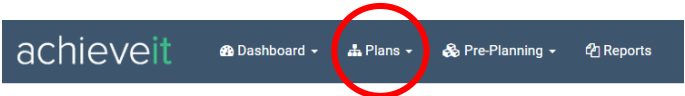


Multi-Plan View

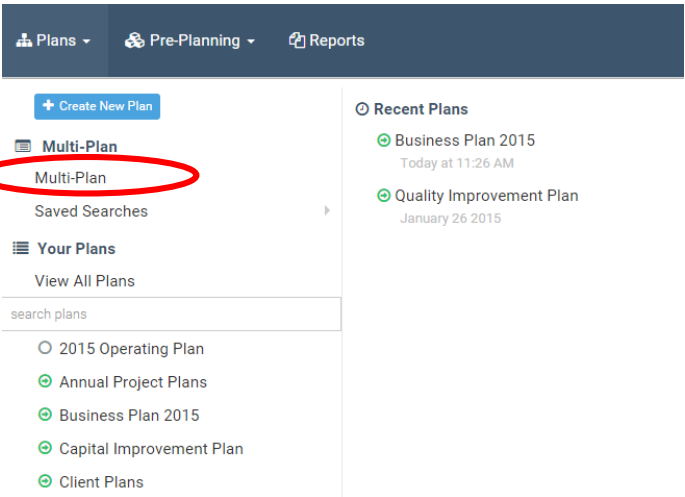
The Multi-Plan View allows you to bring **all your plans into one single view** across the organization. You can run custom reports, answer complex questions and get real time access to your organization's performance.

Step 1: Exploring the Multi-Plan View

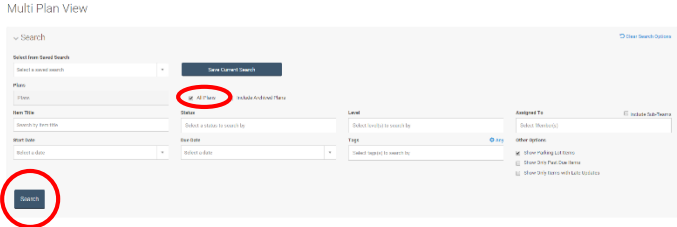
To find the Multi-Plan view:



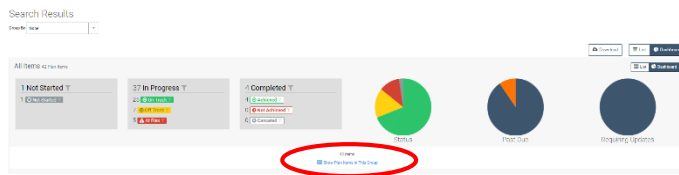
A. Navigate to the "Plans" tab in the top left corner of your screen



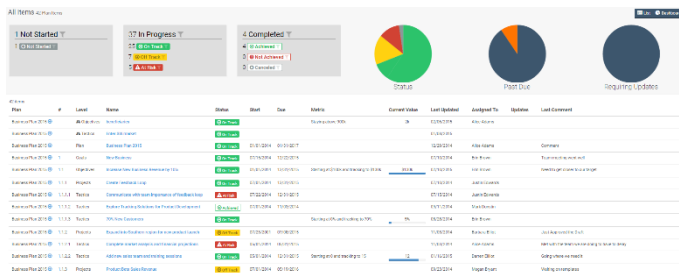
B. Once you have selected the "Plans" tab → click the "Multi-Plan" button



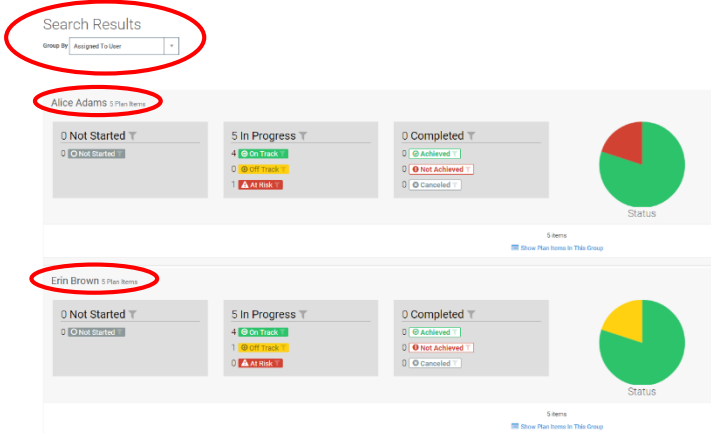
C. After the "Multi-Plan" screen appears, you are able to filter your search across the different plans within your organization. The checked box "All Plans" is the default → click "Search"



D. The search results will appear along with pie graphs displaying the status lights (which are clickable). You have the option of just seeing the 'Dashboards' (pie charts) or you can click the 'List' tab to display more information in a tabular format

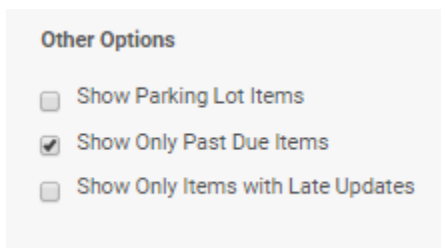


E. Once you have clicked the 'List' tab, all the information from those plans will expand in the tabular format to better see the items that need more attention

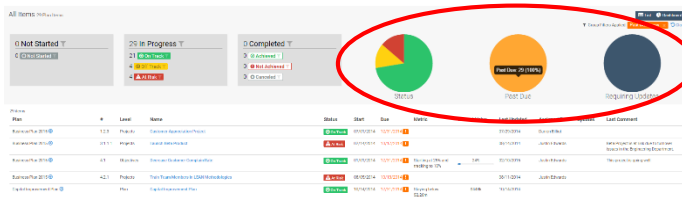


F. There is also the option of searching "Group By." Here you can group by:

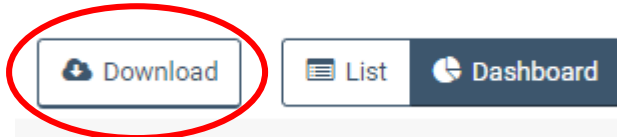
- Assigned To User
- Plan
- Tag
- Status
- Level
- Members (Team)
- Members (Users) - which is shown to the left, highlighting each users tasks



G. On the far right side of the Filters is an 'Other Options' checklist. You can check which ones fit your needs



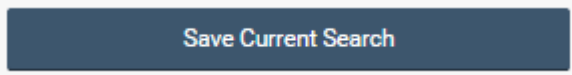
H. If you click directly on the pie chart, it will list out the items that are past due



I. On the right hand side under the Filter is the option to 'Download' your search results into a customized PDF report

Step 2: Saving a Search

If you wish to save a search to make for a quicker filter process:



A. Select your desired search fields → click "Save Current Search"

The 'Save Search' dialog box has two main sections: 'New' and 'Existing'. Under 'New', there is a text input for 'Save Search Name' containing 'Northern Region', a checked checkbox for 'Visible to All Users', and a 'Save' button (circled in red). Under 'Existing', there is a dropdown menu for 'Select from Saved Search' with the text 'Select a saved filter' and a 'Cancel' button.

B. You will be directed to the "Save Search" options page. Here you can save you search as a 'New' search or save it to an existing search