



How-to Guide: Create a New Plan

Audience: Plan Owners, Plan Approvers

Welcome to Plato! This guide will help you create a new plan and ensure a smooth experience with your project planning. Follow these steps to create a new plan seamlessly in Plato.

Step-by-Step Instructions

1

Sign in to Plato

After Signing In, you will be directed to the My Dashboard page.



2

Create a New Plan

On the My Dashboard page, click on “Create a New Plan” button.

Enter Plan details

A new page will open with the fields to create a plan. Provide the required details, such as:

Plan Basics

Plan Name

Enter a name for your plan.

Department Name

Select the department from the dropdown.

Plan Year

Specify the year the plan applies to.

Plan Budget Total

Enter 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.

The screenshot shows the 'New Plan' form with the following fields and sections:

- Plan Name:** A text input field.
- Department Name:** A dropdown menu with '-- select --' as the placeholder.
- Plan Start Date:** A date input field with a calendar icon, showing 'mm/dd/yyyy'.
- Plan End Date:** A date input field with a calendar icon, showing 'mm/dd/yyyy'.
- Plan Budget (000s):** A text input field with a dollar sign and '0' as the placeholder.
- Plan Year:** A dropdown menu with 'Select year' as the placeholder.
- Plan Roles:** A section containing 'Plan Contributors' and 'Plan Approvers' lists.
- Plan Financials:** A section with a 'Save Your Plan' button.

Plan Roles

Plan Contributors

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

The screenshot shows the 'Plan Roles' configuration page. On the left, a 'Getting Started' sidebar lists five steps: 1. Plan Basics, 2. Plan Roles (highlighted), 3. Plan Financials, 4. Advanced Planning, and 5. Save Your Plan. The main content area is titled 'Plan Roles' and contains three sections: 'Plan Contributors' with a search bar and a dropdown showing 'Misti Espinoza'; 'Plan Approvers' with a search bar and a dropdown showing 'Unni Rajendran' and 'Rajesh Vadivelu'; and 'Plan Financials' with a 'Select a Budgeting Methodology' section showing 'CapEx/OpEx' and 'Total Budget' (highlighted with a pink box). A pink line connects the 'Plan Contributors' search bar to the 'Plan Contributors' heading above it.

Plan Approvers

Add approvers for the plan.

Plan Financials

The screenshot shows the 'Plan Financials' configuration page. On the left, the 'Getting Started' sidebar lists five steps: 1. Plan Basics, 2. Plan Roles, 3. Plan Financials (highlighted), 4. Advanced Planning, and 5. Save Your Plan. The main content area is titled 'Plan Financials' and contains three sections: 'Plan Contributors' with a search bar and a dropdown showing 'Misti Espinoza'; 'Plan Approvers' with a search bar and a dropdown showing 'Unni Rajendran' and 'Rajesh Vadivelu'; and 'Plan Financials' with a 'Select a Budgeting Methodology' section showing 'CapEx/OpEx' and 'Total Budget' (highlighted with a pink box). A pink line connects the 'Total Budget' button to the 'Advanced Planning' section below it.

Capex/Opex Ratio or Manual Entry

Select between using a default Capex/Opex ratio or manually entering values for each project.

Advanced Planning

Enable Dynamic Planning

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

The screenshot shows the 'Advanced Planning' section of a software interface. On the left, a sidebar contains a 'Getting Started' list with five items: 1 Plan Basics, 2 Plan Roles, 3 Plan Financials, 4 Advanced Planning (highlighted with a green circle), and 5 Save Your Plan. The main content area is titled 'Plan Financials' and includes a 'Select a Budgeting Methodology' section with 'CapEx/OpEx' and 'Total Budget' buttons. Below this is the 'Advanced Planning' section, which contains a checkbox for 'Enable Dynamic Planning' (checked), a 'Dynamic Plan Frequency' dropdown set to 'Bi-Annual' (with 'Quarterly' as an option), and a 'Holdback Per Period' section with 'Amount' (set to \$ 35000) and 'Percentage' (set to 36 %). At the bottom of this section is a checkbox for 'Enable Above-the-Line Threshold' (unchecked). A 'Save' button and a 'Cancel' button are at the bottom right. Three pink lines with dots at the end point from the text blocks to specific fields: one to the 'Enable Dynamic Planning' checkbox, one to the 'Dynamic Plan Frequency' dropdown, and one to the 'Enable Above-the-Line Threshold' checkbox.

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.

Sales & Marketing

Plan Overview Portfolio Reporting Plan Attributes

Getting Started

- 1 Plan Basics
- 2 Plan Roles
- 3 Plan Financials
- 4 Advanced Planning
- 5 Save Your Plan

Plan Financials

Select a Budgeting Methodology

CapEx/OpEx Total Budget

Advanced Planning

☒ Enable Dynamic Planning

Dynamic Plan Frequency:

Bi-Annual Quarterly

Holdback Per Period

Amount \$ 35000 Percentage 36 %

☐ Enable Above-the-line Threshold

Save Cancel

Once you have entered all necessary details and customized the settings, click “Save” to finalize the plan setup. After saving, a new plan page will be created.

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