

Managing Agreements and Compliance

User Guide 2 Configuration of a Plaza Account

Overview

This User Guide provides common Plaza™ User terminology and step-by-step instructions to configure your new account system settings.

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 Contract Manager.
Second Party	Supplier, service provider, or contractor.
Third Party	Subcontractor, lawyer, auditor, financial institution, insurer, or client.

Log in

Please navigate to the URL <http://plaza.apetsoftware.com.au/home> and log on using the details provided.

Managing agreements and compliance

Plaza is a contract management community where parties meet to share information about their agreements. Some information in Plaza is public (no login required) but some is private between parties.

Please contact Lange Consulting & Software at support@langeconsulting.com.au if your organisation is looking for an easy to use contract management system.

Login

Email or User Name:

Password:

Remember me

[Forgot your password?](#)

Enter your Email or User Name and Password

Figure 1 Plaza™ log in screen

You are now logged in as an Owner (see Terminology above).

To view your Plaza™ Account, navigate to Plaza Accounts.

The dashboard consists of eight tiles arranged in a grid:

- Deliverables:** Tasks, activities and other obligations. Includes three colored buttons (red, orange, green).
- Agreements:** Contract, Deed, MoU, Grant or Partnership. Shows Total Estimated Value \$0 and Total Actual Value \$0. Includes three colored buttons (red, orange, green).
- Variations:** Capture and approve changes. Includes a blue 'change' button.
- Parties to an Agreement:** Customers, suppliers and third parties. Includes an icon of two people.
- Plaza Accounts:** Central list of organizations that use Plaza. Includes a blue padlock icon.
- Certificates:** Insurance, licenses, accreditation. Includes three colored buttons (red, orange, green).
- Party Contacts:** People connected to the Agreement. Includes an icon of a woman and a man.
- Plaza Users:** People who can access Plaza via an Account. Includes an icon of a man and a woman.

Figure 2 Plaza Settings

Accounts

The Plaza Accounts tile provides access to organizations with Plaza™ Accounts where you have a relationship with them. There are two types of accounts; licensed Accounts (yours) and unlicensed Accounts:

1. Licensed Accounts – are created and customised for a fee for organisations (like yours) by simplylogical.net. These accounts are Owner accounts which act as administrator accounts, allocating permissions in Plaza™ and creating new users for that account.
2. Unlicensed Accounts – can be created by you (on behalf of an organisation) or by the organisation themselves who are parties (usually second and third level) to your Agreements. These accounts enable collaboration on your Agreements. These accounts do not require a fee and they can view all publicly listed information, but they only have access to a limited set of Plaza’s functions (primarily add/edit your User and Certification details). These accounts can be converted to licensed accounts by contacting simplylogical.net at support@simplylogical.net.

Your licensed Account has already been created for you, and you would have already received your login details via an email from simplylogical.net and Plaza™.

Creating an unlicensed Plaza™ Account

Before creating an unlicensed Account, it is useful to understand the different functions and filters accessible from the Accounts menu (i.e. via the Plaza Accounts tile):

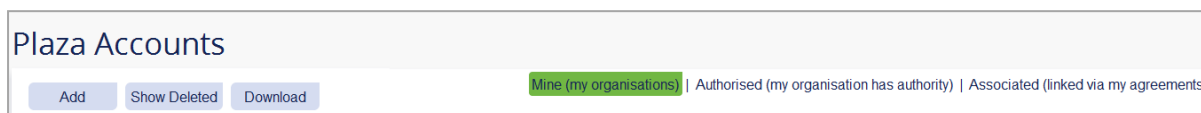


Figure 3 Accounts menu

Functions

- **Add** Able to add new unlicensed Accounts
- **Show Deleted** Displays Accounts that have deleted (then you have the option to hide deleted)
- **Download** Download Account details into an Excel workbook

You can filter your view by selecting one of the following options:

Filters

- **Mine** Displays Accounts created by you
- **Authorised** Displays only the Accounts you have permission to edit
- **Associated** Default view; Displays Accounts linked to your Agreements

Adding a new unlicensed Plaza™ Account on behalf of a supplier/organisation (authorised Account)

The option is available to licensed Account holders (you) to add an unlicensed Account on behalf of a supplier/organisation. When **you** create a new account (via the Add button > New Plaza Account), **you automatically have authority over that account to edit all details (you do not have to add yourself as an authority).**

If you want to add other Accounts to also act as an authority on the unlicensed Account you just created, you do so via the Add New button beside “*Other Plaza Account with Authority to Manage {name of newly created account}*” shown below.

Plaza Account: Ange's Account

Save Add Delete

Postcode:

Country:

Comments:

Website:

Attachments: 0 files

Other Plaza Accounts with authority to manage Ange's Account:	Authorised Accounts	Actions
	Plaza Trial City Council t/a: Plaza Trial City Council	<input type="button" value="Remove Authority"/>
		<input type="button" value="Add New"/>

Figure 4 Adding another Account to act as an authority

As the creator of that unlicensed Account, you will continue to have authority over the Account (i.e. you will manage it on behalf of the supplier/organisation) until you create a new User (via the steps below) and hand over ownership.

Importing Multiple unlicensed Accounts

If you would like to create multiple Accounts on behalf of your suppliers/organisations, please contact support@simplylogical.net for the relevant import template.

Instructing a Supplier/Organisation to create/manage their own Plaza™ Account

If you want a supplier to manage their own Account, please send them the following URL <http://plaza.apetsoftware.com.au/> and invite them to add their organisation via the 'Add Organisation to Plaza' tile on the login screen. If you feel a brief instructional guide would be helpful to send to the supplier, please contact simplylogical.net at support@simplylogical.net and we can arrange it.

Users

The Plaza Users tile provides access to the people (Users) who are connected to organisations with Plaza™ registrations. You will see yourself and your organisation listed there because the Account has been set up for you – you are the User of your Account.

If you would like to add multiple Users for one or more Accounts (perhaps for the Accounts that you created on behalf of a supplier/organisation), please contact support@simplylogical.net for the relevant import template.

If you are adding a new User to an unlicensed Account you created (i.e. you are handing over ownership of the Account to a representative from that organisation), add the new User via the steps below and in doing so, two warning messages will appear advising you that your edit rights over this new account will be removed and ownership of the Account will go to the new User.

Before editing or creating a User, it is useful to understand the different functions and filters accessible from the Users menu (i.e. via the Users tile):



Figure 5 Users menu

Functions

- **Add** Able to manually add new User details
- **Show Deleted** Displays Users who have deleted (then you have the option to hide deleted)
- **Download** Download User details into an Excel file
- **My Login Options** Able to change your password

You can filter your view by selecting one of the following options:

Filters

- **Colleagues** Displays all Users linked to your Account
- **Associates** Default view; Displays Users who are linked to your Agreements

Editing User details

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

Adding a new User

You can add a new User via:

1. The Plaza Users tile, or
2. The Plaza Accounts tile.

Via the Plaza Users tile

1. To set up a new User, click **Add New Plaza User** from the Users menu
2. Select the Plaza™ **Account** (if multiple accounts) that this person will be linked to
3. Select the **Role** this person will occupy
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. The new user will receive an email (example shown in figure 6) with their login details. You can also copy the details and inform the new user.



Figure 6 Example email of Plaza™ login details

Via the Accounts tile

1. To set up a new User, click **Plaza Accounts** tile
2. Click on the name of Plaza™ Account the User will be linked to
3. Click **Users** on the right hand side (Figure 7)



Figure 7 Select 'Users'

4. Click **Add** and **select New Plaza User**
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. The new user will receive an email (example shown in Figure 6) with their login details. You can also copy the details and inform the new user.

Change Password

From the Plaza Users tile, click on *My Login Options* to change your password.



Figure 8 Use 'My Login Options' to change password

Now that you have become familiar with the Accounts and Users, navigate to 'Agreements' and create your Agreement.