# Plato

# How-to Guide: Navigating Through Plato
**Audience: All Users**

Welcome to Plato! This guide will help you navigate the Plato product and ensure a smooth experience with your project planning. Follow these steps to navigate through Plato using the primary navigation on the left.

# 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.
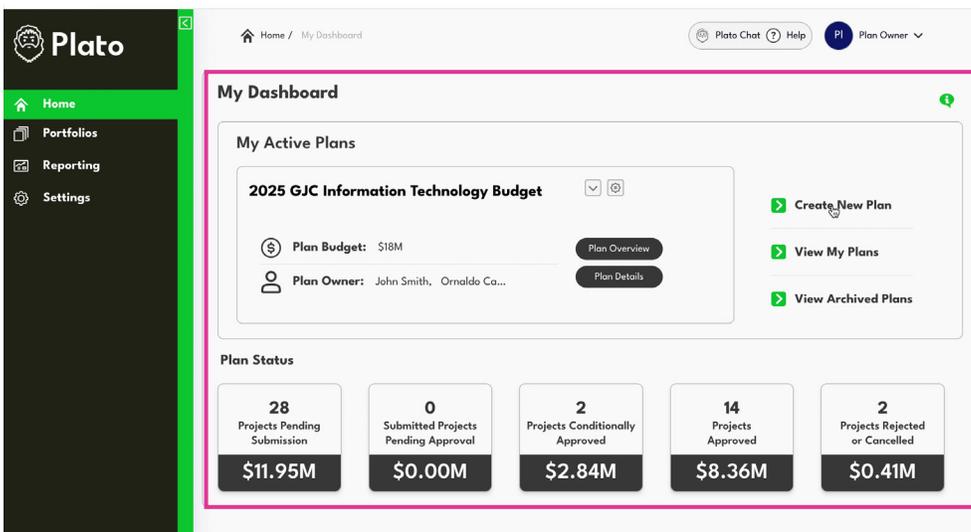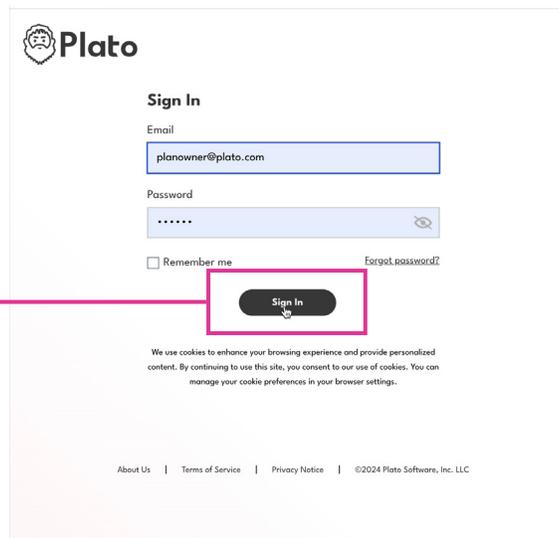


**2**

## View the Dashboard

The Dashboard displays your active plans, projects' stats and quick-access features like editing plans, creating new ones and viewing archived or private plans. This page also provides navigation options to Portfolio and Plan Overview pages to get a centralized view of your portfolios, plans, and performance insights.

## 3

### Explore Portfolio

Click on Portfolios under Home in the left navigation to get to your plan overview. The Portfolio page provides key details about your projects and initiatives within a plan, including the project name, its description, start and end dates, status, associated business units, budget owner, budget details and others.. Users can choose between a summary or a detailed view of a plan for a more comprehensive understanding and their convenience.

Portfolio / Plan Overview

Plato Chat    Help    UR  Unni

## 2025 GJC Information Technology Budget Plan Overview

| Department: | Information Technology |
| Plan Name: | 2025 GJC Information Technology Budget |
| Plan Budget: | $135M |
| Plan Owner: | Unni Rajendran |

### Plan Progress Overview

| Plan Budget | $135M |
| Current Requested Amount | $159M |
| Plan Progress | Submit  Rank  Review  Approve |

### Portfolio by Budget Owner

Portfolio by Business Unit
Portfolio by Owner
Portfolio by Project
Portfolio by Benefit
All Projects

| Sales & Marketing | Total Projects | 23 | Budget Request | $43.7M |
| Manufacturing | Total Projects | 16 | Budget Request | $18.9M |
| Operations | Total Projects | 28 | Budget Request | $65.3M |
| Corporate | Total Projects | 6 | Budget Request | $31.1M |

Reports / Pipeline Report

Plato Chat    Help    UR  Unni

## 2024 GJ Technology Services Budget Plan

FILTERS

$93.2
PROPOSED BUDGET

79
APPROVED PROJECTS

31
PROJECTS HELD FOR DYNAMIC
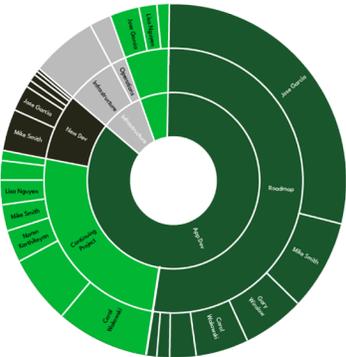
Budget by Business Unit

Budget by IT Owner

## 4

### Access Reporting

Under the Reporting section you can access the Overall Dashboard Report and Pipeline Report to analyze performance and progress.

## 5

## Manage Settings

Click on "Settings" to configure department-level settings and customize your preferences.
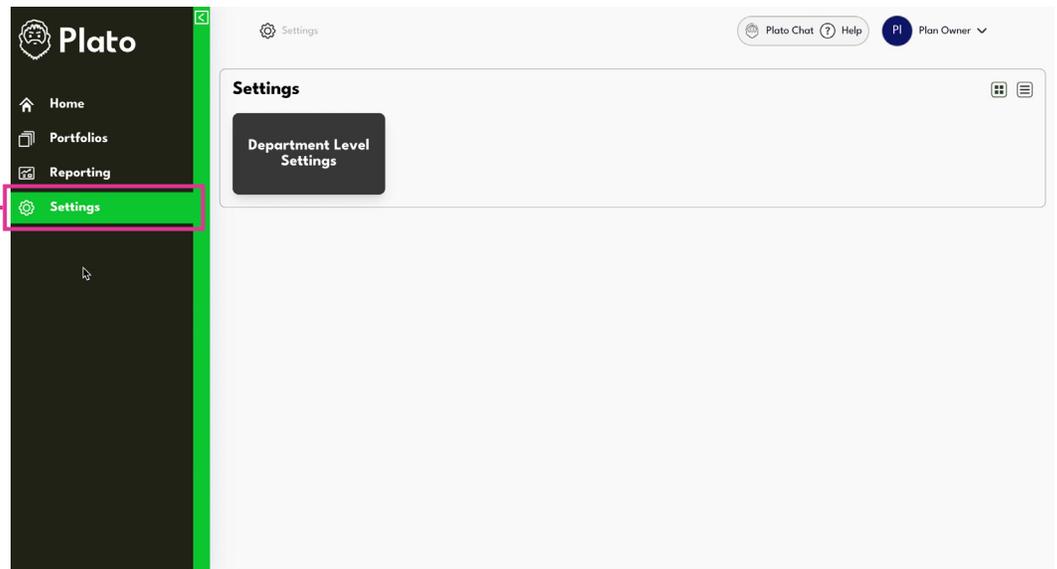
**Note:** Access to settings is restricted to specific roles within the platform. The availability of the navigation button will depend on your assigned access level. Users with appropriate access will be able to view and modify settings accordingly.

This streamlined navigation ensures easy access to all critical features within the Plato 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