reporting.buy.nsw user guide

Contract managers

Table of contents

1. Introduction

The reporting.buy.nsw tool allows contract managers to meet their contract policy reporting requirements. The platform will facilitate 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 and workflows

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 will contract their supplier if they have not completed and submitted your reporting obligations 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 reporting requirements, which will list the contract targets as required by the policy, as well as any special conditions.

- View the reporting schedule which will outline the reporting period and reporting frequency in which submissions need to be completed.

- View all policies that are applicable to the procurement contract.

- Save draft reports and submit completed reports capturing contract 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 manager

3.1 Contract manager dashboard

After logging in, you will see the Contract Manager dashboard.

- **New contracts**

  o Displays new contracts assigned to the contract manager.

  o You can setup and confirm contract reporting requirements for new contracts by selecting the contract name.

- **Submitted reports**

  o Displays contracts assigned to the contract manager that have reporting data submitted from suppliers.

- **Contracts in progress**

  o In progress contracts include all contracts with current reporting requirements where the setup has been completed and the contracts have been assigned to the supplier.

- **Completed contracts**

  o Displays all contracts currently assigned under the contract manager which have been finalised.

Contract manager home page

From your contract manager dashboard you can set up and confirm details for new contract reporting requirements and assign them to the supplier. View and monitor active contracts and quickly and easily access all contracts that you have been assigned.

New contracts

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

Contract name	Supplier	Contract value	CAN ID
Demo contract 002	Demo Supplier	$8,200,000.00	DEMO002

View All

Submitted reports

Submitted contracts are all contracts where the assigned supplier has submitted a completed report. You can view detail by selecting the contract name. If the contract is not visible select 'view all'.

Contract name	Supplier	Contract value	Report Submitted Date
Test for content	Demo Supplier	$8,000,000.00	23/11/2021

View All

Contracts in progress

In progress contracts include all contracts with current reporting requirements where setup has been completed and the contracts have been assigned to the supplier. You can view detail by selecting the contract name. If the contract is not visible select 'view all'.

Contract name	Supplier	Contract value	CAN ID
Elizabeth's test contract	Demo Supplier	$10,000,000.00	123456
Health Demo Contract	Demo Supplier	$500,000.00	Health 123
Test 3 for Elizabeth	Demo Supplier	$7,000,000.00	12345
Test for content	Demo Supplier	$8,000,000.00	1234
This is a test	Demo Supplier	$10,000,000.00	1234

View All

Completed reports

3.2 Notifications

Notifications are sent when a contract changes status or you need to complete an action. You will receive notifications via email and can also access them through the notifications bar on your dashboard.

- In the upper right corner on your dashboard there is a notification bell. You can select this to review notifications.

- Selecting a notification will take you to the related contract.
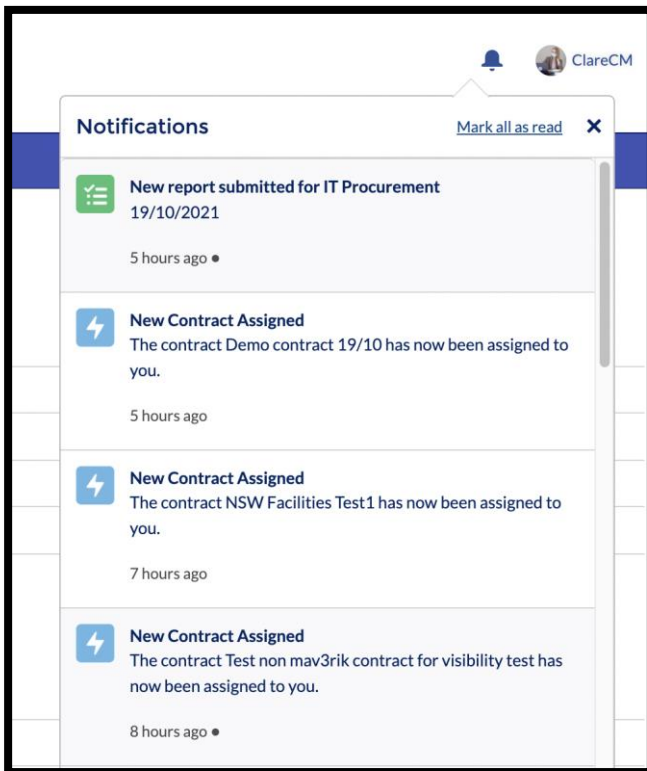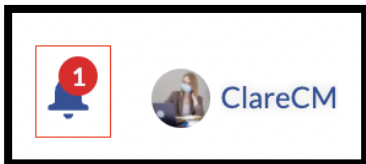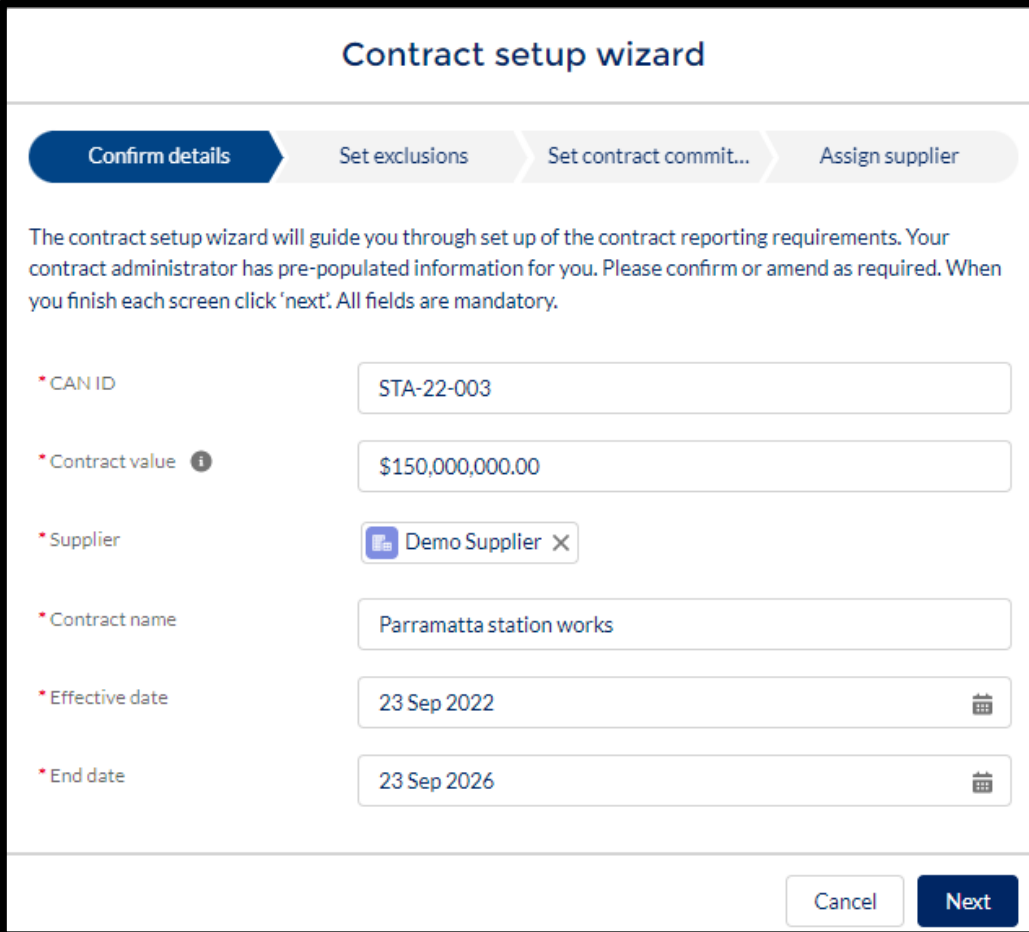
3.3 Setting up a newly assigned contract

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

Confirm details

- Check the information on the 'Confirm details' screen and make any changes. This information has been pre-populated for you by your contract administrator. 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'.

Set exclusions

- You can add an exclusion amount against a policy or multiple policies (if applicable). The exclusion amount will be subtracted from the total contract value.

- Enter the exclusion amount and exclusion reason. If you enter an exclusion amount the 'exclusion reason' field is mandatory

- **Press** the 'save' button after you have entered the exclusion reason. Press 'next' to proceed with the contract setup.

Contract setup wizard

| ✓ | Set exclusions | Set contract commit... | Assign supplier |

Please set any reporting exclusion amounts. Exclusion amounts can include items such as machinery used for construction. The exclusion amount will be subtracted from the contract value. You will need to provide a reason for any exclusions.

Policy

Aboriginal Procurement Policy (2021) ▼

Exclusion amount

$2,000,000.00

Exclusion reason

Material costs not included in contract

Save

Cancel   **Next**

Contract setup wizard

| ✓ | Set exclusions | Set contract commit... | Assign supplier |

Please set any reporting exclusion amounts. Exclusion amounts can include items such as machinery used for construction. The exclusion amount will be subtracted from the contract value. You will need to provide a reason for any exclusions.

Excluded policies (1)

Policy name	Exclusion amount	Exclusion reason	
Aboriginal Procurement Policy (2021)	2000000	Material costs not included in contract	🗑

Cancel   **Next**

Set contract commitments

- The reporting fields are automatically added based on the assigned policy.

- The contract manager will need to specify the targets for the reporting fields. We recommend referring to the header agreement with the supplier to determine how the targets should be distributed across the reporting fields for the policy. Hover over the target you wish to edit and select the pencil icon for the appropriate field. You can then enter the updated figures.

- You can also add comments in the special conditions fields to explain the targets.

Assign the supplier

- The supplier has automatically been allocated based of the details provided in the contract award notice disclosure entered on NSW eTendering.

- If the supplier details are correct select 'Next' to review the setup and notify the supplier.

- You can change the supplier by clicking on the cross. Type the correct supplier's name into the search bar and select to confirm.

  Note 1: Only one supplier can be added per contract. If you have awarded the contract to multiple suppliers, your agency contract administrator will need to set up an additional contract in the reporting tool for each supplier.

  Note 2: If the **supplier does not appear when typing their company name; they may not be registered in supplier hub. Ensure that the supplier has registered their ABN on supplier hub. Suppliers can register on supplier hub through this link:**

  https://suppliers.buy.nsw.gov.au/login/signup

Review

- **Review the details and select 'finish' to complete setup and trigger an automatic notification to the supplier.**

Contract setup wizard

Congratulations you have completed the contract manager setup wizard. The contract has now been allocated to **Demo Supplier** for reporting. The final reporting requirements are detailed below. You can view the details from your dashboard (contracts in progress) and click through to edit at any time. By selecting finish you will exit the wizard and the supplier will be notified.

CAN ID	STA-22-003
Contract value	$150,000,000.00
Supplier	Demo Supplier
Contract name	Parramatta station works
Effective date	23/09/2022
End date	23/09/2026

Reporting field	Contract target (%)	Condition
Spend on capability/capacity building	1	
Spend with Aboriginal sub-contractors	1.5	
Number of Aboriginal FTE	0	

Finish

3.4 Reviewing and editing details for in progress contracts

- You can view details of in progress contracts by selecting the contract name on your dashboard.

- You can edit individual fields for an in-progress contract by hovering over the field and selecting the pencil icon.

- Fields that can be edited include:

  o contract value

  o exclusion amount

  o supplier

  o reporter

  o effective date and end date

Editing policy targets and commitments

- In the targets and commitments section on the right of the contract detail screen and select the dropdown arrow of the target you wish to edit.

- Select edit

- Edit the contract target and/or condition

- Select the 'Save' button at the bottom of the window to save your changes

3.5 Approving/rejecting submitted reports

You will receive a notification when a report has been submitted that requires review and approval/rejection.

Click into the notification item, you will be redirected to the task page. Then click the 'Related to' field to be redirected to the reporting submission approval screen.

You can also find submitted reports from the contract manager dashboard:

- Log in to your contract manager dashboard

- Scroll to the submitted reports table and select the contract name. This will take you to the contract detail page.

- From the contract detail page, navigate to the Reporting Submission table on the bottom right of the screen.

- Select the report requiring approval. Status will display as submitted.

- This will launch the approval screen.

- To review the data submitted scroll to the bottom of the screen to view the 'Contract total' sections (1).

- To approve or reject the report scroll to the top of the screen and select the appropriate button (2).
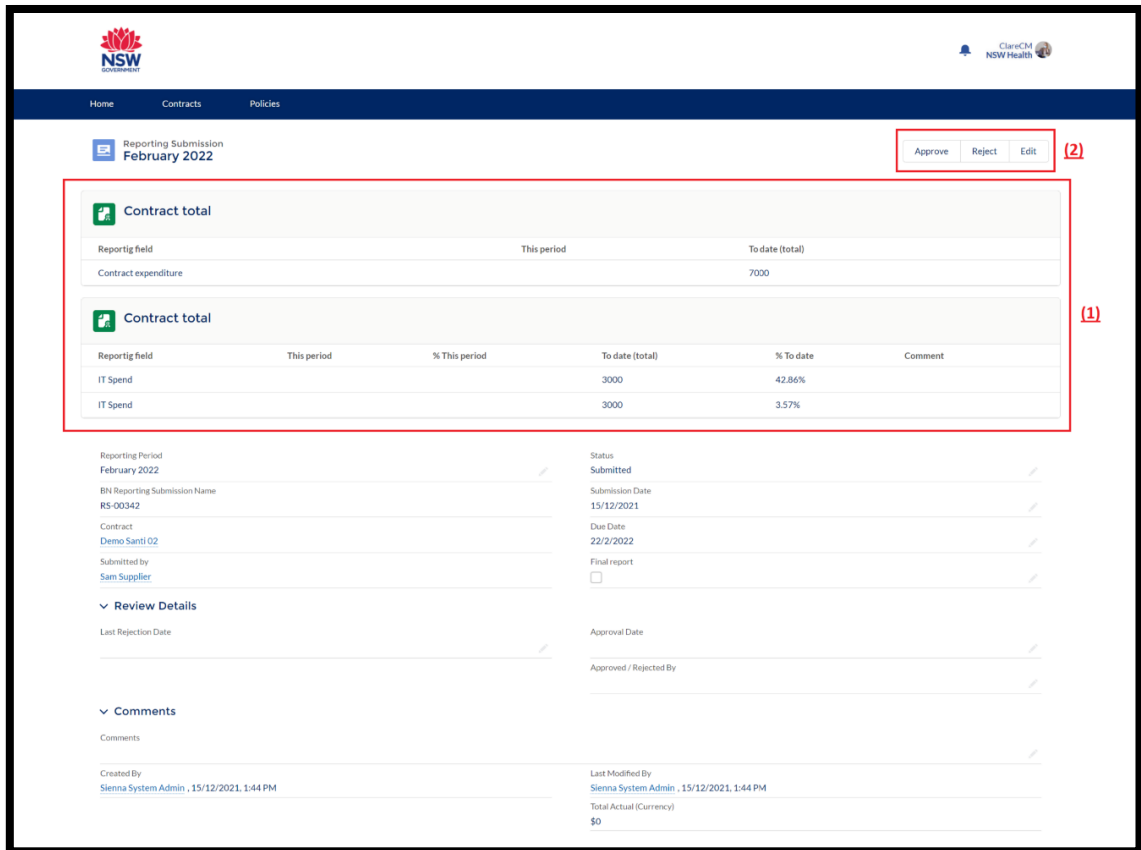
- You must add comments when approving or rejecting a report.

- If you are rejecting the report, please include a reason with specific instructions on why the report is being rejected.
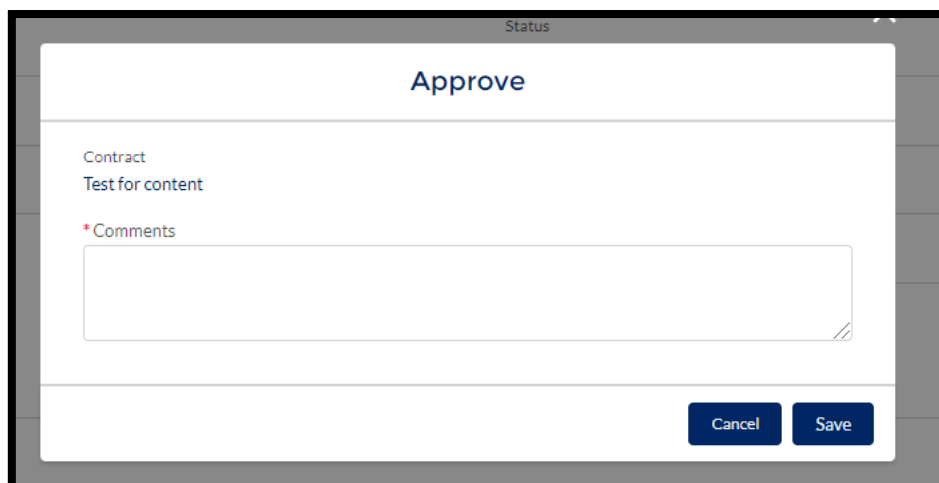
3.6 Finalise a contract

- Follow instructions from 3.5 to approve the report. If this is a final report, a finalisation screen will appear, click **'Next'** to start the finalisation process for this contract.
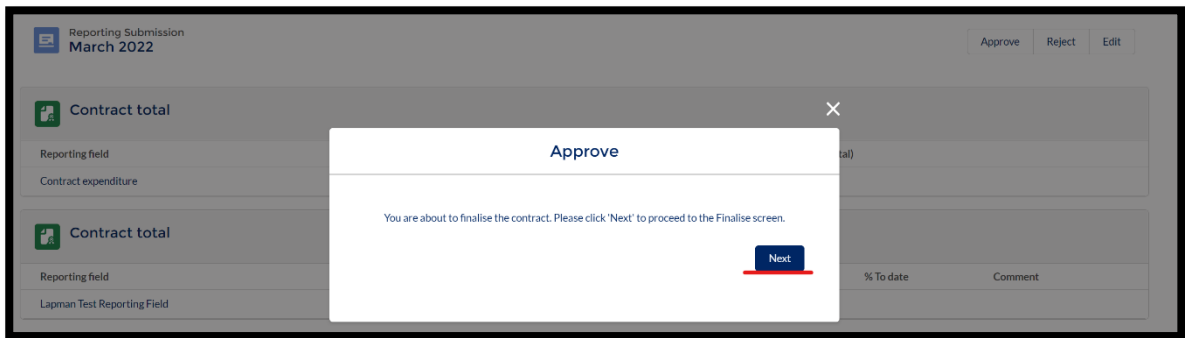
- Review the reporting fields and the related information.

- You must enter a comment to finalise.

- Click **'Finalise'** to approve the finalisation.
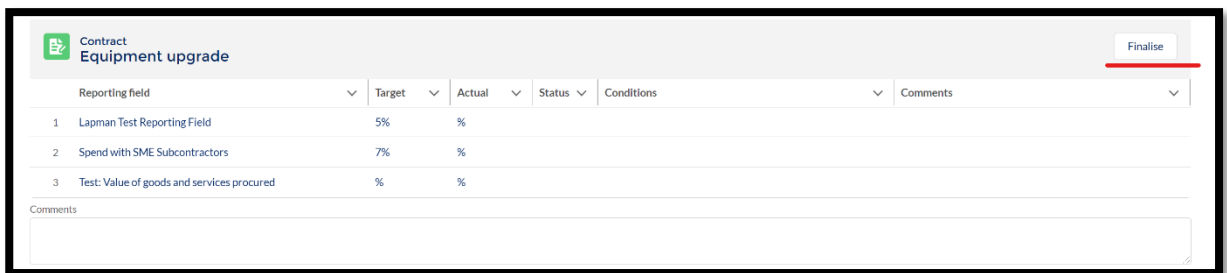
- Click **'Confirm'** if you are approving the finalisation of this report.
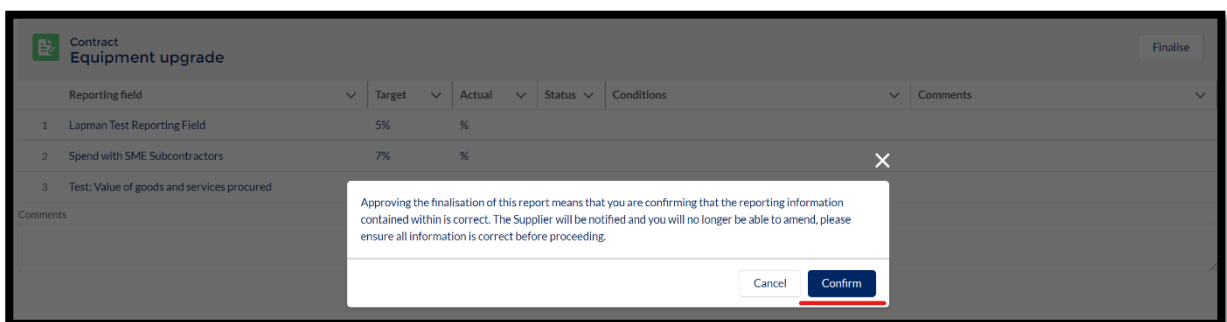
- You are now redirected to the home page and the contract will be displayed in the **'Completed contracts'** list.

Contract manager home page

From your contract manager dashboard you can set up and confirm details for new contract reporting requirements and assign them to the supplier. View and monitor active contracts and quickly and easily access all contracts that you have been assigned.

New contracts

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

Contract name	Supplier	Contract value	CAN ID
Jeanne's test contract 01/02	Mav3rik Supplier	$3,000,000.00	JTC0102

View All

Submitted reports

Submitted contracts are all contracts where the assigned supplier has submitted a completed report. You can view detail by selecting the contract name. If the contract is not visible select 'view all'.

Contracts in progress

In progress contracts include all contracts with current reporting requirements where setup has been completed and the contracts have been assigned to the supplier. You can view detail by selecting the contract name. If the contract is not visible select 'view all'.

Completed contracts

Contract name	Supplier	Contract value	CAN ID
Equipment upgrade	Mav3rik Supplier	$5,000,000.00	FR0001
Test Contract	Mav3rik Supplier	$5,000,000.00	1000230400

View All

4 Support

You can read our reporting.buy.nsw help for information and advice and troubleshoot common issues. You can find it here:
https://suppliers.buy.nsw.gov.au/help/reportingbuynsw#gettingstarted

If you have specific issues, please get in touch with your contract administrator in the first instance.

If you still require help you can contact buy.nsw@customerservice.nsw.gov.au or by calling us on 1800 679 289.

5. User workflows

Contract administrator workflow


```
                    ┌──────────┐
                    │  Start   │─────────────────┐
                    └──────────┘                 │
                         │                        │
                         ▼                        ▼
                  ╱───────────────╲        ┌─────────────┐
                 ╱ Disclosed contract╲     │ Create new  │
                 ╲                   ╱      │ contracts   │
                  ╲─────────────────╱      └─────────────┘
                         │                        │
                         ▼                        │
                  ┌─────────────┐                 │
                  │  View and   │                 │
                  │ drill down  │                 │
                  │    into     │                 │
                  │  contracts  │                 │
                  └─────────────┘                 │
                         │                        │
                         ▼                        │
                  ┌─────────────┐                 │
                  │   Review    │◄────────────────┘
                  │  contracts  │
                  │   details   │
                  └─────────────┘
                         │
                         ▼
                  ┌─────────────┐
                  ║   Manage    ║
                  ║  policies   ║
                  ║  against    ║
                  ║  contract   ║
                  └─────────────┘
                         │
                         ▼
                  ┌─────────────┐
                  │   Assign    │
                  │ contracts to│
                  │  contract   │
                  │  manager    │
                  └─────────────┘
```

Contract manager workflow

View and
drill down
into
assigned
contracts

↓

Review
contracts
details

↓

Set
reporting
contract
targets

↓

Assign
supplier
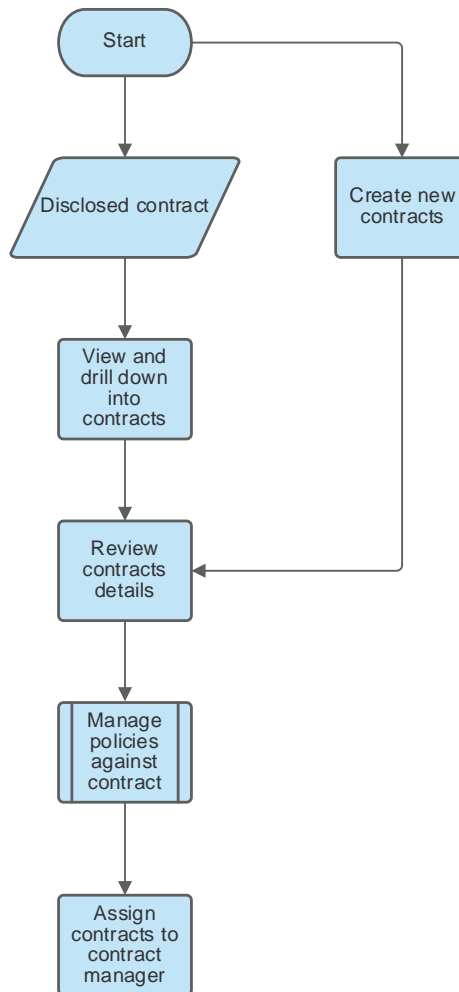
Contract manager workflow continued

System auto-generated based on frequency

Report submission generation → Receive report submission from supplier → Review report

Reject report ← Reject — Outcome

Review report → Outcome

Outcome — Approve → Approve report → Is final report?

Is final report? — No – final report not completed → Complete for this report

Is final report? — Yes - final report completed → Review targets to date (agency view)

Review targets to date (agency view) → Review finalisation comment → Make / capture outcome → Contract is completed

Supplier workflow