Plaza



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):

| Assessn | nents | |
|---------|----------|---|
| Add New | Download | Mine (assessed by me) Shared with me Public |
| Add New | Download | |

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)

| Agree | ement 7 (A | nge's Test | Contra | Select | |
|----------|---------------|------------|-----------|---------------|--|
| Back to: | Full List Sav | ve Delete | Subscribe | Private Notes | Agreement Details Parties Deliverables Assessments Correspondence Variations |

Figure 2 Select 'Assessments'

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

| Plaza | Home About Contact Terms Help My Account Log Agreements Parties Party Contacts Deliveral Variations Assessments Correspondence Certific: | |
|------------------------------------|--|--|
| Managing agreements and compliance | Select | |
| Assessment staus | | |

Being assessed

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