Getting started with Perfony

The step-by-step guide, from your first login to steering your activity



LEVEL 1 · USER

Steps 1 to 3

Follow up and find your actions

LEVEL 2 · PILOT

Steps 4 to 7

Organise, steer and run your meetings

LEVEL 3 · EXECUTIVE

Steps 8 and 9

Structure and measure

⏱ About 3½ hours in all, at your own pace · ✋ 32 exercises to tick off

perfony

November 2026 edition

Contents

Start here	How to use this guide		...
LEVEL 1 · USER			
Step 1	Welcome to Perfony!	15 min	...
Step 2	Follow up my actions	20 min	...
Step 3	Find my actions	20 min	...
LEVEL 2 · PILOT			
Step 4	Create my first folder	25 min	...
Step 5	Steer	25 min	...
Step 6	Run my first meeting	30 min	...
Step 7	Work from my everyday tools	20 min	...
LEVEL 3 · EXECUTIVE			
Step 8	Structure	30 min	...
Step 9	Measure	25 min	...
APPENDICES			
Appendix A	Quick reference		...
Appendix B	Glossary		...
Appendix C	Where to find help		...

Click a title or a page number to go straight there.

How to use this guide

This guide takes you step by step from your first login to steering your activity. No need to read it all at once: go at your own pace, one step at a time.

🧭 A path in three levels

- **Level 1 · User** (steps 1 to 3): for everyone. You follow up and find your actions.
- **Level 2 · Pilot** (steps 4 to 7): you organise folders, steer your team's work and run your meetings.
- **Level 3 · Executive** (steps 8 and 9): you structure your folders and measure the activity.

Start with level 1, then carry on according to your role and your licence. The progress bar at the top of each step shows you where you are.

🗺️ Signposts in each step

🎯 **By the end of this step…**	What you will be able to do once the step is done.
✋ **Your turn**	What to do in Perfony, in order. Tick the box at the bottom of the card once you have succeeded.
💡 **Tip, Good to know**	Advice to save time or avoid a pitfall.
🤔 **Help box**	What to do if something does not show up on your screen.
📘 **Learn more**	The Perfony Academy articles on the topic: click to open them.

> 💡 **Keep your ticks**
> To keep the boxes you tick, first save this PDF to your computer, then open it from that file. If you only read it in your browser, your ticks will be lost when you close it.

📸 *The screenshots come from the Perfony Academy: some may show another language or an earlier version. The labels on your screen may differ slightly, but the steps remain the same.*

LEVEL 1 · USER 15 minutes

Step 1 · Welcome to Perfony!

Log in and find your way around



Good news: Perfony is quick to learn. In a quarter of an hour, you will log in to your account, take a tour of the place and make it your own.

Look out for the ✋ **Your turn** cards: they list what to do, in order. Once you have succeeded, tick the box at the bottom of the card to see your progress. Everything else is there to help you understand.

> 🎯 **By the end of this step, you will know how to…**
>
> - ✓ log in, and recover your password if needed;
> - ✓ find your way around the screen;
> - ✓ find any folder, action or meeting;
> - ✓ set your language, your avatar and your email alerts.

🔑 Log in to your account

Your organisation has its own Perfony account. To get in, you need three things:

- **your account address**, such as *yourcompany.iperfony.com*;
- **your email address**, which is your login;
- **your password**.

✋ YOUR TURN Log in

1. Open **Chrome, Edge or Firefox**.
2. Type your account address: *https://yourcompany.iperfony.com*
3. Enter your email address, then your password.
4. Click **Log in**.

☐ **Tick when done!** Expected result: your home page appears. Remember to bookmark it!

> 💡 **Tip**
>
> Note the **"i"** before perfony in the address: *iperfony.com*.

> 🤔 **You don't know your account address?**
>
> - look for an email from Perfony in your inbox (and in your spam folder): it contains the link;
> - ask a colleague, or your organisation's Perfony administrator;
> - or write to us at support@perfony.com.

🔒 Forgotten your password? Don't panic

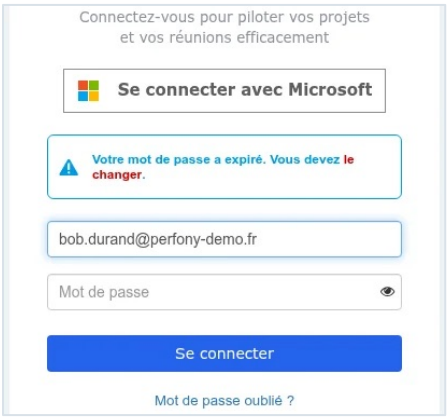
1. On the login page, click **Forgotten password?**
2. Enter your email address.
3. Open the message you receive and follow the link to choose a new password.

Nothing after a minute? Check your spam folder.

To **change your password** at any time: click your avatar at the top right, then **Change my password**.

Good to know

Your organisation may have set a lifetime for passwords. When yours expires, Perfony tells you as soon as you log in: just use “Forgotten password?”.



The message shown when a password has expired.

Take a tour of the place

Your screen reads from top to bottom and from left to right, from the most general to the most detailed.



1	**The ribbon**	The top bar. The logo always takes you back home.
2	**Search**	To find anything with a few letters.
3	**The main menu**	Home, Actions, Folders, Meetings, Reports…
4	**Your preferences**	Language, help (?) with the Academy and support, notifications (bell) and your avatar.
5	**The workspace**	The content of the section chosen in the menu.

> **The secret of the panes**
>
> Perfony is displayed in panes, from left to right: the list (your folders), then the chosen item (a folder), then its details (an action). You can widen or collapse each pane.

✋ YOUR TURN Explore your screen

1. In the left-hand menu, click **Actions**, **Folders** and **Meetings** in turn.
2. In **Folders**, click a folder: its content opens in the next pane.
3. Click the **Perfony logo** at the top left.

☐ **Tick when done!** Expected result: you are back on your home page.

🔍 Find anything with three letters

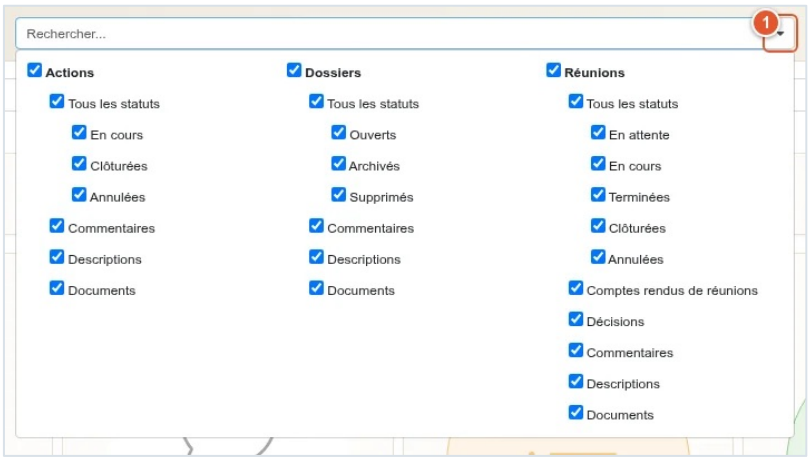
The “Search…” box at the top of the screen looks through your whole account: folders, actions, meetings, decisions, comments, documents and minutes.

✋ YOUR TURN Find a folder

1. Click in the **Search…** box.
2. Type the **first 3 letters** of a folder you are working on.
3. Click the result with the folder icon.

☐ **Tick when done!** Expected result: the folder opens directly.

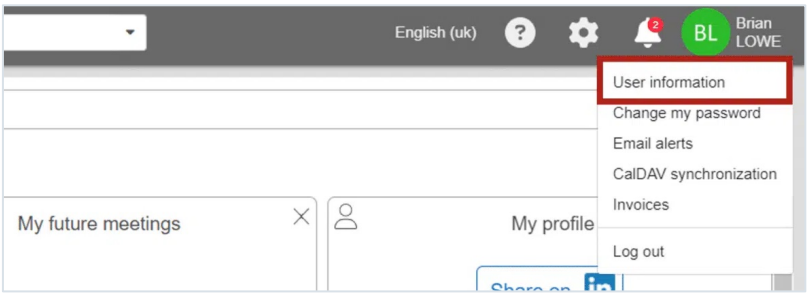
Closed actions and archived folders appear greyed out, but remain accessible. To narrow your search, click the **small arrow** at the end of the box and choose what to look for.



The search options, by Actions, Folders and Meetings.

🎨 Make yourself at home

A few settings, and Perfony is yours. Everything is behind your avatar, at the top right.



Your avatar menu.

✋ YOUR TURN Personalise your account

1. Click your avatar, then **User information**.
2. Click the avatar on the page: add a photo, or click **Delete photo** to draw a new colour at random. Save.
3. Go back to your avatar, then **Email alerts**: switch on the useful messages and, at the very bottom, the weekly summary of your due dates.

☐ **Tick when done!** Expected result: your avatar looks like you and you only receive the emails that matter.

💡 **What about the language?**

Click the language shown in the ribbon: 8 languages are available. Only Perfony's own texts change; what you and your colleagues have typed stays in its original language.

🎉 **Well done, step 1 complete!**

You know how to get into Perfony, find your way around, find what you are looking for and set up your account the way you like it.

➜ **Next step: Follow up my actions**.

📘 **Learn more in the Academy**

- Log in to your account · Your iPerfony domain
- Your password · Log in with Office 365
- Overview of the interface · The ribbon · The main menu
- The search bar · Choose your language
- Change your avatar

LEVEL 1 · USER 20 minutes

Step 2 · Follow up my actions

See what is expected of you and say where you stand



In Perfony, everything you are given to do takes the form of an action. And each time you update it, the whole team sees where you stand, without a single email.

In this step, you will find your actions, move them forward and discuss them with your colleagues. As in step 1, tick the box on each ✋ **Your turn** card once you have succeeded.

> 🎯 **By the end of this step, you will know how to…**
>
> - ✓ find the actions you are responsible for or contribute to;
> - ✓ update their progress and due date;
> - ✓ comment on an action and attach a document;
> - ✓ mark an action as completed.

🧩 What is an action?

An action is a precise task with a clear goal. It always has:

- **a person responsible**, who carries it out (their avatar is shown in front of the action);
- **a label**, which says what needs to be done;
- **a due date**, by which it must be done;
- **a progress bar**, from 0 to 100%;
- and, if needed, **comments**, **documents** and **contributors** who help the person responsible.

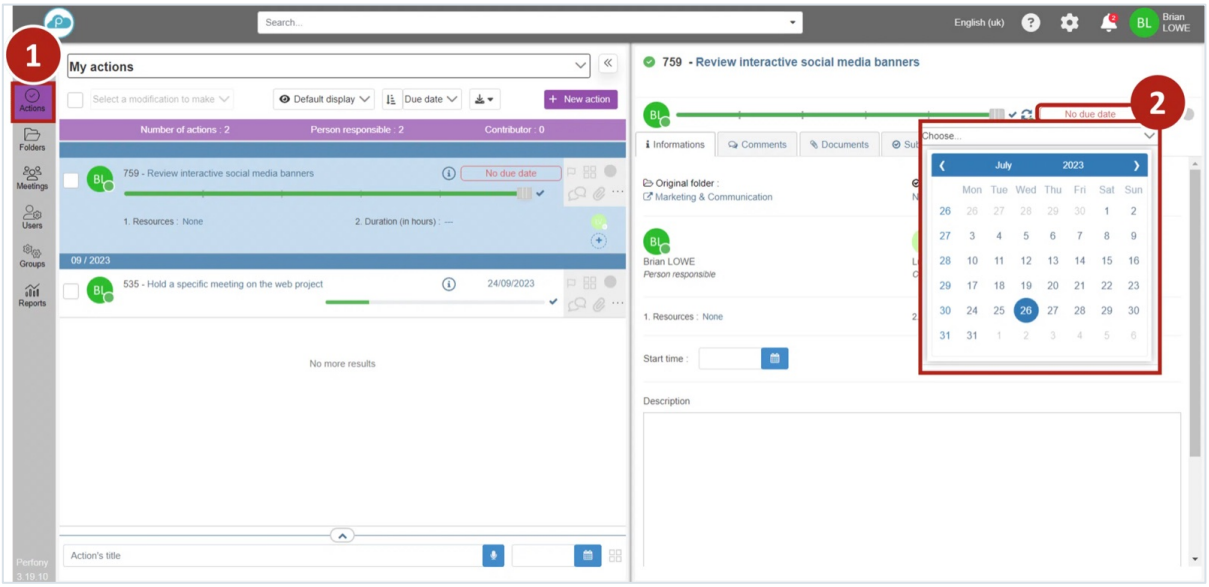
> **Good to know**
>
> Every action belongs to a folder: a project, an action plan, a committee… All the folder's participants see its actions and can move them forward.

Find your actions

The **Actions** menu, on the left, brings together all the actions that concern you, whatever their folder:

- **My actions**: those you are responsible for or contribute to;
- **Overdue**: only those past their due date. Handy to know where to start!

Click the name of an action: its form opens in the right-hand pane, with its Information, Comments and Documents tabs.



1	**The Actions menu**	Your list of actions is shown in the left-hand pane.
2	**The due date**	In the action form, clicking the date opens the calendar.

🖐 YOUR TURN Display your actions

1. In the left-hand menu, click **Actions**, then **My actions**.
2. Look through the list: person responsible, label, due date, progress.
3. Click the name of an action to open its form.

☐ **Tick when done!** Expected result: the action form opens to the right of your list.

> 🤔 **No action in your name yet?**
> That's normal if you are just starting. Ask the person who steers your folder to give you one to practise on, or come back to this step a little later.

On your home page too, widgets such as **My actions** show you at a glance what is waiting for you. Clicking the widget opens the matching list.

📈 Move your actions forward

The progress bar shows at a glance where the action stands. Drag the slider:

- **0%**: not started yet;
- **20 to 40%**: started, less than half done;
- **60 to 80%**: more than half done;
- **100%**: completed!



The progress bar of an action: drag the slider.

🖐 YOUR TURN Update a progress bar

1. In **My actions**, pick an action you have already worked on.
2. Drag the slider of its bar to the right level, for example **40%**.

☐ **Tick when done!** Expected result: the bar fills up to the level you chose, and the whole team can see it.

> 💡 **No stress**
> Made a mistake? Just drag the slider back. Every change remains visible in the action's History tab.

📅 A realistic due date

In the action form, click the date (or “No due date”) and pick a new day in the calendar. The menu above the calendar shifts the date in one go: 1 week, 2 weeks, 1 month…

No date yet? Choose **For the record** in the same menu: the action will not be counted as overdue.

> 💡 **Good to know**
> Each change of due date counts as a postponement of the action. So it is better to set a date you can keep from the start than to push it back several times.

💬 Talk on the action, not by email

A question, a detail, a document to share? Put it straight on the action: the information stays where it belongs, visible to all the folder's participants.

- **Comments**: the bubble is empty when there is no comment yet and filled when there are some. A red dot flags new ones.
- **Documents**: from your computer, or from OneDrive, SharePoint or Google Drive if your organisation has connected them.

✋ YOUR TURN Comment and share a document

1. Open the form of one of your actions, **Comments** tab.
2. Write a short message, for example “I've started, I'll give an update on Friday”, then click **Post**.
3. **Documents** tab: click **Add a document** and choose a file.

☐ **Tick when done!** Expected result: your comment and your document appear on the action, with your name and the date.

🏁 Complete an action

Action done? Drag its bar to **100%**: it is completed. The folder's pilot then checks the work and **closes** the action to approve it.

If something is missing, the pilot moves the bar back: the action returns to your list, often with a comment explaining why.

✋ YOUR TURN Complete an action

1. Choose an action you have really finished.
2. Drag its bar to **100%**.
3. Add a comment for the pilot, for example “Done, the report is attached”.

☐ **Tick when done!** Expected result: the action is completed and waiting for the pilot to close it.

> 🎉 **Well done, step 2 complete!**
>
> You know how to find your actions, move them forward, discuss them and complete them. Your colleagues know where you stand, with no reminders and no emails.
>
> ➜ **Next step: Find my actions**, with filters, favourites and your own widgets.

Learn more in the Academy

- About actions · The main menu · The My actions widget
- Change the progress · Change the due date
- Comment on an action · All about comments
- Attach a document · Complete, close, reopen

LEVEL 1 · USER 20 minutes

Step 3 · Find my actions

Your own lists, as favourites and on your home page



“My actions” shows everything. But day to day, you often want a more precise list: my actions in progress, those in one folder, those I contribute to…

Good news: you can create your own lists, keep them as favourites and even show them on your home page, with a live count of actions.

🎯 **By the end of this step, you will know how to…**

- ✓ filter and sort your actions;
- ✓ save a list as a favourite;
- ✓ turn it into a widget on your home page;
- ✓ organise your home page and track important actions.

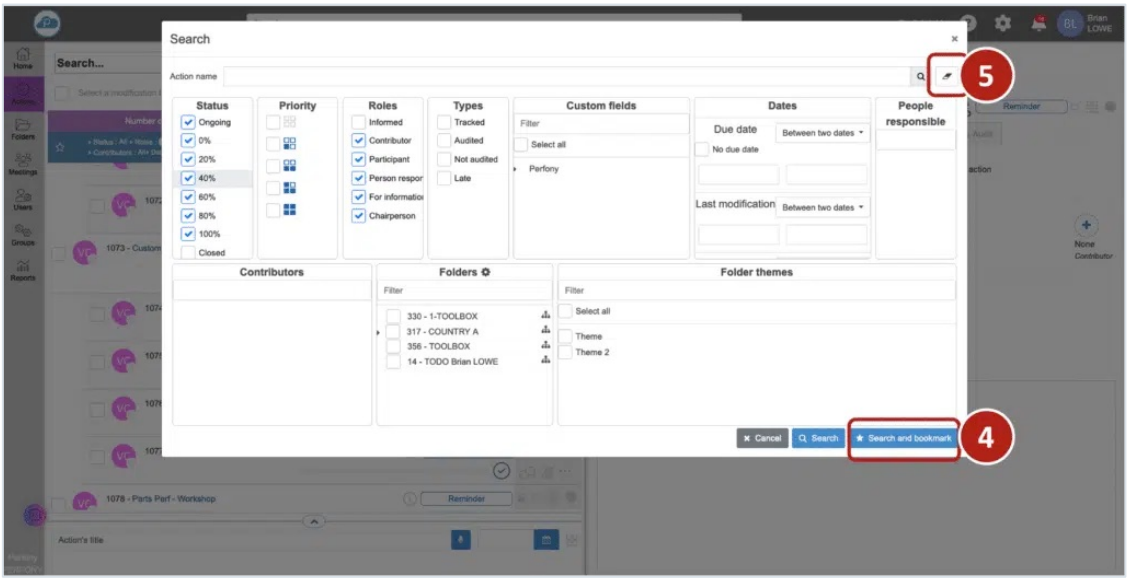
🔎 Filter and sort your actions

In the **Actions** menu, choose **Search**. Then click the small **gear wheel** to the right of the blue banner: the search window opens.

Tick the criteria you are interested in. They add up:

- **status**: not started, in progress, completed…;
- **your role**: responsible, contributor…;
- **dates, priority, folders, people responsible** and **keywords**.

To change the order of the list, use the sort menu at the top of the list: by due date, for example.



4	**Search and add to favourites**	Runs the search and offers to save the list (see below).
5	**The eraser**	Clears all criteria so you can start again from scratch.

> **Tip**
> Perfony remembers your last criteria. Before a new search, remember to click the eraser.

YOUR TURN Create your first list

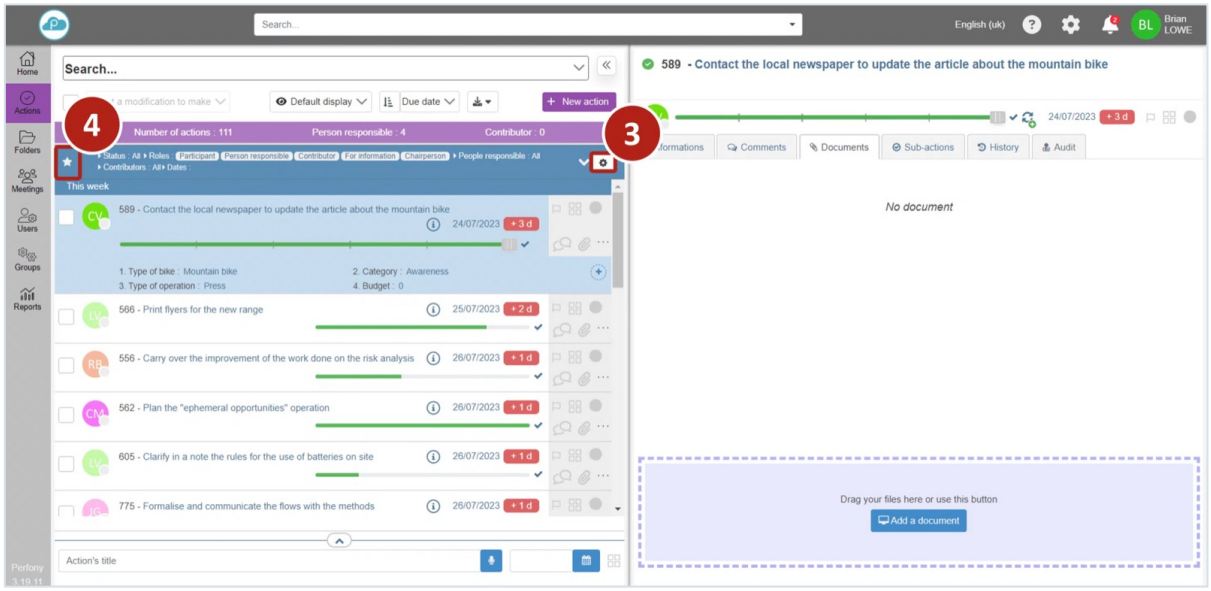
1. **Actions** menu, then **Search**.
2. Click the **gear wheel** to the right of the blue banner.
3. Click the **eraser**, then tick the status **In progress** and the role **Responsible**.
4. Click **Search**.

☐ **Tick when done!** Expected result: the list now shows only your actions in progress.

⭐ Keep your lists as favourites

No need to redo your filters every morning! Click the **star** to the left of the blue banner, or **Search and add to favourites** in the search window, then give your list a name.

You will find it in the **drop-down menu** at the top of the Actions page, with your other favourites.



3	**The gear wheel**	Opens the search window to change the criteria.
4	**The star**	Saves the list shown to your favourites.

✋ YOUR TURN Add your list to favourites

1. On your list of actions in progress, click the **star**.
2. Name it, for example “My actions in progress”, and confirm.
3. Open the drop-down menu at the top of the Actions page: your list is there.

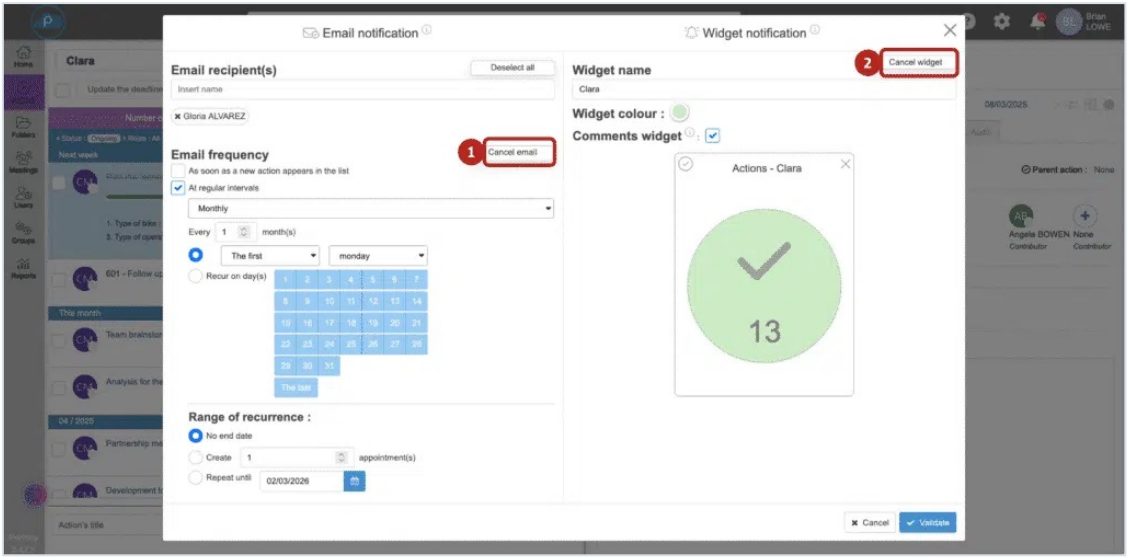
☐ **Tick when done!** Expected result: your list is saved and opens in one click.

> **Better together**
>
> A list your colleagues would find useful? Share it with the share icon to the right of its name. Each person will only see the actions of the folders they have access to.

Turn it into a widget

A widget is a tile on your home page. It shows the number of actions in your list, and clicking it opens the list.

Open your favourite list, then click the **notification icon** to the right of its name. A window opens in two parts: emails on the left, the widget on the right.



1	**Cancel email**	Click it if you only want the widget, without emails.
2	**Cancel widget**	Click it if you only want the emails.

🖐 YOUR TURN Create your widget

1. Open your “My actions in progress” list from the drop-down menu.
2. Click the **notification icon** to the right of its name.
3. On the left, click **Cancel email**. On the right, give your widget a name and a colour.
4. Click **Confirm**.

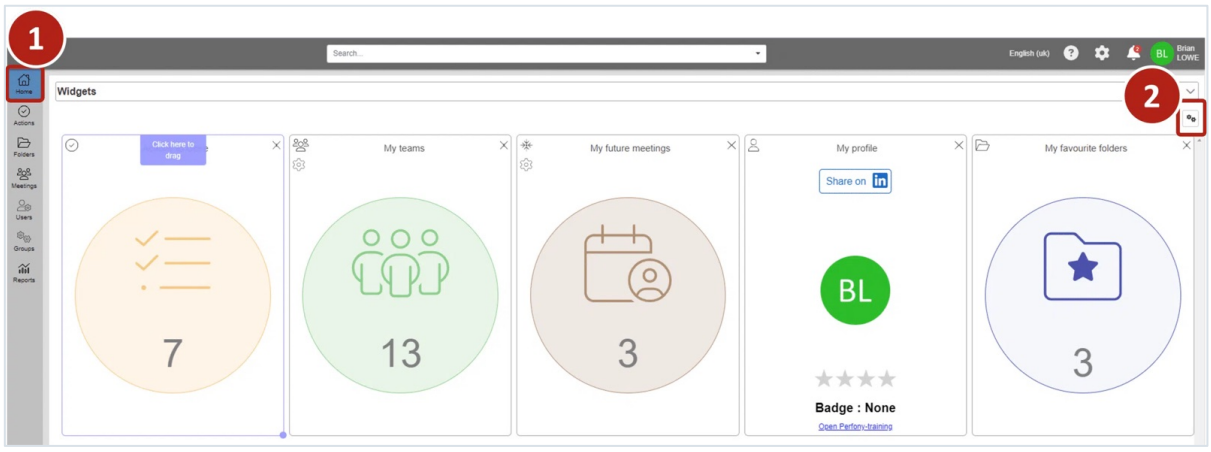
☐ **Tick when done!** Expected result: your widget is ready: we'll show it on the home page right after.

> 💡 **What about the emails?**
>
> The left part of the same window sends you the list by email: as soon as a new action joins it, or at regular intervals, for example every Monday morning.

🏠 Organise your home page

Your home page is your dashboard. Arrange it your way:

- **show or hide** widgets: configuration icon at the top right of the home page, then tick or untick;
- **move** a widget: grab it by its title and drag it;
- **enlarge** a widget: pull its bottom right corner;
- **remove** a widget: click its cross. You can always show it again.



1	**Home**	Your home page and its widgets.
2	**Configure**	Choose the widgets to display.

YOUR TURN Tidy up your home page

1. Click **Home**, then the configuration icon at the top right.
2. Tick your new “My actions in progress” widget.
3. Drag it to the first position, then remove a widget you don't use.

☐ **Tick when done!** Expected result: your home page shows what matters to you first.

Keep an eye on an important action

An action matters to you, even though it isn't yours? Track it with the **flag**, next to the priority icon. It turns red, and the action joins the **Tracked actions** list.

1. Click an action's **flag**: it turns red.
2. Find it in the drop-down menu of the Actions page, or in the **Tracked actions** widget on the home page.
3. To stop tracking it, click the flag again.

🎓 **Well done, User level complete!**

You know how to log in, follow up your actions and find what matters to you in one click. You have mastered the essentials of everyday Perfony.

➜ **Next step: Create my first folder**. On to the Pilot level: now you organise the work!

📘 **Learn more in the Academy**

- Filter actions · Sort actions · Action plan views
- Create and share an action view, and make it a widget
- Favourite action lists · All about favourites
- Customise the home page · Tracked actions

LEVEL 2 · PILOT 25 minutes

Step 4 · Create my first folder

Organise the work and hand it to your team



Welcome to the Pilot level! Until now, you moved forward the actions you were given. Now you are the one organising: you create the folder, invite the team and share out the actions.

The ✋ **Your turn** cards turn blue, the colour of the Pilot level. The principle stays the same: do the exercise, then tick the box.

🎯 **By the end of this step, you will know how to…**

- ✓ create a folder and file it in the right place;
- ✓ invite your team and choose each person's role;
- ✓ create actions and assign them;
- ✓ break an action down into sub-actions.

🤔 **No “New folder” button?**

To create a folder, you need a Pilot or Executive licence. If the button does not appear in Folders, ask your organisation's Perfony administrator to upgrade your licence.

📁 The folder, at the heart of teamwork

A folder is the workspace of a project, a committee or an action plan. It brings together:

- **the participants**, the people who work in it;
- **the action plan**, all the folder's actions;
- **the documents** and **the meetings** related to the topic.

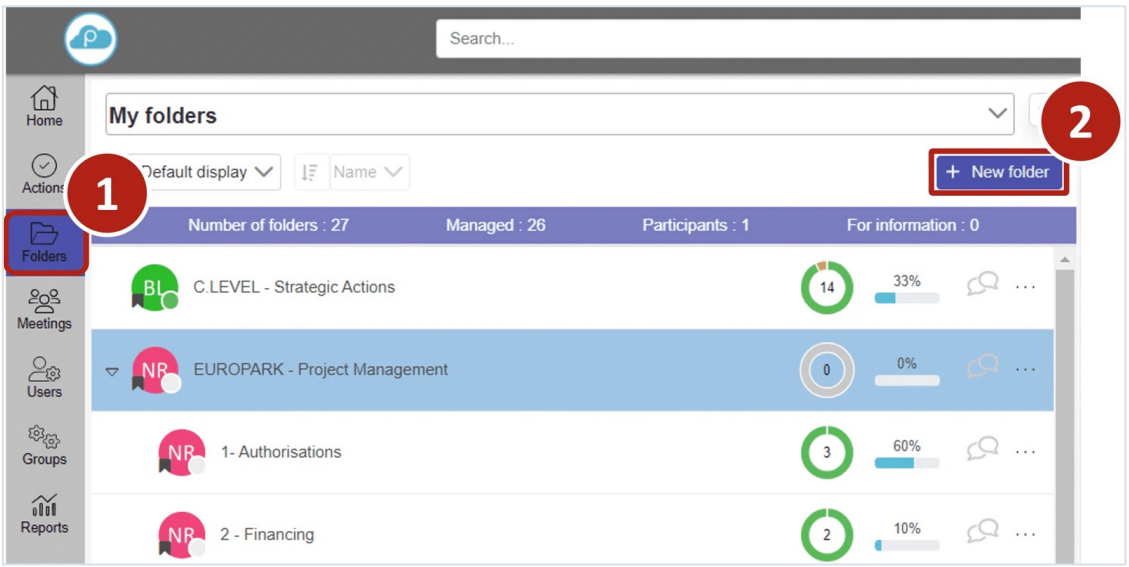
Folders are organised in a tree: a “parent” folder can contain sub-folders, for example a project and its various workstreams.

> 💡 **One folder per topic**
>
> Create a folder for each project or each body (executive committee, team meeting…). You will find everything in one place, and each person will only see the folders that concern them.

✨ Create your folder

In the **Folders** menu, click **New folder**. Only the name is required, but take a few seconds to also enter:

- **the parent folder**, if there is one: your folder will be neatly filed and easy to find;
- **the participants**: you can add them as soon as you create it.



1	**Folders**	The list of your folders, as a tree.
2	**New folder**	Visible if your licence allows you to create folders.

✋ YOUR TURN Create your first folder

1. Click **Folders**, then **New folder**.
2. Give it a clear name, for example “Test – My first folder”.
3. Choose its parent folder if needed, then confirm.

☐ **Tick when done!** Expected result: your folder appears in the list, with your avatar: you are its pilot.

> 💡 **What about sub-folders?**
> From a folder you steer, you can create a sub-folder: it is automatically filed under its parent folder, and is then managed like any other folder.

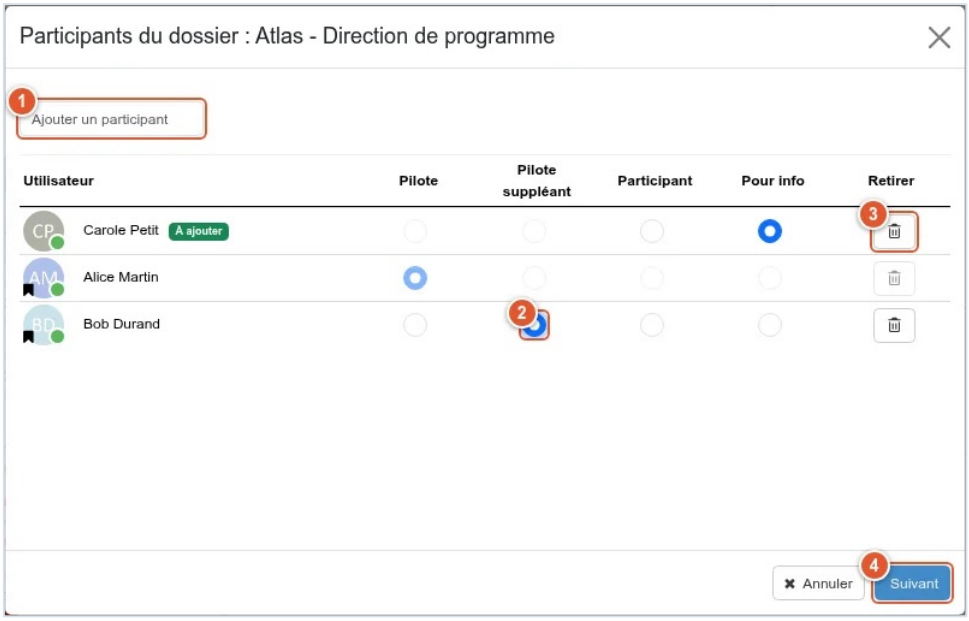
👥 Invite your team

Each participant has a role in the folder:

- **Pilot and co-pilot**: they manage the folder (participants, sub-folders, closing actions). They need a Pilot licence.
- **Participant**: works in the folder and can be responsible for actions, whatever their licence.
- **For information**: sees the folder without taking part, with no actions or notifications. Ideal for a line manager.

> **The golden rule**
>
> To be responsible for an action, a person must be a participant in the folder. So invite your team before sharing out the actions.

To manage participants, open the folder's **…** menu, then **Manage participants**.



1	**Add a participant**	Type the start of a name, then choose the person.
2	**The role**	Tick each person's role: pilot, co-pilot, participant or for information.
3	**Remove**	The bin removes a person from the folder.
4	**Next**	Shows the summary before confirming everything at once.

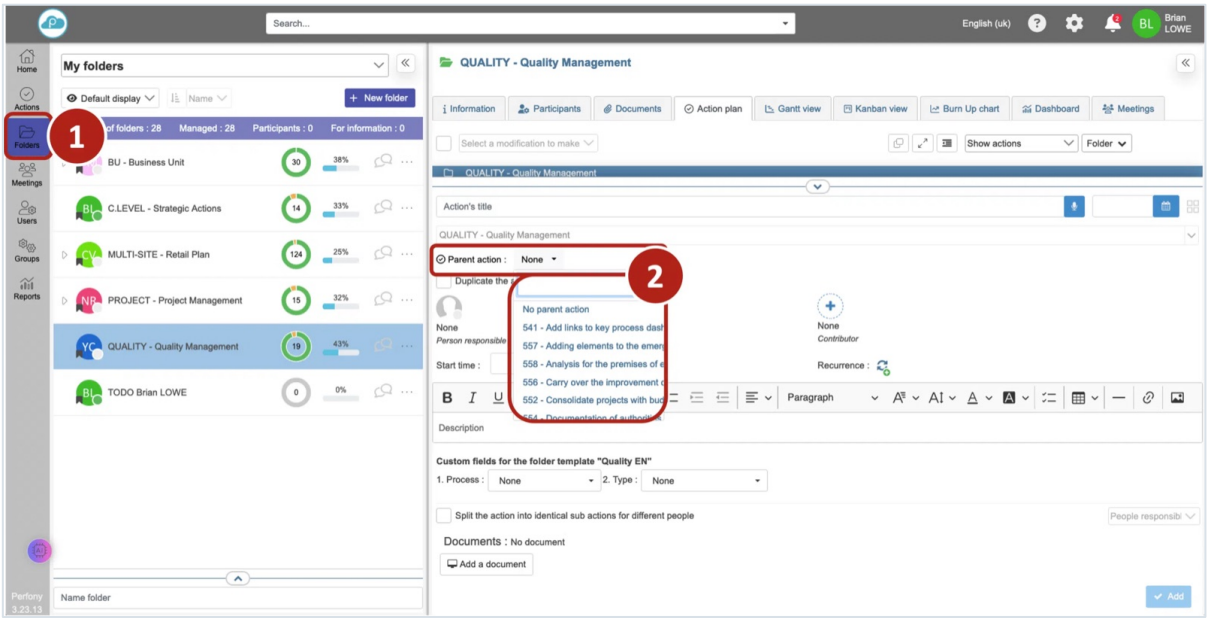
YOUR TURN Invite a colleague

1. In **Folders**, click your folder's **…** menu, then **Manage participants**.
2. In **Add a participant**, type a colleague's name and choose them.
3. Tick the **Participant** role, click **Next**, check the summary and confirm.

☐ **Tick when done!** Expected result: your colleague is now part of the folder and can be given actions.

✅ Create the actions and assign them

Open your folder, **Action plan** tab. At the bottom, start typing the label of a new action: the other fields appear. Choose the **person responsible**, the **due date** and, if needed, the **priority** and **contributors**, then click **Add**.



1	**Folders**	Open the folder, then its Action plan tab.
2	**Parent action**	To create a sub-action (see below).

> 💡 **A good label**
>
> Start with a verb and state the expected result: “Send the signed quote to the customer” rather than “Quote”. The person responsible knows straight away what to do, and when it is done.

🖐 YOUR TURN Create and assign two actions

1. In your folder, **Action plan** tab, type a label in the box at the bottom.
2. Choose your colleague as the **person responsible**, set a due date, then click **Add**.
3. Create a second action for yourself, with no date: choose **For the record**.

☐ **Tick when done!** Expected result: both actions appear in the action plan, and your colleague sees theirs in “My actions”.

🌿 Break it down with sub-actions

An action that is a bit too big? Break it down into sub-actions. They appear just below, slightly indented. There is only one level: no sub-action of a sub-action.

1. Click the name of the action to open its form, **Sub-actions** tab.
2. Type the label of the sub-action in the box at the bottom, then click **Add**.
3. Another way: in the action plan's creation area, choose the **parent action**.

> 💡 **Is your action plan already in Excel?**
>
> No need to type it all again: Perfony can import it. See the article Import an Excel action plan.

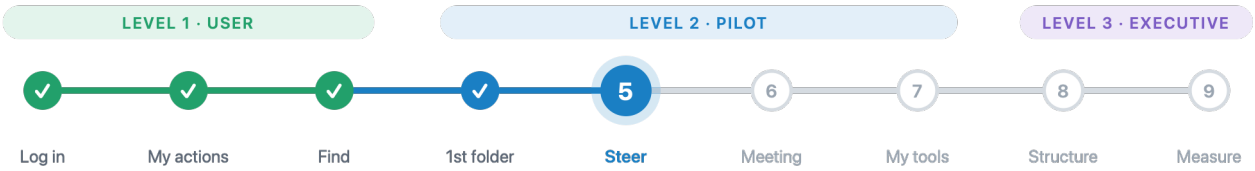
> 🎉 **Well done, step 4 complete!**
>
> Your folder is created, your team is invited and the first actions are assigned. The work can begin!
>
> ➜ **Next step: Steer**, to follow the progress of your action plan and close the completed actions.

> 📘 **Learn more in the Academy**
>
> - What is a folder? · Who can create a folder? · Licences
> - Create a folder · Create a sub-folder
> - Roles in a folder · Manage participants
> - Create an action in a folder · Change the person responsible
> - Add contributors

LEVEL 2 · PILOT 25 minutes

Step 5 · Steer

Follow the progress and approve the work



Your folder is alive: actions move forward, some are completed, others fall behind. Your job as pilot: see all this at a glance, and approve the work done.

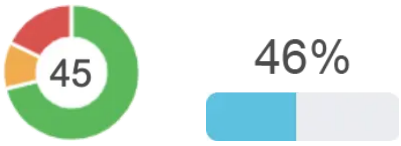
In this step, you learn to read the indicators, choose the view that works for you and close actions.

By the end of this step, you will know how to…

- ✓ read a folder's indicators;
- ✓ switch from the list to the Gantt and Kanban views;
- ✓ close completed actions, or send them back;
- ✓ follow the folder's trajectory and share its status.

Read your folders at a glance

In the **Folders** list, each folder shows two indicators:



- **The donut**: the number in the middle is the number of actions in progress. **Red** shows the share that is overdue, **orange** the completed actions waiting for you to close them, **green** those on schedule.
- **The gauge**: the overall progress of the folder, across all actions.

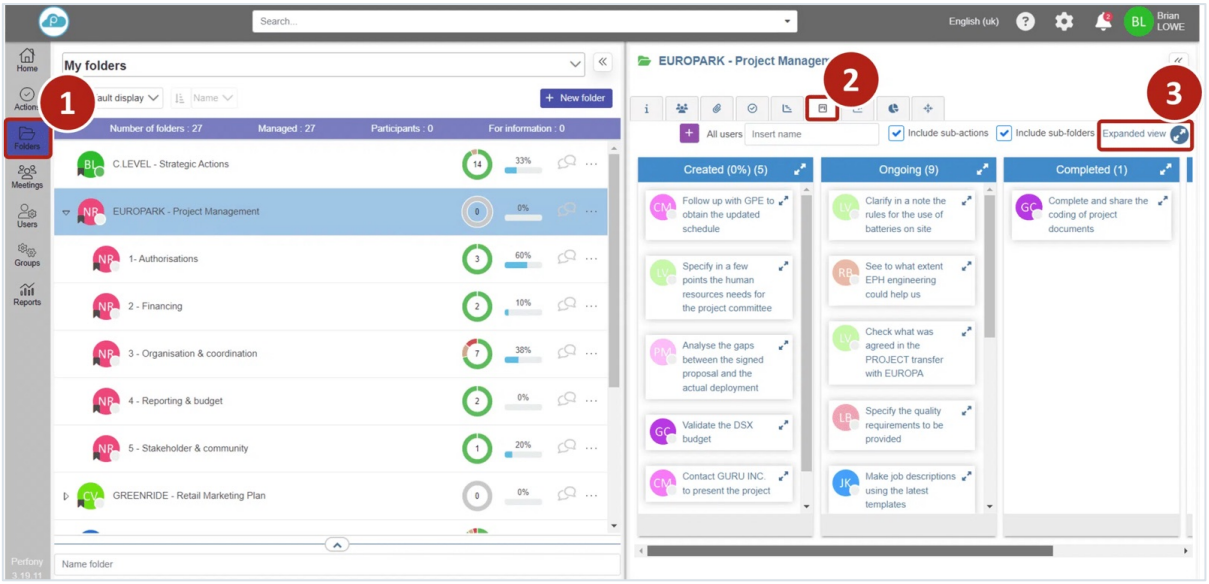
In the folder's **Information** tab, you choose whether or not to include sub-folders and closed actions in these figures.

> **The Monday morning reflex**
>
> Spot the red (overdue actions to chase) and the orange (actions to close). In two minutes, you know where to act.

Choose the view that works for you

Open a folder: its tabs offer several ways of looking at the same action plan.

- **Action plan**: the list, one action per line. You can compact or expand it, and show or hide sub-actions.
- **Gantt view**: the actions on a calendar, with their dependency links. Only actions with a date appear: not the “For the record” ones.
- **Kanban view**: one column per status (created, in progress, completed, closed). Drag a card from one column to another to change its status.



1	**Folders**	Choose the folder in the list.
2	**Kanban view**	The Kanban tab (the Gantt is right next to it).
3	**Extended view**	Shows the Kanban across the full width of the screen.

YOUR TURN Switch views

1. Open your test folder, **Action plan** tab.
2. Switch to the **Gantt view**, then to the **Kanban view**.
3. Click **Extended view**, then close it with the cross at the top right.

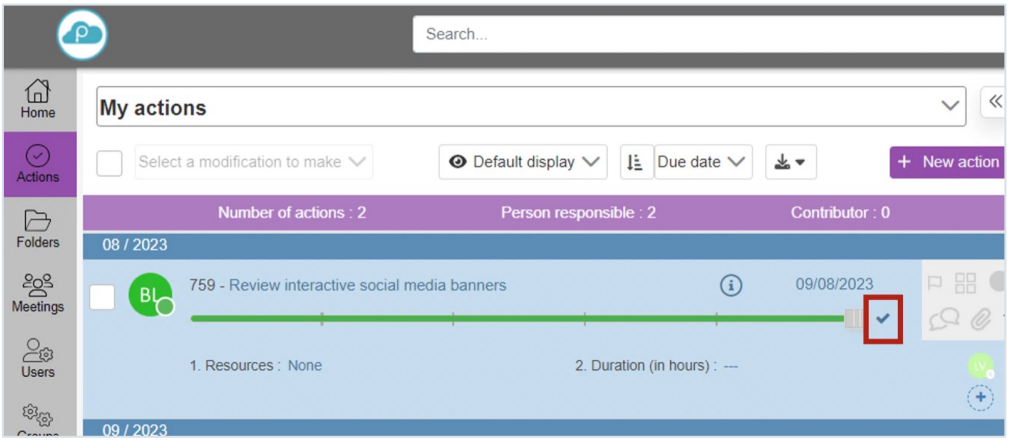
☐ **Tick when done!** Expected result: you have seen the same action plan from three angles.

> **Columns made to measure**
> Fancy a Kanban by project phase, by site or by work package? It's possible with custom fields: see step 8.

✓ Approve the work: close

When the person responsible moves their action to 100%, it is **completed**. It's up to you to check the work, then **close** it: that's your approval.

- **All good?** Click the **Close** icon, just to the right of the progress bar. The action turns grey.
- **Something missing?** Move the bar back and explain why in a comment: the action goes back to the person responsible.



The Close icon, to the right of the bar of a completed action.

✋ YOUR TURN Close an action

1. In your test folder, move the action you gave yourself to **100%**.
2. Click the **Close** icon to the right of its bar.
3. Add a quick word of congratulations as a comment: it's always appreciated!

☐ **Tick when done!** Expected result: the action is greyed out: it is closed.

> 💡 **Never miss a closure**
>
> On your home page, the “Actions to close” widget counts the completed actions waiting for your approval, in all the folders you steer. You can close them one after the other without leaving the home page. Closed an action by mistake? The action's “…” menu, then “Reopen”.

⚡ Save time: edit in bulk

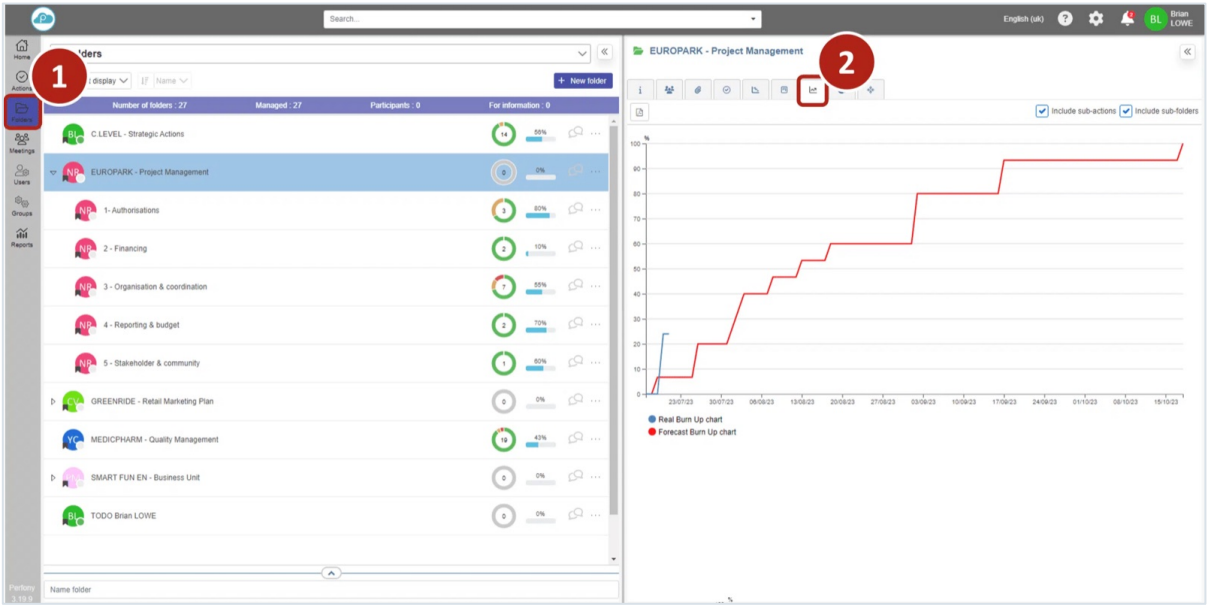
Ten actions to push back by a week? No need to open them one by one.

1. Tick the box to the left of the actions concerned.
2. In the edit menu at the top of the list, choose what to change: due date, priority, folder, complete…
3. Check the selection, then confirm.

From the same selection, you can also **send the actions by email**, even to people who don't have a Perfony account.

Stay on course with the Burn-up

The folder's **Burn Up** tab compares two curves: in **red**, the planned progress based on the due dates; in **blue**, the actual progress. If the blue curve drops below the red one, the folder is falling behind.



1	**Folders**	Choose the folder in the list.
2	**Burn Up**	The progress chart tab.

> **Be warned in time**
>
> In the folder's Information tab, tick “folder alarm”: a bell will appear next to its name as soon as it falls behind. The “Folder alarm” widget brings them together on your home page.

Share the progress report

For a committee or a customer: the folder's **…** menu, then **Download**. You get the action plan as a **PDF**, ready to send, or in **Excel**, to rework the figures.

🎉 **Well done, step 5 complete!**

You read your folders at a glance, choose the right view, approve the work and stay on course.

➜ **Next step: Run my first meeting**: from the agenda to the minutes, with decisions that become actions.

📘 **Learn more in the Academy**

- A folder's indicators · A folder's views
- The Gantt view · The Kanban view · The Burn-up
- Complete, close, reopen · The Actions to close widget
- Edit actions in bulk · The folder alarm
- Excel export · PDF export of a folder

LEVEL 2 · PILOT 30 minutes

Step 6 · Run my first meeting

From the agenda to the minutes, without losing a thing



How many decisions made in meetings get lost in a notebook or an email? With Perfony, what is decided in the meeting immediately becomes an action, with a person responsible and a due date.

In this step, you prepare a meeting, run it, turn the decisions into actions and share the minutes.

By the end of this step, you will know how to…

- ✓ create a meeting and link it to your folder;
- ✓ prepare and send the agenda;
- ✓ record decisions and create actions during the meeting;
- ✓ share the minutes and close the meeting.

Create your meeting

Meetings menu, then **New meeting**. Perfony first asks you what you want to do:

- **New meeting**: a new appointment or a new body, for example “Project X steering committee”;
- **New occurrence** of an existing meeting: the next session of a meeting that already exists.

Only the name is required. Then add:

- **the participants** and the meeting's other pilots;
- **the date and time**, and if needed the recurrence (gear wheel) for a meeting that comes back every week or every month;
- **the action plan**: link the meeting to your folder, or let Perfony create a folder with the same name. The actions decided in the meeting will be filed there.

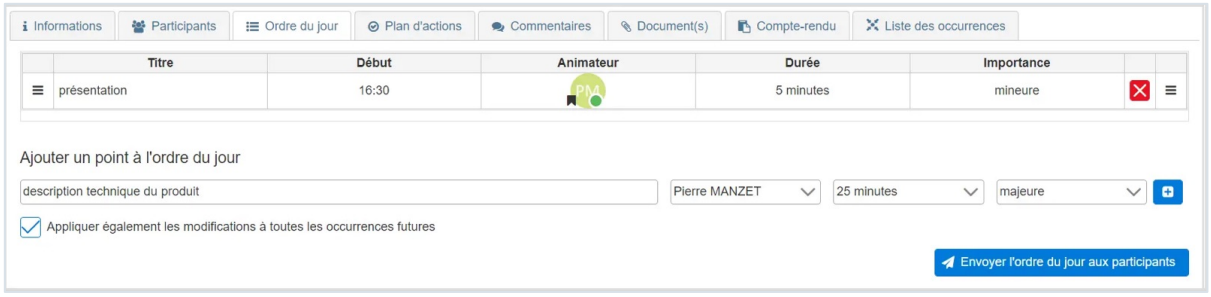
✋ YOUR TURN Create your meeting

1. **Meetings** menu, then **New meeting**.
2. Name it, for example “Test meeting”, and add the colleague you invited to your folder.
3. Set a date and time, then link the meeting to your test folder.
4. Save.

☐ **Tick when done!** Expected result: your meeting appears in Meetings, with the status “pending”.

📝 Prepare the agenda

Agenda tab: for each item, enter a title, a facilitator, a duration and an importance, then click the blue **+**. Perfony works out the start time of each item. To change the order, drag the lines.



The Agenda tab and its button for sending it to the participants.

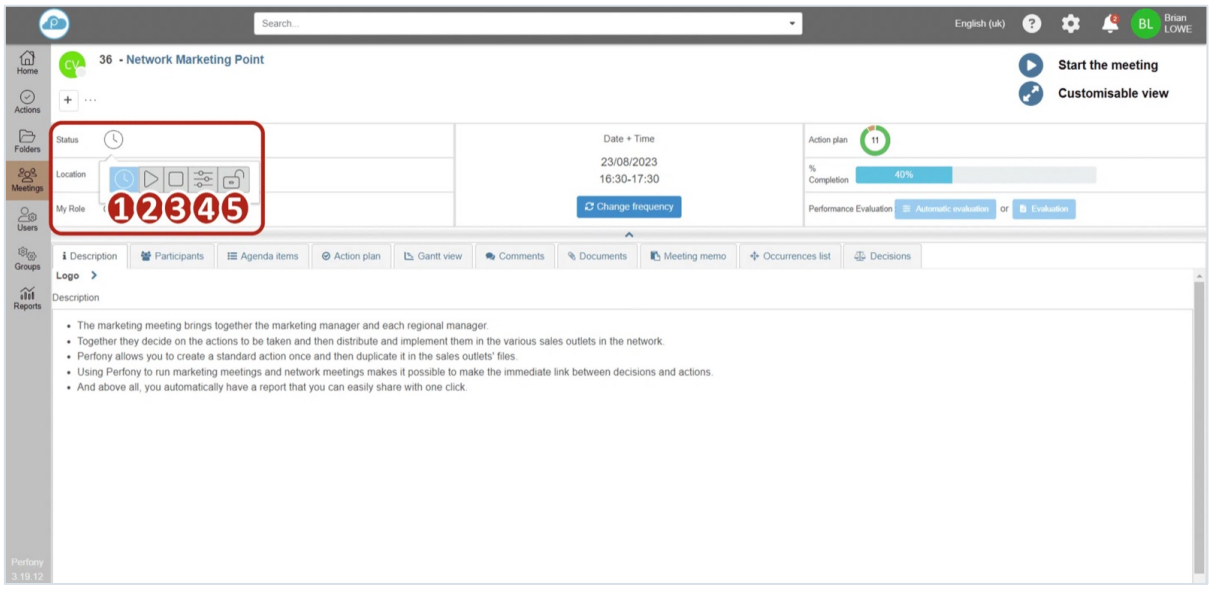
✋ YOUR TURN Prepare and send the agenda

1. In your meeting, **Agenda** tab, add two items.
2. Click **Send the agenda to participants**, add a note if you wish, then send.

☐ **Tick when done!** Expected result: your participants receive the agenda by email and can prepare.

▶️ Run the meeting

A meeting goes through several statuses, which you change in one click:



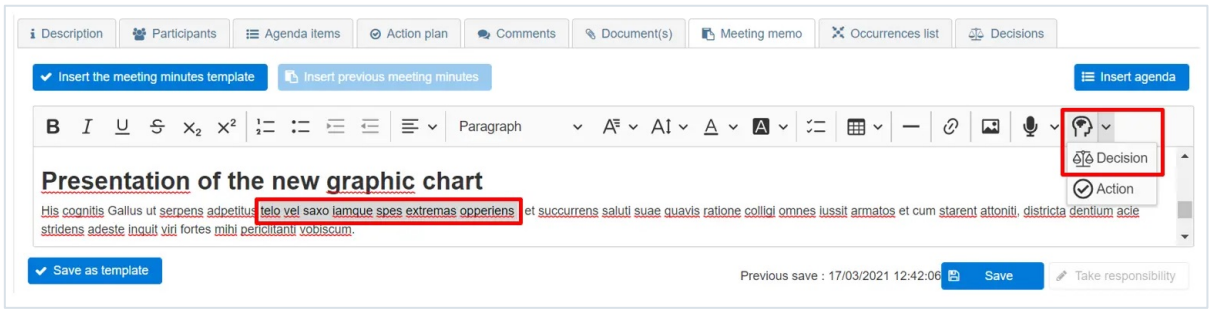
1	**Pending**	The meeting is scheduled.
2	**In progress**	Off we go! All participants can write in the minutes and the action plan.
3	**Completed**	The session is over: time for the minutes.
4	**To be evaluated**	If you wish, participants rate the meeting.
5	**Closed**	Everything is frozen and archived. A pilot can reopen it.

During the meeting, take your notes in the **Minutes** tab. Buttons insert the agenda or the minutes of the previous meeting in one click: handy to review what had been decided.

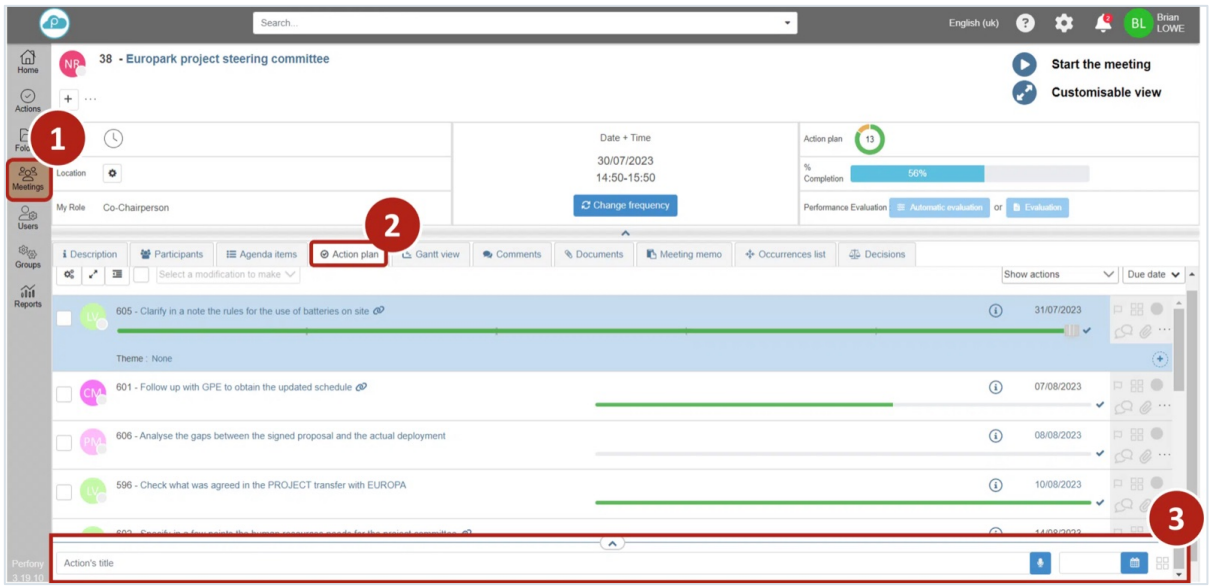
⚖️ Decisions and actions, on the spot

Perfony relies on the **RIDA** method: each exchange is an **Information**, a **Decision** or an **Action**.

- **A decision**: select the passage in the minutes, click the AI icon, then **Decision**. It joins the decision log (Decisions tab).
- **An action**: the meeting's **Action plan** tab, creation area at the bottom. Make sure you choose the right folder if the meeting follows several.



Select a passage of the minutes, then AI › Decision.



1	**Meetings**	Open your meeting.
2	**Action plan**	The actions of the folders followed by the meeting.
3	**Creation area**	To add an action during the meeting.

YOUR TURN Turn a decision into an action

1. Start the meeting: status **In progress**.
2. In **Minutes**, write “We are launching phase 2”, select the sentence, then AI › **Decision**.
3. **Action plan** tab: create the action “Prepare the phase 2 schedule”, assigned to your colleague.
4. Move the meeting to the **Completed** status.

☐ **Tick when done!** Expected result: the decision is in the log and the action in your folder's action plan.

🤖 Let the AI take notes

Perfony's artificial intelligence is on by default (your administrator can switch it off). It can do a good part of the work:

- **Automatic transcription** turns speech into text. Each voice appears as “Speaker 1, 2…” and can be linked to a participant. You can also import the recording of a Teams meeting.
- **The summary** sums up the meeting in the format of your choice, including the RIDA format. It spots actions and decisions and offers to create them in one click.

> 💡 **The AI suggests, you decide**
> Review each suggested action before approving it: the right person responsible, the right due date, the right folder. You stay in control, the AI saves you time.

📤 Share the minutes and close

Minutes tab, export icon: choose what the minutes will contain (participants, decisions, action plan, documents…), then click **PDF** to download them, or **Email** to send them to the participants.

Keen to improve? Before closing, launch the evaluation: each participant rates the meeting in under a minute, anonymously, on three criteria (preparation, conduct, results).

✋ YOUR TURN Share and close

1. **Minutes** tab, click the export icon, tick the items to include, then **Email**.
2. Move the meeting to the **Closed** status.

☐ **Tick when done!** Expected result: the participants have received the minutes, which are also filed in the meeting's Documents tab.

🎉 **Well done, step 6 complete!**

You know how to prepare, run and wrap up a meeting. Decisions no longer get lost: they become actions that are followed up.

➜ **Next step: Work from my everyday tools**: Outlook, Teams, your phone…

📘 **Learn more in the Academy**

- Bodies and events · Create a meeting · Recurring meeting
- Create the agenda · Share the agenda · The statuses
- The decision log · Create an action in a meeting
- Meetings with AI · Automatic transcription · The automatic summary
- Share the minutes · Evaluate a meeting

LEVEL 2 · PILOT 20 minutes

Step 7 · Work from my everyday tools

Perfony in Outlook, Teams, your phone and your calendar



Do you spend your days in Outlook, Teams or on your phone? Perfony comes to you: create an action from an email or a conversation, follow your actions on the move, see your meetings in your calendar.

Only do the exercises that match your tools. Some tools are installed by your IT department: if one is missing, ask them for it.

🎯 **By the end of this step, you will know how to…**

- ✓ turn an Outlook email into an action;
- ✓ use Perfony in Teams;
- ✓ follow your actions from your phone;
- ✓ show your meetings and actions in your calendar.

📧 In Outlook

The Perfony add-in adds a Perfony icon to the Outlook ribbon. It opens a panel that lets you:

- **turn an email into an action**: no more “to do” emails piling up;
- **manage your action plan** and reply to comments without leaving Outlook;
- **synchronise your meetings**: a meeting created in Outlook can also be created in Perfony.

🤔 **No Perfony icon in Outlook?**

The add-in is installed for the whole organisation by the Microsoft 365 administrator, with the help of the Perfony project manager. Ask your IT department for it.

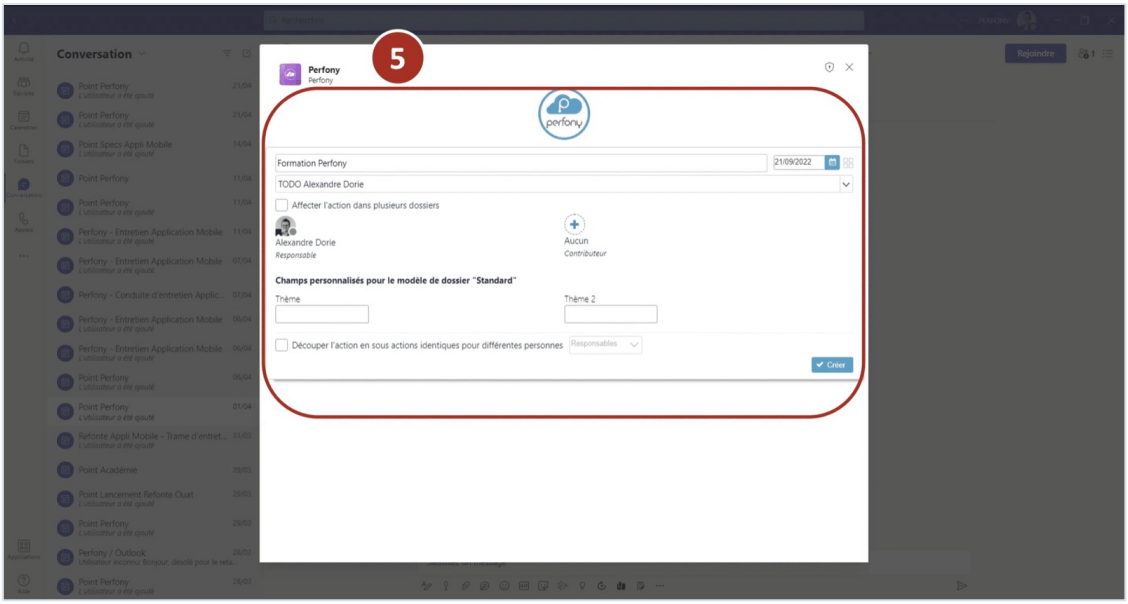
✋ YOUR TURN Turn an email into an action

1. In Outlook, open an email asking you to do something.
2. Click the **Perfony** icon in the ribbon, then the tab that turns the email into an action.
3. Check the label, choose the folder, the person responsible and the due date, then confirm.

☐ **Tick when done!** Expected result: the action is created in Perfony, with the email as context.

💬 In Teams

- **A Perfony tab in a channel**: click the **+** in the channel's tab bar, add Perfony and choose the folder to display. The team follows the action plan without leaving Teams.
- **An action from a conversation**: click the **…** below the message box, choose Perfony and fill in the form. A card announces the action in the conversation.
- **The Perfony agent for Copilot**: if your organisation uses Microsoft 365 Copilot, ask it in plain language to list, create or update your actions.



The Perfony form, opened from a Teams conversation.

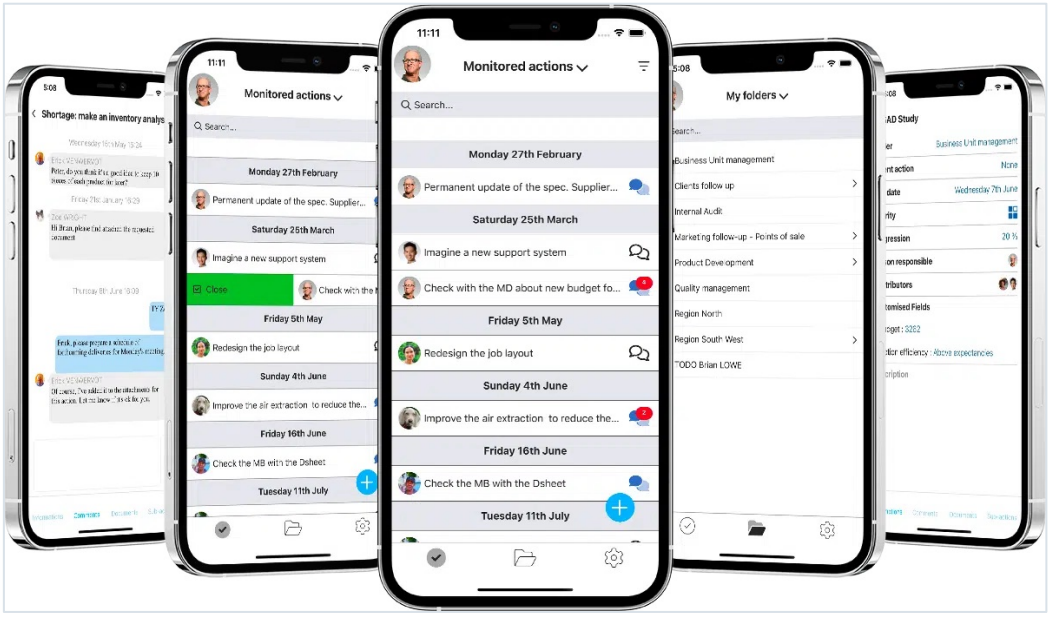
✋ YOUR TURN Create an action from Teams

1. In a Teams conversation, click the **…** below the message box, then **Perfony** (log in the first time).
2. Type the label, choose the folder, the person responsible and the due date, then click **Create**.

☐ **Tick when done!** Expected result: a card announces the action in the conversation, and it is in Perfony.

📱 On your phone

The **Perfony** app for iPhone and Android is deliberately simple: the essentials for when you are on the move. You find your actions and folders, update progress, comment and add a photo taken in the field.



The Perfony mobile app: actions, folders, comments.

✋ YOUR TURN Install the app

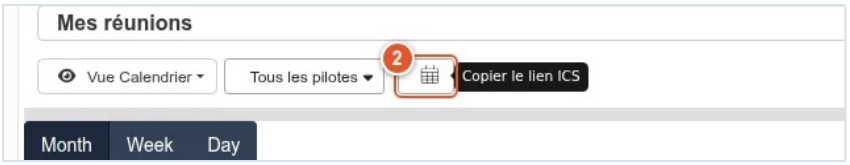
1. Install **Perfony** from the App Store or Google Play.
2. Log in with your Perfony email address and password.
3. Tap the **+** at the bottom right to create an action, then add a photo to it.

☐ **Tick when done!** Expected result: your action, with its photo, is also visible in Perfony on your computer.

> **Nothing to install**
> Perfony also works in the browser of your phone or tablet: just open your account address. The screens adapt and everything is done with your finger.

In your calendar

Your Perfony meetings and actions can appear in your usual calendar, Outlook or Google Calendar. In the **Meetings** menu, click the **Copy ICS link** button, then subscribe to this calendar from your calendar app.



The Copy ICS link button, in the Meetings menu.

YOUR TURN Add Perfony to your calendar

1. **Meetings** menu, then **Copy ICS link**.
2. In Outlook or Google Calendar, add a calendar from an internet address and paste the link.

☐ **Tick when done!** Expected result: your Perfony meetings and actions appear in your calendar.

> **A personal link**
> This link gives access to your calendar without a password: don't share it. The calendar is read-only: changes are made in Perfony.

With your AI assistant

Do you use **Claude** or **Microsoft Copilot**? Connect them to Perfony: just ask “What are my overdue actions?” or “Create an action to chase the supplier on Friday”. The assistant sees exactly what you see in Perfony, no more, no less.

For Claude, the first step is to ask support@perfony.com to activate the connector. Everything is explained in the Academy (see below).

🎓 **Well done, Pilot level complete!**

You know how to create and steer a folder, run a meeting and use Perfony from your everyday tools. Your team is in good hands!

➜ **Next step: Structure**. On to the Executive level: groups, templates and custom fields.

📘 **Learn more in the Academy**

- Install the Outlook add-in · Use the Outlook add-in
- The Perfony tab in Teams · An action plan in a channel
- Create an action from Teams · The Copilot agent
- The mobile app · Create an action on mobile · Perfony in the mobile browser
- Perfony in your calendar · Connect Claude

LEVEL 3 · EXECUTIVE 30 minutes

Step 8 · Structure

Tailor-made folders: groups, templates and custom fields



Welcome to the Executive level! You are going to set the rules of the game: the information tracked on actions, each person's rights, the structure of folders. All the folders built on your template will speak the same language.

And the reward comes at the end: a **Kanban of your own**, with one column per project phase, per site or per work package.

🎯 **By the end of this step, you will know how to…**

- ✓ create a group and invite colleagues to it;
- ✓ create a custom field for actions;
- ✓ put together a folder template and apply it;
- ✓ create your own Kanban from a custom field.

> 🤔 **No “Groups” menu?**
> You need a Pilot or Executive licence to access it, and to be a manager of a group to edit it. If needed, contact your organisation's Perfony lead or support@perfony.com.

🏗️ The principle, in four stages

Everything is prepared in the **Groups** menu, then applied to folders:

1. **The group**: your preparation space, shared with the colleagues you choose.
2. **The building blocks**: custom fields for actions, folder themes and rights on actions.
3. **The folder template**: it brings together the building blocks you need.
4. **The folder**: you apply the template to it, and its actions immediately have your fields.

👥 Create your group

Groups menu, then **+ New group**. Name it, for example after your department. Then add members with the add member icon, choosing their role:

- **member**: can use the group's templates for their folders;
- **manager**: can also create and edit templates.

> 💡 **What about sub-groups?**
> A sub-group inherits the templates of its parent group and can have its own. Put the templates shared by the whole organisation in the main group, and let each department create its own in a sub-group.

YOUR TURN **Create your group**

1. **Groups** menu, then **+ New group**. Name it, for example “My department”.
2. Add a colleague as a **member**.

☐ **Tick when done!** Expected result: your group appears in the list, ready for your templates.

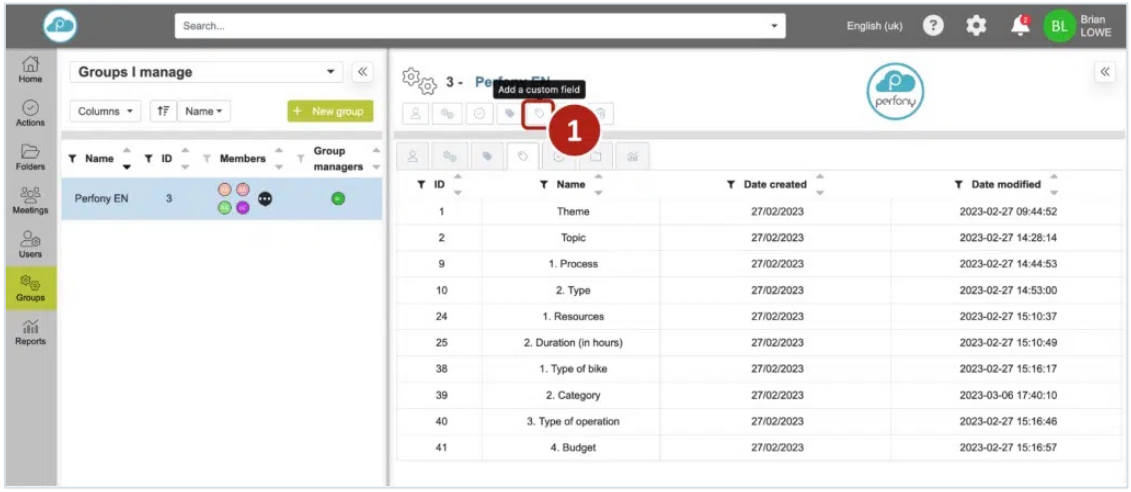
Create your custom fields

A **custom field** adds a piece of information to every action: a phase, a site, a type of anomaly, a budget… You can then filter, sort and chart by its values, and even turn it into a Kanban.

There are three types of fields:

- **free text**;
- **fixed list**: a drop-down menu with the values you choose. This is the type that lets you create a Kanban;
- **number**.

Folder themes work the same way, but for folders: ideal for classifying a project portfolio by customer, type or region.



1 **Add a custom field** In your group, the icon that creates a new field.

✋ YOUR TURN Create a “Phase” field

1. In your group, click **Add a custom field**.
2. Name it “Phase” and choose the **fixed list** type.
3. Enter the values in order: Scoping, Design, Build, Acceptance. Confirm.

☐ **Tick when done!** Expected result: the “Phase” field is ready to go into a template.

🧩 Put together your folder template

In your group, click **Add a folder template**. Give it a name, then choose:

- **the rights on actions**: “Default” (flexible and collaborative), “ISO” (restricted: participants only update progress and comment), or your own configuration;
- **the folder themes** and **custom fields** to use;
- **how sub-actions behave**: do they move the parent action forward? do they have the custom fields?

To apply it, open a folder, **Information** tab, **Folder template** section. You can also choose it when you create a folder.

> ⚠️ **Careful when changing template**
> Fields that are not in the new template disappear from the folder and its actions. Their values come back if you switch back to a template that contains them. Only the folder's pilots can change its template.

✋ YOUR TURN Create and apply your template

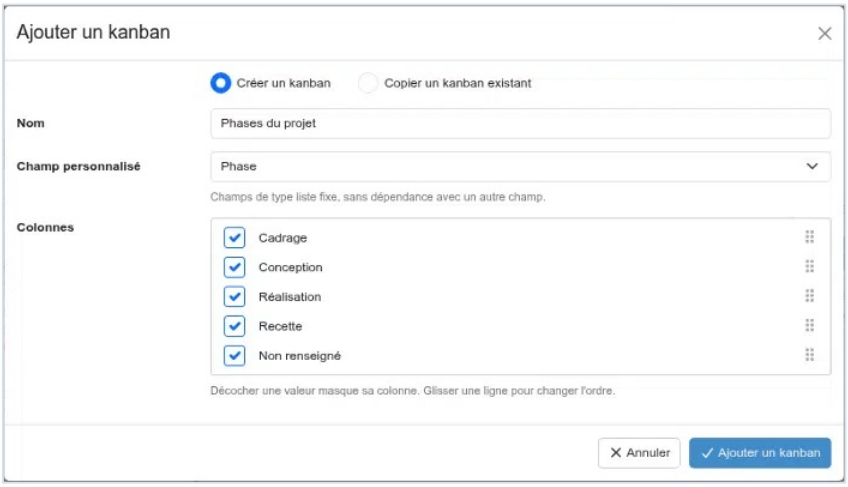
1. In your group, click **Add a folder template** and name it “Project”.
2. Keep the “Default” rights, tick the **Phase** field, then click **Add**.
3. Open your test folder, **Information** tab, and choose the “Project” template.

☐ **Tick when done!** Expected result: the actions in your folder now have a “Phase” field.

Your Kanban, made to measure

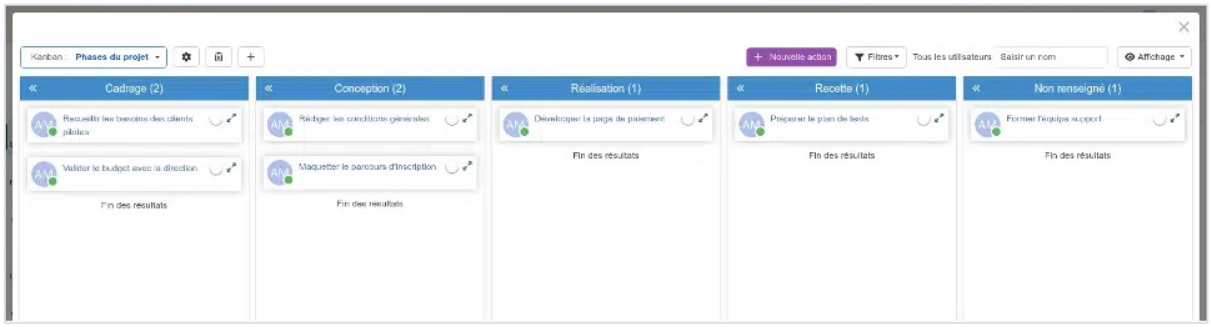
Remember step 5: the Kanban sorted actions by status. With a fixed-list custom field, you create **your own Kanbans**: one column per value of the field, plus a “Not filled in” column.

In the folder, **Kanban view** tab, click **+** (Add a kanban). Give it a name, choose the field, then set up the columns: untick a value to hide it, drag a line to change the order.



The Add a kanban window: a name, a field, and your columns.

Then drag a card from one column to another: the field's value changes in the action, and the change is recorded in its history.



The “Project phases” Kanban in extended view: one column per phase.

YOUR TURN Create your Kanban by phase

1. In your test folder, **Kanban view** tab, click **+**.
2. Name it “Project phases”, choose the **Phase** field, then click **Add a kanban**.
3. Drag your actions from “Not filled in” to the right phase.

☐ **Tick when done!** Expected result: your actions are sorted by phase, and each one has received the right value.

💡 **Good to know**

- Your Kanbans are your own: your colleagues don't see them and create their own.
- To reuse a Kanban in another folder that has the same field: + then “Copy an existing kanban”.
- Kanbans also exist in the Actions menu (Kanban view), for all your actions.
- Colour a card with the dot at the top right to spot a hot topic at a glance.

🎉 **Well done, step 8 complete!**

You have created a group, a custom field, a folder template and your own Kanban. Your folders are now structured the way you want.

→ **Last step: Measure**: reports, dashboards and indicators to steer your activity.

📘 **Learn more in the Academy**

- Purpose and creation of a group · Group members · Sub-groups
- Custom fields · Folder themes
- Folder templates · Rights on actions
- Create your own Kanbans · Customise the Kanban view

LEVEL 3 · EXECUTIVE ⏱ 25 minutes

Step 9 · Measure

Dashboards and indicators to steer your activity



The home stretch! Your folders are structured and your actions well documented. Time to get figures out of them: how many actions per person, per phase, per site? Where are the delays? Are your objectives moving forward?

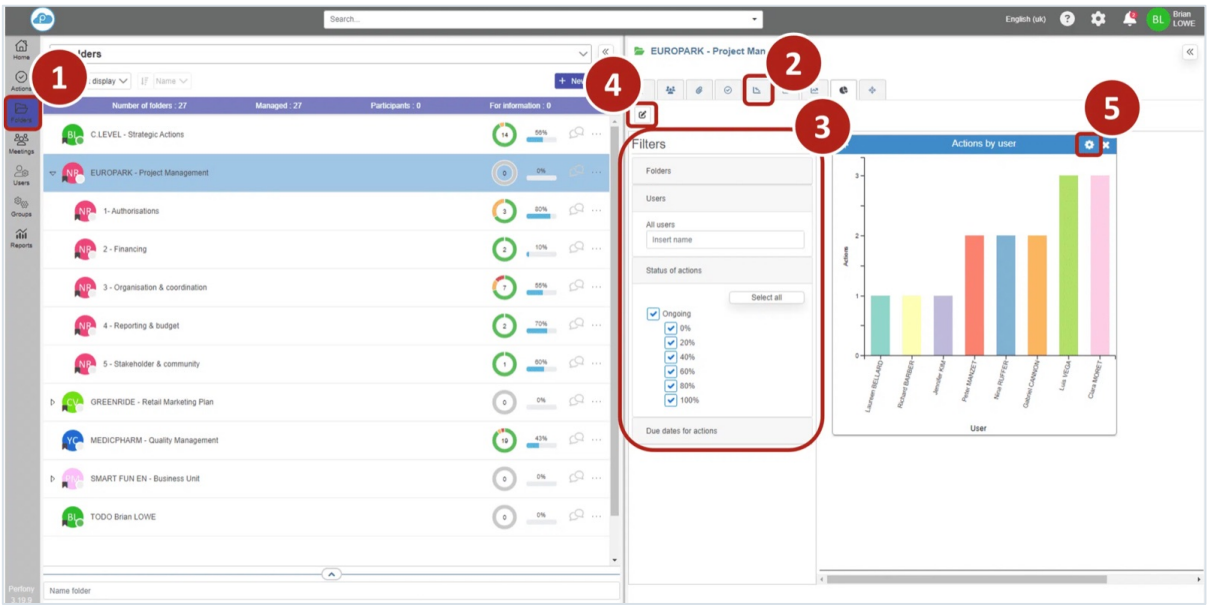
In this step, you turn your actions into charts, share them and keep them in front of you.

🎯 **By the end of this step, you will know how to…**

- ✓ create a folder's dashboard;
- ✓ create and share a report in the Reports menu;
- ✓ pin a chart to your home page;
- ✓ find an answer with the Perfony assistant.

📊 A folder's dashboard

Each folder has a **Dashboard** tab. Click the edit button to add charts and choose their type, then set up each chart with its gear wheel. The filters on the left refine the data: folders, users, status, due dates.



3	**The filters**	To keep only the data you need.
4	**Edit**	The edit button: add charts, change their type.
5	**Settings**	Each chart's gear wheel.

✋ YOUR TURN Add a chart to your folder

1. Open your test folder, **Dashboard** tab.
2. Click the edit button and add a chart, for example the breakdown of actions by person responsible or by phase.
3. Save your dashboard.

☐ **Tick when done!** Expected result: the chart updates itself every time an action changes.

📈 The Reports menu

For a view that goes beyond a single folder, open the **Reports** menu and click **New dashboard**. Four types are available:

- **analytical**: actions broken down by custom field, for detailed analysis;
- **chart**: your data as charts, with a shared filter;
- **advanced chart**: each chart can have its own source folders;

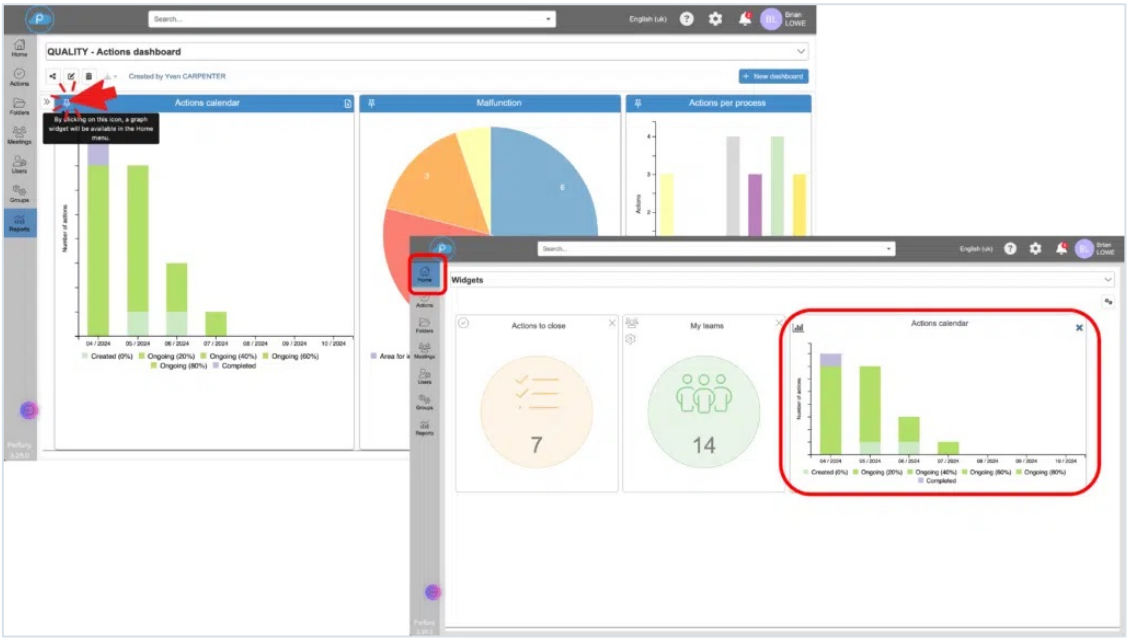
- **OKR**: your objectives and their key results (see below).

Give the dashboard a name and choose who to share it with: those people will see it read-only in their Reports menu, even with a Collaborator licence.

> 💡 **From chart to action**
>
> Click part of a chart: Perfony shows the list of matching actions. Ideal for going from observation to follow-up.

📌 Keep your indicators in view

In a dashboard, click the **pin** at the top left of a chart: it becomes a widget on your home page. Clicking this widget takes you back to the original dashboard.



A chart's pin, and the widget it creates on the home page.

✋ YOUR TURN Create and pin a report

1. **Reports** menu, then **New dashboard**: choose the **chart** type, name it and share it with a colleague.
2. Add a chart, for example actions by status, and save.
3. Click the chart's **pin**, then open your home page.

☐ **Tick when done!** Expected result: your chart is on the home page, and your colleague can see the report.

🎯 Follow your objectives with OKRs

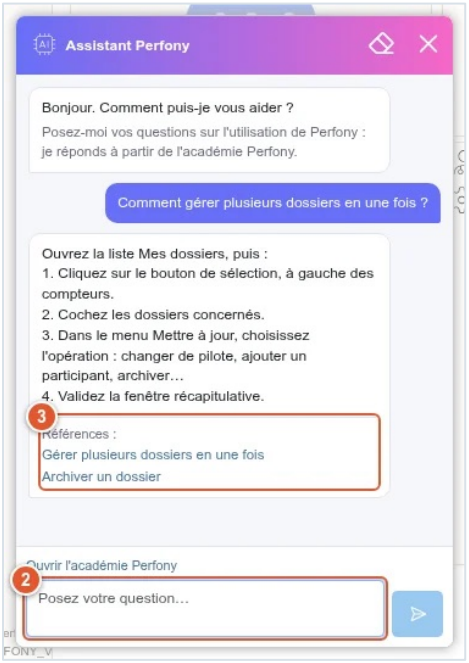
OKRs (Objectives and Key Results) link a big objective to a few key results. In Perfony, an OKR dashboard groups actions (the key results) under an objective. Its progress is calculated automatically from the progress of these actions, even if they are spread across several folders.

🔍 For quality approaches

- **Audit**: switched on in the folder template, it lets auditors flag a point of concern on an action, then approve its correction. The auditor role is assigned by an Executive user.
- **Root cause analysis**: an extra tab in your folders, switched on from the Groups menu, to handle a non-conformity from start to finish with the 5 Whys and 5M methods, right up to measuring the effectiveness of corrective actions.

The Perfony assistant, always there

A question about Perfony? Click the **bubble** at the bottom left of the screen and ask it as you would a colleague. The assistant answers from the Academy articles and gives its references, so you can learn more.



2	**Your question**	Type it, then press Enter.
3	**The references**	The Academy articles used to answer.

YOUR TURN Ask the assistant a question

1. Click the **bubble** at the bottom left of the screen.
2. Ask for example: “How do I archive a folder?”
3. Open one of the articles suggested in the references.

☐ **Tick when done!** Expected result: you have your answer, and the Academy article for the details.

No bubble? Your account administrator may have switched off artificial intelligence.

🏆 **Congratulations, you have finished the guide!**

In 9 steps, you have gone from your first login to steering your activity:

- **User level**: you follow up and find your actions;
- **Pilot level**: you organise folders, run meetings and work from your everyday tools;
- **Executive level**: you structure and measure.

Well done! Perfony is now your everyday ally. To go further, the Perfony Academy and the assistant are always just a click away, and the support team is here for you.

📘 **Learn more in the Academy**

- The Reports menu · Chart dashboard · Advanced chart
- A folder's dashboard · Pin to the home page · OKRs
- Action audit · Root cause analysis
- The Perfony assistant · The whole Academy · support@perfony.com

Appendix A · Quick reference

Perfony's essential moves, on a single page. Keep it handy!

EVERY DAY	
Log in	https://yourcompany.iperfony.com, then email address and password
Find anything	Search… box at the top of the screen: type 3 letters
See my actions	Actions › My actions (or Overdue)
Move an action forward	Drag its progress bar
Comment, attach a document	Action form › Comments or Documents
Keep a list of actions	Actions › Search › gear wheel › Search, then the star
Show a list on the home page	Favourite list › notification icon › Cancel email › Confirm
TO STEER	
Create a folder	Folders › New folder
Invite someone to a folder	Folder's … menu › Manage participants
Create and assign an action	Folder › Action plan › bottom area › Add
Approve a completed action	Close icon, to the right of its bar at 100%
Switch views	The folder's Action plan, Gantt view, Kanban view and Burn Up tabs
Create a meeting	Meetings › New meeting
Record a decision	Minutes › select the text › AI › Decision
Share the minutes	Minutes › export icon › PDF or Email
See Perfony in my calendar	Meetings › Copy ICS link
TO STRUCTURE AND MEASURE	
Create a custom field	Groups › your group › Add a custom field
Create a tailor-made Kanban	Folder › Kanban view › + › a fixed-list field
Create a report	Reports › New dashboard
A QUESTION?	
Ask the assistant	The bubble at the bottom left of the screen

Appendix B · Glossary

Perfony's words, simply explained.

Action	A precise task, with a person responsible, a due date and a progress bar. It always belongs to a folder.
Sub-action	Part of an action, shown just below it. Only one level is possible.
Person responsible	The person who carries out the action. They must be a participant in the folder.
Contributor	A person who helps the person responsible with an action.
Completed / Closed	Completed: the person responsible has moved the action to 100%. Closed: the pilot has approved the work.
For the record	An action with no due date: it is never counted as overdue.
Folder	The workspace of a project, a committee or an action plan: participants, actions, documents, meetings.
Pilot, co-pilot	The people who manage a folder or a meeting.
Participant, For information	Participant: works in the folder. For information: sees it without taking part.
Licence	Collaborator, Pilot or Executive: it defines what each person can do in Perfony.
Action plan	The list of actions of a folder or a meeting.
Gantt, Kanban, Burn-up	Three views of an action plan: on a calendar, in columns, as progress curves.
Widget	A tile on your home page that shows a figure or a chart, and opens the details in one click.
Favourite	A list, folder or meeting saved so you can come back to it in one click.
Meeting, occurrence	A meeting can repeat: each session is an occurrence.
RIDA	Information, Decision, Action: the method for structuring minutes.
Decision log	The list of decisions made in meetings, reviewed at the next meeting.
Group	The space where folder templates and their building blocks are prepared.
Custom field	A piece of information added to actions: phase, site, budget… Used for filters, charts and Kanbans.
Folder theme	A piece of information added to folders, to classify a project portfolio.
Folder template	The set of fields, themes and rights applied to a folder.
OKR	An objective and its key results: its progress is calculated from the actions that make it up.

Appendix C · Where to find help

A question, a doubt, stuck? You are never alone:

📘 **The Perfony Academy**

Hundreds of step-by-step articles, always up to date: www.perfony.com/en/academy. It is also available from the question mark at the top of the screen.

🤖 **The Perfony assistant**

Click the bubble at the bottom left of the screen and ask your question: it answers from the Academy and gives you the relevant articles.

✉️ **Perfony support**

Write to us at support@perfony.com: the team will answer and help you.

🛠️ **Are you the administrator of your Perfony account?**

Creating users and licences, security, company settings and rolling out the tools are covered in the Administrator Guide. Ask your Perfony project manager or support@perfony.com for it.

Enjoy the journey with Perfony! 🚀