



Customer
Service

reporting.buy.nsw user guide

Contract administrators

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1. Introduction

The reporting.buy.nsw tool allows contract administrators to meet their mandatory social procurement policy reporting requirements. The platform facilitates the following:

- Policy managers will be able to create policies and define reporting requirements within each policy.
- Contract disclosure data is automatically retrieved from NSW eTendering to create contracts within the reporting tool.
- Contract administrators will have the ability to review disclosed contracts and the key contract details.
- Policies are automatically matched up with the contracts based on the policy definitions set out by the policy managers.
- Contract administrators are responsible for checking the policies attached to contracts and must ensure they add the correct policies or exclude policies which are not applicable along with a reason for the exclusion.
- Contract administrators will assign contract managers who will review the contract details, add exclusion values if applicable and set the targets against reporting fields. The contract managers are responsible for ensuring the supplier fulfills their reporting obligations.
- Suppliers will be able to submit reporting obligations to contract managers for review, the reporting tool merges fields where multiple policies collect the same reporting data.

1.1 Mandatory policy reporting requirements

Agency buyers are required to include social procurement policies when awarding and negotiating a contract with suppliers.

The policies that have mandatory reporting requirements are:

- Aboriginal Procurement Policy
- Small and Medium Enterprise and Regional Procurement Policy
- Infrastructure Skills Legacy Program
- Small Business, Shorter Payment Terms Policy

2. User roles

2.1 Contract administrator

The contract administrator will receive notifications about new contract disclosures and is responsible for checking the contract details, assigning, or excluding policies and allocating a contract manager to a contract.

Functions a contract administrator can perform:

- View all contracts disclosed from NSW eTendering under their respective agency.
- Create a new contract not disclosed in NSW eTendering.
- Review and amend contract details such as contract title, CAN ID, category, contract value, supplier, start and end date.
- Manages the policies assigned to a contract (by adding or excluding policies).
- Assigns contracts to a contract manager.

2.2 Contract manager

The contract manager is responsible for the day-to-day management of the contract.

The contract managers will review the contract details and policies assigned to a contract, ensuring that they are correct. The contract managers are responsible for ensuring the supplier fulfills their reporting obligations.

Functions a contract manager can perform:

- Review and amend contract details such as contract title, CAN ID, category, contract value, supplier, start and end date.
- Set-up an 'exclusion amount' along with an 'exclusion reason' which will subtract the exclusion amount from the contract value to create the 'reporting contract value' which targets will be measured against.
- Modify specific reporting commitments if the target threshold for the contract is higher or lower than the default policy reporting requirements. The contract manager will also be able to add a condition or reason for modifying the default requirement.
- Assign a supplier to respond to the reporting requirements.

2.3 Supplier

Suppliers that have been awarded a contract which meet certain policy thresholds are required to submit mandatory reporting for the following policies:

- Aboriginal Procurement Policy
- Small and Medium Enterprise and Regional Procurement Policy
- Infrastructure Skills Legacy Program
- Small Business Shorter Payment Terms Policy

These policies require that suppliers capture and record details against policy targets. These will be reviewed by a contract manager and approved or rejected based upon whether the contract manager believes they have met or complied with the target conditions set out in the policy.

The reporting frequency is defined by the individual policy. Reporting commences from the contract start date, sometimes also referred to as 'contract effective date'. Suppliers will receive a system generated email notification triggered two weeks prior to the date their reporting submission is due.

Contract managers may be in touch with suppliers if reporting obligations are not complete and submitted on time.

Functions a supplier can perform:

- View contracts awarded to their business.
- View contract details including contract value, contract award notice ID, category, agency awarding the contract and the contract duration (contract start and end date).
- View contract manager name, phone number and contact email address. The contract manager is the primary contact for awarded contracts.
- View all policies that are applicable to the procurement contract.
- View reporting requirements, which will list the contract targets set by the contract manager as required by the policy.
- The reporting schedule which will outline the reporting period and reporting frequency in which submissions need to be completed.
- Save draft reports and submit completed reports capturing contract progress towards targets for a specific period.
- View previous submissions for earlier reporting periods along with the submission status.

- View submission status of reports.
- Review report notifications.
- View report submissions for contracts which have been completed.

3 Contract administrator

3.1 Contract administrator dashboard

From the contract administrator dashboard, you can view three lists of the contracts associated with your agency.

- The **'New contracts'** list shows all new contracts that require action. Contracts in this list require an agency admin to assign policies or assign a contract manager to the contract.
 - When you press the contract name (#1 in screenshot below), it will automatically trigger the 'Contract setup wizard' and navigate into the contract detail page.
 - Press **'view all'** for more contracts in the list (#2 in screenshot below).
- The **'Active contracts'** list shows all contracts with current reporting requirements where the contract administrator has completed the 'Contract setup wizard'.
 - You can view detail on active contracts by selecting the contract name.
 - If the contract is not visible select **'View All'**.
- The **'All completed contracts'** list shows all completed contracts which have had their final report submitted and approved.
 - If the contract is not visible select **'View All'** .

Home Contracts Policies

Contract administrator home page

From your contract administrator dashboard set up and confirm details for new contract reporting requirements assigned to your agency. You can also monitor and view active, completed and finalised contracts.

New contracts
To setup and confirm contract reporting requirements for new contracts launch the contract setup wizard by selecting the contract name.

CAN ID	Contract name	Supplier	Contract value
123456	Harry's test contract for wizard testing	Mav3rks Supplier	\$100,101,234.00
123456789	Contract Manager Notification -PS	Mav3rks Supplier	\$10,000.00
15161616161	test contract of sam supplier	Mav3rks Supplier	\$1,000,000.00
1568173	Contract Reassigning Use case		\$32,123.00
20211910	Jeanne test contract 19/10		\$70,000.00
211410	Clare's test contract 14/10	Mav3rks Supplier	\$50,000.00

[View All](#) (2)

Active contracts
Active contracts include all contracts with current reporting requirements where contract administrator setup has been completed. You can view detail on active contracts by selecting the contract name. If the contract is not visible select 'view all'.

CAN ID	Contract name	Supplier	Contract value
082501	Health Contract	Mav3rks Supplier	\$6,000,000.00
082602	Jeanne's Test Contract 02 - 6 Monthly - Annually	Mav3rks Supplier	\$400,000.00
092101	Jeanne's test contract 21/09	Mav3rks Supplier	\$50,000.00
0921202102	Santi 02	Mav3rks Supplier	\$1,000,000.00
0921202103	Santi 03	Mav3rks Supplier	\$1,000,000.00
0922202101	Santi 04	Mav3rks Supplier	\$50,000,000.00
092801	Carl's contract - Test 28/09	Mav3rks Supplier	\$1,000,000.00
10028903849	Test 236	Mav3rks Supplier	\$7,000,000.00
1007202101	Email Test santi 01	Mav3rks Supplier	\$10,000,000.00
1011202101	Email Test 10-11-2021 01	Mav3rks Supplier	\$1,000,000.00
1012202101	Test Contract 10-12-2021	Mav3rks Supplier	\$1,000,000.00
1012202102	Test 5 10-12-2021 01	Mav3rks Supplier	\$1,000,000.00
1012202103	Test contract 10-12-2021 03	Mav3rks Supplier	\$1,000,000.00
1012202104	test 123 01	Mav3rks Supplier	\$1,000,000.00
1012202105	Clare's test contract 29/10	Mav3rks Supplier	\$1,000,000.00

[View All](#)

All completed contracts

CAN ID	Contract name	Supplier	Contract value
0921202101	Santi 01	Mav3rks Supplier	\$70,000.00
0923202101	Email Test Santi 01	Mav3rks Supplier	\$1,000,000.00
10282021 1134	EZE Email Contract Email 10282021 1134	Mav3rks Supplier	\$1,000,000.00
1039209456	Test Supplier	Mav3rks Supplier	\$2,000,000.00

3.2 Setting up a new contract

- In the 'New' contracts table select the contract that has recently been assigned to your agency. This will trigger the contract setup wizard.

Home Contracts Policies

Contract administrator home page

From your contract administrator dashboard set up and confirm details for new contract reporting requirements assigned to your agency. You can also monitor and view active, completed and finalised contracts.

New contracts
To setup and confirm contract reporting requirements for new contracts launch the contract setup wizard by selecting the contract name.

CAN ID	Contract name	Supplier	Contract value
10239403950	Test Contract		\$5,000,000.00

[View All](#)

- Check the information on the 'Confirm details' screen and make any changes. Press 'Next' to move onto the next step. Note: you can cancel the wizard at any step. Any changes you have made will be saved if you have selected 'Next'.

Contract setup wizard

Confirm Details
Review Policy
Exclusion Reason
Assign Contract Man...

The contract setup wizard will guide you through set up of the contract reporting requirements. Where possible information has been pre-populated for you. Please confirm or amend as required. When you finish each screen click 'next'. All fields are mandatory.

Agency	🏢 Fire & Rescue NSW ✕
Contract Title	<input style="width: 90%;" type="text" value="Equipment upgrade"/>
Category	Engineering, research and technology services ▼
Contract Value ⓘ	<input style="width: 90%;" type="text" value="\$5,000,000.00"/>
Supplier	🏢 Mav3rik Supplier ✕
Start Date	<input style="text-align: center;" type="text" value="1 Feb 2022"/> 📅
End Date	<input style="text-align: center;" type="text" value="31 Jan 2024"/> 📅

Cancel
Next

- From the 'Review Policy' tab confirm that the correct policies have been assigned. Policies will automatically be assigned based on contract value, category and effective date.
- You can add a policy to the contract by searching the policy bar (1).
- You can also exclude a policy by selecting the 'recycle bin' icon next to the policy (2). Select the 'Next' button to proceed.
- NOTE: if you click next, once you proceed to the next step, you will not be able to go back to change or exclude policies. Any errors with policy assignment can only be undone by the technical support team. Ensure your details on applicable policies are correct.

Contract setup wizard



Policies are automatically assigned based on value and category of spend. You can add additional policies for reporting by using the search bar. Policies can also be removed by selecting the recycle bin. You will need to provide a reason for any policies you remove.

Policy Information (1)		
Policy Name	Reporting Frequency	
Aboriginal Procurement Policy (2021)	Quarterly	

- If a policy is removed, the next screen will contain the list of policies excluded along with a field to fill in the exclusion reason. Once the reasons are noted down, click 'Next' at the bottom of the screen.

NOTE: if all policies need to be excluded, the wizard will automatically complete and you will not need to assign a contract manager. The contract will remain visible on the dashboard and can be found in the "Completed" section.

Contract setup wizard



Please enter reasons for excluded policies.

Excluded policies (2)	
Policy name	Exclusion reason
Infrastructure Skills Legacy Program (10M+)	<input type="text"/>
Infrastructure Skills Legacy Program (100M+)	<input type="text"/>

- To assign the contract manager start typing the name of the contract manager in the search bar. The portal will provide suggestions for contract manager users who have been onboarded within your agency, select the 'contract manager' by clicking on their name. Select the 'Next' button to proceed to the summary screen.

If you are unable to find a contract manager in the search bar, contact the buy.nsw service centre. The contract manager can be onboarded by the technical support team.

Contract setup wizard

Assign a contract manager by using the search bar to find all the available contract managers for your agency. Simply select the contract manager from the available names. The contract manager will have day to day responsibility for ensuring reporting is submitted.

Contract Manager

Clicking next will notify the assigned contract manager of their new contract.


- When all chevrons are ticked, you will see a summary screen. Check all the information is correct. Select the 'Finish' button at the bottom of the page.

Contract setup wizard

✓ ✓ ✓ ✓

Congratulations you have completed the contract administrator setup wizard. The contract has now been allocated to contract manager Training Contract Manager. The final reporting requirements are detailed below. You can view the details from your dashboard (active contracts) and click through to edit at any time. By selecting finish you will exit the wizard.

Contract Title	Parramatta station works	
Contract Value	\$150,000,000.00	
Agency	Training Agency	
Supplier	Demo Supplier	
Category	Construction	
Start Date	23 Sep 2022	📅
End Date	23 Sep 2026	📅
Contract Manager	Training Contract Manager	

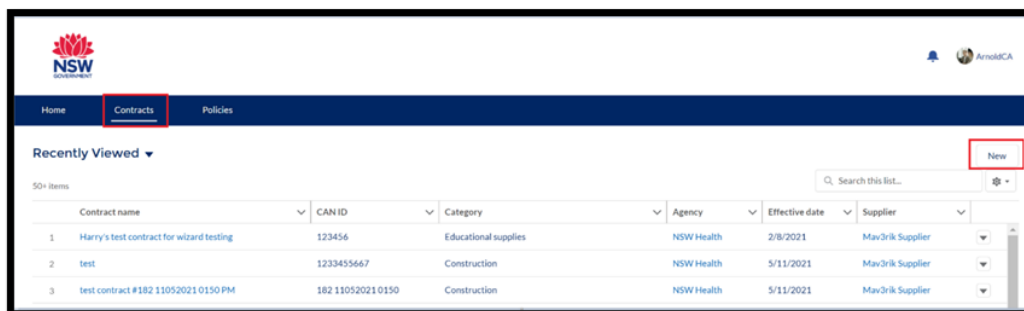
 **Policy Information (1)**

Policy Name	Reporting Frequency
Aboriginal Procurement Policy (2021)	Quarterly

Finish

- The contract manager will receive a notification that they have been awarded a contract which has mandatory reporting requirements attached. The contract will now move into the 'active contracts' table on your dashboard. There are no further actions required for the contract administrator.

3.3 Adding a new contract that hasn't been disclosed on NSW eTendering



Navigate to Contracts tab.

Press 'New' to create a new contract. A setup wizard will appear.

- The agency field is automatically populated for a contract admin at agency level. If you are a contract admin at department level which has multiple agencies, you can start typing to search for an agency within your department.

Contract setup wizard

Confirm Details | Review Policy | Exclusion Reason | Assign Contract Man...

The contract setup wizard will guide you through set up of the contract reporting requirements. Where possible information has been pre-populated for you. Please confirm or amend as required. When you finish each screen click 'next'. All fields are mandatory.

Agency: Fire & Rescue NSW

Contract Title: Equipment upgrade

Category: Engineering, research and technology services

Contract Value: \$5,000,000.00

Supplier: Mav3rik Supplier

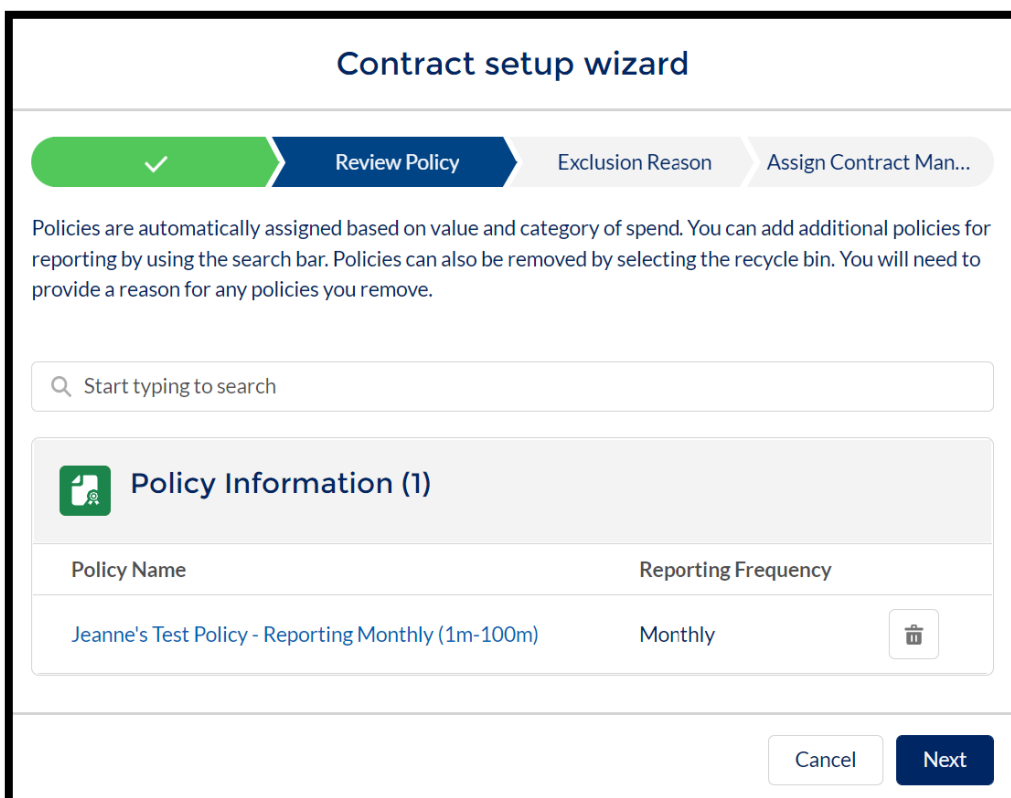
Start Date: 1 Feb 2022

End Date: 31 Jan 2024

Cancel | Next

- Manually enter the details of the contract on the 'Confirm details' screen and click the 'Next' button.

- Policies will automatically be assigned based on the information provided in the previous 'Confirm details' screen. It is the contract administrator's responsibility to check that the correct policies have been assigned or excluded from the contract.
- The contract administrator can add additional policies or remove a policy.
 - To add a policy, type the name of the policy into the search bar and then select the policy you wish to add.
 - To remove a policy, use the recycle bin icon. When you are finished click the 'Next' button at the bottom of the screen.



- If a policy is removed, the next screen will contain the list of policies excluded along with a field to enter in the exclusion reason. You must enter the exclusion reason to proceed. Once the reasons are noted down, click 'Next' at the bottom of the wizard.

Note the exclusion reason is captured and tracked by the system and is auditable.

Contract setup wizard

✓
✓
Exclusion Reason
Assign Contract Man...

Please enter reasons for excluded policies.

📄

Excluded policies (1)

Policy name	Exclusion reason
<div style="display: flex; align-items: center;"> Jeanne's Test Policy - Reporting Monthly (1m-... <div style="flex-grow: 1; border-bottom: 1px solid #ccc; margin-left: 5px;"></div> </div>	

Cancel
Next

- To assign the contract manager start typing in the search bar. Select the contract manager by clicking on their name. Select the 'Next' button to move to the summary screen.

Contract setup wizard

✓
✓
✓
Assign Contract Man...

Assign a contract manager by using the search bar to find all the available contract managers for your agency. Simply select the contract manager from the available names. The contract manager will have day to day responsibility for ensuring reporting is submitted.

Contract Manager

Clicking next will notify the assigned contract manager of their new contract.

Cancel
Next

- From the summary screen check all the information is correct. Select the 'Finish' button at the bottom of the page.
- The contract manager will now receive a notification that they have been assigned a contract. And the contract will be moved into the active contracts table on your dashboard.

Contract setup wizard

Congratulations you have completed the contract administrator setup wizard. The contract has now been allocated to contract manager FR CM2. The final reporting requirements are detailed below. You can view the details from your dashboard (active contracts) and click through to edit at any time. By selecting finish you will exit the wizard.

Contract Title	Equipment upgrade
Contract Value	\$5,000,000.00
Agency	Fire & Rescue NSW
Supplier	Mav3rik Supplier
Category	Engineering, research and technology services
Start Date	1 Feb 2022
End Date	31 Jan 2024
Contract Manager	FR CM2

Policy Information (1)

Policy Name	Reporting Frequency
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Finish

3.4 Viewing details for setup contracts

- You can view contract details at any time by selecting the contract name from your dashboard.
- From the contract details page, you can update, add or amend the contract details.

Active contracts
Active contracts include all contracts with current reporting requirements where contract administrator setup has been completed. You can view detail on active contracts by selecting the contract name. If the contract is not visible select 'view all'.

CAN ID	Contract name	Supplier	Contract value
001	Clare Test 1	Demo Supplier	\$500,000.00
007	007 Die another day	Demo Supplier	\$8,000,000.00
007 CR	007 Casino Royale	Demo Supplier	\$8,000,000.00
007 DR	007 Dr No	Demo Supplier	\$8,000,000.00
007 GE	a025P000001LjvB	Demo Supplier	\$9,000,000.00
007 MR	007 Moonraker	Demo Supplier	\$9,000,000.00

3.5 Viewing policies associated with a contract

- On the 'contacts' or 'home' dashboard, select the name of the contract to navigate to the contract detail page.
- The 'Policy information' section at the right shows policies associated with the contract.
- Select 'View all' to view all associated policies.

The screenshot shows the contract details page for 'IT Procurement'. The 'Policy information (2)' section is highlighted with a red box and an arrow. It contains the following data:

Policy Name	Reporting Fr...	Exclude	Date excluded
Jeanne's Te...	Monthly	<input type="checkbox"/>	
Jeanne's Te...	Quarterly	<input type="checkbox"/>	

Other sections visible include 'Reporting financial' with contract value of \$6,000,000.00 and reporting contract value of \$5,999,998, and 'Reporting submissions (3)' with a table of submissions.

4 Support

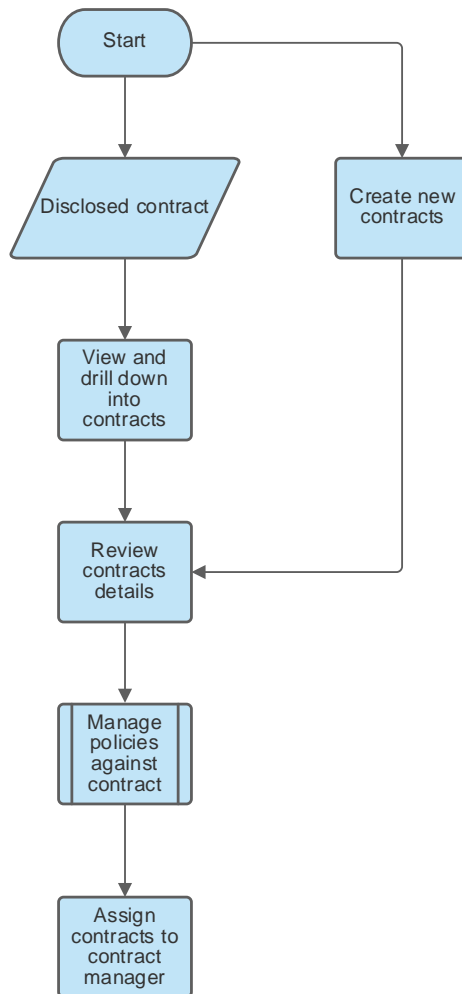
If you have specific issues, please get in touch with our team. You can reach us at buy.nsw@customerservice.nsw.gov.au or by calling us on 1800 679 289.

This guide is saved to the following web page, along with user guides for contract administrators and suppliers:

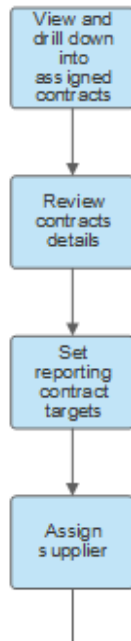
<https://suppliers.buy.nsw.gov.au/help/reporting-buy-nsw#help-and-support>

5. USER WORKFLOWS

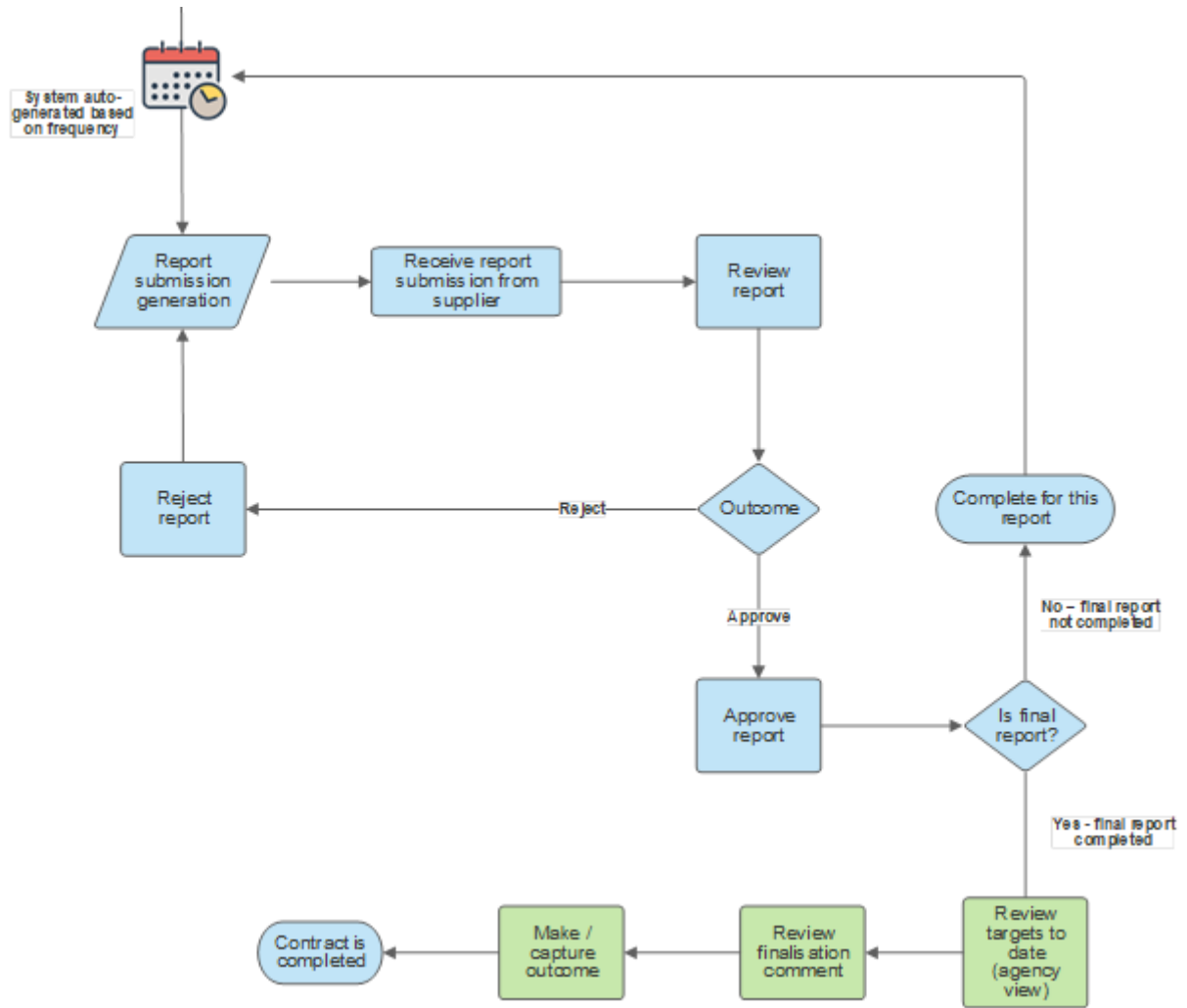
Contract administrator workflow



Contract manager workflow



Contract manager workflow continued



Supplier workflow

