provisioning, the IP allowlist, audit logs and the proposal pipeline come with Enterprise (see Plan your rollout (<https://docs.onplana.com/getting-started/plan-your-rollout/>)).

1. Who to bring in, and when

Each group sets up what the next group needs, so invite in this order.

Order	Who	What they do before the next group arrives	Their page
1	Owner (and one or two Admins)	Sign-in rules, roles, visibility, billing, AI controls	Pro rollout for the Owner (https://docs.onplana.com/getting-started/pro-rollout-for-the-owner/)
2	Portfolio managers	Teams, intake and the reports everyone reads	Pro rollout for portfolio managers (https://docs.onplana.com/getting-started/pro-rollout-for-portfolio-managers/)
3	Project managers	Real projects with tasks, dates and owners	Rollout for project managers (https://docs.onplana.com/getting-started/rollout-for-project-managers/)
4	Members and guests	Their own work, kept up to date	Rollout for members and guests (https://docs.onplana.com/getting-started/rollout-for-members-and-guests/)

Why this order: a member who signs in to an empty workspace leaves. A member who signs in and finds their tasks already assigned, in a project their manager built, stays. Everything above them has to exist first.

A pilot can compress it. One team can go through all four steps in a week. Keep the order, shorten the gaps.

2. Identity and access

Decide these before step 3 of the table above, while the workspace is still small.

1. **Invitations.** Invite people by email (<https://docs.onplana.com/getting-started/invite-your-team/>), with the role each one needs. Single sign-on and SCIM provisioning come with Enterprise; if you move up later, accounts link to SSO by verified email.
2. **Two-factor sign-in.** Enforce two-factor authentication (<https://docs.onplana.com/admin-security/enforce-two-factor-authentication/>) now, while only admins are in. Turned on before invitations, it is part of joining; turned on later, it interrupts everyone.

3. **Roles and the permission matrix.** Read Understand roles and permissions (<https://docs.onplana.com/admin-security/understand-roles-and-permissions/>) and pick a posture preset. Only the Owner can edit the matrix. Custom roles come with Business.
4. **Project visibility.** By default, Owners, Admins and Portfolio Managers see every project; Members see only projects they own or were added to; Guests see only the projects they were added to. If members should be able to find other projects and ask to join, turn on the project directory (<https://docs.onplana.com/admin-security/let-members-find-projects/>).

Other access controls, when your policy needs them: session policies (<https://docs.onplana.com/admin-security/manage-sessions-and-devices/>) and API tokens (<https://docs.onplana.com/admin-security/create-api-tokens/>).

3. Integrations and apps

Switch each one on when the people who use it have arrived. Most need a Microsoft 365 or SharePoint admin as well as an Onplana admin.

What	What it gives people	Set it up
Microsoft Teams app	Onplana as tabs in Teams, and an agent in Microsoft 365 Copilot	Deploy for Teams (https://docs.onplana.com/admin-security/deploy-onplana-for-microsoft-teams/), then use it (https://docs.onplana.com/collaboration/use-onplana-in-microsoft-teams/)
Outlook, calendar and To Do	Email into tasks, calendar sync, Microsoft To Do	Connect Google and Microsoft accounts (https://docs.onplana.com/automation/connect-google-and-microsoft/), receive email into projects (https://docs.onplana.com/automation/receive-email-into-projects/)
SharePoint	Onplana Projects web parts, the Onplana bar and document library commands	Deploy Onplana Projects (https://docs.onplana.com/admin-security/deploy-onplana-for-sharepoint/), use it (https://docs.onplana.com/collaboration/use-onplana-in-sharepoint/)
Document libraries	Project files in Onplana, or linked from SharePoint	Document folders (https://docs.onplana.com/collaboration/organize-document-libraries/), attach from SharePoint (https://docs.onplana.com/collaboration/attach-files-from-sharepoint/)
Power BI and Excel	A read-only reporting feed	Connect to the OData feed (https://docs.onplana.com/automation/connect-power-bi-to-the-odata-feed/)
Claude, ChatGPT and other agents	Your AI assistant works in Onplana through the MCP connector	Connect an external agent (https://docs.onplana.com/ai-agents/connect-an-external-agent/), from Claude (https://docs.onplana.com/ai-agents/connect-onplana-from-the-claude-connectors-directory/), from ChatGPT (https://docs.onplana.com/ai-agents/connect-onplana-from-the-chatgpt-directory/)
Workflows	Automated steps and approvals	Build a workflow (https://docs.onplana.com/automation/build-a-workflow/). Webhooks to your own systems come with Business.
Onplana Tasks	Your tasks on Windows, Mac, iPhone, Android and in the browser	Windows (https://docs.onplana.com/getting-started/install-onplana-tasks-for-windows/), Mac (https://docs.onplana.com/getting-started/install-onplana-tasks-for-mac/), iPhone (https://docs.onplana.com/getting-started/install-onplana-tasks-for-iphone/), Android (https://docs.onplana.com/getting-started/install-onplana-tasks-for-android/), browser (https://docs.onplana.com/getting-started/install-onplana-tasks-browser-extension/)

What	What it gives people	Set it up
Onplana Schedule	A desktop scheduler that opens Microsoft Project files	Install Onplana Schedule (https://docs.onplana.com/getting-started/install-onplana-schedule-desktop/)

Note

Approval cards from the Onplana bot in Teams cannot be used in a workspace that requires two-factor sign-in, because Teams cannot prove it. Approvers in those workspaces approve from the bell and email instead.

Good order for most organizations: Teams and Outlook first (they meet people where they already work), then SharePoint, then the Tasks apps for people who live in their own task list, then reporting and agents once there is real data.

4. AI setup and control

AI works on day one, and the defaults are safe. This is what you control, and where.

The model provider. Onplana chooses which AI provider runs the in-app assistant; there is no per-workspace setting for it. You choose which AI features are on, who may use agents, and what they may do. If you want an agent to run on your own AI provider account, see [run an agent on your own key](https://docs.onplana.com/ai-agents/run-an-agent-on-your-own-key/) (<https://docs.onplana.com/ai-agents/run-an-agent-on-your-own-key/>).

Budgets and metering. Every AI call draws on the workspace's token budget. See [understand your AI token budget](https://docs.onplana.com/ai-agents/understand-your-ai-token-budget/) (<https://docs.onplana.com/ai-agents/understand-your-ai-token-budget/>) for what your plan includes.

Organization settings > AI and Storage (Owner and Admin by default) has these controls:

- AI features

- **All AI features:** one switch. Off rejects every AI request in the workspace.
- **Customize individual features:** turn single features on or off.
- A feature with a **Plan** badge is not in your plan and cannot be turned on until you upgrade.

- Fair-share policy (Per-user AI cap)

- Off by default: the AI tokens are one shared pool.
- On: each person is capped at a percentage of the monthly pool, from 1 to 100 percent (30 percent until you change it).

- Storage

- Used against your plan's limit, with a warning from 80 percent.
- Split between **Workspace files** and **Task attachments**.

Agent governance and policies. Also on **AI and Storage**, under **External AI agents**:

- **Allow external AI agents:** one switch. Off means only the Owner can use agents.
- Who may use them: **Everyone can use agents**, **Only selected users / teams**, or **Everyone except selected users / teams**. Team membership is read live, so a change to a team applies at once.
- **Registered connections:** how many exist, against the plan's limit, and how many may run at once.
- **Max registered connections:** an override for the workspace; blank keeps the plan default.
- **Per-user cap:** the most connections one person may register; blank means unlimited.

In **Settings > Agents > Agent Policies**:

- Rules that allow, deny, or hold an agent's call for a person to approve, optionally starting from a policy pack.
- What agents can delete (<https://docs.onplana.com/admin-security/control-what-agents-can-delete/>).

What AI never does without a person:

- An agent's deliverable (a document, a report, an analysis) waits in the review inbox (<https://docs.onplana.com/ai-agents/review-agent-output/>) until a person approves or rejects it.
- A call that a policy holds for approval waits for a signed-in person. API tokens and agent connections cannot approve it, so an agent cannot approve its own call.
- The in-app assistant acts only when someone asks it to, and records each change under that person's name, with **Undo** for most actions.
- Most things an agent deletes go to the recycle bin (<https://docs.onplana.com/projects-tasks/restore-from-the-recycle-bin/>). A removed dependency or calendar exception does not: bring it back with **Undo** on the assistant's action, or with a schedule restore (<https://docs.onplana.com/projects-tasks/restore-a-schedule-to-an-earlier-moment/>) for a dependency.
- The exception is the schedule's logic: an agent changes dependencies, constraints, working calendars and baselines straight away, with no approval step, unless a rule in **Settings > Agents > Agent Policies** holds the call for a person. Those rules cover connected agents; the in-app assistant makes such a change when someone asks it to.

FAQs

Do we have to finish all four parts before anyone starts? No. Parts 1 and 2 come first because they decide who gets in and what they see. Part 3 follows the people, and part 4 can wait until agents are in use.

What do we gain by moving up? Business adds portfolios, goals, custom roles and webhooks; see Plan your Business rollout (<https://docs.onplana.com/getting-started/plan-your-business-rollout/>). Enterprise adds single sign-on, SCIM, the IP allowlist, audit logs and the proposal pipeline; see Plan your rollout (<https://docs.onplana.com/getting-started/plan-your-rollout/>). To compare every feature, see compare plans and upgrade (<https://docs.onplana.com/billing/compare-plans-and-upgrade/>).

Related

- Plan your Business rollout (<https://docs.onplana.com/getting-started/plan-your-business-rollout/>)
- Plan your rollout (<https://docs.onplana.com/getting-started/plan-your-rollout/>) (Enterprise)
- Admin first-week checklist (<https://docs.onplana.com/getting-started/admin-first-week-checklist/>)
- Invite your team (<https://docs.onplana.com/getting-started/invite-your-team/>)
- Manage seats and guests (<https://docs.onplana.com/billing/manage-seats-and-guests/>)

Part 2. Pro rollout for the Owner

<https://docs.onplana.com/getting-started/pro-rollout-for-the-owner/>

You go first. When you finish, the people who run work across projects can sign in to a workspace whose access rules are already decided. This is step 1 of Plan your Pro rollout (<https://docs.onplana.com/getting-started/plan-your-pro-rollout/>).

1. **Name one or two Admins** to share the work. Admins run security and integrations; only you change the plan and edit the permission matrix. See roles and permissions (<https://docs.onplana.com/admin-security/understand-roles-and-permissions/>).
2. **Set the sign-in rules.** Enforce two-factor authentication (<https://docs.onplana.com/admin-security/enforce-two-factor-authentication/>) before anyone else joins, and set session policies (<https://docs.onplana.com/admin-security/manage-sessions-and-devices/>) if your policy needs them. Single sign-on and SCIM come with Enterprise.
3. **Choose the permission posture** in the matrix, and decide whether members may find projects they are not on (<https://docs.onplana.com/admin-security/let-members-find-projects/>). Custom roles come with Business.
4. **Check seats and billing.** Understand member and guest seats (<https://docs.onplana.com/billing/manage-seats-and-guests/>) before invitations go out.
5. **Decide the AI controls** in **Organization settings > AI and Storage**: features on or off, the per-user AI cap, and who may connect external agents. See part 4 of Plan your Pro rollout (<https://docs.onplana.com/getting-started/plan-your-pro-rollout/#4-ai-setup-and-control>).
6. **Invite the people who run work across projects.** Invite your team (<https://docs.onplana.com/getting-started/invite-your-team/>) with the Portfolio Manager role.

For the rest of your first week, use the admin first-week checklist (<https://docs.onplana.com/getting-started/admin-first-week-checklist/>).

Back to Plan your Pro rollout (<https://docs.onplana.com/getting-started/plan-your-pro-rollout/>).

Part 3. Pro rollout for portfolio managers

<https://docs.onplana.com/getting-started/pro-rollout-for-portfolio-managers/>

You come in after the Owner. When you finish, project managers know how work is grouped, how new work arrives and what will be reported. This is step 2 of Plan your Pro rollout (<https://docs.onplana.com/getting-started/plan-your-pro-rollout/>).

A Portfolio Manager sees every project in the workspace by default, so you can check what project managers build without being added to each project.

1. **Create teams** that match how work is really done. See create and manage teams (<https://docs.onplana.com/admin-security/create-and-manage-teams/>).
2. **Decide how new work arrives.** An intake form (<https://docs.onplana.com/automation/create-public-intake-forms/>) collects requests in one place. The proposal pipeline with gate reviewers comes with Enterprise.
3. **Agree what you will report on**, then build it once: cross-project reports (<https://docs.onplana.com/getting-started/run-cross-project-reports/>) or a custom dashboard (<https://docs.onplana.com/getting-started/build-a-custom-dashboard/>). Portfolios and goals come with Business.
4. **Invite your project managers.** Invite your team (<https://docs.onplana.com/getting-started/invite-your-team/>), and send them their rollout page (<https://docs.onplana.com/getting-started/rollout-for-project-managers/>).

Back to Plan your Pro rollout (<https://docs.onplana.com/getting-started/plan-your-pro-rollout/>).

Part 4. Rollout for project managers

<https://docs.onplana.com/getting-started/rollout-for-project-managers/>

You come in after portfolio managers. When you finish, every member who signs in finds their own tasks already waiting. This is step 3 of the rollout guide for your plan: Pro (<https://docs.onplana.com/getting-started/plan-your-pro-rollout/>), Business (<https://docs.onplana.com/getting-started/plan-your-business-rollout/>) or Enterprise (<https://docs.onplana.com/getting-started/plan-your-rollout/>).

1. **Bring your plans in.** Import from Microsoft Project (<https://docs.onplana.com/getting-started/import-from-microsoft-project/>), import a WBS from Excel (<https://docs.onplana.com/getting-started/import-a-wbs-from-excel/>), or create your first project (<https://docs.onplana.com/getting-started/create-your-first-project/>).
2. **Assign owners and dates** to the tasks, and link dependencies (<https://docs.onplana.com/projects-tasks/link-task-dependencies/>) where one task waits on another.
3. **Add the people** to each project, members and guests alike. Guests see only the projects you add them to. See bring your team into an imported plan (<https://docs.onplana.com/getting-started/bring-your-team-into-an-imported-plan/>).
4. **Capture a baseline** so you can show change later. See capture and compare baselines (<https://docs.onplana.com/projects-tasks/capture-and-compare-baselines/>).
5. **Tell members where their work is.** Send them their rollout page (<https://docs.onplana.com/getting-started/rollout-for-members-and-guests/>).

For the full first week, read the PM onboarding bundle (<https://docs.onplana.com/getting-started/pm-onboarding-bundle/>).

Back to the rollout guide for Pro (<https://docs.onplana.com/getting-started/plan-your-pro-rollout/>), Business (<https://docs.onplana.com/getting-started/plan-your-business-rollout/>) or Enterprise (<https://docs.onplana.com/getting-started/plan-your-rollout/>).

Part 5. Rollout for members and guests

<https://docs.onplana.com/getting-started/rollout-for-members-and-guests/>

You come in last, on purpose: your projects and tasks are already set up. This is step 4 of the rollout guide for your plan: Pro (<https://docs.onplana.com/getting-started/plan-your-pro-rollout/>), Business (<https://docs.onplana.com/getting-started/plan-your-business-rollout/>) or Enterprise (<https://docs.onplana.com/getting-started/plan-your-rollout/>).

1. **Accept your invitation.** See join a workspace by invitation (<https://docs.onplana.com/getting-started/join-a-workspace-by-invitation/>). If your company uses single sign-on, sign in with it.
2. **Find your work** in My Work. See work from My Work (<https://docs.onplana.com/getting-started/work-from-my-work/>).
3. **Keep it up to date:** status, progress and comments on the tasks assigned to you. See work with tasks (<https://docs.onplana.com/projects-tasks/work-with-tasks/>) and comment and mention (<https://docs.onplana.com/collaboration/comment-and-mention/>).
4. **Pick where you work.** Onplana in Microsoft Teams (<https://docs.onplana.com/collaboration/use-onplana-in-microsoft-teams/>), or the Onplana Tasks app for Windows (<https://docs.onplana.com/getting-started/install-onplana-tasks-for-windows/>), Mac (<https://docs.onplana.com/getting-started/install-onplana-tasks-for-mac/>), iPhone (<https://docs.onplana.com/getting-started/install-onplana-tasks-for-iphone/>), Android (<https://docs.onplana.com/getting-started/install-onplana-tasks-for-android/>) or your browser (<https://docs.onplana.com/getting-started/install-onplana-tasks-browser-extension/>).

Guests see only the projects they were added to and nothing else in the workspace. Everything above still applies inside those projects.

For a fuller first week, read the member onboarding bundle (<https://docs.onplana.com/getting-started/member-onboarding-bundle/>).

Back to the rollout guide for Pro (<https://docs.onplana.com/getting-started/plan-your-pro-rollout/>), Business (<https://docs.onplana.com/getting-started/plan-your-business-rollout/>) or Enterprise (<https://docs.onplana.com/getting-started/plan-your-rollout/>).