

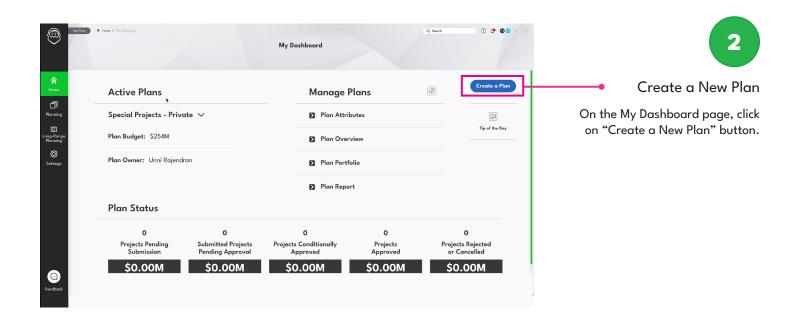
How-to Guide: Create a New Plan

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

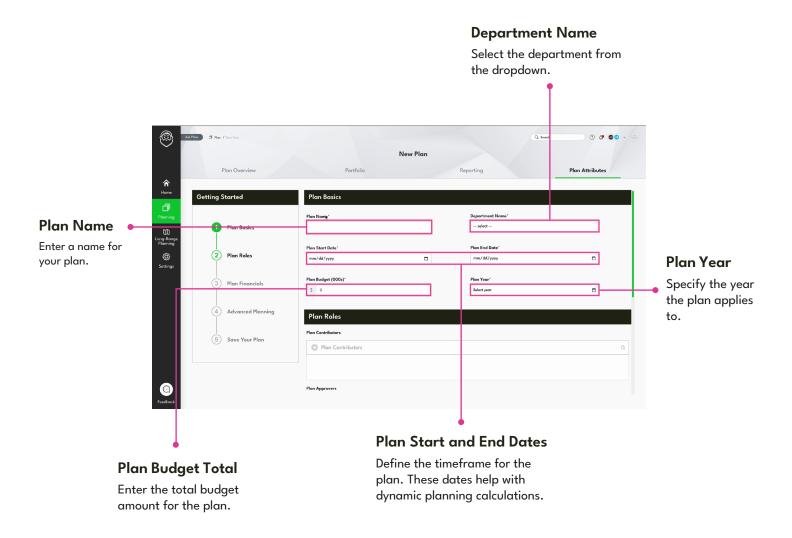




Enter Plan details

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

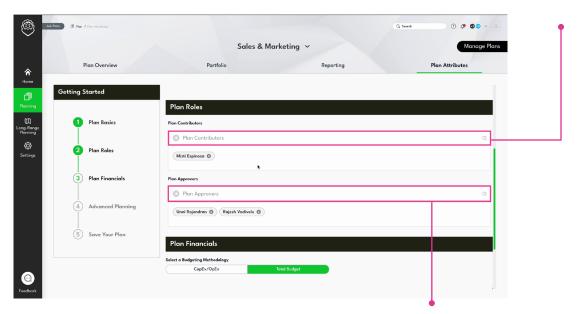
Plan Basics



Plan Roles

Plan Contributors

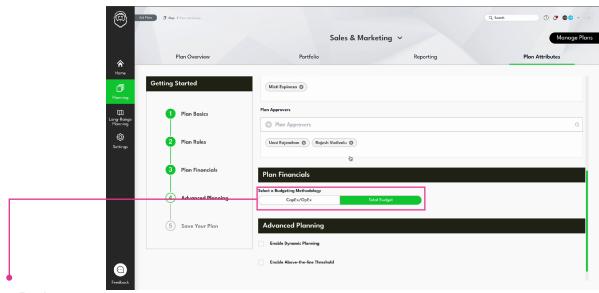
Add contributors who can edit the plan. Owners are contributors by default.



Plan Approvers

Add approvers for the plan.

Plan Financials



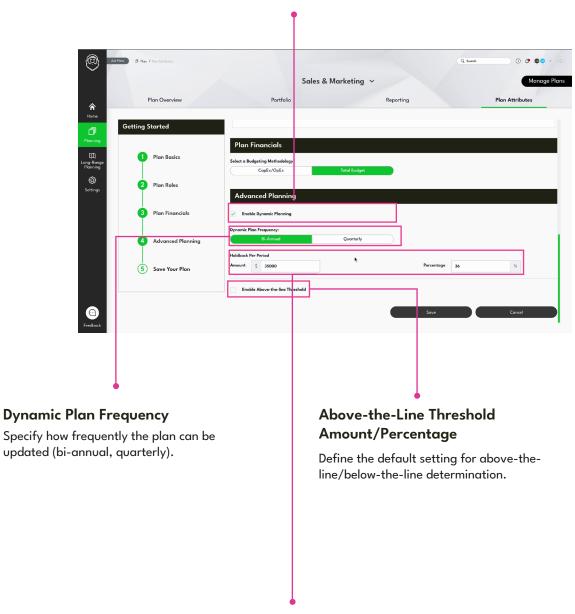
Capex/Opex Ratio or Manual Entry

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

Advanced Planning

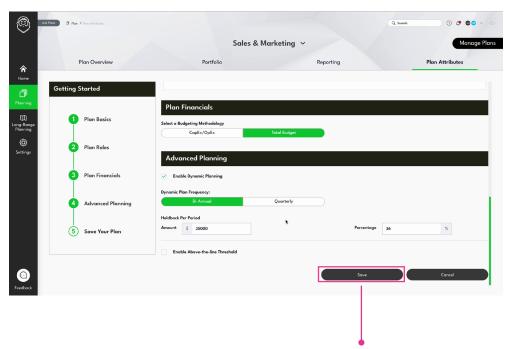
Enable Dynamic Planning

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



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.



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

- platosoftware.com