Plato

How-to Guide: Set up Department Settings

Audience: Plan Owners, Plan Approver, Tenant Admin

Welcome to Plato! This guide will help you configure Department Settings in Plato, ensuring a smooth and efficient experience.

Step-by-Step Instructions

1

Sign in to Plato

When you successfully sign in, to Plato for the first time you will be directed to the "My Dashboard" page.

Plato

Sign In

Email
unni@gj-consultinggroup.com

Password
····························

☐ Remember me

Sign In

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Navigate to "Department Settings"

On the Settings page, click on Department Settings to view and manage department level configurations.

3   Manage "Department Settings"

Department Level Settings

Getting Started

1. Project Attributes
2. Department Roles & Users
3. Portfolio Ranking Methodology
4. Expense Types
5. Integration Settings

System Attributes	Enable Attributes	Required For Submission	Include In Summary View		
Long Description	■	☐	☐	?	⋮
Start Date	■	☐	☐	?	⋮
End Date	■	☐	☐	?	⋮
Business Unit	■	☐	■	?	

≡ Communications ⊗
≡ Corporate ⊗
≡ Sales ⊗

Budget Owner	■	☐	■	?	⋮
Geography	■	☐	☐	?	⋮
Business Sponsor	■	☐	☐	?	⋮

Business Units
Indicates all the associated business units in the department. Users can add new ones or remove existing ones if needed.

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System Attributes	Enable Attributes	Required For Submission	Include In Summary View		
Business Unit	■	☐	■	?	⋮
Budget Owner	■	☐	■	?	⋮

Add Budget Owner
Sarah Johnson ⊗

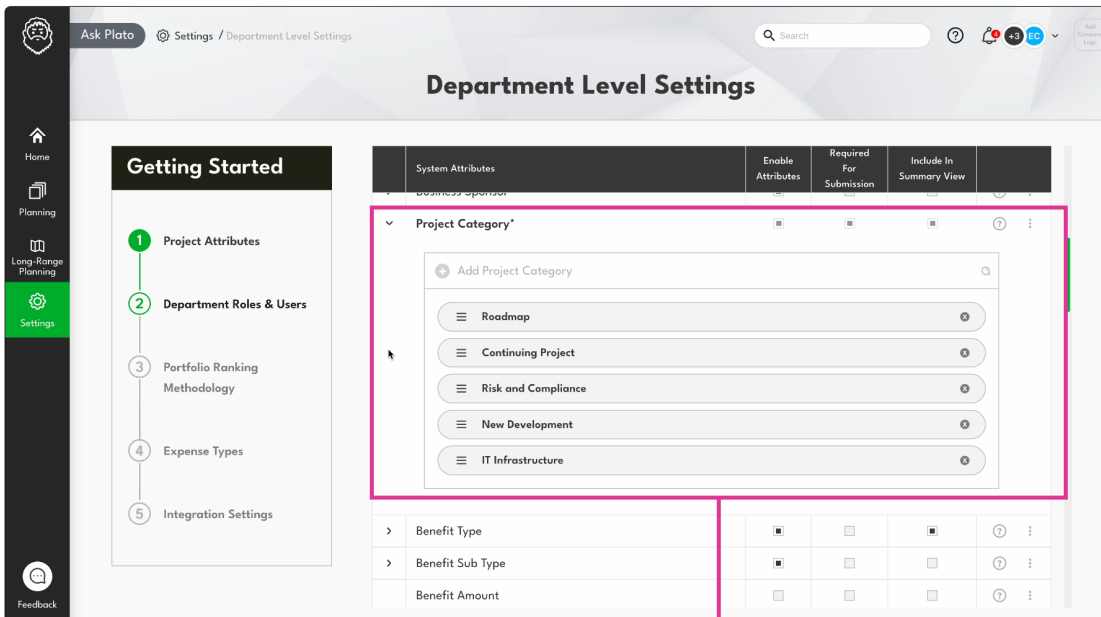| Geography | ■ | ☐ | ☐ | ? | ⋮ |
Business Sponsor	■	☐	☐	?	⋮
Project Category*	■	■	■	?	⋮
Benefit Type	■	☐	■	?	⋮
Benefit Sub Type	■	☐	☐	?	⋮
Benefit Amount	☐	☐	☐	?	⋮
Benefit Baseline	☐	☐	☐	?	⋮

Budget Owner
Allows adding or editing Budget Owners (individuals managing the department's budget.)

Geography
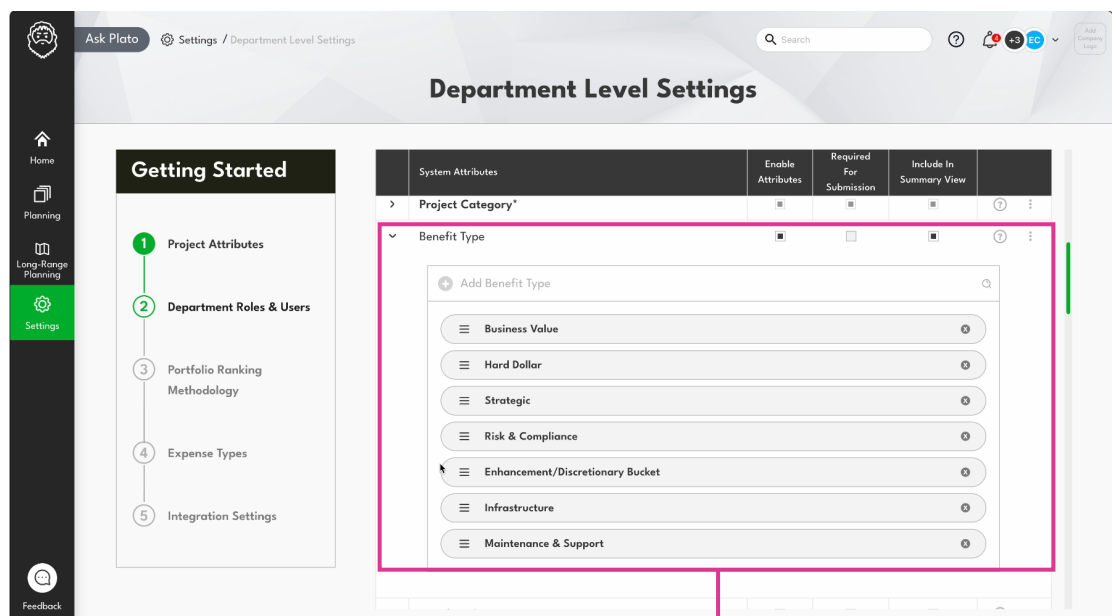
Define or update location-specific data.

Business Sponsor

Add, edit, or remove Business Sponsors (Individuals managing the department's budget)
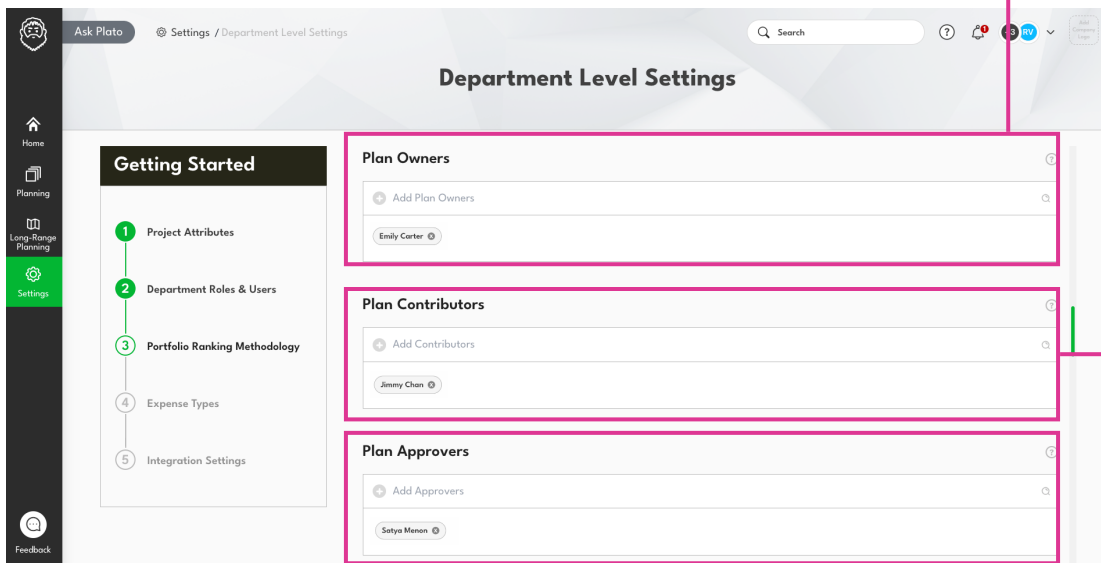
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System Attributes	Enable Attributes	Required For Submission	Include In Summary View		
⌄ Project Category*	▪	▪	▪	⑦	⋮

Add Project Category

≡ Roadmap ⊗
≡ Continuing Project ⊗
≡ Risk and Compliance ⊗
≡ New Development ⊗
≡ IT Infrastructure ⊗

❯ Benefit Type	▪	☐	▪	⑦	⋮
❯ Benefit Sub Type	▪	☐	☐	⑦	⋮
Benefit Amount	☐	☐	☐	⑦	⋮

Project Categories

Organize projects by their respective categories. Users can create or remove project categories.

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System Attributes	Enable Attributes	Required For Submission	Include In Summary View		
❯ Project Category*	▪		▪	⑦	⋮
⌄ Benefit Type	▪	☐	▪	⑦	⋮

Add Benefit Type

≡ Business Value ⊗
≡ Hard Dollar ⊗
≡ Strategic ⊗
≡ Risk & Compliance ⊗
≡ Enhancement/Discretionary Bucket ⊗
≡ Infrastructure ⊗
≡ Maintenance & Support ⊗

Benefit Types

Configure the types of benefits associated with a project. Users can easily drag and drop the sequence of benefit types for each department.

Plan Owners

Assign Plan Owners responsible for the overall creation, management, and oversight of department-level plans.

Plan Contributors

Add or remove Plan contributors (Members who assist in building and updating the plan content) as needed from the department list.

Plan Approvers

Assign approvers based on department-level decision-making roles. Plan Approvers are designated individuals who can approve submitted plans within the department.

Need Further Assistance?

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

Contact Us

✉ support@platosoftware.com

🌐 platosoftware.com