

Tessitura



**EUROPEAN
CONFERENCE 2015**

**5 & 6 NOVEMBER
NOTTINGHAM**

PLANS & PROTFOLIOS FOR MOVES MANAGEMENT

YOU CAN PLAN ON IT!

PRESENTER

Paul Woods: Tessitura Network



Using v12 Plans/Portfolios Agenda

- Plans overview
- Plans components
- Linking Contributions to Plans
- Maintaining Plans
- Managing a Portfolio
- Reporting on Plans
- Tessitura on the Go!



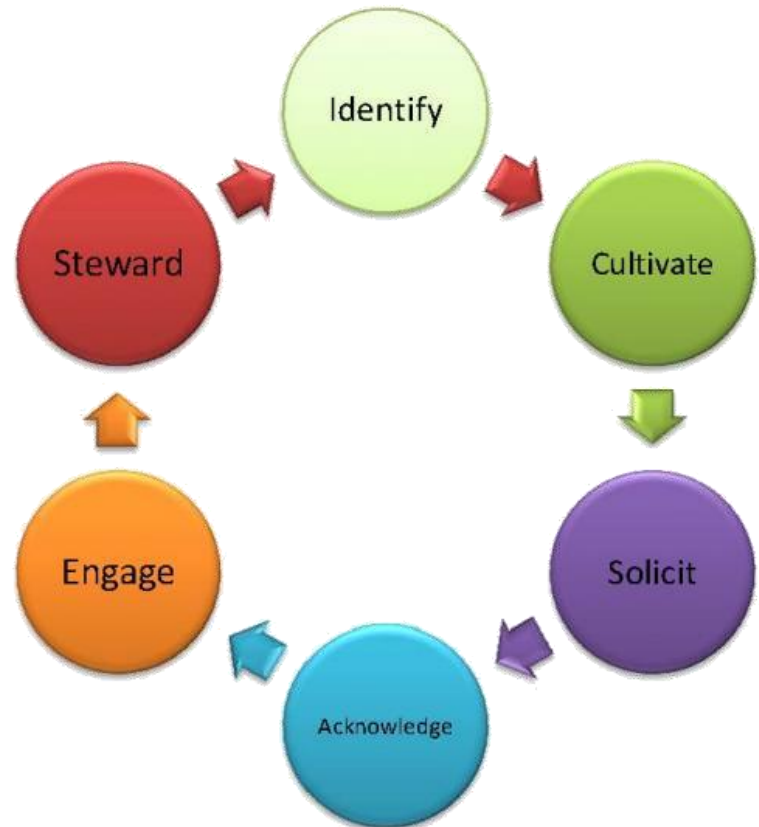
PLANS OVERVIEW





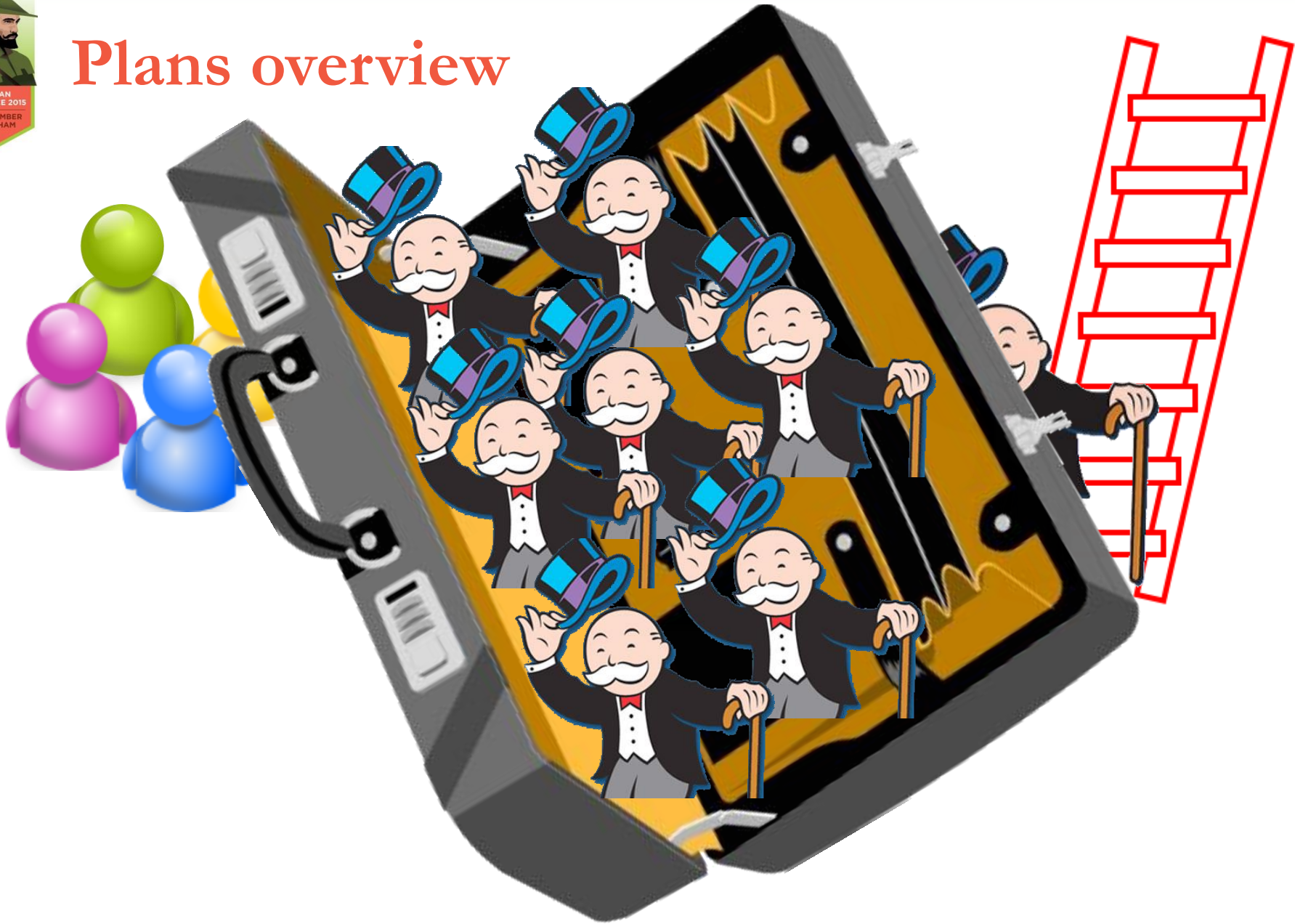
Plans Overview – What is a Plan?

- Enhanced version of Solicitations
- Tracking engagement and interactions
- Prospecting
- Managing moves, grants, sponsorships





Plans overview





V12 Rollout and Plans

- Available in all flavors of V12
- Migration – optional and minimal
 - Some mapping suggested for Workers
- Training – little bit (similar to Solicitations)

Plan

Detail

Owner: Selby Parzel

Campaign: 2015 Individual Ask: \$50,000.00 Start Dt: 04/10/2014 Primary Worker: Dale Aucoin (1070)

Designation: Education Goal: \$40,000.00 By: 08/31/2015 Workers (4) Contributions (0)

Fund: Ind Education/Outreach Recorded: \$.00 Cont Total:

Type: Annual Ind - Hot Plan Source: Board Prospect

Status: 2 - Research Priority: High Probability: 80%

Custom Data

Access 3

Affinity 1

Planned Giving Yes

Estimated Capacity \$3,000,000.00

First Contact 07/01/2010

Notes



Plans Components

Workers – Plans - Steps





Workers

- Staff, Board Members, Volunteers
- Constituent record tagged w/Worker type
- Plans Tab > Worker Setup
- TR_WORKER_TYPE





Workers



Violet Crawley

#70044

DNM, FIC

Level: **3** **Active**

Memb. Expiration: **12/31/2013**

Entered: **1/25/2013**

14-Month Giving: **\$10,000.00**

User ID: **nbarnett**

Batch:

On Account:

History

Connections

Contributions

Transactions

Ticket History

General

Names

Contact Details

Plans

Relationships

Portfolio Plans **Worker Setup**

Worker Type

Inactive

Created

Modified

Violet Crawley

Ballet Board



Created: 5/13/2013 10:43:36 by nbarnett at NBARNETT

Modified: 5/13/2013 10:43:36 by nbarnett



Plans

- Record goals and intentions
- Track progress through moves
- Large Notes and Custom Data fields

Custom Data

Access	3	▼
Affinity	1	
Planned Giving	Yes	
Estimated Capacity	\$3,000,000.00	
First Contact	07/01/2010	▼

Notes

Ms. Parzel is a big fan of Opera

Created: 4/10/2014 12:30:48 by daucoin at DAUJOIN-TN Modified: 7/31/2014 19:58:30



Plans

- TR_PLAN_TYPE
- TR_PLAN_STATUS
- TR_PLAN_PRIORITY
- TR_PLAN_SOURCE
- TR_WORKER_ROLE
- T_KEYWORD



Plans



Lord and Lady Robert Crawley

#70038
(BRD), DNM, FIC

Level: **3** **Active**
 Memb. Expiration: **5/31/2014**
 Entered: **1/25/2013**
 14-Month Giving: **\$15,000.00**

User ID: **nbarnett**
 Batch:
 On Account:

- Robert and Cora Crawl** ▲
- ★ Robert Crawley
 - ★ Cora Crawley
 - ★ Mary Crawley ▼

History	Connections	Contributions	Transactions	Ticket History	Orders	Custom
General	Names	Contact Details	Plans	Relationships	Research	Attributes

Portfolio
 Plans
 Worker Setup

 Plan View
 Step View

Start Date	Campaign	Designation	Fund	Primary Worker	Created	Modified
Robert and Cora Crawley Household						
5/21/2013	2014 AF Individual Special Project	Ind General		Violet Crawley	Created: 5/21/2013 12:02:41 by jshort at JSHORT Modified: 5/21/2013 12:02:41 by jshort	
5/13/2013	2013 AF Individual (unassigned)			Violet Crawley	Created: 5/13/2013 10:45:09 by nbarnett at NBARNETT Modified: 5/13/2013 10:48:23 by nbarnett	



Plans

7 Plan
? X

Detail

Owner: Selby Parzel	Ask: \$50,000.00	Start Dt: 04/10/2014	Primary Worker: Dale Aucoin
Campaign: 2015 Individual	Goal: \$40,000.00	By: 08/31/2015	Workers (4) Contributions (0)
Designation: Education	Recorded: \$.00	Cont Total:	
Fund: Ind Education/Outreach	Plan Source: Board Prospect		
Type: Annual Ind - Hot	Priority: High	Probability: 80%	
Status: 2 - Research			

Custom Data

Access	3
Affinity	1
Planned Giving	Yes
Estimated Capacity	\$3,000,000.00
First Contact	07/01/2010

Notes

Ms. Parzel is a big fan of Opera

Created: 4/10/2014 12:30:48 by daucoin at DAUCOIN-TN Modified: 7/31/2014 19:58:30

Plan Steps

Description	Step Type	Step Date	Due Date	Completed	Worker	Modified
Follow-Up	Follow-Up	7/31/2014	8/30/2014		Dale Aucoin	7/31/2014 by daucoin
Status Changed	Status Change	7/31/2014			1 - Identify to 2 - Research	7/31/2014 by daucoin

Add Step

Save Close



Plans

Designation: Education **Goal:** \$40,000.00 **By:** 08/31/2015 Dale Aucoin
Fund: Ind Education/Outreach **Recorded:** \$0.00 **Cont Total:** \$5,000.00 Dale Aucoin
Type: Annual Ind - Hot **Plan Source:** Board Prospect Dale Aucoin

Workers (4)

Contributions (1)

Assign Worker(s)

Worker	Role	Primary	Portfolio	Created	Modified
Dale Aucoin (1070)	Staff	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Created: 4/10/2014 12:31:39 by daucoin at DAUCOIN-TN Modified: 4/10/2014 12:31:39 by daucoin	
Alan Alda (1301)	Committee Member	<input type="checkbox"/>	<input type="checkbox"/>	Created: 7/31/2014 19:58:31 by daucoin at DAUCOIN-TN Modified: 7/31/2014 19:58:31 by daucoin	
Ryan Creps (1309)	Board	<input type="checkbox"/>	<input type="checkbox"/>	Created: 7/31/2014 19:58:31 by daucoin at DAUCOIN-TN Modified: 7/31/2014 19:58:31 by daucoin	
Brian Feldman (1303)	Staff	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Created: 7/31/2014 19:58:31 by daucoin at DAUCOIN-TN Modified: 7/31/2014 19:58:31 by daucoin	

Detail

Owner: Selby Parzel **Ask:** \$50,000.00 **Start Dt:** 04/10/2014 Dale Aucoin
Campaign: 2015 Individual **Goal:** \$40,000.00 **By:** 08/31/2015 Dale Aucoin
Designation: Education **Recorded:** \$0.00 **Cont Total:** \$5,000.00 Dale Aucoin
Fund: Ind Education/Outreach **Plan Source:** Board Prospect Dale Aucoin
Type: Annual Ind - Hot Dale Aucoin

Workers (4)

Contributions (1)

Plan Contributions

RefNo	Constituent	Date	Contribution	Amt Received	Type	Campaign	Fund
1161	Ms. Selby Parzel	7/31/2014	\$5,000.00	\$5,000.00	G	2015 Individual	Ind Education/Outreach



Steps

- Enhanced version of Tasks/Reminders
- Record each interaction
- Associate a third Constituent
- Attachments
- Lengthy notes
- System generated audit steps
- Flag to identify incomplete steps
- Step view on Plans tab
- TR_STEP_TYPE



Steps

Step

Owner: Milton Adair

Plan: 2015 Individual / Education / Ind Capital

Step Type: Follow-Up
Step Description: Follow-Up W/Secretary
Worker: Nick Barnett

Step Date: 06/08/2015
Due Date: 08/31/2015
Completed Date: 00/00/0000

Warn Days: 5
Priority: Medium

Associate ID: 21228906
Associate Name: Ms. Selby Parzel

Attachment: Add

Notes:

Created: 6/8/2015 16:48:37 by daucoin at DAUCOIN-TN Modified: 6/8/2015 16:48:37 by daucoin

Prev Next Save Cancel



LINKING CONTRIBUTIONS TO PLANS





Linking Contributions to Plans

- Done when entering Contributions
- Matching Plans auto select
- Selected Plan can be manually overridden
- Can also link via Contributions tab





Linking Contributions to Plans

Lord and Lady Robert Crawley

#70038
(BRD), FIC

Level:
Memb. Expiration:
Entered: 1/25/2013
14-Month Giving:

User ID: nbarnett
Batch: 29
Default Batch Type
On Account:

Owner: 70038 Source: 50 Date: 06/17/2013 Channel: In Person Worker: Violet Crawley
Initiator: 70039 Lord Robert Crawley (Adult Member)

Date	Contribution	Received	Type	Fund	Campaign	Contribution Change	Payment Change
------	--------------	----------	------	------	----------	---------------------	----------------

Contribution Memberships Prem/Ack Matching/Credit Event Restricted Notes/GIK Summary Custom Data

Details
New
Fund: Ind General
Campaign: 2014 AF Individual
Designation: Special Project
Plan: 2014 AF Individual / Special Project
Pledge: .00
Amt. Paid: .00
Payment: 15,000.00

Billing
Billing Type:
Account:

Payment Plan

Amount	Date	Status	Received
\$0.00			\$0.00

Beginning: 06/17/2013
Ending: 06/18/2014
of Payments:



MAINTAINING PLANS





Plans Maintenance

- Campaigns > Plans Maintenance
- Global create/update Plans with a list
- Add Steps to multiple Plans at once
- Add Workers to multiple Plans at once





Plans Maintenance

7 Plans

Plans Steps Workers

Mode
 Add Update

List: [dropdown]

Detail

Campaign:	[dropdown]	Ask:	[text] \$.00	Start Dt:	[text] 07/31/2014
Designation:	[dropdown]	Goal:	[text] \$.00	By:	[text] 00/00/0000
Fund:	[dropdown]	Recorded:	[text] \$.00	Cont Total:	
Type:	[dropdown]	Plan Source:	[dropdown]		
Status:	[dropdown]	Priority:	[dropdown]	Probability:	[text] % [spin]

Custom Data

Access	[text]
Affinity	[text]
Planned Giving	[text]
Estimated Capacity	[text] \$.00
First Contact	[text] 00/00/0000

Notes



Plans Maintenance

Plans											
Steps		Workers									
Mode: Add		List: All Donors			Campaign: 2014 AF Individual			Designation: Undesignated		Fund: Ind General	
	Constituent	Primary Worker	Ask	Goal	Recorded	Contribution	Probability	Start Date	Complete By	Status	
<input checked="" type="checkbox"/>	Mr. Joaquin Emanuele Bedford		\$1,000.00	\$1,000.00	\$0.00	\$0.00	85%	07/01/2013	06/30/2014	3 - Cultivate/Stew	
<input checked="" type="checkbox"/>	Ms. Corinne Marjorie Bergman		\$2,500.00	\$2,250.00	\$0.00	\$0.00	90%	07/01/2013	06/30/2014	2 - Research	
<input checked="" type="checkbox"/>	Mr. Carroll Gavan Kanfield		\$600.00	\$450.00	\$0.00	\$0.00	50%	07/01/2013	06/30/2014	3 - Cultivate/Stew	
<input checked="" type="checkbox"/>	Ms. Miller Omar Kaniye		\$100.00	\$100.00	\$0.00	\$0.00	76%	07/01/2013	06/30/2014	4 - Ask	



MANAGING A PORTFOLIO





Portfolios

- A Worker's set of Plans
- Flexible grid format
- Filterable
- User selects columns
- Custom columns for additional detail
- Copy to clipboard for exporting
- My Portfolio, show at login option
- `TR_PORTFOLIO_CUSTOM_ELEMENT`



Portfolios



Violet Crawley

#70044
DNM, FIC

Level: **3** **Active**
Memb. Expiration: **12/31/2013**
Entered: **1/25/2013**
14-Month Giving: **\$10,000.00**

User ID: **nbarnett**
Batch:
On Account:

Violet Crawley

History	Connections	Contributions	Transactions	Ticket History	Orders	Custom
General	Names	Contact Details	Plans	Relationships	Research	Attributes

Portfolio Plans Worker Setup

Primary Worker Only (filter by status) (filter by role) (select columns)

Constituent Name	Plan	Ask Amount	Contribution Amount	Goal Amount	Priority	Status
Mr. Joaquin Emanuele Bedford	2014 AF Individual/Undesignated/Ind General	\$1,000.00		\$1,000.00	Medium	3 - Cultivate/Steward
Ms. Corinne Marjorie Bergman	2014 AF Individual/Undesignated/Ind General	\$2,500.00		\$2,250.00	Medium	2 - Research
Ms. Miller Omar Kaniye	2014 AF Individual/Undesignated/Ind General	\$100.00		\$100.00	Medium	4 - Ask
Mr. Carroll Gavan Kanfield	2014 AF Individual/Undesignated/Ind General	\$600.00		\$450.00	Medium	3 - Cultivate/Steward
Robert and Cora Crawley House	2014 AF Individual/Special Project/Ind General	\$15,000.00	\$15,000.00	\$10,000.00	Medium	3 - Cultivate/Steward
Mr. Steve Wozniak	2013 AF Individual/Undesignated/Ind General	\$500,000.00		\$375,000.00	Medium	4 - Ask

Copy To Clipboard

Ready



REPORTING ON PLANS





Campaign View

2014 AF Individual **Control Group:** (Default Control Group) **Single Open Pledge:** **Gift:** \$42,000.00
Goal: \$1,200,000.00 **Membership Organization:** Friends of Autumn Ridge **Match Memb:** **Pledge:** \$0.00
Start Date: 01/01/2014 **FYear:** 2014 **Auto-Restrict Conts Before Start Date:** **Pledge Payment:** \$0.00
End Date: 12/31/2014 **Min Pldg Pmt:** \$0.00 **Pledge Balance:** \$0.00
Status: Active **Contacts Attempted:** **Ticket Income:** \$0.00
Category: Annual Fund **% Successful:** 0.0000%
Notes:

Campaign No: 54 **Created:** 5/25/2012 **By:** rcreps **Last Updated:** 5/25/2012 **By:** rcreps **Days Left In Campaign:** 562

- Funds
- Expense
- Plans
- Revenue Graphs
- Summary Reports
- Designations
- Custom

Const ID	Constituent	Start Date	Status	Designation	Fund	Primary Worker		Cre
70037	Padmé Amidala	5/21/2013	2 - Research	(unassigned)	Ind General	Mr. Daniel Munthe Agger		5/21
7	Mr. Joaquin Emanuele Bedford	7/1/2013	3 - Cultivate/Steward	Undesignated	Ind General	Violet Crawley		6/17
13	Ms. Corinne Marjorie Bergman	7/1/2013	2 - Research	Undesignated	Ind General	Violet Crawley		6/17
734	Mr. Ilene Lenore Bob	5/15/2013	4 - Ask	Undesignated	Ind General	Ms. Kenneth Rex Krunbhol		5/15
70188	Sharon and Martin Butler Househ	6/14/2013	3 - Cultivate/Steward	(unassigned)				6/14
70052	Juliet Capulet	5/21/2013	2 - Research	(unassigned)	Ind General	Mr. Daniel Munthe Agger		5/21
70053	Tybalt Capulet	5/21/2013	2 - Research	(unassigned)	Ind General	Mr. Daniel Munthe Agger		5/21
70050	Lord Capulet	5/21/2013	2 - Research	(unassigned)	Ind General	Mr. Daniel Munthe Agger		5/21
70051	Lady Capulet	5/21/2013	2 - Research	(unassigned)	Ind General	Mr. Daniel Munthe Agger		5/21
70096	Mr. James Lee Duncan Carragher	5/1/2013	4 - Ask	(unassigned)	Ind General	Mr. Daniel Munthe Agger		5/21
70043	Lady Sybil Crawley	5/21/2013	2 - Research	(unassigned)	Ind General	Mr. Daniel Munthe Agger		5/21
70044	Violet Crawley	5/21/2013	2 - Research	(unassigned)	Ind General	Mr. Daniel Munthe Agger		5/21
70039	Lord Robert Crawley	5/21/2013	3 - Cultivate/Steward	(unassigned)	Ind General	Mr. Daniel Munthe Agger		5/21
70041	Lady Mary Crawley	5/21/2013	2 - Research	(unassigned)	Ind General	Mr. Daniel Munthe Agger		5/21



Plan Summary Report

- Replaces Solicitation Listing Report
- Filter by Worker, List & various Plan details
- Output Includes
 - All Plan data fields
 - Previous and Next Steps
 - Optional: Workers
 - Optional: Plan Custom Fields
 - Optional: Notes
 - Optional: Steps



Plan Summary Report

Autumn Ridge Performing Arts Center

Plan Summary

Report Parameters

Campaign: 2014 AF Individual

Designation: (All)

Fund: (All)

Worker: (All)

Primary Worker: (All)

Type: (All)

Status: (All)

Priority: (All)

Source: (All)

Start Date:

End Date:

Include Custom Data: No

Include Workers: No

Include Steps: No

Include Notes: No

List: (None)

Plan	Const Id	Constituent	Source	Status	Type	Start	Complete	Priority	Prob
		Primary Worker	Step		Goal	Ask	Contrib	Recorded	Goal by Prob
2014 AF Individual / (unassigned)	70096	Ms. Chandra Asken	(Default)	2 - Research	3. Annual Ind - Hot	10/15/2013		Medium	50%
		Barbara Mazer Gross (70069)			\$10,000.00				\$0.00
		Previous Step none			Next Step 10/31/2013: Send Letter				
2014 AF Individual / (unassigned)	409	Mr. Jim Rexford Ford	(Default)	3 - Initial Contact	3. Annual Ind - Hot	8/18/2014		Default Plan Priority	0%
		No primary worker assigned			\$0.00	\$0.00		\$0.00	\$0.00
		Previous Step none			Next Step none				
2014 AF Individual / (unassigned)	70068	Andrew Recinos	Donors	3 - Initial Contact	3. Annual Ind - Hot	9/5/2014		Default Plan Priority	0%
		Don Youngberg (70071)			\$300.00		\$300.00		\$0.00
		Previous Step none			Next Step none				
2014 AF Individual / (unassigned) / Ind Education/Outreach	825	Ms. Dan Dug Jimenez	Board	3 - Initial Contact	2. Annual Ind - Warm	4/4/2014		Low	0%



Step Detail Report

- Filter by List, Plan or Step Worker and various Step and Plan details
- Includes:
 - Plan “Header” (Camp/Desig/Fund)
 - All Step fields
 - Optional: Step Notes
- Can group Steps by Plan



Step Detail Report

Autumn Ridge Performing Arts Center

Step Detail

Report Parameters

Campaign: 2014 AF Corporate, 2014 AF Individual

Designation: (All)

Fund: (All)

Plan Worker: (All)

Plan Primary Worker: (All)

Plan Type: (All)

Plan Status: (All)

Step Type: (All)

Step Worker: (All)

Step Date Start:

Step Date End:

Due Date Start:

Due Date End:

Include Notes: Yes

Group By Plan: No

List: (None)

Plan	Const Id	Constituent	Step Dt	Step Type	Priority	Due	Complt	Warn	Worker
				Step Description					Associate
2014 AF Corporate / (unassigned) / Crp General	70093	Acme Inc.	10/9/2013	Send Letter	2	10/15/2013	10/15/2013		Shannon Egan (70084)
				Send Letter of					Douglas Acme
			Notes	Suggest a meeting to discuss support. Oct 15th, mailed letter					
2014 AF Corporate / (unassigned) / Crp General	70093	Acme Inc.	10/9/2013	Default Step Type	2	11/1/2013			Shannon Egan (70084)
			Notes	Production Sponsor?					
2014 AF Corporate / (unassigned) / Crp General	70093	Acme Inc.	10/9/2013	Default Step Type	2		10/19/2013		
			Notes	Mr. Acme called to set up meeting, agreed for Oct 29 Fosters Inn at 1pm					



MOBILE PORTFOLIO MANAGEMENT: TESSITURA ON THE GO





Home

Constituents

 Search 

Plans

 My Portfolio 

Reporting

 Reports 

Home

Constituent Search

parzel

Search

Search Results

 **70001 : Mr. Parker Parzel** 

9531 E Beverly Rd, Santa Rosa, CA, 95401, USA

 **10 : Selby Parzel Household** 

9531 E Beverly Rd, Santa Rosa, CA, 95401, USA

 **70000 : Ms. Selby Jackson Parzel** 

9531 E Beverly Rd, Santa Rosa, CA, 95401, USA

1 to 3 of 3



Home

Contact Plans

70001 : Mr. Parker Parzel

Salutation 1

Mr. Parker Parzel

Salutation 2

Street 1

9531 E Beverly Rd

Street 2

Street 3

Locale

Santa Rosa, California, 95401

Country

USA

Dear

Mr. Parzel

Constituencies

Constituencies

(DN)

Membership

Level

Status

Expiration

Contribution (Last)

Date

Received

\$0.00

Fund

Year

\$0.00

Other

Status

Active

Original Source



Home

Portfolio for Mr. Terri Rose Brekhouse

Ms. Dug Enzo Beraoderi

2009-14 Capital Campaign / Undesignated / Cap GIK
3 - Initial Contact



Mr. Mary Charles Guckel

2014 AF Gifts in Kind / (unassigned) / GIK Foundation
5 - Gift Received



Mr. Herb Judge Stammen

2014 AF Individual / Special Project / Ind Production
1 - Identify



Mr. Pat Dick Meacham

2014 AF Individual / Undesignated / Ind General
3 - Initial Contact



Mr. Roney Edsel Beikman

2014 AF Individual / Special Project / Ind Education/Outreach
1 - Identify



Mr. Lenore Eva Najdowski

2014 AF Individual / Undesignated / Ind General
4 - In Process



Home

← Portfolio

☰ Options

Portfolio Details

Mr. Mary Charles Guckel

Active Workers

Terri Brekhouse, Herb Stammen

Campaign

2014 AF Gifts in Kind

Designation

(unassigned)

Fund

GIK Foundation

Type

Annual Ind - Warm

Status

5 - Gift Received

Priority

High

Probability

100 %



Home

← Portfolio ☰ Options

Portfolio Details

Ms. Dug Enzo Beraoderi

Active Workers
Herb Stammen, Joaquin Bedford, Terri Brekhouse

Campaign
2009-14 Capital Campaign

Designation
Undesignated

Fund
Cap GIK

Type
Annual Ind - Hot

Status
3 - Initial Contact

Priority

- View Plan
- Edit Plan
- Add Plan
- Steps
- Add Step

Home

← Portfolio

+ Create new plan for Ms. Selby Jackson Parzel

Campaign	Web Marketing
Designation	(unassigned)
Fund	
Type	Annual Ind - Hot
Status	1 - Identify
Source	(Default)
Priority	Default Plan Priority
Ask	0.00
Goal	0.00
Recorded	0.00



Home

← Plan

+ Add Step

Steps

Phone Call

Phone Call
7/14/2014 3:17 PM



Meeting

Meeting
7/29/2015 12:00 AM



Home

Plan

Steps

Add Step

Owner

Mr. Herb Judge Stammen



Plan

2014 AF Individual / Special Project / Ind Production



Type

Default Step Type



Description

Default Step Type

Worker

Terri Brekhouse



Priority

Low



Step Date



Learning Resources

- Tessitura Help System Documentation
- <http://www.tessituranetwork.com/Help/System/v125/Content/Plans/Plans.htm>

The screenshot shows a web browser window displaying the Tessitura v12.5 Help System documentation. The browser's address bar shows the URL <http://www.tessituranetwork.com/Help/System/v125/Content/Plans/Plans.htm>. The page title is "Tessitura v12.5: Development Setup and Administration > Plans". The main heading is "Plans".

Plans provide a highly flexible and intuitive way for development officers to track the engagement of a constituent from suspect to prospect to donor. Features include the ability to track interactions with constituents throughout the entire life-cycle from research to cultivation to contribution, marking a plan with multiple plan workers, a campaign-level overview of all plans associated with that campaign, and the ability to define a portfolio of plans for the constituents you are tracking. With these and many other features, the plans functionality is truly a comprehensive moves management system.

The **Plans** tab holds three screens related to plans functionality:

History	Connections	Contributions	Transactions	Ticket History	Orders	Custom
General	Names	Contact Details	Plans	Relationships	Research	Attributes

Below the table, there are radio buttons for "Plans", "Portfolio", and "Worker Setup". The "Plans" radio button is selected. To the right, there are radio buttons for "Plan View" and "Step View".

The [Plans](#) screen displays all plans for the constituent.

The [Portfolio](#) screen displays all plans for which the current constituent is selected as a worker.

The [Worker Setup](#) screen is used to designate a constituent that can be used as a worker in plans.

Related Topics

Jessitura



**EUROPEAN
CONFERENCE 2015**

**5 & 6 NOVEMBER
NOTTINGHAM**

QUESTIONS?

- Tell us who you are and where you are from.....

Jessitura



**EUROPEAN
CONFERENCE 2015**

**5 & 6 NOVEMBER
NOTTINGHAM**

WHAT'S NEXT?

- This is now the end of the day. We wish you all safe travels and hope that you have enjoyed TEC15!

- Don't forget to collect your luggage from the cloakroom at the Crowne Plaza Hotel