



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



Sign In

Email
unni@gj-consultinggroup.com

Password
.....

☐ Remember me

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My Dashboard

Active Plans

Special Projects - Private

Plan Budget: \$254M

Plan Owner: Unni Rajendran

Plan Status

0 Projects Pending Submission

\$0.00M

0 Submitted Projects Pending Approval

\$0.00M

0 Projects Conditionally Approved

\$0.00M

0 Projects Approved

\$0.00M

0 Projects Rejected or Cancelled

\$0.00M

Manage Plans

Plan Attributes

Plan Overview

Plan Portfolio

Plan Report

Create a Plan

Tip of the Day

2

Access Plan Attributes

Click the “Edit Plan Attributes” option right next to your active plan name on My Dashboard.

Navigate to the Desired Attributes

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

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.

The screenshot shows the 'Plan Attributes' page for 'Sales & Marketing'. The left sidebar has a 'Getting Started' section with a list of five items: 1 Plan Basics, 2 Plan Roles, 3 Plan Financials, 4 Advanced Planning, and 5 Save Your Plan. A pink box highlights these five items, and a pink line connects this box to the 'Update Plan Attributes' text. The main content area shows the 'Plan Basics' section with fields for Plan Name, Department Name, Plan Start Date, Plan End Date, Plan Budget (000s), and Plan Year. Below this is the 'Plan Roles' section with a search bar for Plan Contributors and a list of contributors including Misti Espinoza.

Plan Basics

Department Name

Select the department from the dropdown.

Plan Name

Edit your plan name.

The screenshot shows the 'Plan Basics' section of the 'Plan Attributes' page. Pink boxes highlight the following fields: Plan Name (Sales & Marketing), Department Name (Iprechaun test), Plan Start Date (07/01/2025), Plan End Date (06/30/2026), Plan Budget (000s) (\$ 75000), and Plan Year (2026). Pink lines connect these boxes to their respective labels: Plan Name, Department Name, Plan Year, Plan Budget Total, and Plan Start and End Dates.

Plan Budget Total

Edit the total budget amount for the plan.

Plan Start and End Dates

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

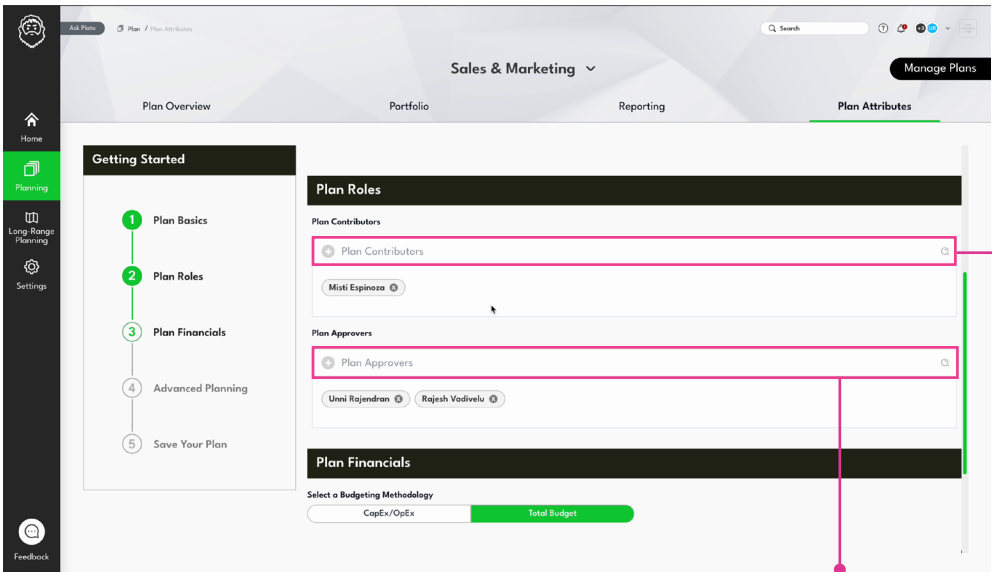
Plan Year

Specify the year the plan applies to.

Plan Roles

Plan Contributors

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



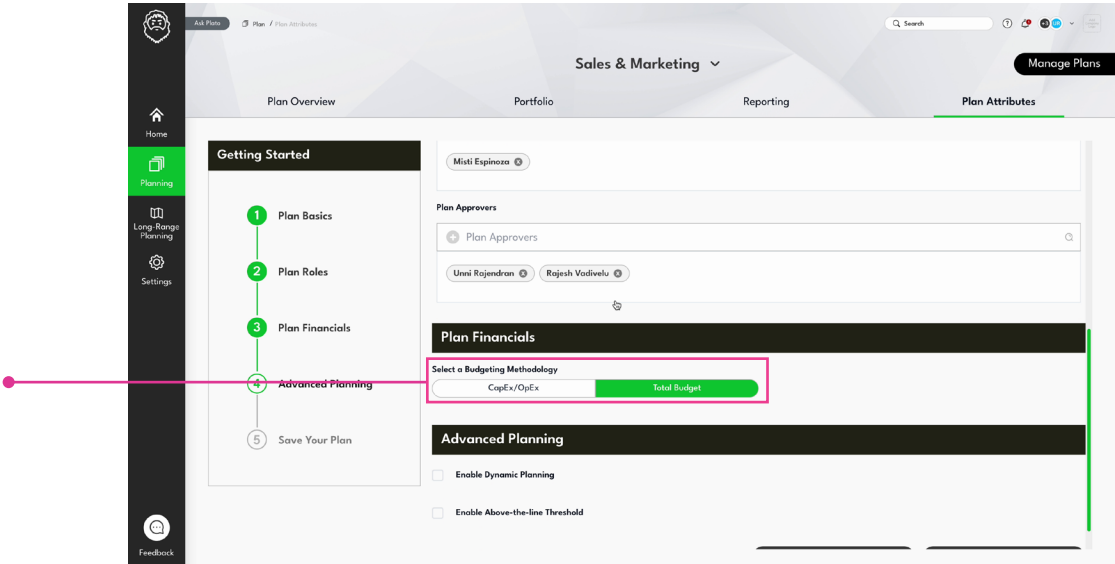
Plan Approvers

Add or remove approvers for the plan.

Plan Financials

Select a Budgeting Methodology

Choose one of the following options: CapEx/OpEx or Total Budget.



Advanced Planning

Enable Dynamic Planning

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

Dynamic Plan Frequency

Specify how frequently the plan can be updated (bi-annual, quarterly).

Above-the-Line Threshold Amount/Percentage

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

Dynamic Plan Holdback % or Amount

Define funds reserved for future planning iterations within the year. Custom frequency allows different spreads for each period; otherwise, the holdback is evenly distributed.

The screenshot shows the 'Plan Financials' and 'Advanced Planning' configuration page. The 'Advanced Planning' section is highlighted with a pink box. It contains a checkbox for 'Enable Dynamic Planning' which is checked. Below it, 'Dynamic Plan Frequency' is set to 'Bi-Annual'. Further down, 'Holdback Per Period' is set to 'Amount' with a value of '\$ 35000' and a 'Percentage' of '36 %'. At the bottom, there is an unchecked checkbox for 'Enable Above-the-Line Threshold'. A 'Getting Started' sidebar on the left lists steps 1 to 5, with step 3 'Plan Financials' highlighted. The top navigation bar includes 'Plan Overview', 'Portfolio', 'Reporting', and 'Plan Attributes'.

5

Save Changes

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

Need Further Assistance?

If you encounter any issues or need further assistance, please refer to our help section or contact support for additional guidance.

Contact Us

✉ support@platosoftware.com
🌐 platosoftware.com