



Customer
Service

reporting.buy.nsw user guide

Contract managers

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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**
 - Displays new contracts assigned to the contract manager.
 - You can setup and confirm contract reporting requirements for new contracts by selecting the contract name.
- **Submitted reports**
 - Displays contracts assigned to the contract manager that have reporting data submitted from suppliers.
- **Contracts in progress**
 - 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**
 - 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

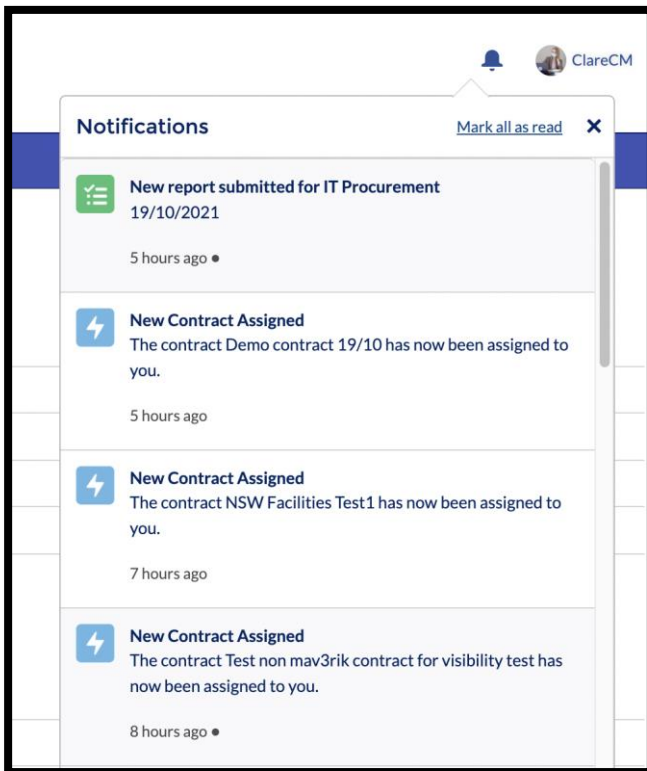
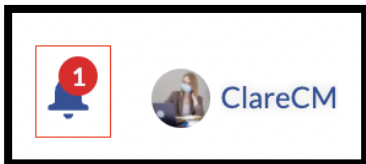
[View All](#)

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.

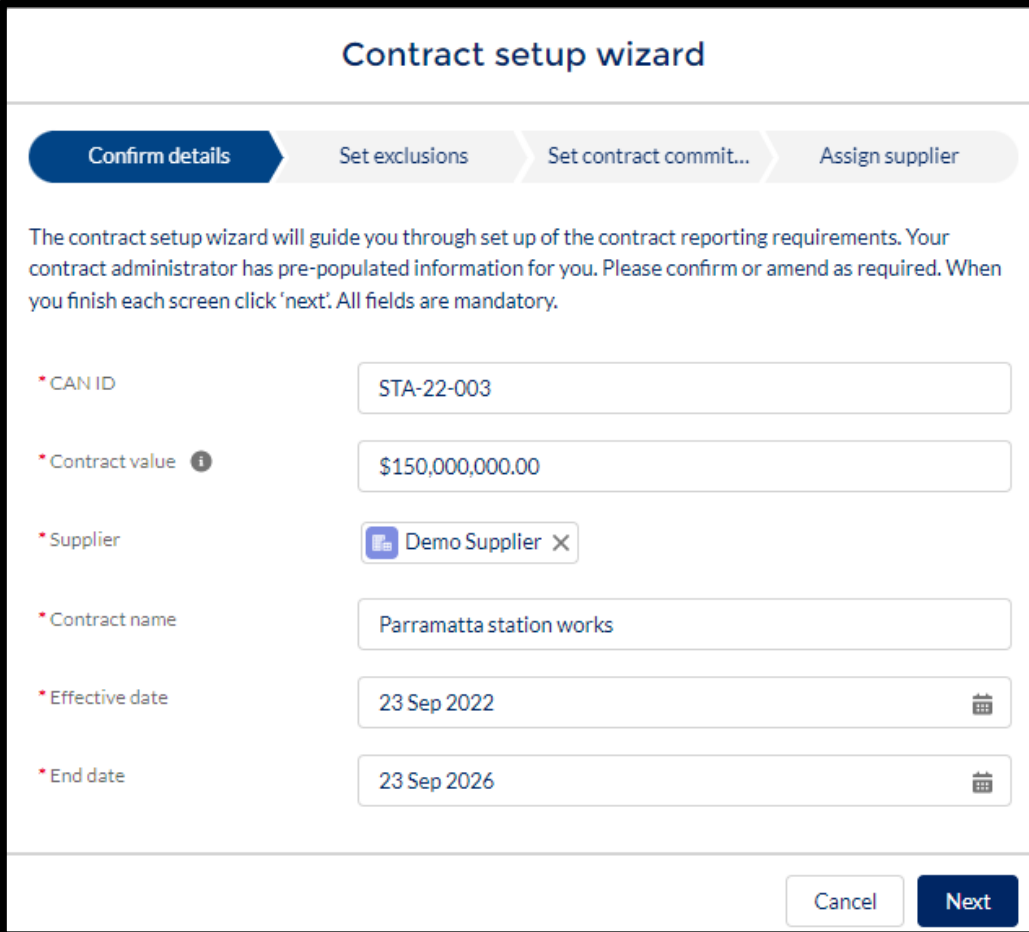


3.3 Setting up a newly assigned contract

- 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'.



The screenshot shows the 'Contract setup wizard' interface. At the top, the title 'Contract setup wizard' is centered. Below the title is a progress bar with four steps: 'Confirm details' (highlighted in blue), 'Set exclusions', 'Set contract commit...', and 'Assign supplier'. Below the progress bar is a paragraph of text: 'The contract setup wizard will guide you through set up of the contract reporting requirements. Your contract administrator has pre-populated information for you. Please confirm or amend as required. When you finish each screen click 'next'. All fields are mandatory.' Below this text are six form fields, each with a red asterisk indicating a mandatory field. The fields are: 'CAN ID' with the value 'STA-22-003'; 'Contract value' with the value '\$150,000,000.00'; 'Supplier' with a dropdown menu showing 'Demo Supplier' and a close button; 'Contract name' with the value 'Parramatta station works'; 'Effective date' with the value '23 Sep 2022' and a calendar icon; and 'End date' with the value '23 Sep 2026' and a calendar icon. At the bottom right of the form are two buttons: 'Cancel' and '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.

Contract setup wizard

✓ ✓ Set contract commit... Assign supplier

The contract reporting commitments are automatically allocated from the assigned policies. Please confirm the allocated commitments. If required, you can amend commitments and include special conditions or commentary.

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

Cancel Next

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.

Contract setup wizard

Confirm the correct supplier has been assigned. To change the supplier you can remove them and use the search to assign another.

Supplier: Demo Supplier X

ABN:

Business contact: John Smith

Email: trainingbuynsw+demosupplier@gmail.com

Title: Supplier

Phone: 55555555

Cancel Next

- 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.

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](#)

- 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:
 - contract value
 - exclusion amount
 - supplier
 - reporter
 - effective date and end date

Contract details:

- Contract name: Elizabeth's test contract
- CAN ID: 123456
- Agency: BuyNSW
- Contract manager: [Name]
- Category: Educational supplies
- Effective date: 23/9/2021
- Supplier: Demo Supplier
- Reporter: [Name]
- End date: 31/12/2022
- Exclusion reason: [Field]

Reporting financial:

- Contract value: \$10,000,000.00
- Exclusion amount: \$0
- Reporting contract value: \$10,000,000

Policy Information: A list of policies assigned to this contract for reporting. Selecting the policy will take you to the detail page for that policy.

Policy Name	Reporting Frequency
Coffee Policy	Quarterly
Aboriginal Procurement Polic...	Quarterly

[View All](#)

Targets and commitments: The policy reporting commitments assigned to this contract and the reporting fields.

BN Contra...	Tracking to T...	Related Policy	Reporting FI...
CRF-00001...		Coffee Policy	Spend on Coffee
CRF-00001...		Jeanne's Test Policy - Reporting Monthly (1m-100m)	IT Spend

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

The screenshot displays the contract manager interface. On the left, there are fields for contract details: Contract name (Elizabeth's test contract), CAN ID (123456), Agency (BuyNSW), Contract manager, Category (Educational supplies), Effective date (23/9/2021), End date (31/12/2022), Reporting financial (Contract value: \$10,000,000.00, Exclusion amount: \$0, Reporting contract value: \$10,000,000), Supplier (Demo Supplier), Reporter, and Exclusion reason. On the right, there are sections for Policy information (2) and Targets and commitments (3). The 'Targets and commitments' section is highlighted with a red box, showing a table with columns: BN Contra..., Tracking to T..., Related Policy, and Reporting FL... The table contains three rows, with the first row highlighted in red. An 'Edit' button is visible next to the first row. Below the table, there is a 'View All' link. At the bottom of the interface, there is a 'Reporting Submissions' section.

Policy Information: A list of policies assigned to this contract for reporting. Selecting the policy will take you to the detail page for that policy.

Policy Name	Reporting Frequency
Coffee Policy	Quarterly
Aboriginal Procurement Polic...	Quarterly

[View All](#)

Targets and commitments: The policy reporting commitments assigned to this contract and the reporting fields.

BN Contra...	Tracking to T...	Related Policy	Reporting FL...
CRF-00001...		Coffee Policy	Spend on Coffee
CRF-00001...		Jeanne's Test Policy - Reporting Monthly (1m-100m)	IT Spend
CRF-00001...		Jeanne's Test Policy - Reporting Quarterly 5m-10m	IT Spend

[View All](#)

Reporting Submissions: Reporting submissions due or requiring review or approval. Selecting the submission will take you to the detail page.

- Edit the contract target and/or condition
- Select the 'Save' button at the bottom of the window to save your changes

Edit CRF-0000180

Information

BN Contract Reporting Field Name: CRF-0000180
 Contract: Elizabeth's test contract

Policy Reporting Field: PRF000026

Contract Target Inputs

Contract Target (%): 10.00%

Details

Condition: [Empty text box]

Actuals To Date Summary (Rolled Up from Collection Fields)

System Information

From Amendment: Report Submitted:

Buttons: Cancel, Save

3.5 Approving/rejecting submitted reports

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

NSW GOVERNMENT

Home Contracts Policies

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 assigned.

New contracts

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

Notifications

- New report submitted 15/12/2021 (highlighted)
- New report submitted 15/12/2021

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.



NSW GOVERNMENT | ClareCM NSW Health

Home Contracts Policies

Reporting Submission February 2022 [Approve] [Reject] [Edit]

Contract total

Reportig field	This period	To date (total)
Contract expenditure		7000

Contract total

Reportig field	This period	% This period	To date (total)	% To date	Comment
IT Spend			3000	42.86%	
IT Spend			3000	3.57%	

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.

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'.

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

The screenshot displays a contract detail page with the following sections:

- Contract Information:** Contract name (Test for content), CAN ID (1234), Agency (BUNDIN), Contract manager (Elizabeth Contractmanager), Category (Engineering, research and technology services), Effective date (25/10/2021), End date (25/10/2022).
- Reporting financial:** Contract value (\$8,000,000.00), Exclusion amount (\$1,000,000), Reporting contract value (\$7,000,000).
- Policy Information (4):** A table listing policies assigned to the contract for reporting.
- Targets and commitments (6+):** A table listing reporting commitments assigned to the contract.
- Reporting Submissions (5):** A table listing reporting submissions due or requiring review or approval. This section is highlighted with a red box.

Policy Information (4)

Policy Name	Reporting Frequency
Infrastructure Skills Legacy P...	Quarterly
Aboriginal Procurement Pol...	Quarterly
SME	Quarterly
Aboriginal Procurement Pol...	Quarterly

Targets and commitments (6+)

BN Contra...	Tracking to T...	Related Policy	Reporting FI...
CRF-0000...			
CRF-0000...		Aboriginal Procurement Policy (2018)	Expenditure on Education, Training & Capability Building
CRF-0000...		Aboriginal Procurement Policy (2018)	Expenditure on Education, Training & Capability Building
CRF-0000...		Infrastructure Skills Legacy Program	Trades Workforce
CRF-0000...		Infrastructure Skills Legacy Program	Women in Trades
CRF-0000...			

Reporting Submissions (5)

Reporting Period...	Submission Date	Status
Jan 2022_RS-00085		Draft
Apr 2022_RS-00086		Draft
Jul 2022_RS-00087		Draft
Oct 2022_RS-00088	29/10/2021	Submitted
January 2023_RS-00219	23/11/2021	Submitted

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

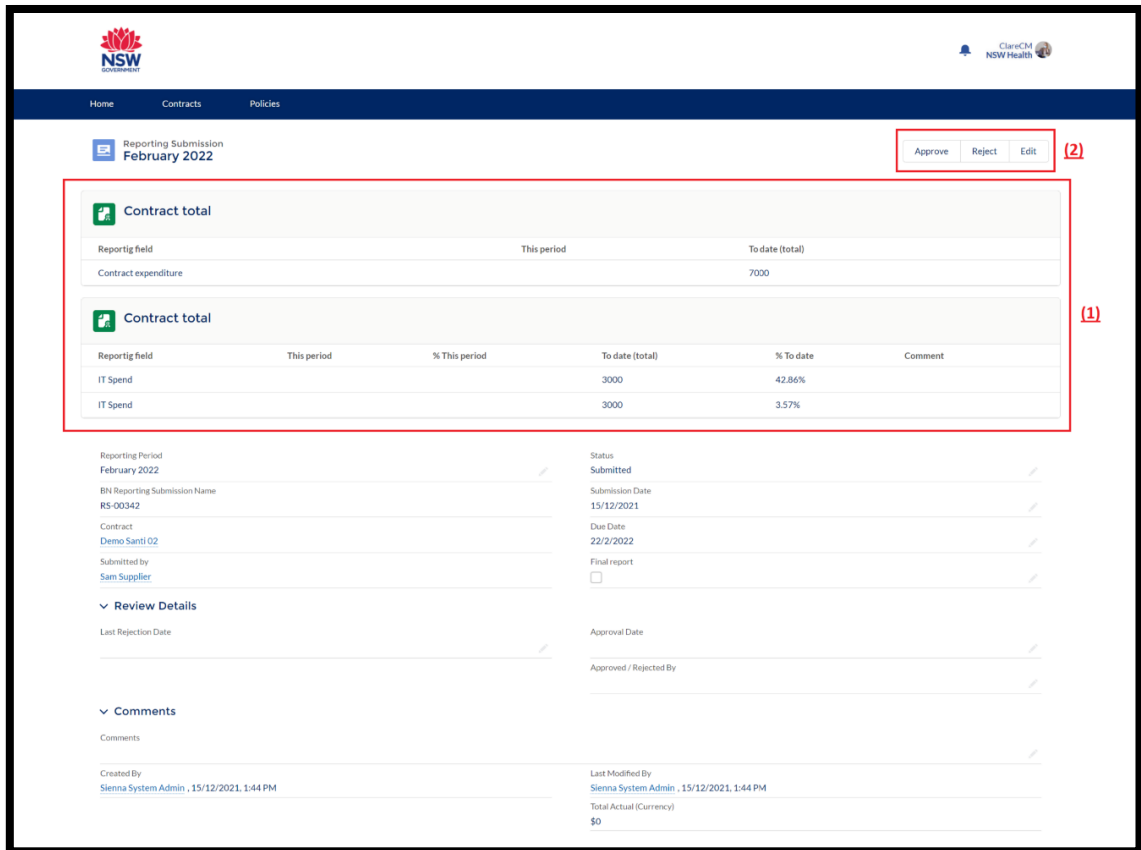
Reporting Submissions: Reporting submissions due or requiring review or approval. Selecting the submission will take you to the detail page.

Reporting submissions (5)			
Reporting Period...	Submission Date	Status	
Jan 2022_RS-00085		Draft	▼
Apr 2022_RS-00086		Draft	▼
Jul 2022_RS-00087		Draft	▼
Oct 2022_RS-00088	29/10/2021	Submitted	← ▼
January 2023_RS-00319	23/11/2021	Submitted	← ▼

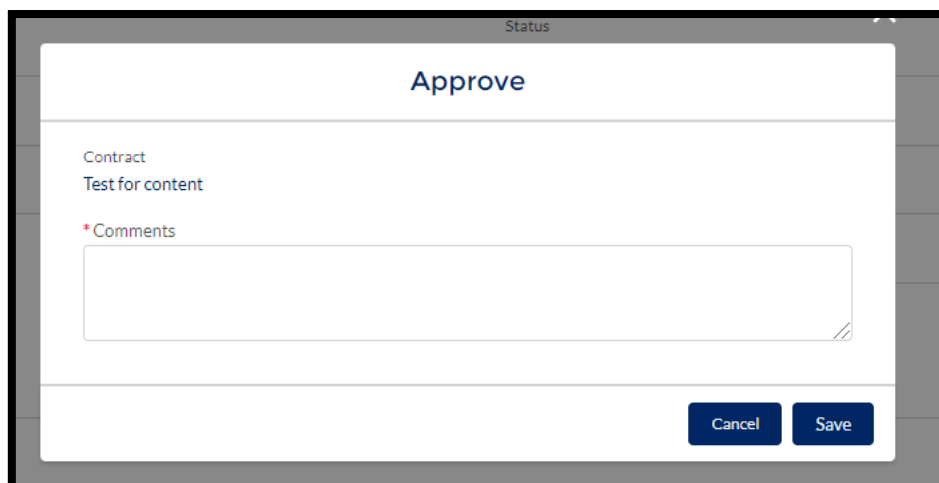
[View All](#)

- 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).

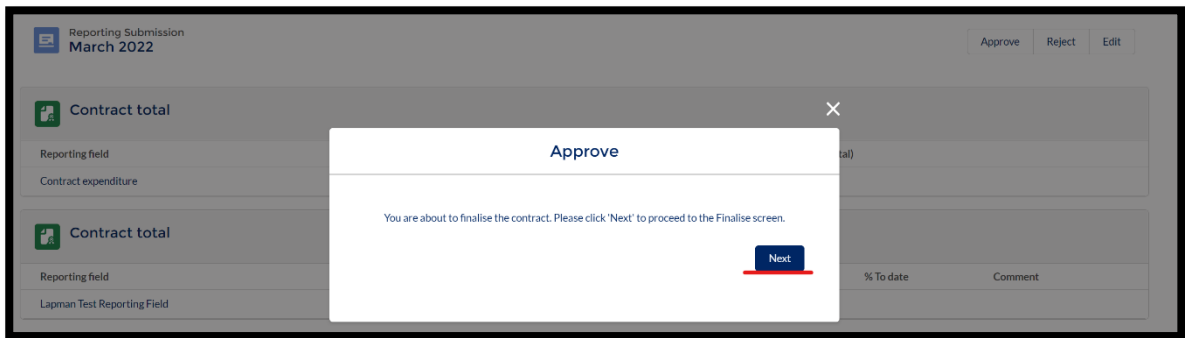


- You must add comments when approving or rejecting a report.
- If you are rejecting the report, please include a reason with specific instructions on why the report is being rejected.

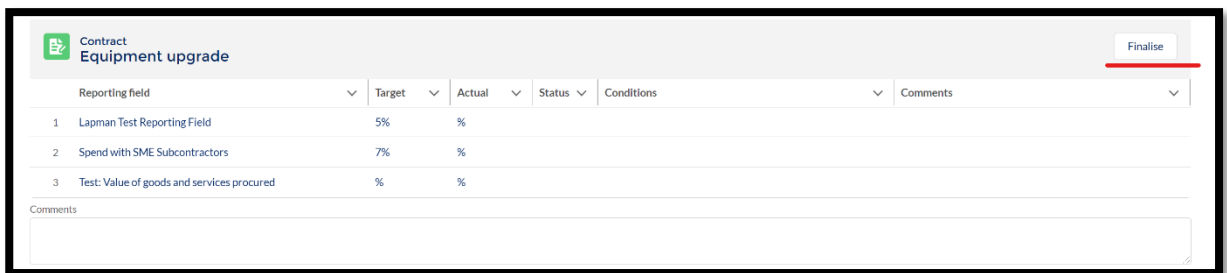


3.6 Finalise a contract

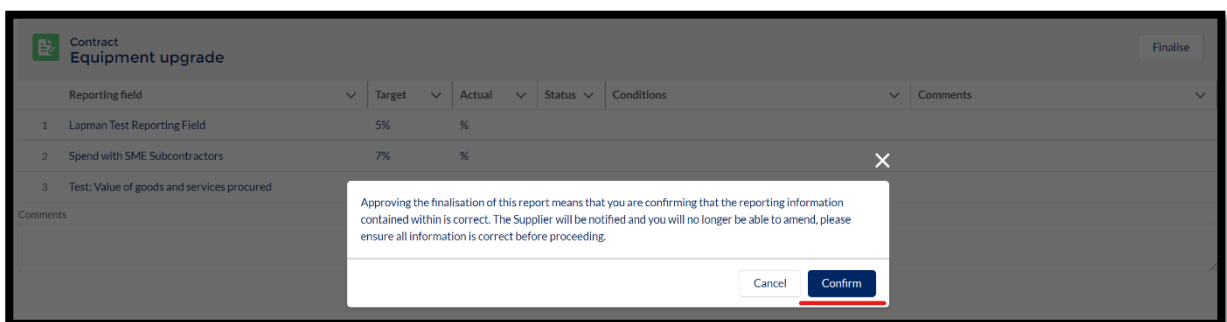
- Follow instructions from 3.5 to approve the report. If this is a final report, a finalisation screen will appear, click **'Next'** to start the finalisation process for this contract.



- 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:

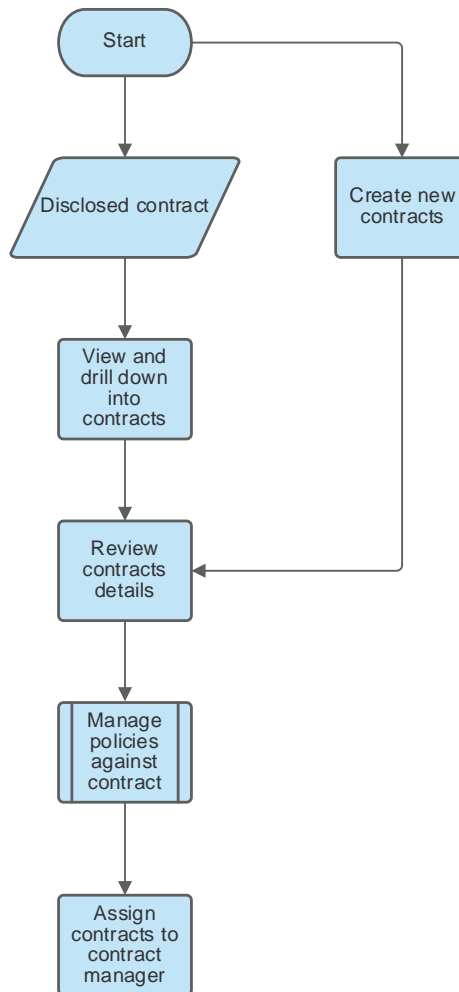
<https://suppliers.buy.nsw.gov.au/help/reportingbuynsw#gettingstarted>

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

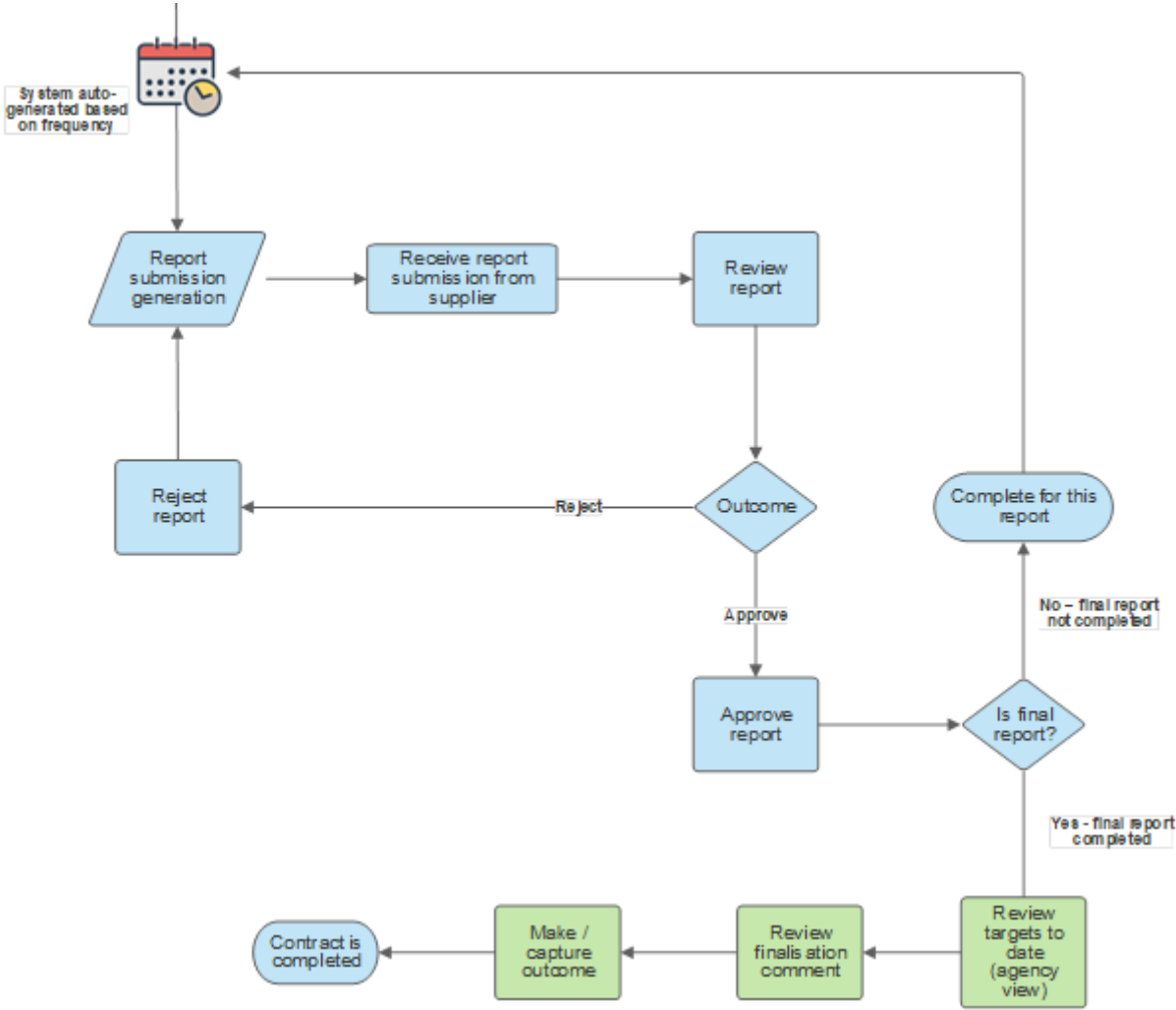
Contract administrator workflow



Contract manager workflow



Contract manager workflow continued



Supplier workflow

