

Sharing Your Plan With Others

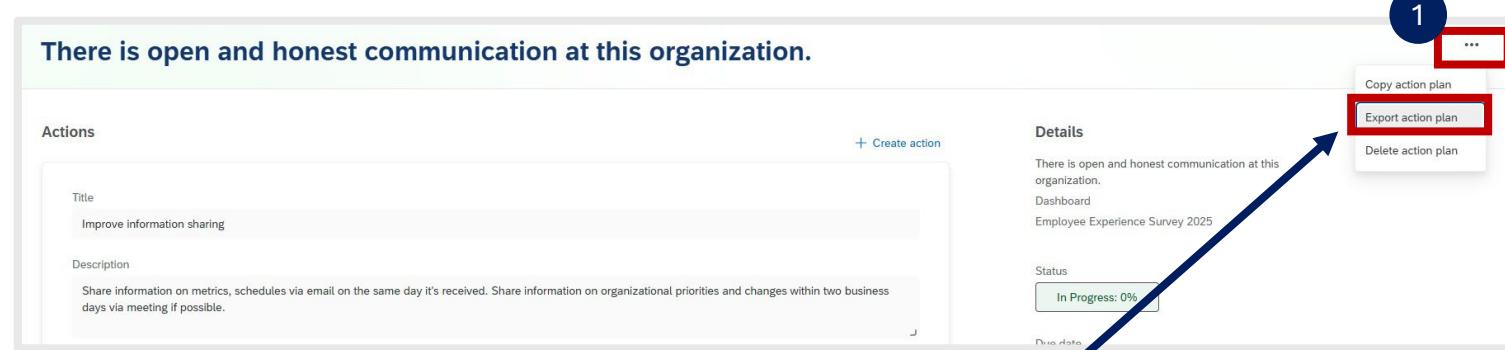


1. To share your plan, export it by clicking the three dots in the right corner of the plan to open the menu.

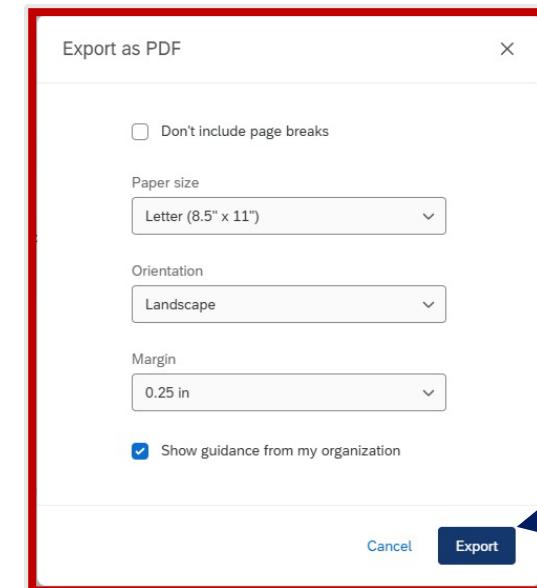
2. Select **Export action plan**.

3. Choose your desired export setting and click **Export**. Your plan will download automatically. **NOTE:** Each action plan needs to be downloaded separately.

Note: You can also share your plan with other managers by adding them as a co-owner. They will then be able to view and edit the action. See the [Creating an Action Plan QRC](#) for more information on adding co-owners.



The screenshot shows the 'Details' section of an action plan. At the top right, there is a menu with three dots. A blue circle labeled '1' points to the '...' icon. A red box highlights the 'Export action plan' option in the dropdown menu. The action plan title is 'There is open and honest communication at this organization.' and the description is 'Share information on metrics, schedules via email on the same day it's received. Share information on organizational priorities and changes within two business days via meeting if possible.' The status is 'In Progress: 0%'.



The dialog box is titled 'Export as PDF'. It contains the following settings:

- Don't include page breaks
- Paper size: Letter (8.5" x 11")
- Orientation: Landscape
- Margin: 0.25 in
- Show guidance from my organization

At the bottom right are 'Cancel' and 'Export' buttons, with 'Export' highlighted by a blue arrow labeled '3'.