

Plans Page

Feature Availability: This feature is available in the following editions:

- Trifacta® Enterprise Edition
- Trifacta Professional Edition
- Trifacta Premium

The Plans page lets you create, review, and manage your plans. A **plan** is a sequence of tasks and the triggers that execute them. Plans can be applied across multiple flows in your workspace.

NOTE: Access to the Plans page in the application and privileges on plans is governed by roles in your workspace. For more information, please contact your workspace administrator.

- To create a new plan, click **Create...**. To rename the new plan, click the `Untitled` value at the top of the page.
 - The maximum number of plan tasks may vary depending on the plan that you have licensed. For more information, please contact your Trifacta representative.
- Workspace admins can access all plans in the workspace.

Name	Owner	Last updated	Last run
Shared with 3 collaborators	A	09/23/2021	09/23/2021
ting channel	SO	09/18/2021	09/20/2021
test_plan	SO	09/05/2021	Last Sunday at 12:30 PM
test_plan	A	08/14/2021	-
Untitled plan	A	08/14/2021	-

Figure: Plans Page

Columns:

- **Name:** The name of the plan.

You can hover over the shared icon link next to the plan to view the name of shared users (up to three shared users) and the total number of shared users. Also, when you click the shared icon link, the share dialog is displayed.

- Click the plan name to review it. See *Plan View Page*.
- **Owner:** Owner of the plan.
- **Last Updated:** Timestamp for the last time that the flow was modified.

- **Last Run:** Timestamp for when the plan was last executed.
 - The displayed icon indicates whether the plan executed successfully or not.
 - Click the link to review details of the run. See *Plan View Page*.

Actions:

- **Create:** From the Create menu, choose to create a plan.
 - Enter a name and description for your plan. Click **Create**.
- **Import:** From the context menu, select **Import** to import a plan into this instance. See *Import Plan*.

Tip: You can import multiple plans (ZIP files) through the file browser or through drag-and-drop. Press `CTRL/COMMAND + click` or `SHIFT + click` to select multiple files for import.

- **Search:** To search plan names, enter a string in the search bar. Results are highlighted immediately in the Plans page.
- **Sort:** Some column headers can be selected to sort the display by the column's entries.

Plan options:

The following options are available on the right side of a plan's entry:

- **Share:** Share the plan with other users. See *Share a Plan*.
- **Rename:** Change the name and description of the plan.
- **Email notifications:** Send email notifications on the plan runs. See *Manage Plan Notifications Dialog*.
- **Export:** Export the plan from Trifacta. See *Export Plan*.
- **Delete Plan:** Delete the plan.

Deleting a plan removes all objects contained in the plan. Flows referenced in the tasks of the plan are not touched.