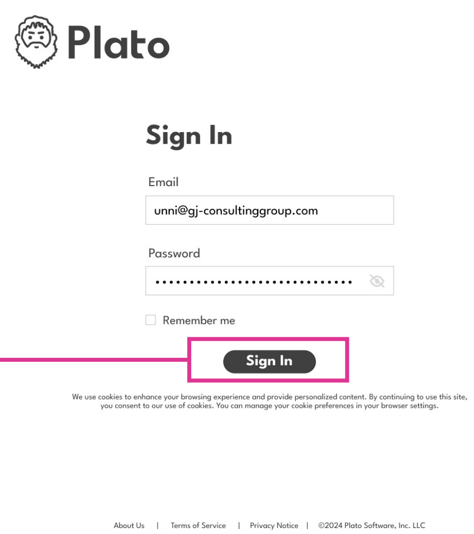
Plato

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.

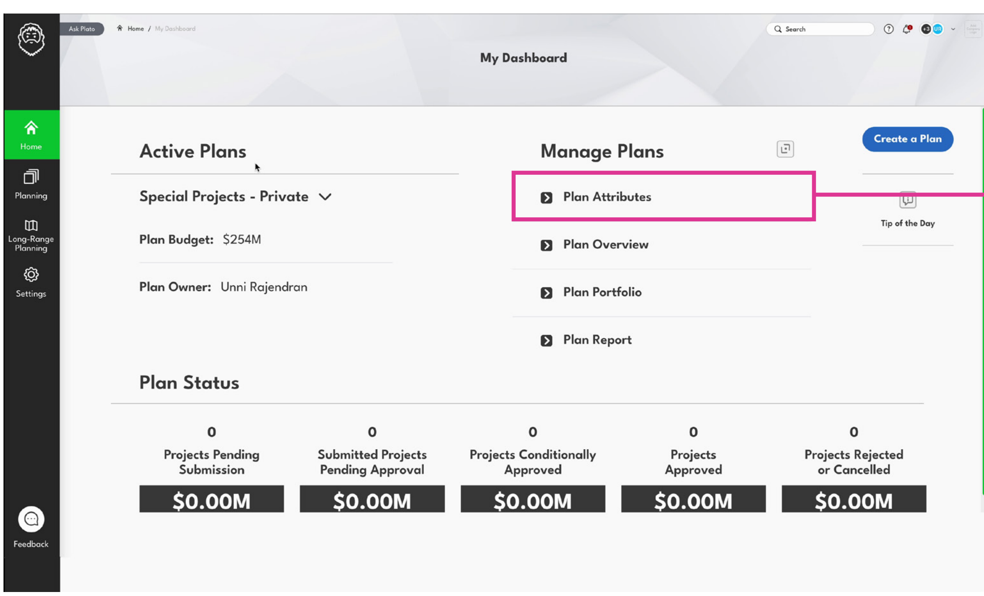
Step-by-Step Instructions



1

Sign in to Plato

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



2

Access Plan Attributes

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

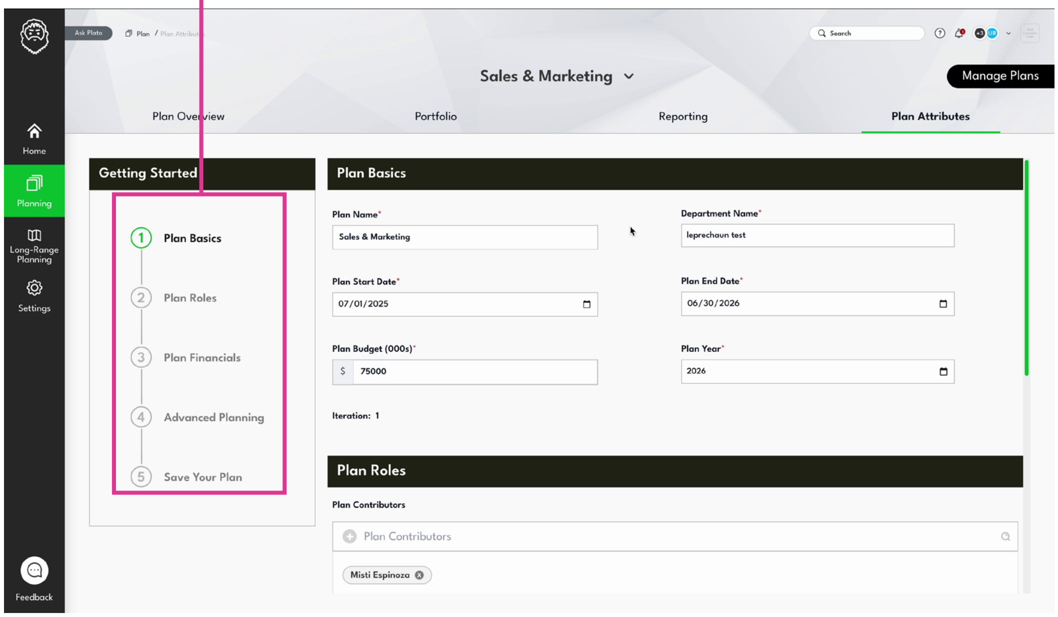
3

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.



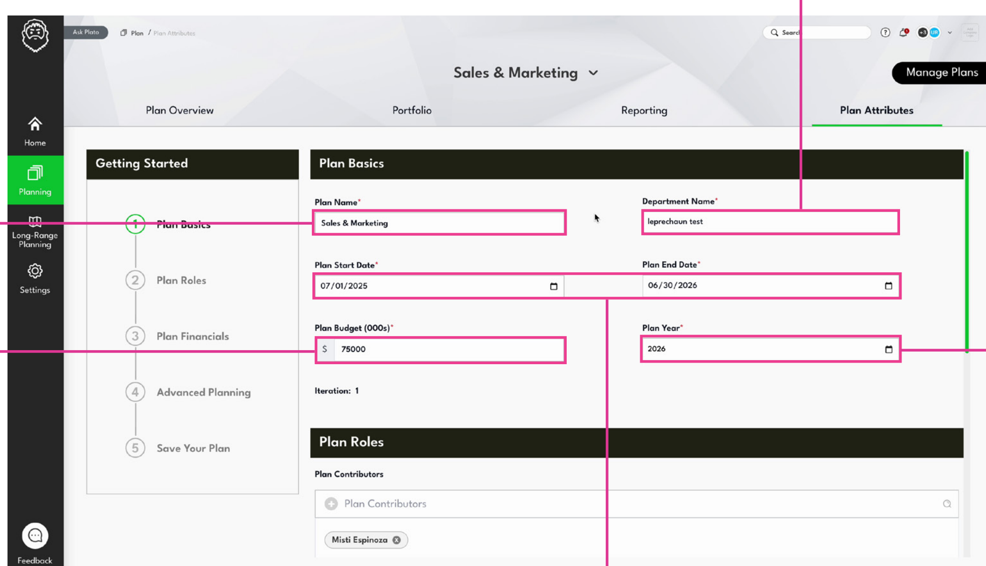
Plan Basics

Department Name

Select the department from the dropdown.

Plan Name

Edit your plan name.



Plan Year

Specify the year the plan applies to.

Plan Budget Total

Edit the total budget amount for the plan.

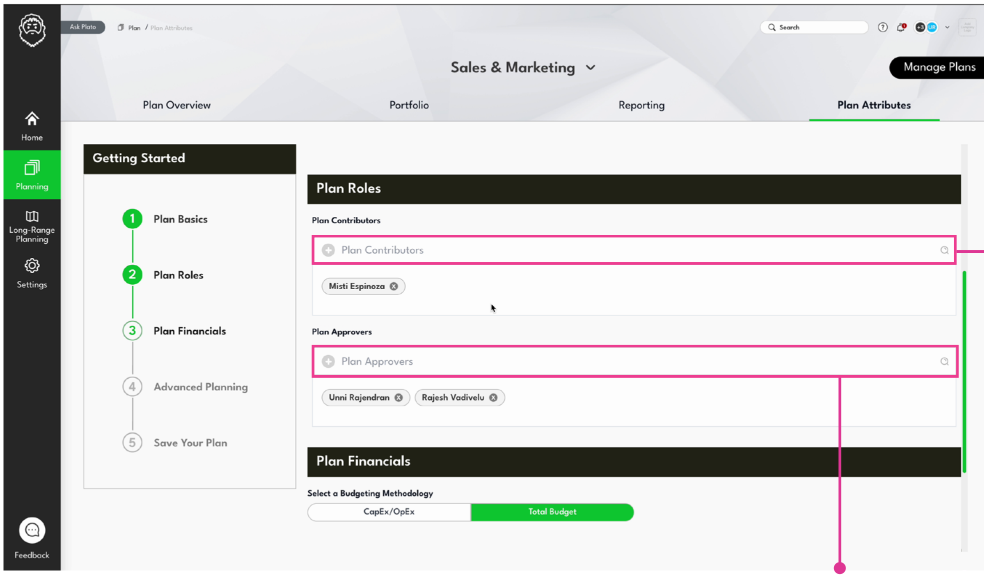
Plan Start and End Dates

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

Plan Roles

Plan Contributors

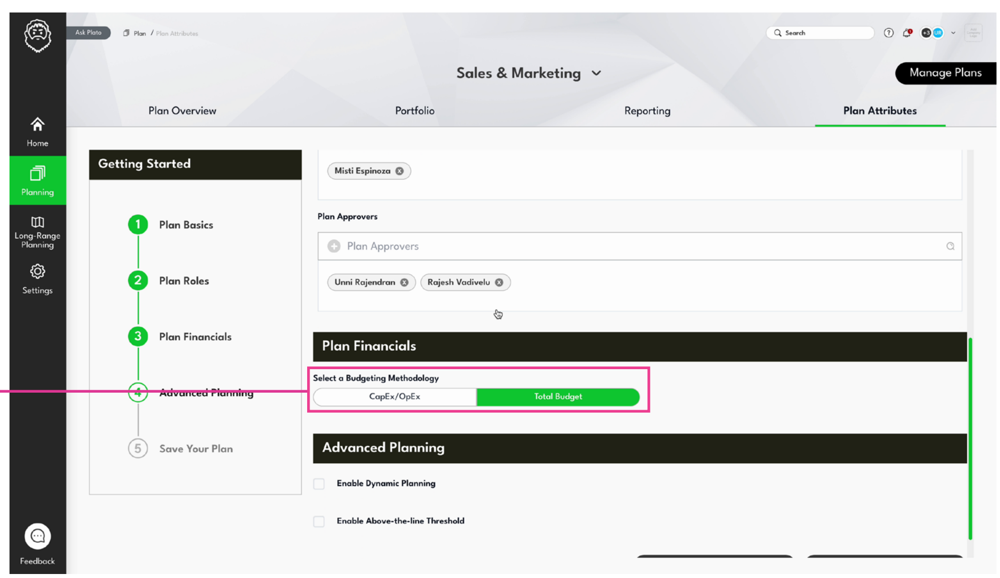
Add or remove contributors who can edit the plan. Owners are contributors by default.



Plan Approvers

Add or remove approvers for the plan.

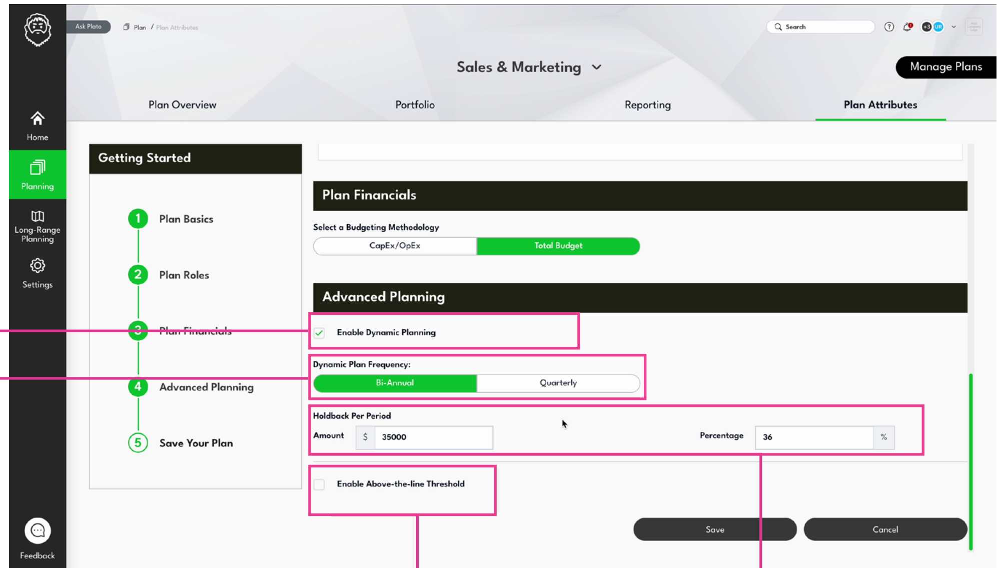
Plan Financials



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.

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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

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platosoftware.com