

## Managing Agreements and Compliance

# User Guide 7 Adding Certificates to an Account

### Overview

This User Guide provides instructions on how to add certificates to a Plaza™ Account. Certificates in Plaza™ are linked to an Account (Organization), not an Agreement. Examples of certificates can include (but is not limited to) insurance certificates, training, safety (accreditation to operate in HV areas, WHS accreditation), Green cards, registration, or compliance certification.

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

If you would like to add multiple Certificates for one or more Accounts, please contact [support@simplylogical.net](mailto:support@simplylogical.net) for the relevant import template.

Before creating a certificate, it is useful to understand the different functions and filters accessible from the Certificates menu:

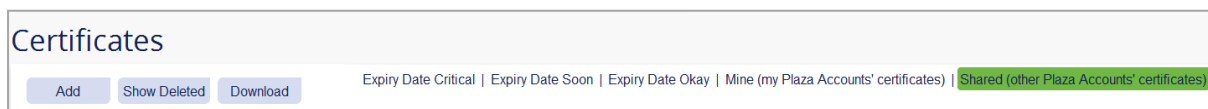


Figure 1 Certificates menu

### Functions

- **Add** Add new certification details (discussed below)
- **Show Deleted** Displays all certifications details that have been deleted (then you have the option to hide deleted)
- **Download** Download certification details into an Excel workbook

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

### Filters

- **Expiry Date Critical** Displays your Certificates which have expired
- **Expiry Date Soon** Displays your Certificates which are expire soon
- **Expiry Date Okay** Displays your Certificates which are within their expiry date
- **Mine** Displays only your Account's certification details
- **Shared** Default view; Displays other Accounts' certification details

### Adding Certificates

From the User's (i.e. your) perspective, adding certification details and dates means you can monitor compliance to a deliverable, and the organisations those certificates are assigned to will be automatically reminded via workflow email when their expiry dates are approaching.

Contractors can login to Plaza™ and upload/maintain their certification details too.

You can add Certificates via:

1. Certificates tile or link, or
2. Plaza Accounts tile, or
3. If you have multiple certificates to enter, you can do so via the Certificates import template – contact [support@simplylogical.net](mailto:support@simplylogical.net)

#### Via the Certificates tile or link

1. Click on the **Certificates tile** or **link** in the top or bottom right-hand corners
2. Click **Add** and select **New Certificate**
3. Select the **Plaza Account** that the certificate belongs to
4. Enter the **Title**
5. Enter the **Issued** and **Expiry Dates**
6. Enter the **Warning Dates**
  - 6.1. The Red warning date sends a message advising that the Certificate has expired
  - 6.2. The Amber warning date sends a message advising that the Certificate is due to expire soon
7. Enter any other **Details** that are relevant to the certificate
8. Click **Save**
9. Drag and drop or 'Add File' to **attach** any relevant documents
10. Click the **Certificates link** in the top right hand corner to return to the main Certificates view

#### Via the Plaza Accounts tile

Because Certificates are linked to Accounts and not Agreements, certification details can be added via the Plaza Accounts tile

1. Click on the **Plaza Accounts** tile
2. Select the **Plaza Account** that the certificate belongs to
3. Select **Certificates** on the right hand side (Figure 3)



Figure 2 Select 'Certificates'

4. Click **Add** and select **New Certificate**
5. Select the **Plaza Account** that the certificate belongs to
6. Enter the **Title**
7. Enter the **Issued** and **Expiry Dates**
8. Enter the **Warning Dates**
  - 8.1. The Red warning date sends a message advising that the Certificate has expired
  - 8.2. The Amber warning date sends a message advising that the Certificate is due to expire soon
9. Enter any other **Details** that are relevant to the certificate
10. Click **Save**
11. Drag and drop or 'Add File' to **attach** any relevant documents
12. Click the **Certificates link** in the top right hand corner to return to the main Certificates view