

## Managing Agreements and Compliance

# User Guide 9 Performing Assessments

### Overview

This User Guide provides instructions on how use Plaza™'s Assessments function.

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



Figure 1 Assessments menu

### Functions

- **Add New** Add a new Assessment (Discussed in detail below)
- **Download** Download Assessment details into Excel

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

### Filters

- **Mine (Assessed by me)** plays contacts from the same party as you
- **Shared with me** Displays contacts who you are associated with via an Agreement
- **Public** Displays all Party contacts listed as Public

## Assessments

You can add Assessments via two ways:

1. via the Agreements tile or link, or
2. via the Assessments link in the top and bottom right hand corner.

### Via the Agreements tile/link

1. Click on the **Agreements** tile or the 'Agreements' link in the top or bottom right-hand corners
2. **Select** your newly created Agreement from the list
3. Click on **Assessments** on the right hand side (Figure 2)



Figure 2 Select 'Assessments'

1. Click on the Assessments link in the top or bottom right-hand corners

**Plaza**<sup>™</sup>  
Managing agreements and compliance

Home About Contact Terms Help My Account Logout

Agreements Parties Party Contacts Deliverables  
Variations Assessments Correspondence Certificates

Select

### Assessment staus

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