



## How-to Guide: Set up System Settings

Audience: Plan Owners, Plan Approvers

Welcome to Plato! This guide will help you Set up System Settings, ensuring a smooth and efficient project management experience. Follow these steps to seamlessly access your archived plans on Plato.

### 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.

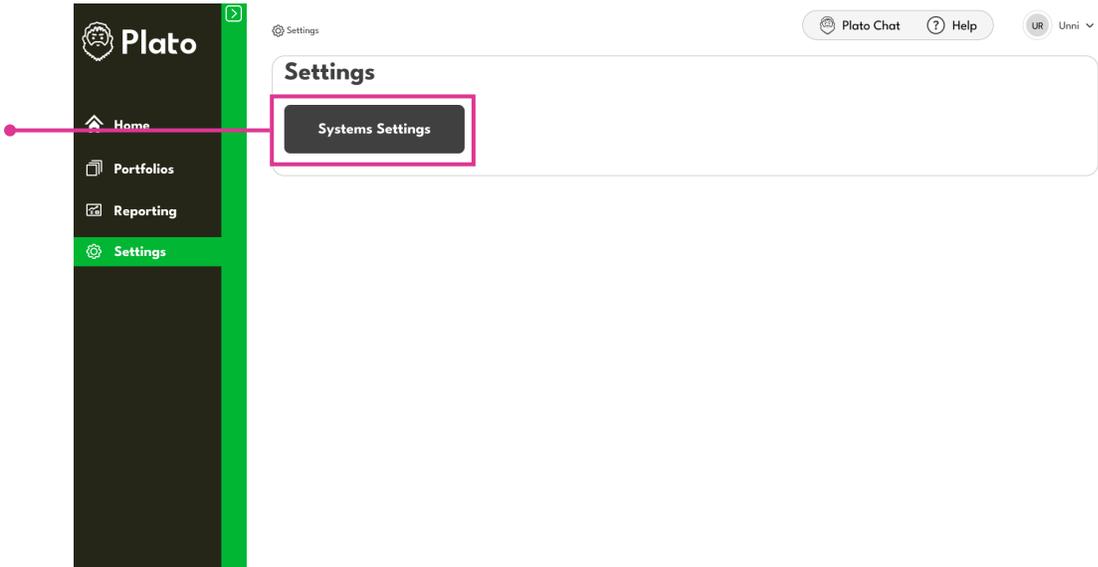
2

Access the  
“Settings” Option  
From the left navigation menu, scroll down  
to the last option and click on Settings.

3

### Open “Systems Settings”

On the Settings page, click on System Settings to view and manage system-level configurations.



4

### Configure “Systems Settings”

In the System Settings section, you can manage the following:

#### Subscription Details

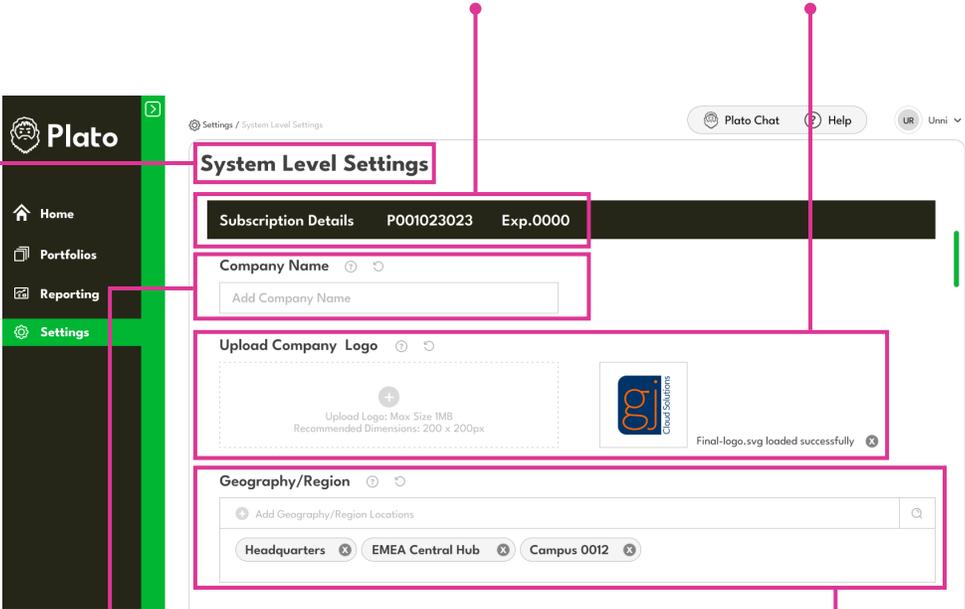
View subscription information (read-only)

#### Upload Customer Logo

Add or update your company’s logo.

#### System Level

Review and update system-wide settings.



#### Company Name

Edit your organization’s name if needed.

#### Geography/Region Values

Define or update location-specific data.

## Create Tenant Admin List

Add or manage tenant administrators.

## Create Departments

Set up and organize departments.

The screenshot shows the 'System Level Settings' page in Plato. The left sidebar contains navigation options: Home, Portfolios, Reporting, and Settings (highlighted in green). The main content area is titled 'System Level Settings' and includes a 'Plato Chat' button, a 'Help' button, and a user profile 'UR | Unni'. The settings are organized into three sections, each highlighted with a pink border:

- Create Site Admin List:** A checkbox is checked. Below it is a 'Site Admins' section with an 'Add Email Address for New Site Admin' input field and three email addresses: unni@emailaddress.com, mike@email.com, and jose@emailaddress.com.
- Create Departments:** A section with an 'Add Departments' input field and three department names: Technology Service A, Technology Service B, and Technology Service C.
- Select Plan Owners by Department:** A table with a note: 'Note: Must select at least one'. The table has two columns: 'Department' and 'Plan Owner'. The rows are: Technology Service A (Unni Rajendran), Technology Service B (Mike Smith), and Technology Service C (Jose Garcia). Below the table are 'Pick Department' and 'Pick Plan Owner' dropdowns. At the bottom right are 'Save' and 'Cancel' buttons.

## Assign Plan Owners by Department

Assign at least one owner per department.

## Save or Discard Changes

Click Save to apply and confirm any changes or Cancel to discard modifications.

## 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](mailto:support@platosoftware.com)

🌐 [platosoftware.com](http://platosoftware.com)