



Customer
Service

reporting.buy.nsw user guide

Supplier

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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

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.
- Manage the policies assigned to a contract (by adding or excluding policies).
- Assign 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 you 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'. You will receive a system generated email notification triggered 2 weeks prior to the date your reporting submission is due.

Contract managers may be in touch with you if you have not completed and submitted your reporting obligations on time.

Functions a supplier can perform:

- View contracts awarded to your 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 your primary contact for the management of the contract which has been awarded to your business.
- View reporting requirements, which will list out 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 your contract.
- Save draft reports and submit completed reports capturing your 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. Supplier

3.1 Supplier dashboard

From the supplier dashboard you can view a list of all contracts assigned to your organisation and cards for notifications you have received.

Contracts will be grouped into 'New', 'In progress' and 'Completed' lists.

You can sort the list by contracts assigned to you, newest first and alphabetical order.

New contracts

- A list of all newly assigned contracts with reporting requirements. Select a contract to view detailed information including reporting fields and schedule.

The screenshot shows a web interface titled 'Contracts'. Below the title is a brief instruction: 'On this page see all the contracts assigned to your organisation and their status. Click on each contract to view details and submit reports.' There is a sub-section for 'New' contracts with the instruction: 'View all your newly assigned contract reporting requirements. Click through for detailed information including reporting fields and schedule.' A 'Show:' dropdown menu is set to 'My contracts'. Below this is a table with the following data:

CAN ID	Name	Contract value	Current report	Status	Reporter
123456701	smoketest #205	A\$1,500,000.00		☆ New	Sam S. →
0927202102	BN74 Demo Test 02	A\$1,000,000.00		☆ New	Sam S. →
11052021 1125	test CM 11052021 1125AM	A\$1,500,000.00		☆ New	Sam S. →
ABC123	DAN - Testing Contract of Reportingness	A\$10,000.00		☆ New	Sam S. →
12341234	Test non mav3rik contract for visibility test	A\$3,000,000.00		☆ New	Sam S. →
11022021 0912	Test contract redirect to home 11022021 0912	A\$1,500,000.00		☆ New	Sam S. →
11012021 1558	test non tracked policy 11012021 1558	A\$1,500,000.00		☆ New	Sam S. →
10282021 1500	Contract 10282021 1500	A\$500,000.00		☆ New	Sam S. →
374858894	test 3	A\$3,000,000.00		☆ New	Sam S. →
10282021 1458	Contract 10282021 1458	A\$8,000,000.00		☆ New	Sam S. →

- Select 'View all new contracts' to expand your view.

In progress

- A list of all in-progress contracts with varying reporting status. The status of the contracts includes in progress, submitted, approved, rejected or in finalisation.
- Contracts which need action will be marked accordingly.

In progress

View your contract status at a glance and what stage you are up to. See when you need to take action and access forms and feedback quickly and easily.

Show:

CAN ID	Name	Contract value	Current report	Status	Reporter
202111701	Jeanne test contract 17 Nov	A\$2,000,000.00	Rejected	Action required	Sam S. →
202111601	Jeanne test contract 16 Nov	A\$1,000,000.00	In progress	Action required	Sam S. →
182 11082021 1135	Smoketest #182 11082021 1135 AM	A\$1,500,000.00	Finalisation	Action required	Sam S. →
213 11052021 1104	Smoketest #213 11052021 1104AM	A\$1,500,000.00	Approved	Action required	Sam S. →
11042021 1220	Smoketest #99 11042021 1220 PM	A\$1,500,000.00	In progress	Action required	Sam S. →
11032021 1458	Smoketest email notif 11032021 1458 PM	A\$1,500,000.00	In progress	Action required	Sam S. →
1234567	test reporting period field	A\$1,000,000.00	In progress	Action required	Sam S. →
123	Harry test 3	A\$10,000.00	Submitted	OK	Sam S. →
2313	Lapman's test contract 1	A\$1,500,000.00	Submitted	Action required	Sam S. →
2021102601	Test report submission 26/10	A\$1,000,000.00	Submitted	OK	Sam S. →

[View all in progress contracts →](#)

Completed

- A list containing all completed contracts. You can view their history and any reports submitted.

Completed

Access all your completed contracts. View their history and any reports submitted.

Show:

CAN ID	Name	Contract value	Current report	Status	Reporter
007 OP	007 - Octopussy	A\$5,000,000.00	Report due	Completed	Sam S. →
2021091902	jeanne test contract 19/10	A\$70,000.00	Finalisation	Completed	Sam S. →

[View all completed contracts →](#)

3.2 Viewing contract reporting details

- You can view reporting details for contracts by selecting the appropriate contract row.

Contracts

On this page see all the contracts assigned to your organisation and their status. Click on each contract to view details and submit reports.

New

View all your newly assigned contract reporting requirements. Click through for detailed information including reporting fields and schedule.

Show: My contracts ▾

CAN ID	Name	Contract value	Current report	Status	Reporter
123456701	smoketest #205	A\$1,500,000.00		☆ New	Sam S. →
0927202102	BN74 Demo Test 02	A\$1,000,000.00		☆ New	Sam S. →

Current report

- The current report will show your most recently submitted report and its associated status.
- If a report is due for completion, you will be taken to the report submission screen.

CAN ID: CAN-2021-16

Paul's Test Contract 2021-16

Current report | All reports | Contract details

✓ **Report approved**
On 18/11/2021 by paul.Contractmanager. Correct number of workers

January 2022 Report

Submitted on 18/11/2021

Complete the fields below with your 'to date' reporting data from contract commencement. These should be your total figures for each commitment. This will form the baseline for all future reports. You can save progress and return later by using the update button at the bottom of the page. For more information on specific commitments see your contract details page

Contract totals

Your contract totals are your top line expenditure and workforce figures. These figures are used to calculate your performance against target for each commitment.

Reporting field	To date	To date (total)
Project workforce		0

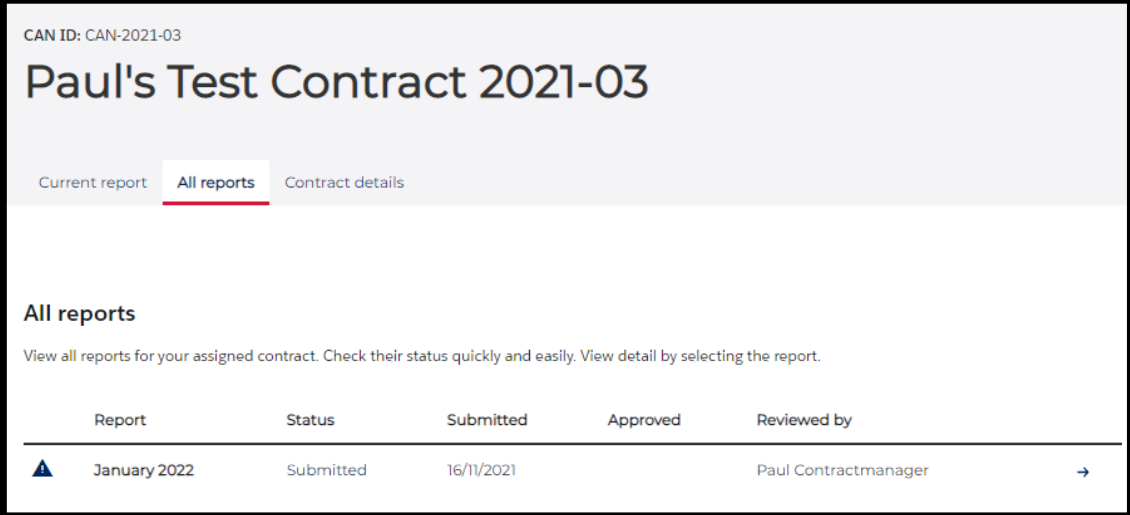
Contract targets

Contract targets are your individual reporting commitments under the terms of the contract. Complete your to date figures from contract commencement. Add any explanatory notes in the comments field for each commitment


Reporting field	To date	% This period	To date (total)	% To date	Comments
Trades Workforce	1,200		1,200		

All reports

- The 'All reports' tab will show you all previously submitted reports.
- You can view previously submitted reports by selecting the appropriate report row.



The screenshot shows a web interface for a contract. At the top, it displays 'CAN ID: CAN-2021-03' and the title 'Paul's Test Contract 2021-03'. Below the title are three tabs: 'Current report', 'All reports' (which is selected and underlined), and 'Contract details'. Under the 'All reports' tab, there is a heading 'All reports' followed by a sub-heading: 'View all reports for your assigned contract. Check their status quickly and easily. View detail by selecting the report.' Below this is a table with the following columns: Report, Status, Submitted, Approved, and Reviewed by. The table contains one row of data: a report for 'January 2022' with a status of 'Submitted', submitted on '16/11/2021', and reviewed by 'Paul Contractmanager'. A right-pointing arrow is visible at the end of the row.

Report	Status	Submitted	Approved	Reviewed by
 January 2022	Submitted	16/11/2021		Paul Contractmanager →

Contract details

- The contract details tab shows all details for the specific contract.
- From here you can find information about the assigned reporting requirements (1), your contract manager's contact details (2) and your reporting schedule (3).
- You can view details on the policies (4) attached to the contract by using the links at the bottom of the page.

CAN ID: 12345678901

Demo 2 Contract

Current report All reports **Contract details**

Details

Contract Award Notice ID 12345678901
Category Engineering, research and technology services
Agency Mav3rik Test Agency

Reporter

Hank Supplier Business Contact
buynsw.project@mav3rik.com

Assign to:

Hank S. 

Business contact

Hank Supplier Business Contact
buynsw.project@mav3rik.com
0312345678

Contract value
A\$5,000,000.00

Contract period
14/12/2021 - 31/12/2021

Contacts

Contract manager **2**
steve.contract.manager
buynsw.project@mav3rik.com
0400111222

Reporting requirements **1**

The following reporting requirements have been assigned to this contract. A new draft submission will automatically be generated and made available prior to each reporting period for you to complete.

Reporting detail	Contract target	Special conditions
Value of goods and services procured in NSW Dollar value of non labour components of the contract spent with an SME (Australian or New Zealand based enterprise with fewer than 200 full-time equivalent employees)- reporting of subcontractors not required if supplier is an SME		
Spend with SME sub-contractors Dollar value of spend with SME subcontractors (Australian or New Zealand based enterprise with fewer than 200 full-time equivalent employees)		

Reporting schedule **3**

Please see below for the dates each of your reports are due.

Report	Due by
Q1 Report	22nd January
Q2 Report	22nd April
Q3 Report	22nd July
Q4 Report	22nd October

Policies attached to this contract **4**

SME Policy

Aboriginal Procurement Policy (2018)

SME Policy

3.3 Completing a report

Action required

- When a contract has a report due for submission, the contract status will change to 'Action required'.
- Select anywhere on the contract row to view the reporting data.

CAN-2021-14	Paul's Test Contract 2021-14	A\$22,225,000.00	 In progress	 Action required	
CAN-2021-17	Paul's Test Contract 2021-17	A\$10,000,000.00	 In progress	 Action required	

- The current report will open with the month of the report (1) and the due date at the top of the page (2).
- The report is divided into two sections:
 - **Contract totals** - your top line expenditure and workforce figures. These figures are used to calculate your performance against target for each commitment. (3).
 - **Contract targets** - your individual reporting commitments under the terms of the contract. (4).

Metro hospital uplift

Current report

All reports

Contract details

(1)

Sep 2021 Report

Due 22/09/2021 (2)

Complete the fields below with your 'to date' reporting data from contract commencement. These should be your total figures for each commitment. This will form the baseline for all future reports. You can save progress and return later by using the update button at the bottom of the page. For more information on specific commitments see your contract details page

Contract totals (3)

Your contract totals are your top line expenditure and workforce figures. These figures are used to calculate your performance against target for each commitment.

Reporting field	To date ⁱ	To date (total)
Contract expenditure	<input type="text"/>	A\$0.00

Contract targets (4)

Contract targets are your individual reporting commitments under the terms of the contract. Complete your to date figures from contract commencement. Add any explanatory notes in the comments field for each commitment

Reporting field	To date	% This period	To date (total)	% To date	Comments
IT Spend	<input type="text" value="A\$0.00"/>		A\$0.00		<input type="text" value="hello world"/>

Update

Submit report

- Complete the required fields for your report and add any explanatory notes in the comments field for each commitment.
- Hover your mouse over the information icon for help to understand what is required in each reporting field.

Contract totals ⁱ

Adding supporting files

- You can upload your data using the reporting template provided for some reporting fields.
- The data upload is accessed via the 'Add supporting files section' at the bottom of the 'current report' page.
- Download the template from this section, populate it with your data and upload. Please ensure you upload as .csv file type.
- You can also enter data manually in the appropriate field.

The screenshot shows a web interface for adding supporting files. At the top, there is a header with 'Spend with SME subcontractors (1)' and two input fields containing 'A\$0.00'. Below this is a section titled 'Add supporting files' with a red box around the title. The text below reads: 'You can upload your Aboriginal subcontractor spend or FTEs using the reporting template. The total figure will automatically be calculated from the data provided and added to the form.' To the right of this text is a button labeled 'Download reporting template CSV 2kb' with a red box around it. Below the text is a table with three columns: 'Reporting field', 'This period', and 'File name'. The first row has 'Spend with SME subcontractors (1)' in the first column and a 'Select file' button in the second column, both with red boxes around them. At the bottom right of the form are two buttons: 'Update' and 'Submit report'.

Update progress and save

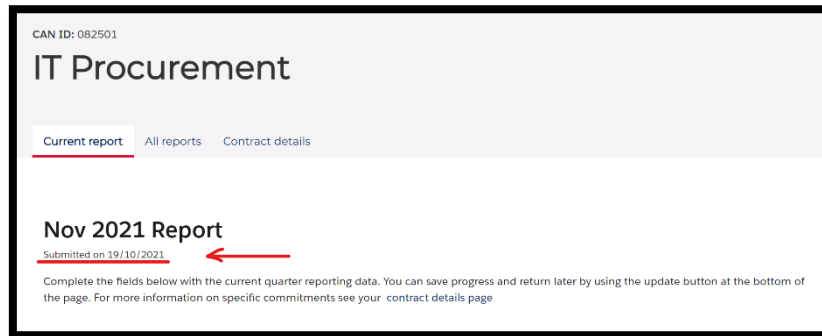
- If you have been completing your report, but are not ready to submit, you can select 'Update' to save your work and return to it later.
- Selecting 'Update' will save the report in the 'In progress' contract list on your dashboard. Locate and select the report to continue completing and submit.

3.4 Submitting a report

- When you have completed the report select 'Submit report'.



- Once submitted, 'Submitted date' will appear in the same place that 'Due date' was.



- The contract status will be updated on your dashboard to 'Submitted'.

CAN-2021-11	Paul's Test Contract 2021-11	A\$100,000,000.00	In progress	Action required	→
CAN-2021-03	Paul's Test Contract 2021-03	A\$10,000.00	Submitted	OK	→
CAN-2021-10	Paul's Test Contract 2021-10	A\$1,000,000.00	In progress	Action required	→

- Your contract manager will receive a notification that you have submitted a report for review and approval.
- When approved you will receive a notification that the report has been approved and the status will be updated to 'Approved'.

CAN-2021-06	Paul's Test Contract 2021-06	A\$5,000,000.00	In progress	Action required	→
CAN-2021-07	Paul's Test Contract 2021-07	A\$50,000.00	Approved	OK	→

3.5 Report has been rejected

- If your report has been rejected, you will receive a notification with the details of the rejection and comments made by the contract manager.
- You will need to update and resubmit your report.
- Login into the supplier dashboard.
- Navigate to the contract that you need to update. The status will have changed to 'Rejected'.
- Select the contract.

007-1021	007 You only live twice	A\$9,000,000.00	Submitted	Action required
1234	Test for content	A\$8,000,000.00	Rejected	Action required
007 SF	007 Skyfall	A\$9,250,000.00	Submitted	OK

- This will open the report submission page.
- The rejection notice with associated comments is displayed at the top of the page.

CAN ID: 1234

Test for content

Current report | All reports | Contract details

Report rejected
On 21/11/2021 by elizabeth.contractmanager. Please provide additional information about the type of trades for women

January 2023 Report

Due 22/01/2023

- Navigate to the required fields. Update the report and resubmit using the submit button at the bottom of the page.

3.6 Finalisation

Current report

Finalisation

- When a contract has a final report due for submission, the current report will change to 'Finalisation'.
- Select anywhere on the contract row to view the reporting data.

CAN ID	Name	Contract value	Current report	Status	Reporter
12329848939	Demo Test	A\$50,000.00	Finalisation	Action required	Supplier T. →

- Submit the final report (refer to 3.4 Submitting a report).
- The finalisation screen will pop up.

- **Reporting field** – Reporting fields from Targets and Commitments
- **Target** – Contract % field
- **Actuals** - % Actuals field
- **Status** – status of the reporting field
- **Conditions** – conditions set out on Targets and Commitments
- **Comments** – you can enter your comments

CAN ID: 1239038490

Demo Contract 3

[Current report](#)
[All reports](#)
[Contract details](#)

Finalisation

Contract description goes here lorem ipsum dolor sit amet, consectetur adipiscing elit. Morbi aliquet massa a dolor elementum porta. Sed condimentum ligula magna, eu efficitur lectus.

Reporting field	Target	Actual	Status	Conditions	Comments
Value of goods and services procured from SME sub-contractors					<input type="text"/>
Number of SME sub-contractors					<input type="text"/>
Number of FTEs in NSW					<input type="text"/>
Value of capital expenditure in NSW					<input type="text"/>
Spend with SME sub-contractors					<input type="text"/>
Value of goods and services procured in NSW					<input type="text"/>

- Select 'Yes' to submit the final report

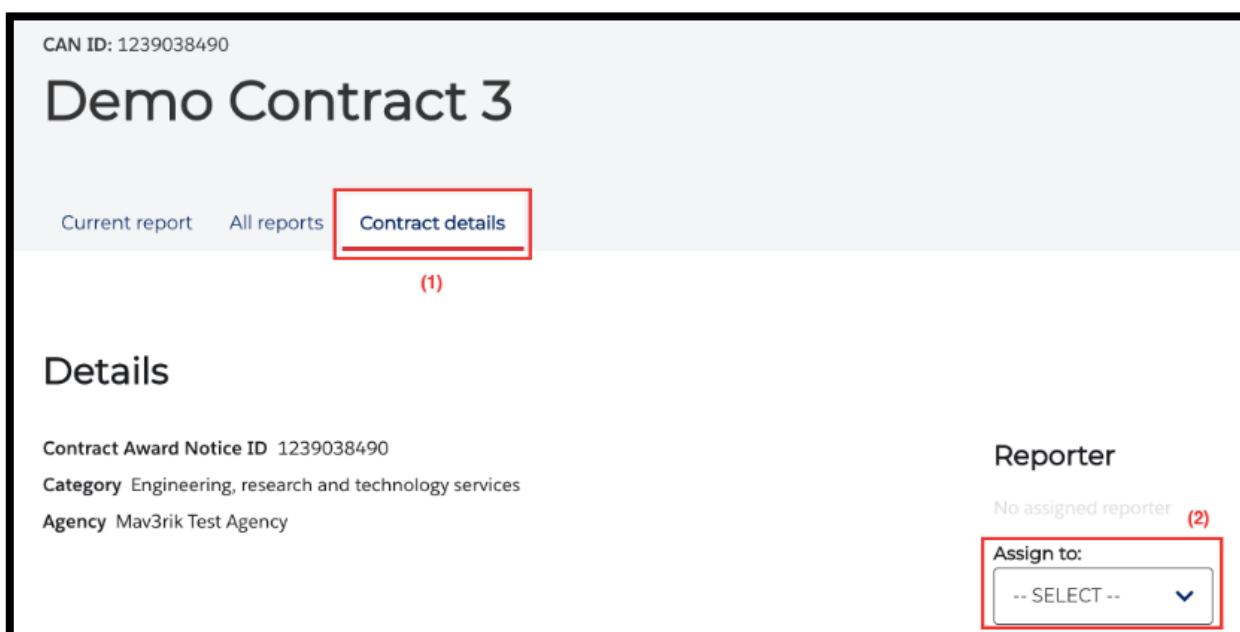
Confirm

Are you sure you want to submit this final report?

3.7 Reassign reporter

A primary contact of a supplier organisation can reassign a contract to a member in the same organisation.

- Select the 'Contract details' tab (1).
- On the right-hand side of the page, under the Reporter subheading, select the assignee from the 'Assign to:' drop down menu (2).
- NOTE: any individual assigned reporting duties, also needs to be recorded as a reporter in the Supplier Hub, under the Company Profile. You can access the Supplier Hub here: <https://suppliers.buy.nsw.gov.au/>



The screenshot displays the 'Demo Contract 3' interface. At the top, the 'CAN ID: 1239038490' is shown. Below the title, there are three tabs: 'Current report', 'All reports', and 'Contract details', with the latter being selected and highlighted by a red box labeled (1). The 'Details' section on the left lists 'Contract Award Notice ID 1239038490', 'Category Engineering, research and technology services', and 'Agency Mav3rik Test Agency'. On the right, under the 'Reporter' heading, it states 'No assigned reporter' with a red (2) next to it. Below this, there is an 'Assign to:' dropdown menu, also highlighted by a red box, showing '-- SELECT --' and a downward arrow.

4 Support

You can read our reporting.buy.nsw help for information and advice and troubleshoot common issues. You can find it here:

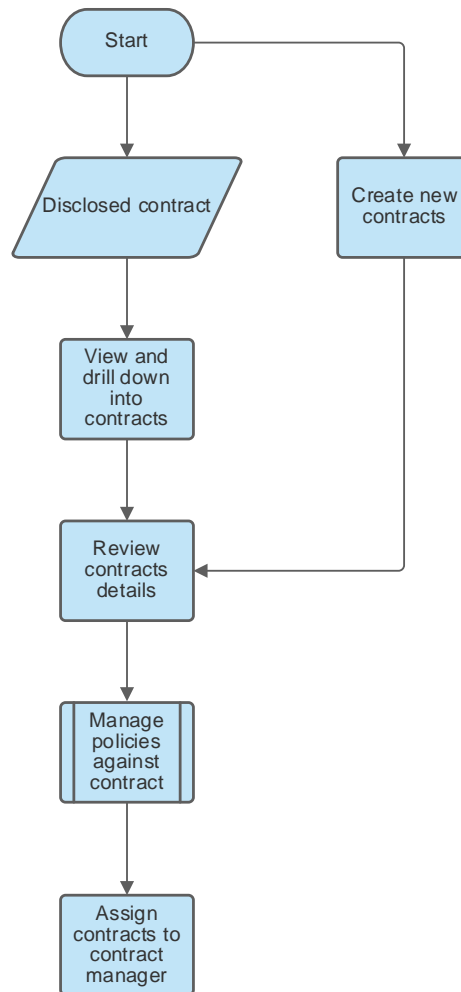
<https://suppliers.buy.nsw.gov.au/help/reportingbuynsw#gettingstarted>

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

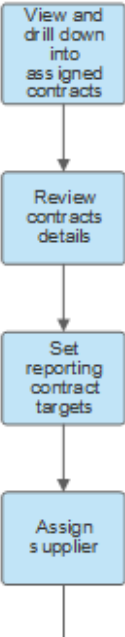
Other enquiries can be directed to buy.nsw@customerservice.nsw.gov.au or by calling us on 1800 679 289.

5. User workflows

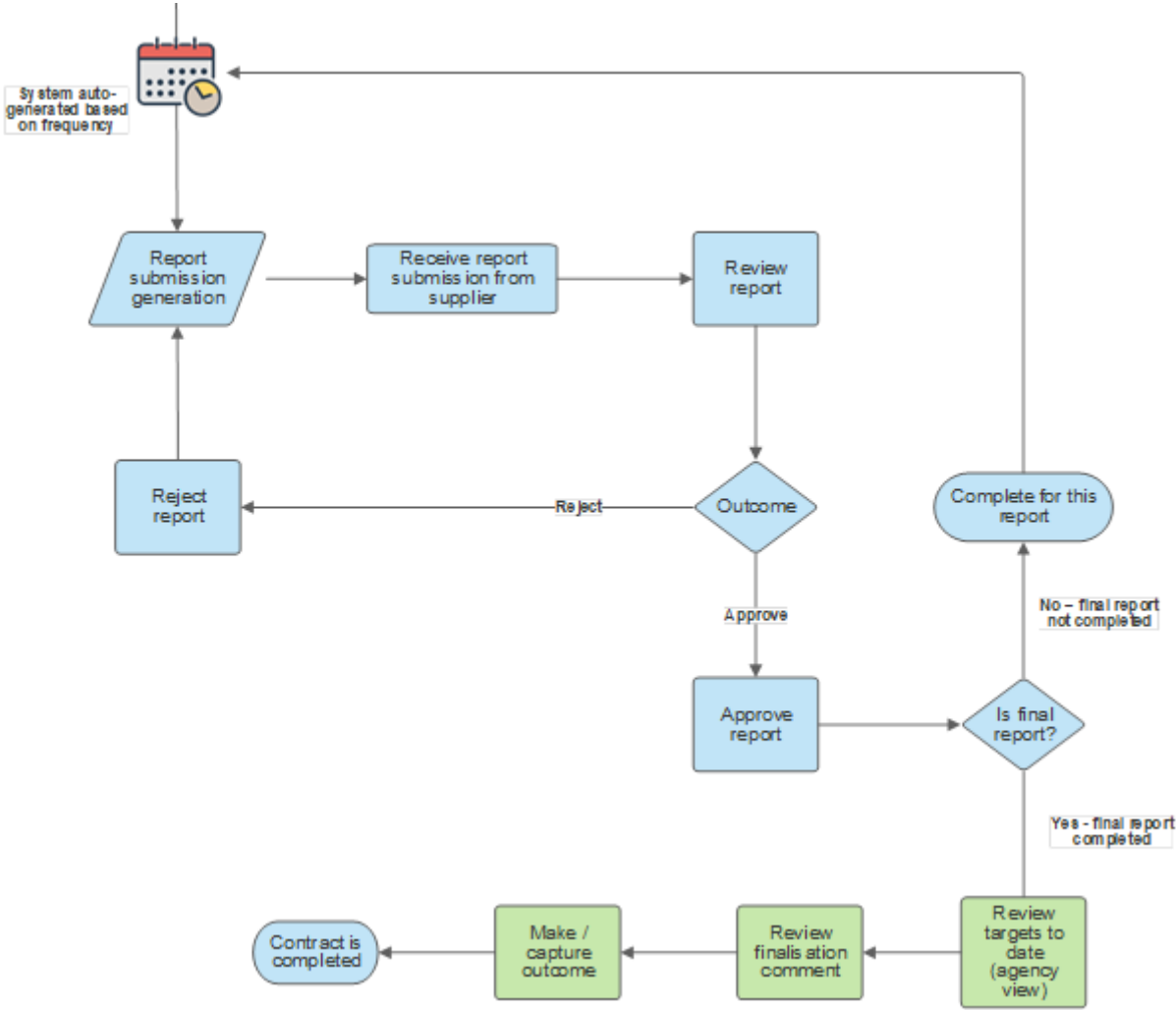
Contract administrator workflow



Contract manager workflow



Contract manager workflow continued



Supplier workflow

