

Add a Mini Plan Action Step

A mini plan is separate plan inside another plan. For example, you may create a mini plan to always send a broadcast message to Management every time a plan is activated with a Major severity and interruption level.

1. To add a mini plan action step, click the Plans icon in the navigation bar, then click to open the plan you wish to edit.
2. Click the Action Steps tab.
3. Click Add.
4. Select Mini Type in the Select Type dropdown menu.

Plan Information

General Visual Modeler **Action Steps** Relationships Properties

Select Type ▾

- Select Type
- Assigned Task
- Broadcast
- Decision
- Event Status Change
- Mini Plan

Cancel Add

There are no action steps to display

5. Enter the title and any descriptions.
6. Click Choose Plan to select which plan the mini plan should be linked to.

Select a Plan

+ Corporate

Browse Filter - Results

Filter

Reset

7. Select Launch New Event or Merge Contents of Mini Plan into Plan from the Behavior dropdown menu.
8. Choose a user or role responsible for the task in the Assigned To field. If you wish to send a notification to the assigned user or role, select the Automatically Notify Assignee When Assigned? checkbox.
9. Enter a number in the Due (After Event Activation) field, then select a period of time from the dropdown menu.
10. Click Add & Exit or Add & Continue.