



How-to Guide: Edit Plan Attributes

Audience: Plan Owners, Plan Approvers

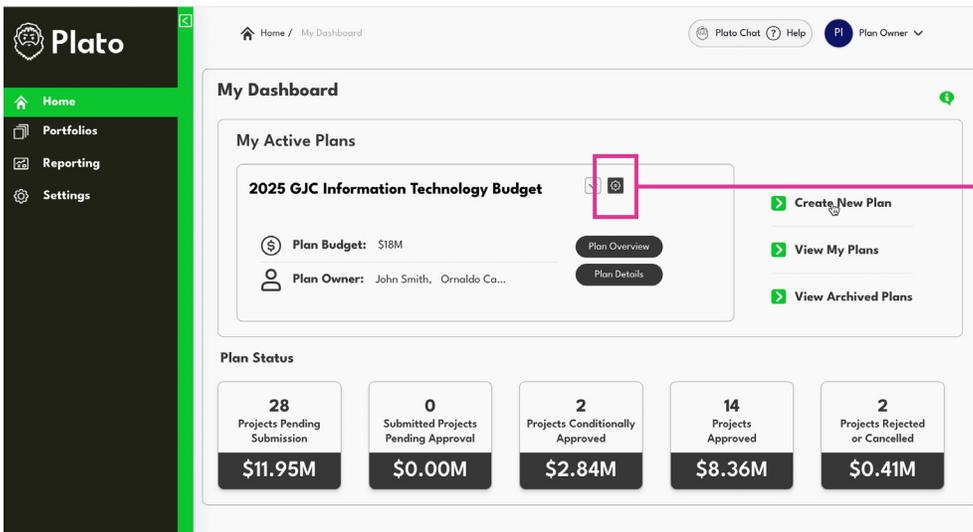
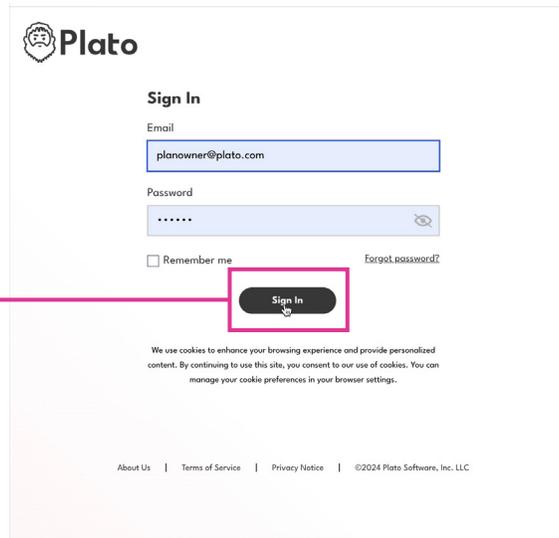
Welcome to Plato! This guide will help you navigate the tool and edit plan attributes effectively.

Step-by-Step Instructions

1

Sign in to Plato

Sign in to your Plato account. You will be directed to the My Dashboard home page.



2

Access Plan Attributes

Click the “Edit Plan Attributes” button under the My Active Plans widget.

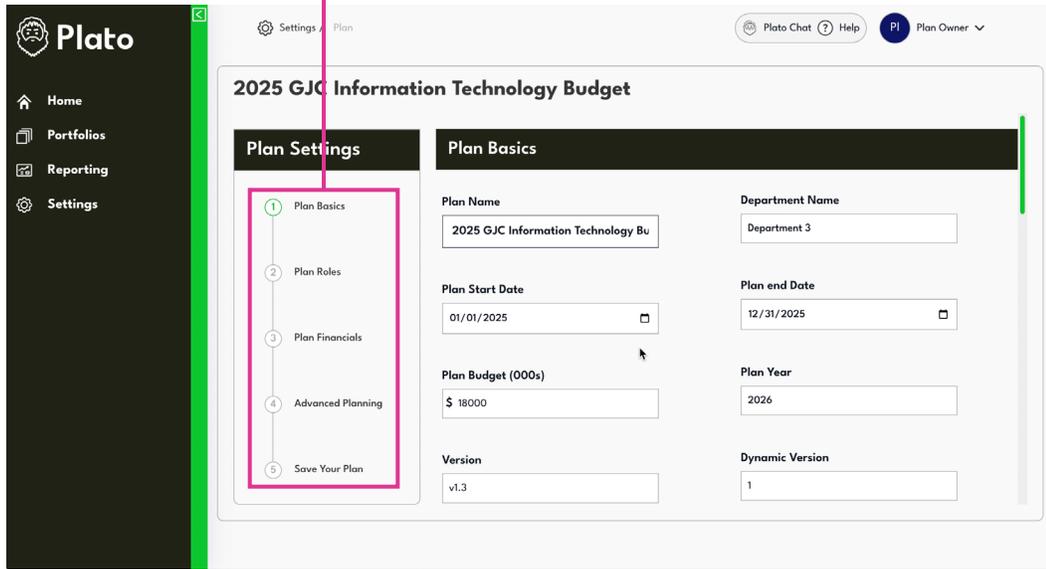
3

Navigate to the Desired Attributes

On the Plan Attributes page, scroll down to find the section you wish to update.

Update Plan Attributes

You can easily make changes to the Plan Basics, Plan Roles, and Advanced Planning sections by scrolling on the right side, or using the left-side quick links.



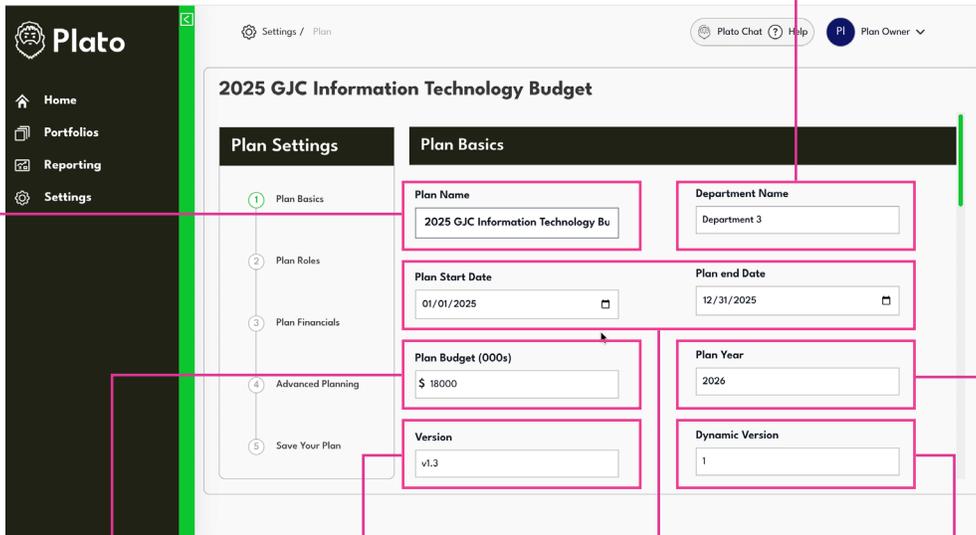
Plan Basics

Department Name

Select the department from the dropdown.

Plan Name

Edit your plan.



Plan Year

Specify the year the plan applies to.

Plan Budget

Enter the total budget amount for the plan.

Version

Specify the project version.

Plan Start and End Dates

Define the timeframe for the plan. These dates help with dynamic planning calculations.

Dynamic Version

If the dynamic plan option is checked, this field is auto-populated and auto-incremented based on user saves; can be overridden by the user.

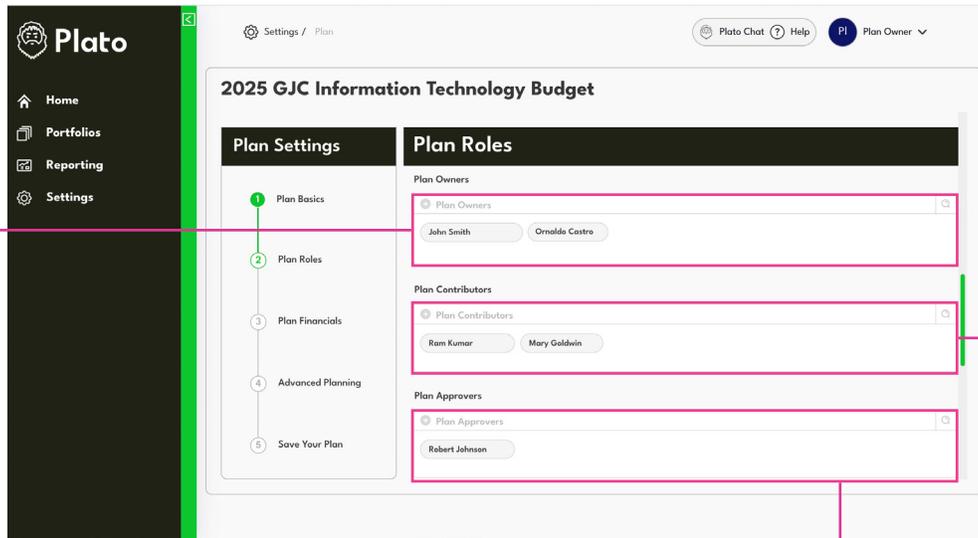
Plan Roles

Plan Owners

Edit the person responsible for the plan.

Plan Contributors

Add contributors who can edit the plan. Owners are contributors by default.



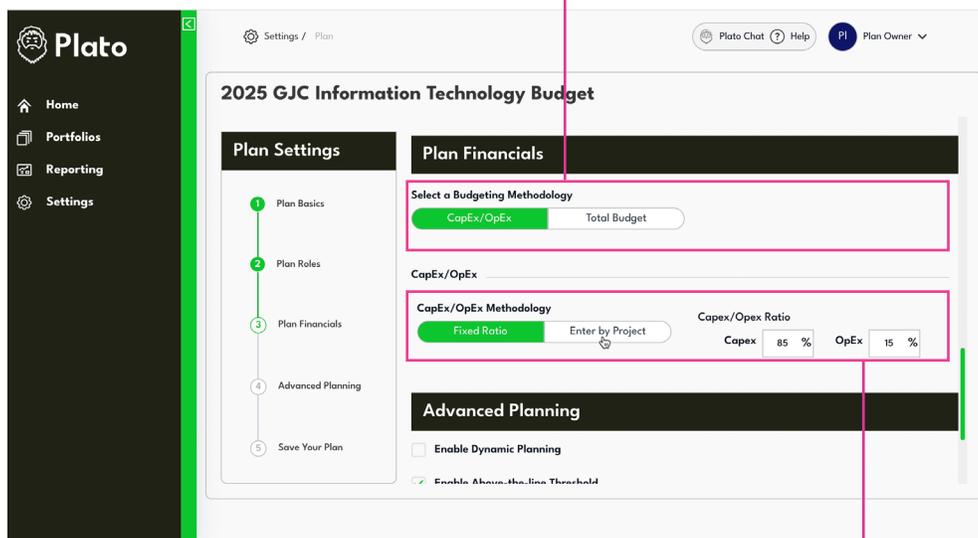
Plan Approvers

Add approvers for the plan.

Plan Financials

Select a Budgeting Methodology

Choose one of the following options:
Enter Capex/Opex, Enter total budget.



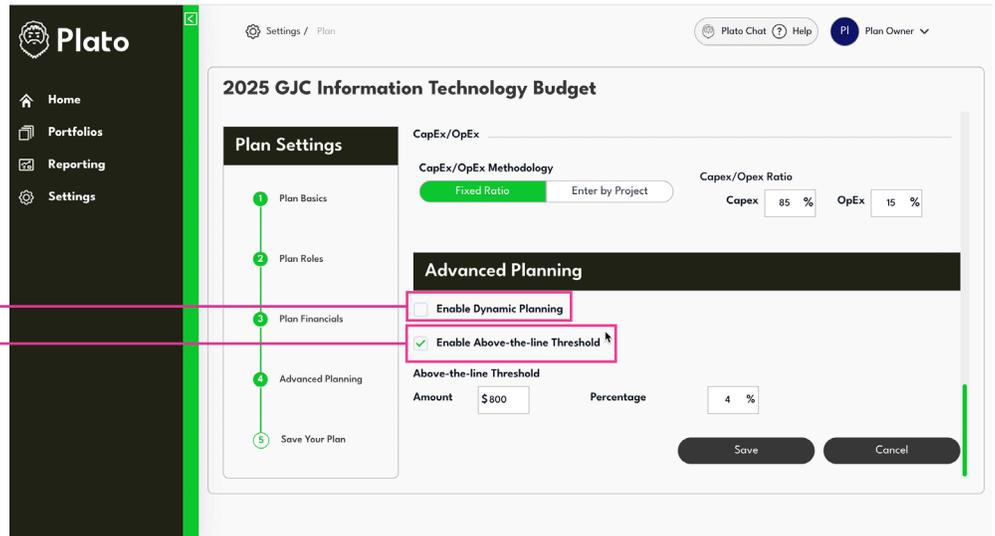
Capex/Opex Ratio or Manual Entry

Select between using a default Capex/Opex ratio or manually entering values for each project.

Advanced Planning

Enable Dynamic Planning

Check the field to enable Dynamic Planning functionality for your plan.



Enable Above-the-Line Threshold Amount/Percentage

Define the default setting for above-the-line/ below-the-line determination.

- **Save Changes:** After updating the settings, scroll to the bottom of the page and click “Save” to apply your modifications.
- **View Updated Plan:** Once saved, the changes will automatically reflect on your dashboard.

Need Further Assistance?

If you encounter any issues navigating Plato or need further assistance in creating a new plan, please refer to our help section or contact support for additional guidance.

Contact Us

✉ support@platosoftware.com
🌐 platosoftware.com