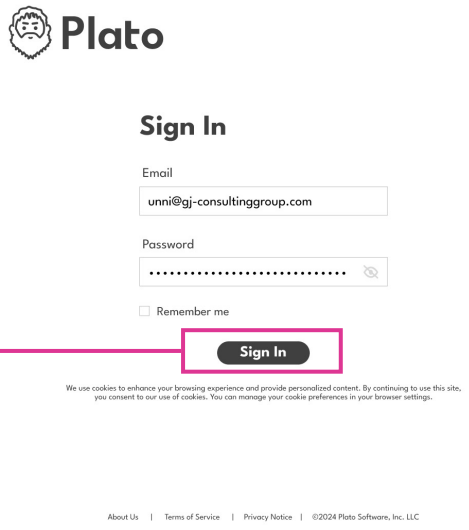
How-to Guide: Set up System Settings

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.

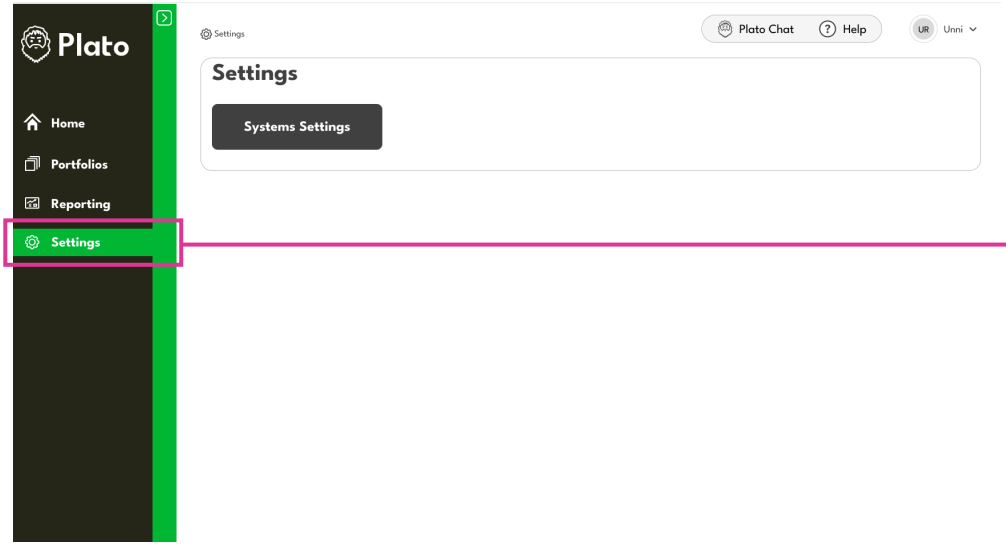
Step-by-Step Instructions



1

Sign in to Plato

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



2

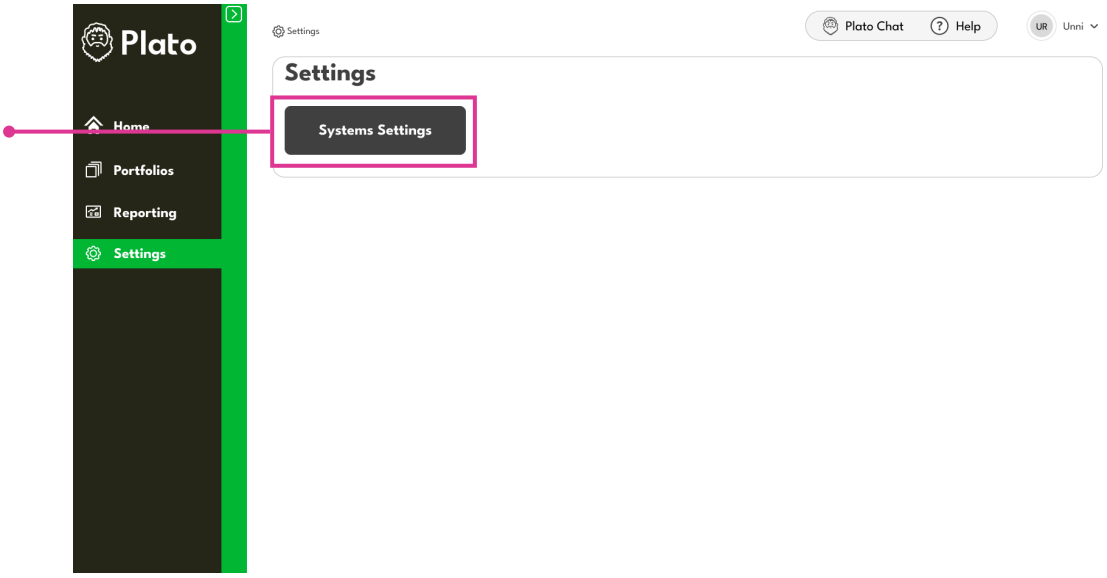
Access the “Settings” Option

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

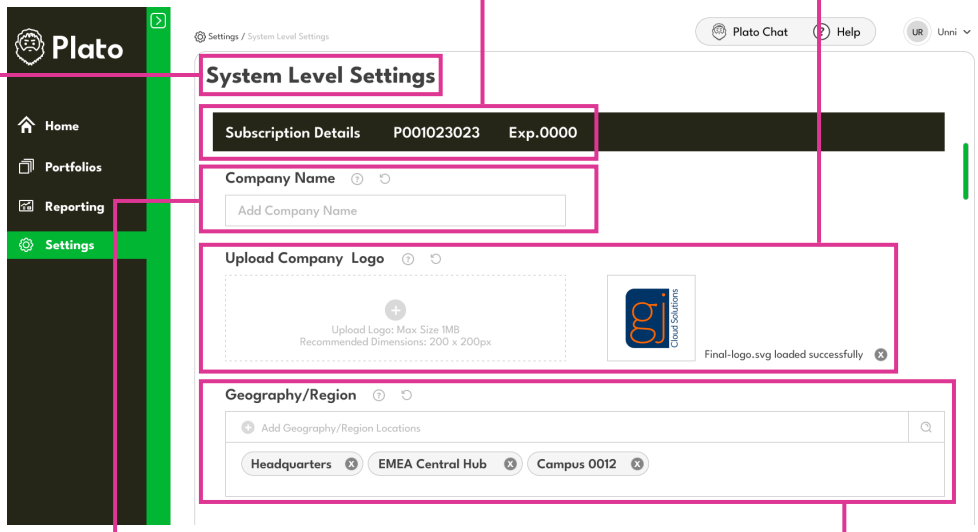
View subscription information (read-only)

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

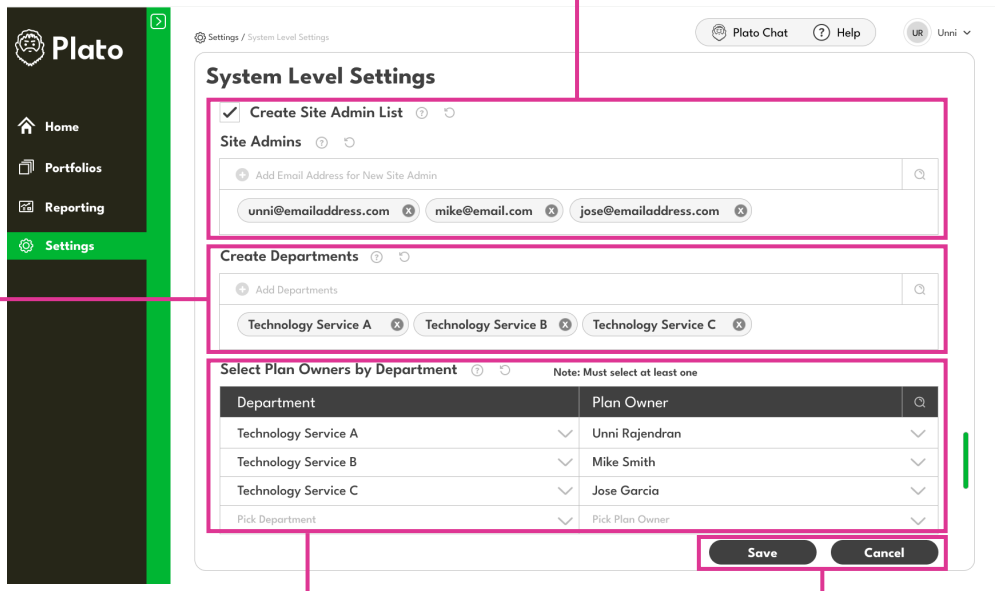
Define or update location-specific data.

Create Tenant Admin List

Add or manage tenant administrators.

Create Departments

Set up and organize departments.



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
platosoftware.com