Decisions User Help

Plan Expert

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Plan Expert

Plan Expert gives you the ability to create a plan or container to combine or include various contact group forecasts or lines of business created from different users for reporting purposes. Plan Expert is convenient for both single-skilled and multi-skilled contact groups. Date ranges are adjustable throughout the plan itself. These plans can also be locked and access permissions can be set. The ability to report from the created plan is through the report viewer. Contact groups from multiple scenarios can be added as well.

Using the Plan Expert

To open the Plan Expert, click **Results** > **Plan Expert**.

The two main options are:

- Create a New Plan
- Submit to a Plan

Create a New Plan

To create a new plan:

1. Click **Create a New Plan**, then click **Ok**.
   This opens the **Create a New Plan** window. From here, fill in the following:
   - Name of the plan.
   - Description of the plan.
   - Date Range of the plan. This cannot be changed once the plan is created. You must delete and recreate the plan if a change is desired.
   - Upload and Reporting permissions.
     Upload Permissions govern the ability to add new contact groups to the current plan.

     Reporting Permissions govern the ability to execute the plan from the report viewer.
   - There are two separate permissions options that are applicable:
     - `Public` allows all users to have this permission.
     - `Private` allows only the creator to have this permission.
   - The Locked function prohibits users other than the plan's creator from changing the plan.
2. Click **Ok** to confirm, or **Cancel**.
3. Decisions defaults back to the **Plan Expert** window. From here, choose the following options:
   - Choose the display option to show either All Plans or My Plans.

This displays the active settings for each plan created in the application. For the permissions, if there is a check mark in the box, that means that the user has that permission (meaning that option is public). For the locked function, if there is a checkbox, this means the user cannot add contact groups unless they are the creator.

- Choose from the following options to change created plans:
    - Edit/View an existing Plan – allows the user to edit or view existing plan information. This information is the same as the information entered when creating the plan.
    - Delete an existing Plan – allows the user to delete a previous plan they have created.
    - Copy an existing Plan – allows the user to copy a previous plan they have created.

Submit to a Plan

To submit to a plan:

1. Click **Submit to Plan** on the **Plan Expert** window, then click **Ok**.
2. Choose which plan(s) you'd like to modify by clicking the check box next to the name of the plan(s). You have the option to change plans with upload permissions set to Public and any plan that you have created.
3. Select the desired groups to upload to the plan. The **Uploaded to...** column in the contact group's section allows you to determine whether or not the contact group is within the plan. If the plan's column displays Yes in the same row as the contact group specified, then it is added to the plan already. If the plan column displays No, then the contact group is not currently added to the selected plan.
4. To add a contact group to the plan(s) selected, check the box to the left of the contact group in the same row. You have the ability to **Select All** at the top of the column by clicking the checkbox within the header.
5. To add a note, type the note in the corresponding box in the same row under the **Add Note** column.
    - Click the column header to change the sorting order from descending to ascending and vice versa.
    - Any column that has a header can also be filtered. A blue filter icon indicates a filter is applied. Default filter features are:
        - Equals (value or text)
        - Does Not Equal (value or text)
        - Begins with... (value or text)
        - Ends with... (value or text)
        - Contains... (value or text)
        - Does Not Contain (value or text)
        - Or Custom Filter

    The Upload Summary visually shows the desired selections for upload.
6. Click **Ok** to confirm changes, or **Cancel**.
7. To exit Plan Expert, click the red X in the upper right-hand corner of the window.