Plaza™

Managing Agreements and Compliance

User Guide 1 Background, User Interface & Permissions

Overview

This User Guide provides a brief background on Plaza™; its functions, terminology, illustration of the data structure, and its user interface.

Background and Functions

Plaza™ is a Web-based tool to manage any type of contract for the delivery of goods and services.

Plaza™ was designed with extensive user input and suggestions, to comply with leading contract management practices. It has an Excel-like tabular user interface to make it simple to use and find what you're looking for.

Plaza™ caters for various contractual agreements - Work Orders, Consultancies, MOUs, Partnerships, Deeds or Grants; for ease of reference the broad term "**Agreement**" is used.

Plaza™ focuses on managing Agreement deliverables from 'either side' (i.e. from the Contract Manager's perspective and the Contractor's perspective) using category management. Plaza™ provides automatic alerts for events such as deliverables and performance assessments with the ability for Contractors to log in and update their compliance details, deliverables, and catalogues. Plaza™ exports reports to flexible Excel worksheets.

Plaza™ provides GIPA and FMA reporting compliant (public) web page of Agreements.

Finally, Plaza™ complies with Federal Government Principles for ICT-enabled Citizen Engagement and it meets Australian National Audit Office Better Practice Guide for Contracts Registers functionality as described at: http://www.anao.gov.au.

Plaza™ Terminology

Term	Definition and/or Example
Account	Organizations who have a Plaza™ registration.
User	People who are connected to Accounts.
Owner	Account administrator who can allocate permission in Plaza™ and create new users for that account.
Agreement Creator	A user (Contract Manager) who can create an agreement in Plaza™ sets obligations, and performs assessments, etc. Unless you have acquired and paid for a licensed account, you will not have access to create or edit an Agreement.
First Party	Council, customer, or Client represented by a Contract Manager.
Second Party	Supplier, service provider, or contractor.
Third Party	Subcontractor, lawyer, auditor, financial institution, insurer, or client.

Technology requirements

Supported browsers: Internet Explorer version 9 or above

Firefox, Chrome, and Safari

Navigation and Data Structure

The data in Plaza is structured into the following 8 simple groupings.
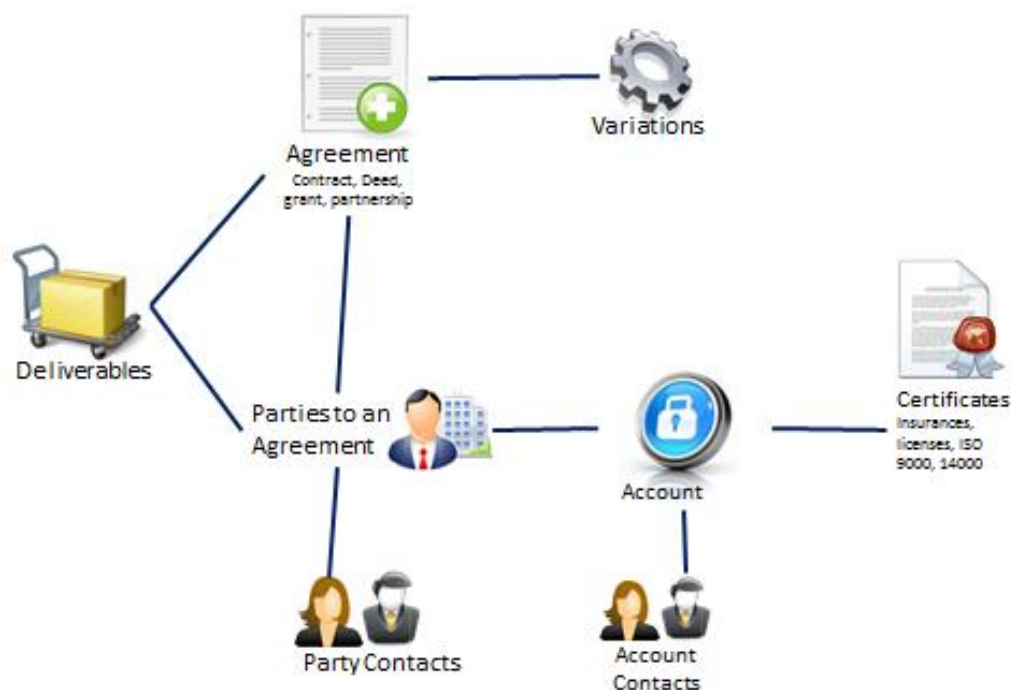

Figure 1 Plaza's Data Structure

User Interface

The user interface designed for Plaza™ allows for easy navigation between different functions of an Agreement (i.e. adding Parties via the Parties link, adding Deliverables via the Deliverables link, and adding Variations via the variations link).

In addition, Plaza's home page provides a snapshot of the current status of your Agreements, Deliverables and Certificates.

In the case of Agreements:

Red box   Number of agreements whose actual value vs. initial +contingency value exceed 10%

Amber box   Number of agreements whose actual value vs. initial +contingency value exceed 5%

Green box   Number of agreements within budget

In the case of Deliverables and Certificates:

Red box   Number of Deliverables/Certificates which are overdue/expired

Amber box   Number of Deliverables/Certificates which are due/expire soon

Green box   Number of Deliverables/Certificates which are within their due date

By clicking on a coloured box, it'll direct you to a view of just those Agreements, Deliverables or Certificates.

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Figure 2 Plaza™ Home Page

Email Notification

Plaza™ Users receive daily email notifications regarding Certificates or Deliverables that are approaching their due/expiry date or those past their due/expiry date. Licensed Plaza™ Account Users will also get a daily digest email providing a complete list of items (Certificates or Deliverables) which relate to the Party's associated with your Agreements.

Certificate's Amber Warning Triggered

10 April 2015 03:00

Plaza Account:	**Green Lawn Company**
Certificate:	**Public Liability Insurance**
Expiry Date:	**31 March 2015**
Amber Warning Date:	**01 March 2015**
Red Warning Date:	**17 March 2015**

Figure 3 Example of Email Notifications from Plaza™

Links

Links in the top and bottom right hand corners are accessible all the time, regardless of what area of the Agreement you are working on.

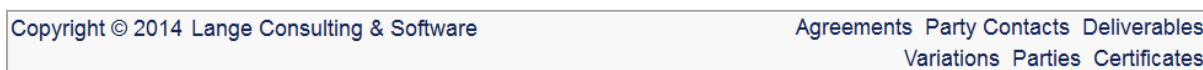Figure 4 Menu options - Top right hand corner

Figure 5 Menu options - Bottom right hand corner

Filtering

Within each Plaza™ function (i.e. Agreements, Parties etc) there are options on the right hand side to filter your view and navigate between Plaza functions. In the figure below from the Agreements menu, if '*Mine (my party is owner)*' is selected only the Agreements your organisation is the Owner for will be displayed.

Figure 6 Filter your view

Filtering explanations are provided in each of the User Guides.

Affiliated details

When working on particular details of your Agreement you will notice options on the right hand side change from filtering options to other Plaza™ functions (i.e. Parties, Deliverables etc). These links (shown below) allow you to add and view details to the Agreement without having to go through the main menu.
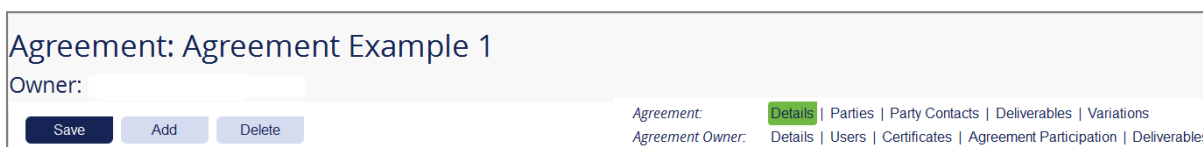

Figure 7 Navigate to affiliated Plaza™ functions

Add button

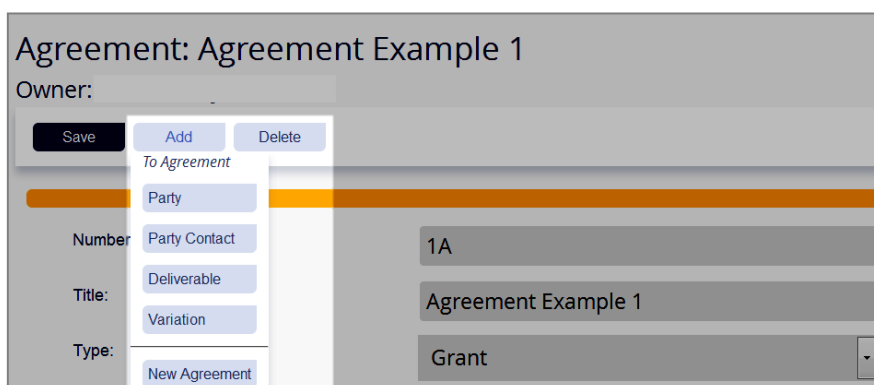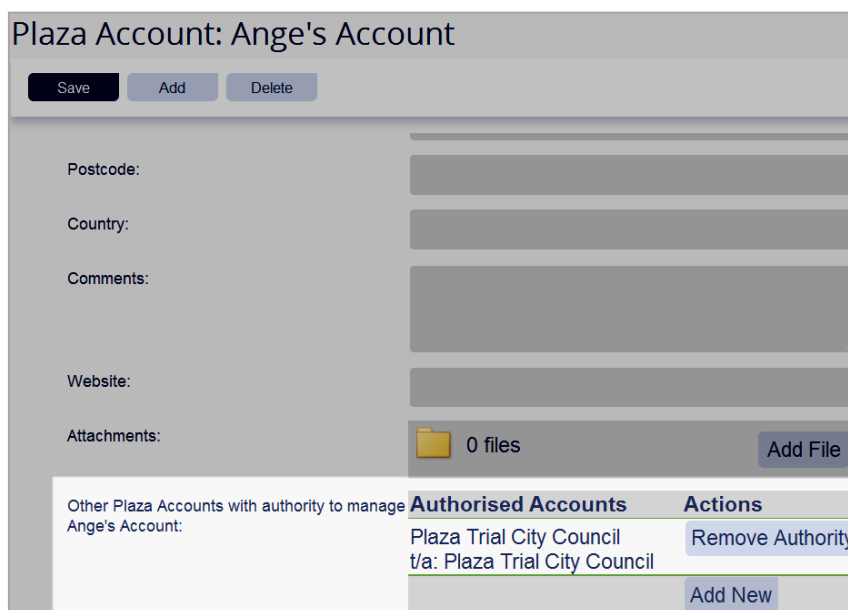Throughout Plaza™, the Add button allows you to select from the relevant options to add new details.

Figure 8 Adding relevant details to an Agreement via the Add button

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Permissions

Agreement Creators (Contract Managers) are able to grant themselves edit rights for the Plaza™ Accounts they create who are a Party to their Agreements (see User Guide on Creating a Party for more detailed instructions). This allows for Agreement Creators to edit Users, Certificates and update Contact information for those Plaza Accounts who are unlikely to maintain their own unlicensed accounts.

Figure 9 Authority to Manage Account

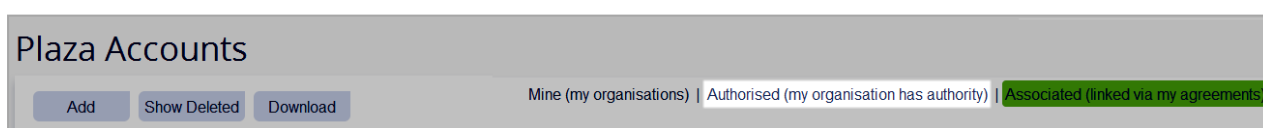Users can filter their view of Accounts to display only the Accounts they have permission to edit.

Figure 10 Filter via Authorised Accounts

Now you that you're familiar with the feel of Plaza™, the next step is to configure your account (please refer to User Guide – Configuration of a Plaza Account)

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