

## Managing Agreements and Compliance

# Adding an Organisation to Plaza™

### Overview

This User Guide provides instructions on how to add an organisation to Plaza™ (creating an unlicensed Plaza™ Account) and the functions available to users with an unlicensed Account.

### Background and Functions

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

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.

Any organisation can be party to agreements in Plaza™. By registering your organisation, you can collaborate on agreements. You are able to view all publicly listed information and you have access to a limited set of Plaza’s functions (primarily add/edit your User and Certification details). Unlicensed Accounts are free.

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

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>.

Finally, if you want to be able to create and manage your own agreements, you’ll need to grab a license from simplylogical.net ([support@simplylogical.net](mailto:support@simplylogical.net)) to covert your Account to a licensed Account.

### 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.

## Adding your Organisation to Plaza

Select the 'Add Organisation to Plaza™' button from the login screen

(<http://plaza.apetsoftware.com.au/home>), complete the details, and click Save.

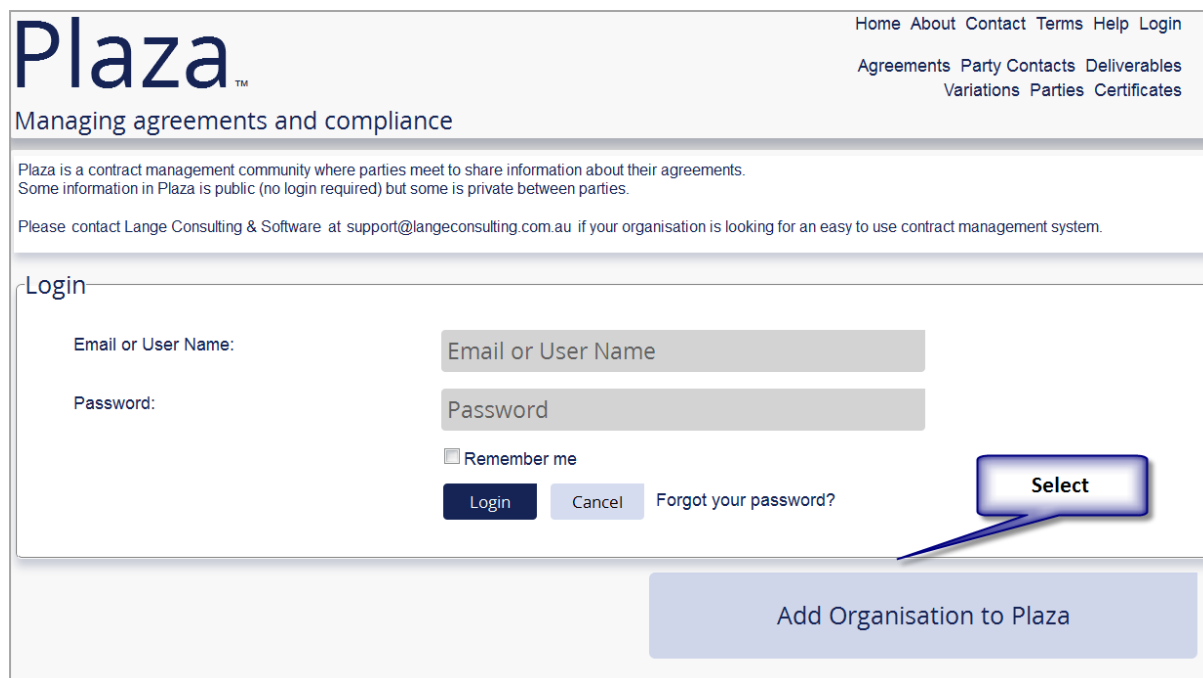


Figure 1 Adding your organisation to Plaza™

You will receive an email with login details:



Figure 2 Example email of Plaza™ login details

Now that your unlicensed Account has been created, you are able to navigate around Plaza™.

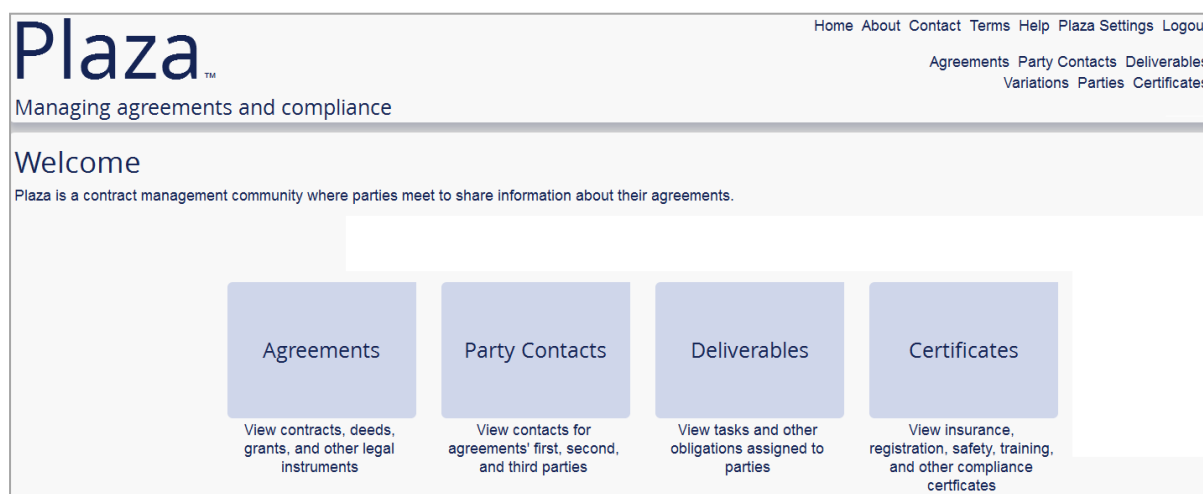


Figure 3 Plaza™ home screen

You are able to view publicly listed Agreements, their Party Contacts, deliverables and variations. With your current unlicensed Account, you are unable to add your own Agreements, Parties, Deliverables, and Variations. Contact [simplylogical.net](mailto:support@simplylogical.net) ([support@simplylogical.net](mailto:support@simplylogical.net)) if you would like to use these functions and convert your Account to a licensed Account.

## Functions Available

You are able to edit and add user details and certification details to your Account.

## Users

The Users tile provides access to the people (Users) who are connected to organizations with Plaza™ registrations. You will see yourself/your organisation listed there.

You can **edit** your details by clicking on your name/organisation.

You can **add** a new User via two ways:

1. Via the Users tile
2. Via the Accounts tile

### Via the Users tile

1. To set up a new User, click **Add New** from the Users menu
2. Select the Plaza™ **Account** – your unlicensed Account will be the only option to select
3. Select the **Role** that person will occupy (see Terminology above)
4. Add their **email** address
5. Select whether or not they are the **primary contact** for the Plaza™ Account
6. Click **Save**
7. A new **login and password** have now been created. Copy the details and inform the new user.

### Via the Accounts tile

1. To set up a new User, click **Accounts** from the Plaza Settings link
2. Click on the name of Plaza™ Account the User will be linked to

3. Click **Users** on the right hand side (Figure 4)

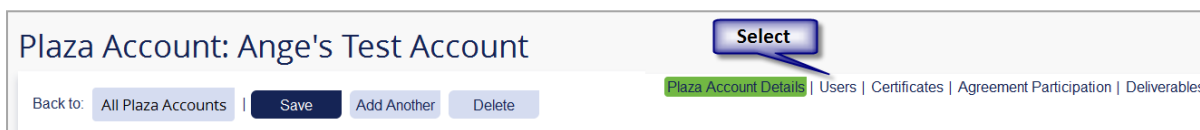


Figure 4 Select 'Users'

4. Click **Add New**
5. The Plaza™ Account will be pre-selected for you
6. Select the **Role** that person will occupy
7. Add their **email** address
8. Select whether or not they are the **primary contact** for the Plaza™ Account
9. Click **Save**
10. A new **login and password** have now been created. Copy the details and inform the new user.

## Certificates

Certificates in Plaza™ are linked to an Account (Organization), not an Agreement. Examples of certificates can include (but not limited to) insurance certificates, training, safety (accreditation to operate in HV areas, WHS accreditation), Green cards, Electrician's licence, vehicle registration, or compliance certification.

Navigate to the Certificates page by selecting the Certificates tile/link.

Adding your certification details and dates means you are able to comply with certification deliverables that have been set as part of any Agreements you are party to.

You can **add** Certificates via two ways:

1. The Certificates tile or link
2. The Accounts tile from the Plaza Settings link.

### Via the Certificates link

1. Click on the **Certificates tile** or **link** in the top or bottom right-hand corners
2. Click **Add New**
3. Select the Plaza™ **Account** – your unlicensed Account will be the only option to select
4. Enter the **Title**
5. Enter the **Issued** and **Expiry Dates**
6. Enter the **Warning Dates** - these are dates you assign to alert yourself (and the Agreement owner) prior to a certificate reaching its expiry date (e.g. the Amber Warning Date might be one month prior to the expiry date and the Red Warning Date might be two weeks prior to the expiry date)
7. Enter any other **Details** that are relevant to the certificate
8. Click **Save**
9. Drag and drop to **attach** any relevant documents

### Via the Accounts tile from the Plaza Settings link

Because Certificates are linked to Accounts and not Agreements, certification details can be added via the Accounts tile from the My Account link.

1. Click on the **My Account** in the top right hand corner

2. Click on **Accounts** tile
3. Select the **Plaza™ Account** – your unlicensed Account will be the only option to select
4. Select **Certificates** on the right hand side (Figure 6)

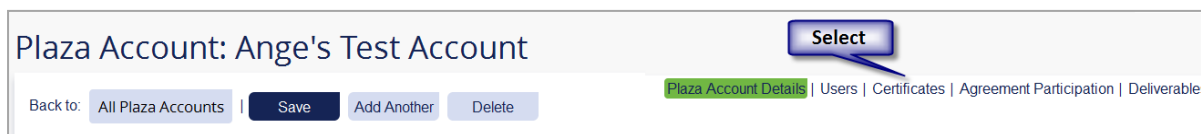


Figure 5 Select 'Certificates'

5. Click **Add New**
6. Select the **Plaza Account** that the certificate belongs to
7. Enter the **Title**
8. Enter the **Issued** and **Expiry Dates**
9. Enter the **Warning Dates** - these are dates you assign to alert yourself (and the Agreement owner) prior to a certificate reaching its expiry date (e.g. the Amber Warning Date might be one month prior to the expiry date and the Red Warning Date might be two weeks prior to the expiry date)
10. Enter any other **Details** that are relevant to the certificate
11. Click **Save**
12. Drag and drop to **attach** any relevant documents

For further assistance, please contact simplylogical.net via our helpdesk: [support@simplylogical.net](mailto:support@simplylogical.net)