



How-to Guide: Navigating Through Plato

Audience: All Users

Welcome to Plato! This guide will help you navigate the Plato product and ensure a smooth experience with your project planning. Follow these steps to navigate through Plato using the primary navigation on the left.

Step-by-Step Instructions

1

Sign in to Plato

After Signing In, 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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View the Dashboard

The Dashboard displays your active plans, projects' stats and quick-access features like editing plans, creating new ones and viewing archived or private plans. This page also provides navigation options to Portfolio and Plan Overview pages to get a centralized view of your portfolios, plans, and performance insights.

Ask Plato

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My Dashboard

Create a Plan

Tip of the Day

Active Plans

FY26 Information Technology

Plan Budget: \$500M

Plan Owner: Emily Carter

Manage Plans

Plan Attributes

Plan Overview

Plan Portfolio

Plan Report

Plan Status

2 Projects Pending Submission

0 Submitted Projects Pending Approval

0 Projects Conditionally Approved

0 Projects Approved

0 Projects Rejected or Cancelled

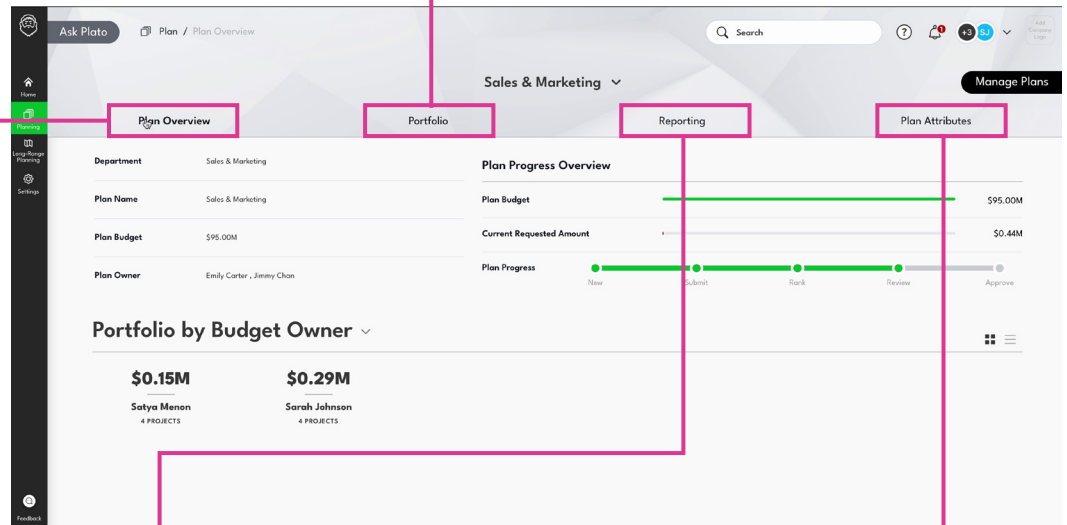
3

Plan Overview

View plan progress overview and the portfolio by various categories, including benefit type, business sponsor, project category, and sponsoring business unit.

Portfolio

Displays project details, business units, budget owner, and budget allocation. You can choose between a summary view or a detailed view.



Reporting

Access the reporting tab to track plan progress, view projects by categories, business unit, and budget owner.

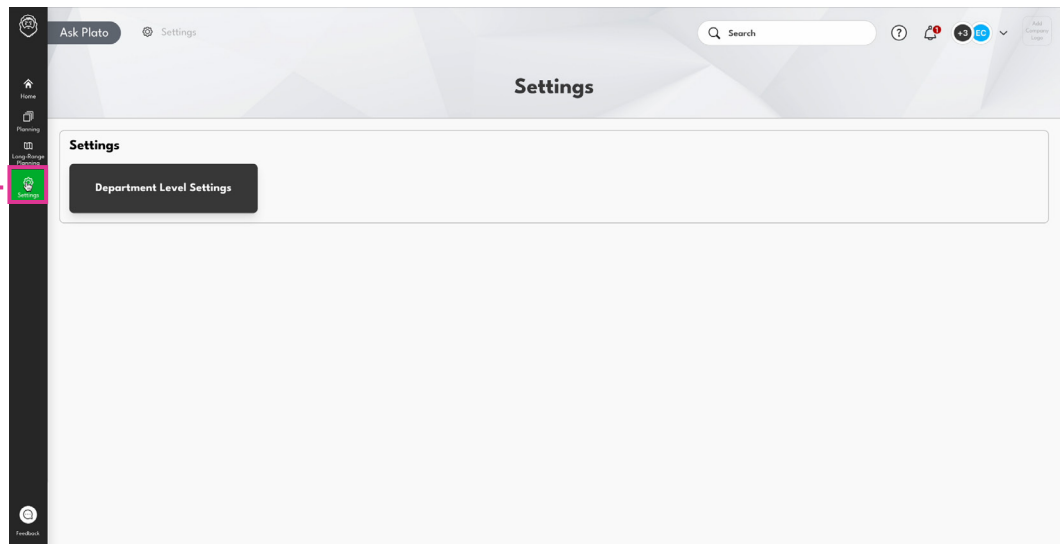
Plan Attributes

Create new plan attributes or edit existing ones. You can easily make changes to the Plan Basics, Plan Roles, and Advanced Planning sections.

4

Manage Settings

Click on “Settings” to configure department-level settings and customize your preferences.



Note: Access to settings is restricted to specific roles within the platform. The availability of the navigation button will depend on your assigned access level. Users with appropriate access will be able to view and modify settings accordingly.

This streamlined navigation ensures easy access to all critical features within the Plato system.

Need Further Assistance?

If you encounter any issues navigating Plato or need further assistance, please refer to our help section or contact support for additional guidance.

Contact Us

✉ support@platosoftware.com

🌐 platosoftware.com