



How-to Guide: Set up System Settings

Audience: Tenant Admin

Welcome to Plato! This guide will help you navigate and configure Plato system settings effectively.

Step-by-Step Instructions

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Sign in to Plato

When you first log-in to your Plato account you will be directed to the “System Settings”page.



Sign In

Email

unni@gj-consultinggroup.com

Password

.....

☐ Remember me

Sign In

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Configure “Systems Settings”

In the System Settings section, you can see and manage the following:

Insert Logo

Add or update your company’s branding image.

The screenshot shows the 'System Settings' page. A sidebar on the left contains navigation links: Home, Planning, Long-Range Planning, Settings (highlighted in green), and Feedback. The main content area has a header 'System Settings' and a 'Subscription Details' bar showing 'P001023023 Exp.0000'. Below this, there are three main sections: 1. 'Company Name' with a text input field and a 'Clear Finance' button. 2. 'Upload Company Logo' with a dashed box for the logo, a '+ Upload 50 x 50 Max file size 100 KB' button, and a 'Clear Finance' button. 3. 'Geography/Region:' with a search bar containing 'Americas' and a 'Clear Finance' button. At the bottom, there is a 'Connect with AD' section with a green checkmark, and two input fields for 'AD Host' (172.190.196.140) and 'AD Port' (689). Three pink lines with dots at the end point to the 'Company Name' field, the 'Upload Company Logo' section, and the 'Geography/Region:' section.

Geography/Region Values

Define or update location-specific data.

Company Name

Enter or Edit your organization’s name.

Connect with Active Directory

Set up or update Active Directory (AD) connection details. Once all details are updated, click Save AD settings to apply and enable synchronization

Create Tenant Admin List

Add or manage tenant administrators who will have admin access.

Create Departments

Set up and organize departments.

Assign Plan Owners by Department

Assign Plan Owners for each department. Ensure to add at least one Plan Owner for each department.

Save or Discard Changes

Click save to apply the settings and start using Plato

The screenshot shows the 'System Settings' page in the Plato application. The page has a dark sidebar on the left with navigation links: Home, Planning, Long-Range Planning, Settings (highlighted in green), and Feedback. The main content area is titled 'System Settings' and contains several sections:

- Connect with AD:** A section with a green checkmark icon. It contains fields for 'AD Host' (172.190.196.140), 'AD Port' (689), 'Base DN' (dc=demo,dc=platosoftware,dc=com), 'Username' (cn=admin,dc=demo,dc=platosoftware,dc=com), and a 'Password' field. There is an 'Is Secure?' checkbox and a 'Save AD Settings' button.
- Create Tenant Admin List:** A section with a green checkmark icon. It contains a 'Tenant Admins' section with an 'Add User Name' button and a search bar.
- Create Departments:** A section with a green checkmark icon. It contains a 'Create Departments:' section with an 'Add Departments' button and a search bar. Below this are three tabs: 'HR', 'Information Technology', and 'Sales & Marketing'.
- Assign Plan Owners by Department:** A section with a green checkmark icon. It contains a table with two columns: 'Department' and 'Plan Owner'. The table has three rows: 'Sales & Marketing', 'Information Technology', and 'HR'. Each row has a 'Type to search' input field.
- Save or Discard Changes:** A section at the bottom right with 'Cancel' and 'Save' buttons.

Callouts from the surrounding text point to these sections: 'Connect with AD' points to the top section, 'Create Tenant Admin List' points to the second section, 'Create Departments' points to the third section, 'Assign Plan Owners by Department' points to the fourth section, and 'Save or Discard Changes' points to the bottom right buttons.

Need Further Assistance?

If you encounter any challenges while setting up your system settings, visit our Help section or contact our support team:

Contact Us

✉ support@platosoftware.com

🌐 platosoftware.com