Plaza™

Managing Agreements and Compliance

# User Guide 3 Creating an Agreement

## Overview

This User Guide provides instructions on how to create an Agreement in Plaza™. Agreements in Plaza™ can be contracts, deeds, grants, leases, and other legal instructions.

## Plaza™ Terminology

| Term | Definition and/or Example |
|---|---|
| **First Party** | Council, customer, or Contract Manager. |
| **Second Party** | Supplier, service provider, or contractor. |
| **Third Party** | Subcontractor, lawyer, auditor, financial institution, insurer, or client. |
| **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. |

If you would like to create multiple Agreements in your Account, please contact [support@simplylogical.net](mailto:support@simplylogical.net) for the relevant import template.

## Create an Agreement

Navigate to the Agreements page by selecting the Agreements tile or link.

Before creating an Agreement, it is useful to understand the different functions and filters accessible from the Agreements menu (i.e. via the Agreements tile or link):


Figure 1 Agreements Menu

**Functions**

- **Add New** Add a new Agreement (Discussed in detail below)
- **Show Deleted** Displays all Agreements that have deleted (then you have the option to hide deleted)
- **Download** Download Agreements and their details into Excel

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

**Filters**

- **Over Budget** Displays only agreements whose actual value vs. initial +contingency value exceed 10%
- **Within Contingency** Displays only agreements whose actual value vs. initial +contingency value exceed 5%

- **Within Budget** Displays only agreements within budget
- **Mine** Default view; Displays only Agreements where your party is the Owner
- **Shared with me** Displays only Agreements owned by another party

## Create an Agreement

Agreements can be created via:

1. The Agreements tile or link, or
2. The Plaza Accounts tile, or
3. If you have multiple agreements to enter, you can do so via the Agreement import template – contact support@simplylogical.net

**Via the Agreements tile or link**

1. Click on the **Agreements tile** or Agreements link in the top or bottom right-hand corners
2. Click **Add** and **New Agreement**
3. **Select the Owner** of the Agreement (the Organisation).
4. Select the **Owner's Level** or Role
5. Add a **Number**, **Title** and a **Description**
6. Select **Active** or **Not Active**
   - ✓ By selecting Active, the Agreement is displayed on the full list
   - ✓ By selecting Not Active, the Agreement is hidden from the full list, but is still in the database
7. Select either **Public** or **Confidential**
   - ✓ By selecting Public, Agreement details are visible to every Plaza™ Account
   - ✓ By selective Confidential **(preferred)**, Agreement details are only visible to those parties with a Plaza™ Account linked to that Agreement
8. Click **Save**
9. The Agreement has been created and more **specific details** can now be entered (discussed below)

## Specific Agreement Details

As mentioned above, now that your Agreement has been created **specific details** can be entered.

| | |
|---|---|
| **Title:** | Displays the title you entered in Step 5 above. |
| **Type:** | Displays options from drop-down menu include - Contract, Standing Offer, Deed, Partnership Agreement, MoU, Grant, Purchase Order, Lease, Employment, Franchise Agreement, and Confidentiality Agreement. |
| **Description:** | Display the description you entered in Step 5 above. |
| **Active:** | Display the preference you entered in Step 6 above. |
| **Public (see info):** | Display the preference you entered in Step 7 above |

| | |
|---|---|
| **Estimated Value:** | Estimated value of the Agreement (this will be displayed in $ when the Agreement is saved). |
| **Initial Value:** | Initial value of the signed contract |
| **Contingency:** | Value set aside for additional expenses/variations |
| **Actual Value:** | Entered when the Agreement has been completed and the actual value is known (this will be displayed as a $ value when the Agreement is saved). |
| **Estimated Start:** | Estimated start date for the Agreement. |
| **Actual Start:** | This date is entered when the Agreement has begun and the start date is known. |
| **Estimated Completion:** | Estimated completion date for the Agreement. |
| **Actual Completion:** | Entered when the Agreement has been completed and the completion date is known. |
| **Extension Available:** | Select whether an extension is available for this contract or not. |
| **Renewal:** | the date when you have to renew the contract by |
| **Amount guaranteed:** | The amount that the supplier has put up as a guarantee that they will complete the requirements of the contract |
| **Guarantee details:** | Who holds the guarantee and what are the conditions associated with it. |
| **Amount Invoiced:** | The amount that has been invoiced to date |
| **Amount Withheld:** | The amount that has been withheld to date to guarantee delivery? This is usually stipulated in the contract. |
| **Amount Paid:** | The amount that has been paid to date |
| **Amount Foregone:** | The amount the client has reduced a payment by due to application of a penalty |
| **Estimated value to paid ratio:** | A calculated value showing the planned percentage of the contract price spent |
| **Actual value to paid ratio:** | A calculated value showing the percentage of the contract price spent. |
| **Confidentiality**: | Options available are: Commercial in Confidence, Sensitive, Sensitive: Legal, Sensitive: Personal, or Nil |
| **Confidentiality Reason:** | Provide a reason why the Confidentiality status has been selected. |
| **Confidential file ref:** | The file location where confidential information may be kept |
| **External system ID:** | A field where you can insert a cross reference for access by another system such as your FMIS |
| **File ref:** | The reference to the formal records in your filing system |
| **File location:** | A link to the relevant file in your EDRMS |
| **Registry file number:** | The Registry file number |
| **Liability limit:** | What is the minimum Public Liability for this contract? |
| **Liability details:** | Any specific details about the Public Liability |
| **Indemnity limit:** | What is the minimum Professional Liability requirements for this contract? |
| **Indemnity details:** | Any specific details about the Professional Indemnity |

**Attachments:** Drag the document from Explorer over the Attachment box and drop it in.

Click **Save.** You have just created your Agreement!

### Via the Plaza Accounts tile

Because Agreements are linked to Accounts, Agreements can be added via the Accounts tile.

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


Figure 2 Select 'Agreement Participation'

4. Click **Add** and **Agreement**
5. The **Owner** of the Agreement will be pre-selected
6. The **Owner Level** will be pre-selected (but you can change this)
7. Add a **Number**, **Title** and a **Description**
8. Select **Active** or **Not Active**
   - ✓ By selecting Active, the Agreement is displayed on the main view
   - ✓ By selecting Not Active, the Agreement is hidden from the main view, but is still in the database
9. Select either **Public** or **Confidential**
   - ✓ By selecting Public, Agreement details are visible to every Plaza™ Account
   - ✓ By selective Confidential (preferred), Agreement details are only visible to those parties with a Plaza™ Account linked to that Agreement
10. Click **Save**
11. The Agreement has been created and more **specific details** can now be entered (discussed above at Specific Agreement Details)
12. Click **Save.** You have just created your Agreement!

## Agreement Menu Options

While new Agreement details are displayed, there are several functions accessible via options shown in Figure 3.


Figure 3 Agreement Menu Options

| | |
|---|---|
| **Save** | Save any additions or changes to your Agreement |
| **Add** | You can create another Agreement, or new details |
| **Delete** | Delete your Agreement |

| | |
|---|---|
| **Agreement Details** | Default View; able to modify Agreement details |
| **Parties** | Displays the parties linked to the Agreement (new parties can be added via Add button) |
| **Deliverables** | Displays the deliverables assigned to the Agreement (new deliverables can be added via Add button) |
| **Variations** | Displays the variations added to the Agreement (new variations can be added via the add button) |
| **Agreement Owner** | This takes you to the details of your Account |
| **Users** | Display the Users of the Account |
| **Certificates** | View the Account's Certificates |
| **Agreement Participation** | View the Agreements the Account participates in |
| **Deliverables** | View the Deliverables that the Account is responsible for |

Next step is to establish who the other Parties are and assign Deliverables to the Agreement.