

AECEE Podio Guidelines



EUROPEAN STUDENTS' FORUM

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What is Podio?



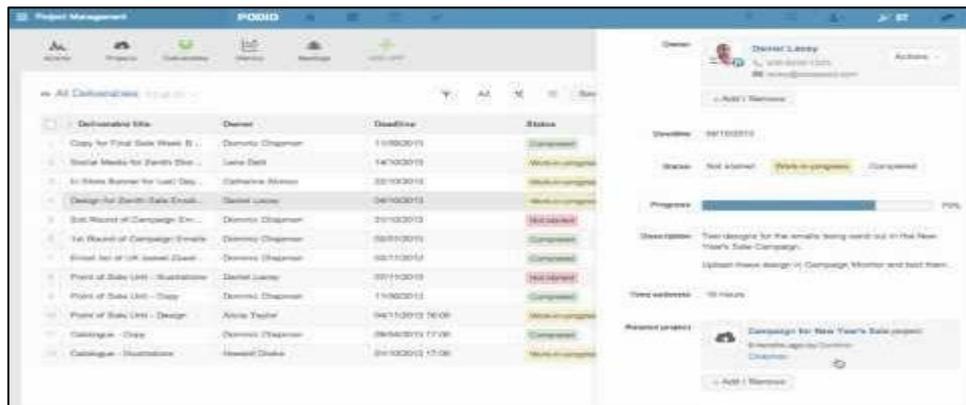
Podio is online collaboration and project management tool. Main aspect of Podio is customization and creation of own applications in simple and fast way.

Strongest part of Podio is management of recurring processes, which in Podio is possible to structure and define the workflow around it.

Podio vs Facebook

Podio is so called Web 2.0 tool which is based on social and sharing aspect. At some point it is possible to use similarity that **Podio is like Facebook but designed for work**. Interface of Podio is similar to Facebook, uses Activity Stream which shows updates from applications or users. Have possibility to make Status Updates and tagging users or instant messaging as chat or video conference inside Podio. Workspace in Podio can be understand as Facebook group.

Video Tutorial – Podio Basics



<https://www.youtube.com/watch?v=TmwmaLplWkk>

Podio for AEGEE-Europe

AEGEE-Europe has partnership with Podio and use it already some time for some Projects on European Level. Our partnership enables us to offer it to the whole Network. Usage of Podio is voluntary and optional.

How to get it?

Fill the request via this form <https://podio.com/webforms/6765925/523568>. After submitting, communication and setting up of the workspace will start.

Getting started

Podio provides in Help Center guides which explain its function. Sections description provided below is based on it and provides just an extract of it.

To find more, visit <https://help.podio.com/hc/en-us/>

The Structure of Podio

Podio is structured through Items, Apps, Workspace and Organisations.

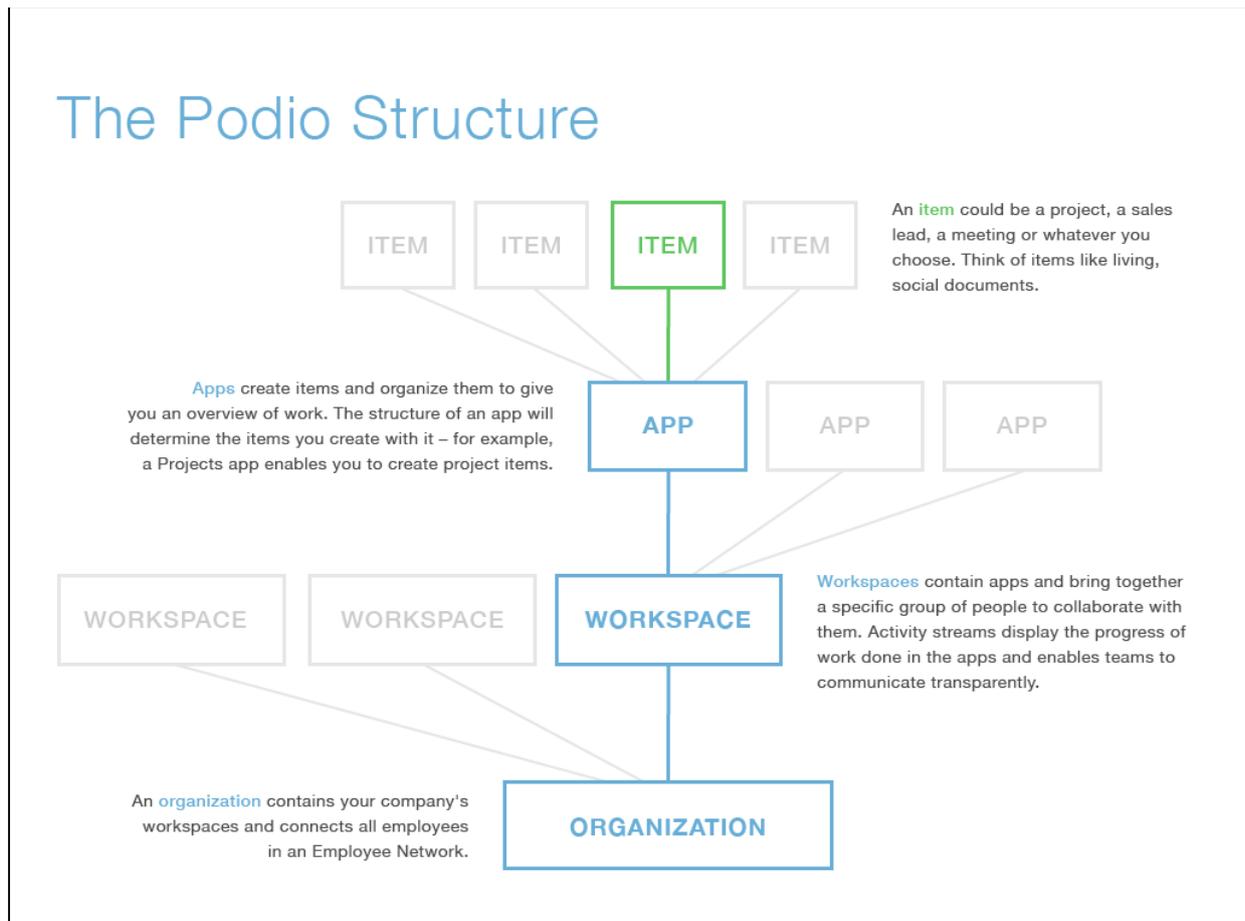


Figure 1: Podio Structure

An **item** could be a project, a sales lead, a meeting or whatever you choose. Think of items like living, social documents.

Apps create items and organise them to give you an overview of work. The structure of an app will determine the items you create with it – for example, a Projects app enables you to create project items.

Workspaces contain apps and bring together a specific group of people to collaborate with them. Activity streams display the progress of work done in the apps and enable teams to communicate transparently. Workspace members have access to all of the apps and app items in that workspace. You can also [share individual app items](#) with

people outside the workspace. This enables you to share specific items without giving someone access to your entire workspace.

An **organisation** contains your company's workspaces and connects all employees in an Employee Network. You can be a member of a workspaces that belong to another organisation than your own – for example, if you're invited to work on a project with a client and they're running the project in one of their workspaces.

Podio account

In general practice, you will not register and create account by yourself. In most cases you will be added to Podio workspace and receive invitation by email

Invitation Email

Picture below shows general email which is sent to person which was added to workspace. Click on **Join now**.

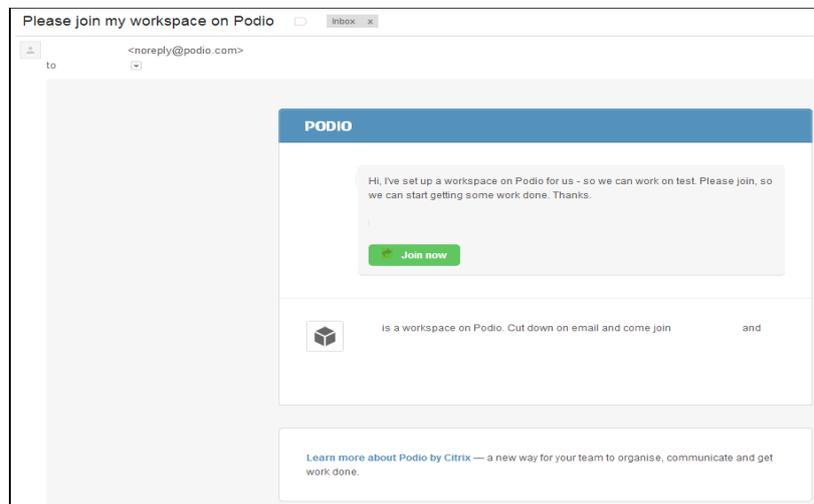


Figure 2: Email invitation Podio Workspace

By clicking Join now, you will be redirected to registration form, where you **add your name** and **create password** which will be used to access Podio.

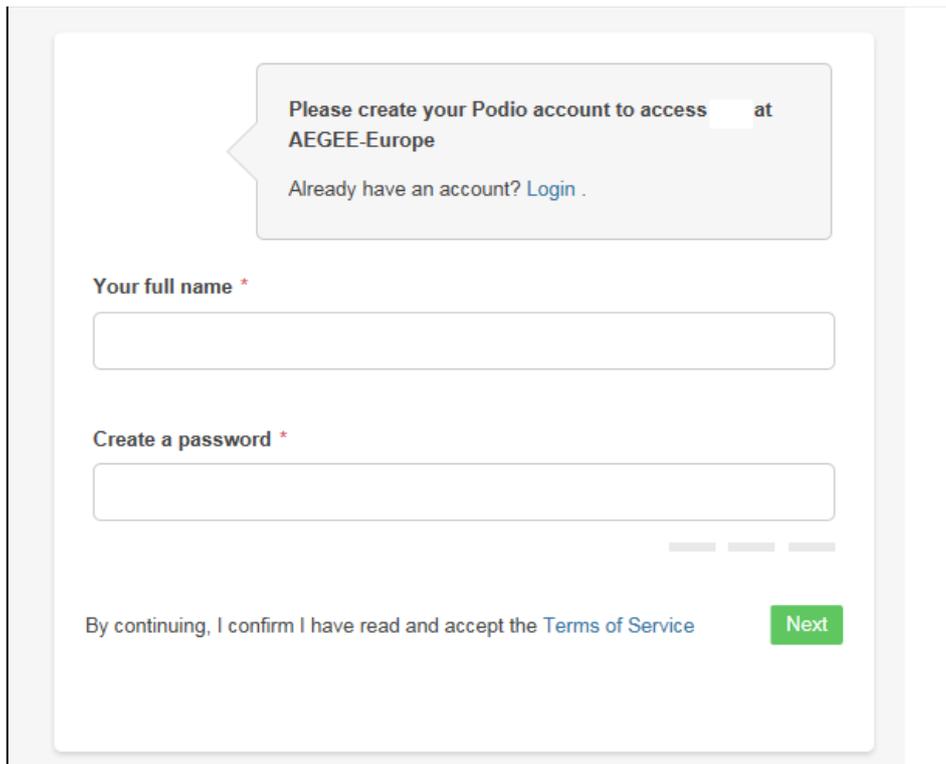
The image shows a registration form for Podio. At the top, there is a grey callout box with the text: "Please create your Podio account to access [redacted] at AEGEE-Europe" and "Already have an account? [Login](#) .". Below this, the form has two input fields: "Your full name *" and "Create a password *". At the bottom, there is a checkbox area with the text "By continuing, I confirm I have read and accept the [Terms of Service](#)" and a green "Next" button.

Figure 3: Registration

Logging in to Podio

You can log in to Podio from <https://podio.com/login>

When you log in to Podio, you can select to be remembered or not. If you select the option to be remembered, you will stay logged in until you log out of Podio. You can log out by clicking the profile icon in the top blue bar, then "Sign out".

Lost or forgot your password?

Use <https://podio.com/user/recover> and enter your email address to receive password reset instructions.

Login via other accounts

Podio offers you also function to use your already existing accounts (Gmail, Facebook or Live) to log in. Such a connection can be made for already existing Podio accounts.

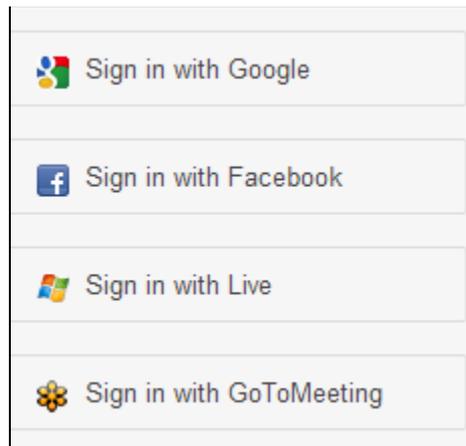


Figure 4: Login via other accounts

Podio General Functions

Activity Streams

Activity Streams are a great way to get an overview of what is going on in your workspaces without having to do any digging. There are two activity streams in Podio - the Home Activity Stream and Workspace Activity Streams.

The Home Activity Stream

The Home Activity Stream is a great starting point when using Podio. You get to the Home Activity Stream by clicking the Podio logo in the top left corner *or* by clicking the house icon in the top blue bar.

Here you will find all updates from all the different workspaces that you're a member of. You can comment, like or create a task directly from the Activity Stream.

Hiding updates from the Home Activity Stream

You can hide certain workspaces or apps from the Home Activity Stream. Mouse over the update and you will see an "x" icon appear in the right corner of the update - click on it to hide updates from either the workspace or the app.

You can see what posts you have hidden via the "Hidden posts" link. See the screenshot below.

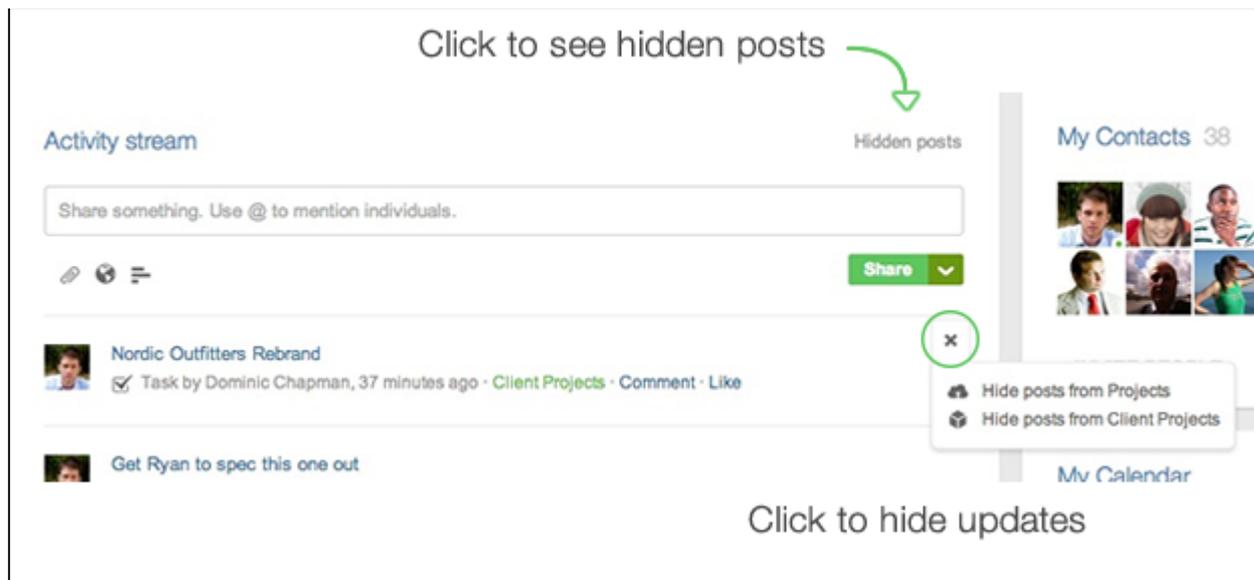


Figure 5: See hidden posts

Please also see the article about [using the Notifications and the Activity Stream together](#).

Calendar

The calendar gives you three ways to view events, along with four levels of personalisation.

You can choose to display your calendar in single day, week or month view – but the most useful feature of the calendar is the option to customize which app items you're shown there.

In the top-right corner of your calendar, click the small wrench icon and in the settings menu you'll get the options to show:

- Items directly involving you (e.g., meetings that you've been invited to)
- Items involving and related to you (e.g., meetings you're invited to and app items like projects and sales leads that you're referenced on in a Contact field)
- Items you're following (e.g., everything you have been referenced on, interacted with or manually chosen to follow)
- All date-related app items in all the workspaces that you're a member of

Personalising your calendar this way enables you to quickly choose between viewing your schedule and your team's.

Push to Google, Outlook via Microsoft Exchange and OS X Calendar

You can push your personal Podio calendar to Google Calendar, Outlook Calendar via Microsoft Exchange and any calendar using OS X Calendar.

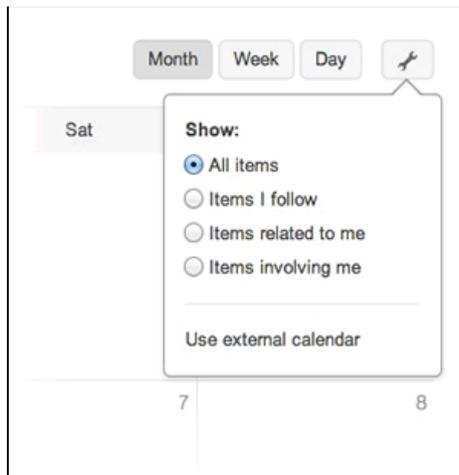


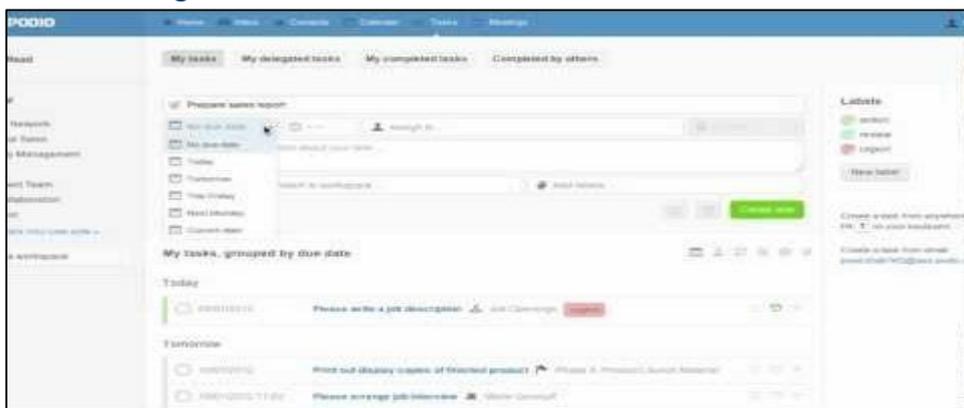
Figure 6: Push your Podio Calendar items to your calendar

The items that will be pushed from Podio to an external calendar are the same as those you view in Podio. So, when personalising your calendar, you'll most likely want to choose just items involving you, or items involving and related to you – in order to not fill your external calendars with your team's work.

Tasks

The tasks in Podio are actions related to an item, status or something else to give the task context.

Video Tutorial – management of Tasks in Podio



<https://www.youtube.com/watch?v=RwdFw7q0jrQ>

Overview of tasks

Tasks in Podio can be used for quick "to-do"s for you and your team members. A task can be created and assigned from any workspace, app, or app item. This gives you a quick and easy way to allocate specific action items to members of your team.

You can access your own tasks via the tasks icon in the top blue bar.



There are a couple of ways to create tasks in Podio:

- Hit 'T' on your keyboard from anywhere to create a task linked to the item/page that you're looking at
- Click the task icon in the top blue bar (shown above). This is also a complete overview of your existing tasks, tasks you delegated, and tasks you are working on.
- You can create a task via email - hit the "Create a task from email" link in right side of your tasks page.
- You can give a task to someone on Podio by going to their profile page and adding it from there.
- On any app item in Podio e.g. a deliverable or a meeting, just press the task icon in the right sidebar to create a task. It will be attached to the item.

When creating a task, you can assign the task to anyone. This includes people who haven't signed up for Podio yet.

[Assigning tasks to others](#)

Sharing a task with anyone you want is as simple as assigning any other task: In the Assignee field, simply type in an email address or pick from any of your contacts, and Podio send them an email with a link to the task. If they don't already have a Podio account, they just need to pick a password and they're in.

The screenshot shows the 'New task' dialog box in Podio. At the top, there is a title bar with 'New task' and a close button. Below it is a yellow notification bar that says 'You can assign tasks to yourself, to co-workers on Podio and to anyone else via email'. The main form contains a checked checkbox for 'Please translate'. Below this is an email input field with 'gustav@neverworkalone.org' and a 'Pick a contact or type an email address' prompt. There are also fields for a date ('03/12/2012'), a time zone, a search field for 'Attach this task to any item or space...', and a 'Private' toggle. The task description area contains the text 'Please translate "Share on Podio" to Swedish.'. At the bottom, there are buttons for 'Attach file' and 'Add labels ...', and a green 'Create task' button.

If you create the task on an item, Podio automatically share the item as well so they have access to information they might need to complete the task. If you don't want this, just remove the reference on the task creation screen.

Remember to write a small description to make sure the assignee understands the task and what you expect.

Inviting and adding members

There are several ways to invite and add members to work with you in Podio.

You can click the "Add people" button at the bottom of the "Who's here? Manage members" widget on the top right of a workspace. From here you can pick from your existing contacts from services like Google or type in an email address of anyone you want to add to the workspace.



You can select people to add to workspaces from your global Contacts list (in the blue bar at the top of Podio) by finding them in the list, clicking 'Actions', and then 'Add' in the dropdown. You then choose which workspace to add them to.

You can go to your global Contacts page (in the blue bar at the top of Podio) and click 'Add member'. You then choose the people and the workspace you want to add them to.

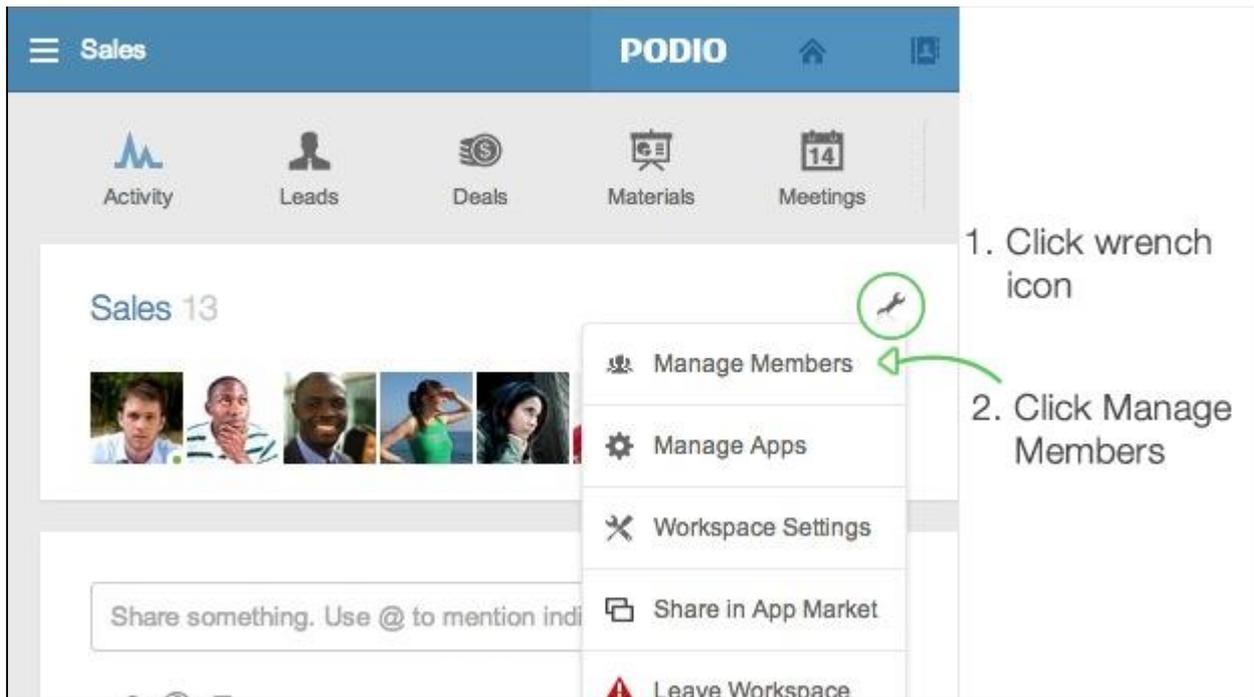
Member roles in workspaces

In Podio there are different types of admin roles and member roles. Two types of admins exist: the **workspace admin** and the **organisation admin**.

Workspace admin

There is a difference between an organisation admin and a workspace admin. Being an administrator in an organisation will not automatically make you an admin in all workspaces. You need to create the workspace yourself to be the admin, or ask a colleague to promote you to an admin in a specific workspace.

When you're an administrator of a workspace, you can change any member's role in the workspace. Click the small wrench icon on top of your workspace activity stream, then choose "Manage Members".



The roles are:

- Light user
- Regular user
- Workspace Administrator user

The main difference are that Regular Member can create application and Workspace, Admin can edit application of other users. More info you can find at:

<https://help.podio.com/hc/en-us/articles/201019898-Member-roles-in-workspaces>

Related to this is the role of **guests**. Guests are users that have been invited to selected items using the share item tool. They can edit and comment these specific items, but cannot see anything else within the workspace, such as the full list of members, other information in the app, or other apps in the same workspace.

Notifications

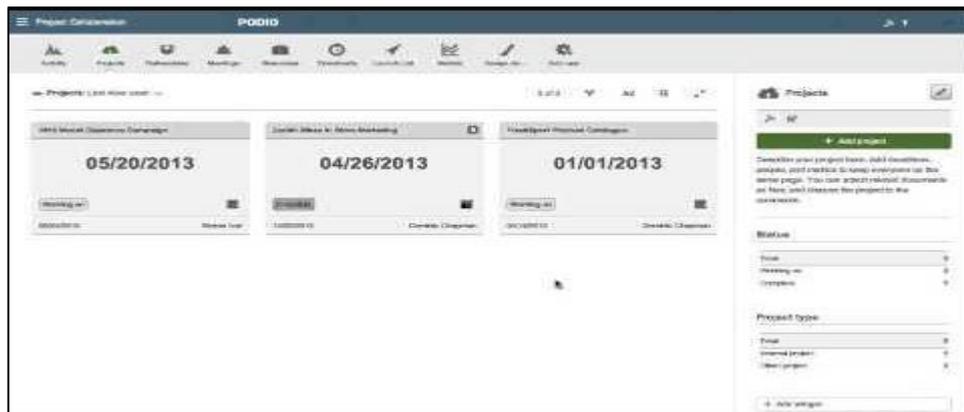
When you get your whole team into Podio, it's likely that you'll have a lot going on in each of your workspaces. You'll want to be sure to set up your notification settings properly to ensure that you don't miss any important updates, and also to prevent notification overload. This way, you will only receive updates for the things you need to know about.

Podio will automatically subscribe you to notifications for the following:

- Workspaces you've created

- Apps that you've created.
- App items that you've created
- App items that you've edited or commented on
- Tasks that are assigned to you
- Tasks that you have assigned or have commented on

Video tutorial for managing notifications



<https://www.youtube.com/watch?v=uDKmMSTlIMY>

Unsubscribing from notifications

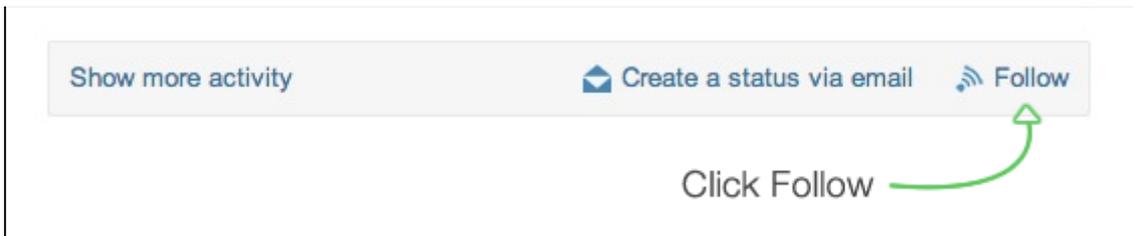
You may not want to receive notifications for each of these things, and for this reason you have the option to unsubscribe from any type of notification. Just look for the notification icon next to the thing you'd like to unsubscribe from, and click it to prevent further notifications.



Subscribing to notifications

If there is something you'd like to receive notifications about, that you're not already following, you can opt to follow it. Look for the same notification icon shown above, and click on it to follow that area. When the icon shows green, it means you are subscribed to those notifications.

Note: If you'd like to follow a workspace, scroll to the bottom of the workspace activity stream, and click "Follow" from there.



Remember that you can also [customize your email notifications](#) to choose what types of Podio notifications will be sent to you via email.

Chat

You receive incoming messages in the pane on the right. You can close the pane if you want more room for content when you're not in a conversation - Podio will alert you about incoming messages and open the pane once you click a notification. You can open and close the pane from the upper right corner or with the keyboard shortcut "C".

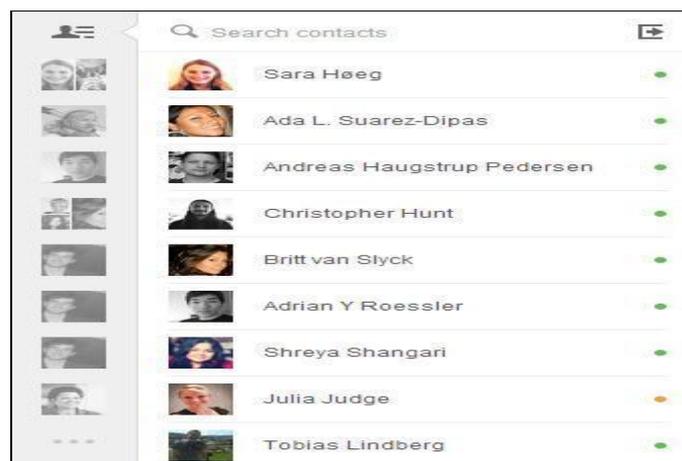


Figure 7: Podio Chat

You can go to a larger view of all your messages from the open pane via the inbox icon below your recent conversations. Here you'll also find tabs for viewing your unread and starred conversations.

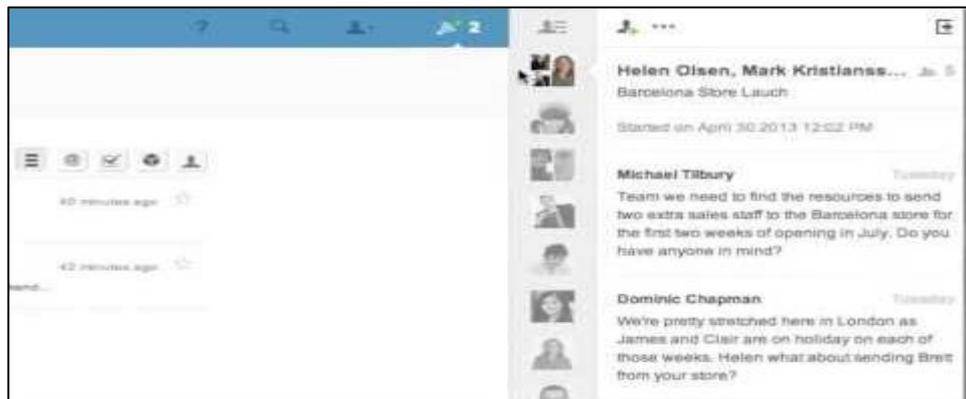
Starting or continuing a conversation is as easy as clicking an existing one and continuing or pressing the People tab to find a person to talk to. Messages are delivered live so if the person is online, you can chat from the pane. Push notifications for Android and iOS will let people know you've messaged them.

One-on-one conversations will be a continuing conversation. If you need to break out to write a message on something specific, just create a new message with a subject and this will be a separate conversation. Same thing goes for group conversations: These will always trigger a new conversation.

Podio will notify you of new messages if you have the messages pane closed or if you

are offline. [Email settings can be set separately](#). If you are in a conversation, we suppress notifications, including push notifications to your mobile device.

Here's a tutorial video:



<https://www.youtube.com/watch?v=1fXXI8Da8tw>

Mobile Apps

Podio has released apps for the iPhone and Android, that enable users to access Podio in comfortable way from their smartphones or tablets.



Figure 8: Podio Mobile App

AppStore

<http://itunes.apple.com/us/app/podio/id404183617?mt=8>

GooglePlay

<https://play.google.com/store/apps/details?id=com.podio>

Setting up the Workspace

Podio offers a lot of options for users. Universality of Podio is the main asset of this tool,

but it can be also main downfall. For users and especially administrators of the Workspaces it is important to have clear concept what for to use it and therefore to **have only necessary applications for it.**

Aim when using Podio is not to have as many applications as possible, it should be only the ones which are needed to work with.

Podio can be used for many purposes, one could be having all communication of the team inside of it. AEGEE practice shows that it can only work when all members of the team are using it fully and constantly. Such case might not always happen due to the voluntary character of the organisation. Therefore, **using Podio for communication as replacement of standard communication via emails, is not recommended.**

Definition of requirements

Before you decide to obtain Podio for your local or body you should have meeting first to decide what for you want to use it.

Some examples:

- Management of the tasks of the team
- Store passwords and documents related to the team (KT, minutes of meetings)
- Manage process inside your team

Recommended Structure

Based on current practice it is strongly recommended to have different workspaces for members of the board of body and members of the body. Reason is different kind of information shared in each workspace.

Workspace for Board or Team Leaders

Such a workspace is priority to manage the team and to store information for next board. Example could be:

- Store Passwords
- Store Activity reports, KT documents
- Members Management – Accepting new members etc.

Workspace for Members of the body or team

For members workspace the main priority would be cooperation between members and work on tasks related to body or local.

Example

- Manage Projects and related tasks
- Organise Meetings

Applications in Podio

Podio enables you to use already created applications which have defined purpose,

which you can edit or even easily create own ones, if you have specific criteria.

Apps from the App Market

There are hundreds of pre-made apps that are available in [App Market](#). The App Market is accessible via the link at the bottom of any page in your Podio account, or via the "Add App" button at the top of any workspace.



Getting apps is free and can be done in seconds. Use the "Find an app" search tool in the upper left corner of the page to search for an app, or browse popular apps that other Podio users have found useful for them.

When you've found an app you wish to install, click the green "Get App" button for that app, select the workspace you wish to add it to, and the app will then be added to that workspace.

Recommended Apps

Project Management App pack

Basic Project Management Apps, which are basically enough to run the team and fulfil tasks. Apps in the pack:

- Projects
- Deliverables
- Meetings

<https://podio.com/market/packs/12655-project-management>

Passwords

A place to store your passwords, security questions and answers etc.

<https://podio.com/market/apps/64957-passwords>

Candidates

With this app you can accept applications for each vacancy through the webform, and record your dialogue with good candidates.

<https://podio.com/market/apps/17096-candidates>

Files Library

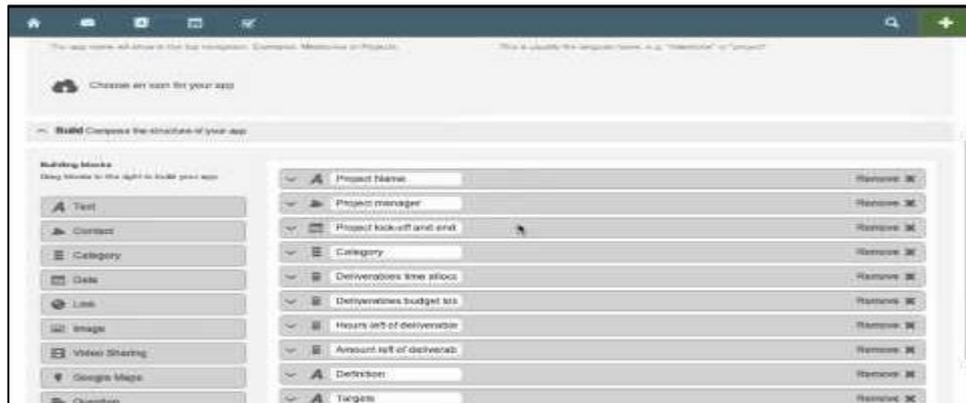
The Files Library app holds and manages important files for team members.

<https://podio.com/market/apps/4332-files-library>

Modify the App

Every app in Podio can be modified to suit your needs. See the apps in the Market as templates that you get and then modify a bit to fit your style of work

Video Tutorial for Modifying the App



<https://www.youtube.com/watch?v=VNKytOJRHyw>

App Builder

If you want to build an app, just click the "Add app" button in one of your workspaces where you want to add a new app. The building blocks are on the right in the App Builder (see screenshot below).

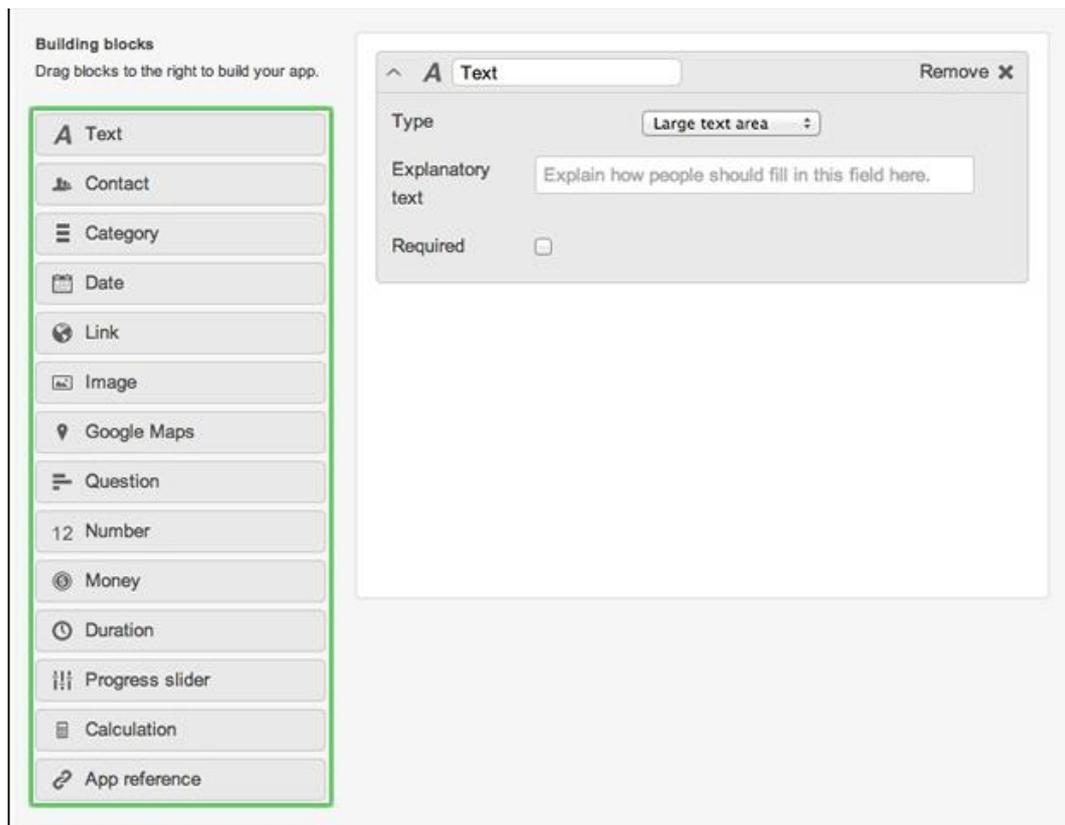


Figure 9: Podio App Builder

Some short explanations to what the building blocks can do:

Text

Use as a headline, a title or anything else that needs one line of text. Use the large text field (click the drop down when you've added the field) for longer and formatted text.

Contact

When you need to reference a person, use this field. There are two types of people you can refer to: workspace members or workspace contacts. The workspace members are the people that you're working together with in the specific workspace. The workspace contacts are "digital business cards" that can be used for referencing people (for example your main contact at a potential client in your CRM workspace).

Category

The categories are great for categorising (surprise!) content. Use it to mark a project as "Completed" or "Working on", or for setting the status in a Leads app. You can choose if the members of the workspace should select one category or multiple choice in the category field.

Date

Use the date field for deadlines, "next follow up" or meeting dates. There's a setting in this field that lets you decide if you'd like to add dates from this field to the calendar or not.

Link

The link field could be used for adding a nice preview link to websites, videos and other web-based content. If you paste a link to a YouTube/Vimeo video when creating your app item, it will be embedded when you click "Attach". This works for a lot of services since Podio supports Embed.ly.

Question

The question field is used for surveys and when you need the users of an app to answer a predefined question. Add more than one and create a great survey app.

Number

This can be used for tracking different amounts, for example number of visitors to an event or number of hours allocated to a project. The number field can also be used in calculations (scroll down a bit for more info and a video about the calculation field).

Find more at: <https://help.podio.com/hc/en-us/articles/201019298-The-building-blocks-in-the-App-Builder>

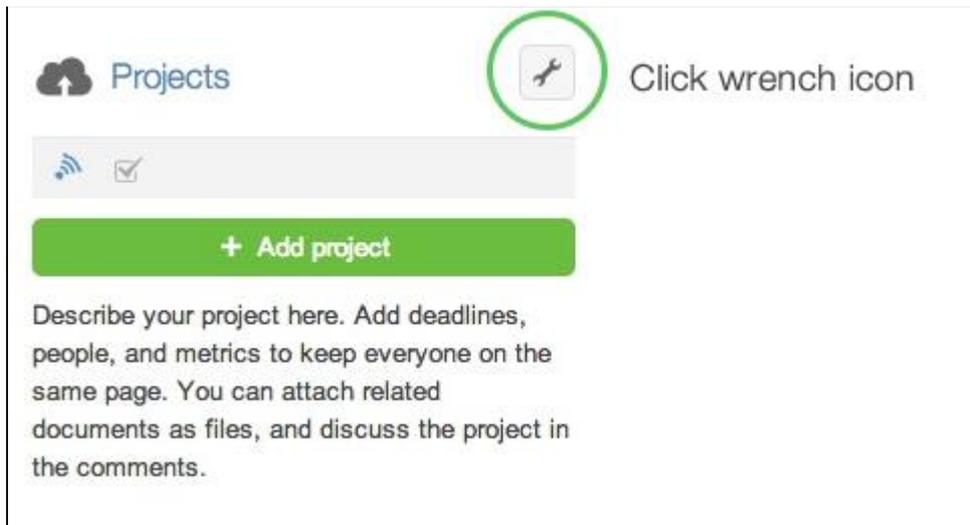
Webforms

By adding a webform to your app, you can get data into Podio from an external source, such as your website.

Webforms are truly a great feature of Podio, and they can be used for many different purposes. Some common examples are:

- Use an Attendees app with a webform to gather submissions to your event.
- Use a Requests app with a webform to get contact form postings from your website's "Contact Us" section.
- Use a Candidates app to get candidates for your next job opening into your Recruitment workflow.

All apps have a webform that can be used to submit items into the app. To access the webform link as well as the webform settings, click the wrench icon to the right of your app, and select "Webform".



Here is a quick video showing how to set up webforms in your app:



<https://www.youtube.com/watch?v=UUudYUW6Dg4>

For advanced and CSS-savvy people, you can add your own CSS to style the webforms to look the way you want. Click "Theme" and there's a box to add your own CSS to your Podio webforms.

AEGERE Webform VI CSS style

To use style of webforms which is based on AEGEE Visual Identity you can use bellow CSS code. When you embed this webform, don't use body tag.

```
body { /*do not use body tag when embed on website */
  background: #1468B3;
  background-image: url(http://aegee.org/wp-content/uploads/background.png);
  min-height: 100%;
}
h5, .h5 {
  font-size: 25px;
  /* font-size: 2.5rem */
  font-weight: bold;
```

```

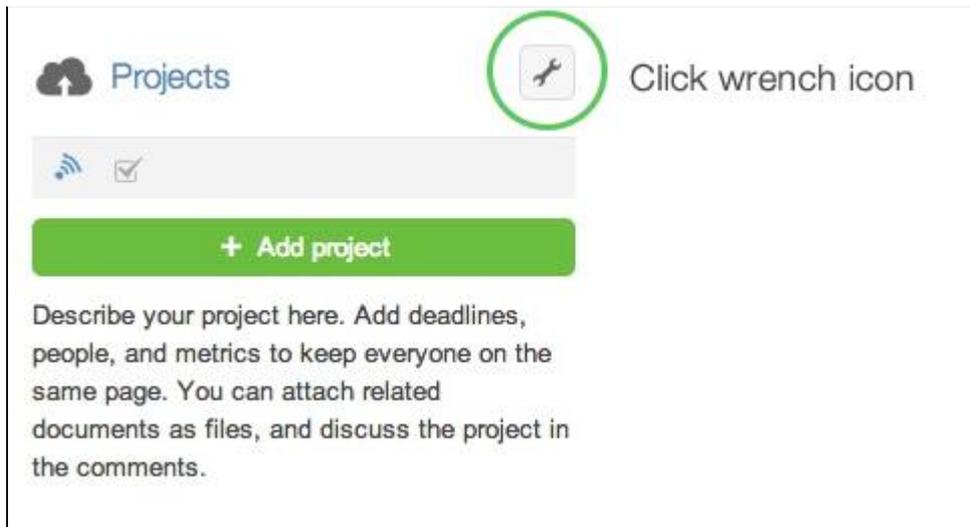
    font-style: normal;
    color: #204379;
}
p {
    font-size: 15px;
    /* font-size: 1.5rem */
    margin-bottom: 1em;
    line-height: 1.5em;
}
.label {
    font-weight: bold;
    font-size: 15px;
    color: #204379;
}
.form .field .label em {
    color: #c94137;
    margin-left: 3px;
}
.label {
    font-weight: bold;
    /* font-size: 1.5rem */
    color: #204379;
}
.buttons .submit:hover {
    background-color: #1468b3;
}
.buttons .submit {
    -moz-border-radius: 5px;
    -webkit-border-radius: 5px;
    -ms-border-radius: 5px;
    border-radius: 5px;
    display: block;
    padding: 10px 10px 10px;
    font-size: 117%;
    text-decoration: none;
    font-weight: bold;
    line-height: 1;
    border: 1px solid rgba(0, 0, 0, 0.05);
    border-bottom: 1px solid rgba(0, 0, 0, 0.25);
    background: #1468b3;
    color: #fff;
    cursor: pointer;
}

```

Exporting to Excel

Content in all Podio apps can be exported to Excel.

Use the wrench icon to get to the Excel Export functionality.



When you've exported the content to Excel, you'll get a Podio notification telling you that the content has been exported.

You can find the file by clicking the notification, or by clicking the profile icon in the top blue bar, and then Batch jobs.