Publishing user manual for contract disclosure on open data portal

Office of the Chief Advisor - Procurement

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1. Terms and definitions

Abbreviations	Descriptions
Agency/Agencies	Budget sector agencies, departments, large statutory bodies and special purpose vehicles
BCM	Building and Construction Maintenance
CSV	Comma Separated Value. A plain text format data file using commas (,) as separator. This is the required file format for affected entities to upload their data to open data portal
GGS	General Goods and Services
ICT	Information and Communications Technology
KDS	Key Data Set
MED	Medical
OCA-P	Office of the Chief Advisor – Procurement
QPP	Queensland Procurement Policy
QPS	Queensland Procurement Strategy
SOC	Social
TIS	Transport Infrastructure Services
QCD	Queensland Contracts Directory. Whole of Government contracts directory which also hosts the Contract Disclosure data
OCDS	Open Contracting Data Specifications. The Open Contracting Data Standard (OCDS) enables disclosure of data and documents at all stages of the contracting process by defining a common data model. It was created to support organisations to increase contracting transparency, and allow deeper analysis of contracting data by a wide range of users. The Open Contracting Data Standard is a core product of the Open Contracting Partnership (OCP). Version 1.0 of the standard was developed for the OCP by the World Wide Web Foundation, through a project supported by the Omidyar Network and the World Bank. Ongoing development is managed by Open Data Services Co-operative under contract to OCP. More information can be found here: http://standard.open-contracting.org/latest/en/

2. Background

Clause 3.3 of the Queensland Procurement Policy requires budget sector agencies, large statutory bodies and special purpose vehicles (agencies) to publish certain information about contracts awarded over $10,000.

This manual assists agencies to publish this information on the Open Data website. It should be read together with the *Procurement Guidelines: Contract Disclosure* document.

3. Purpose of this publication

The purpose of this user manual is to provide detailed information to agencies so they are able to disclose details of the awarded contracts as required by clause 3.3 of the Queensland Procurement Policy and to provide step-by-step instructions and supporting documentation to representatives of agencies for the publishing of contract disclosure data to the open data portal. The following information is included in this document:

- mapping existing data structures to new data structures for contract disclosure.
- step-by-step guide to disclose contracts over $10,000 in accordance with the QPP and data specifications
- specific technical requirements to upload the data file to open data portal.

4. Scope

4.1 Included

- Detailed information on publishing and a suggested decision tree to assist with the contract disclosure process.
- Technical information on data specifications and related information to publish data on the open data portal.

4.2 Excluded

- Specific technical ICT user guide on how to use a PC and internet browsers.
- Specific technical ICT user guide on how to access the open data portal.

4.3 Assumptions

This guide assumes the following:

- users are familiar with the disclosure requirements in the QPP and the Contract disclosure guideline.
- agencies are aware of Queensland Government's open data portal and can access this website.
- users within agencies can access the open data portal and know how to use internet browser.

4.4 Publishing requirements

Agencies must have a dataset custodian who is responsible for creating and publishing the required dataset resource on the open data portal.

The custodian will require a self-publishing account to publish contract disclosure datasets on the open data portal. A new account should be requested via an online form at: https://www.forgov.qld.gov.au/request-publishing-access-data-and-publications-portals.

This data is loaded and updated using the instructions found in **9.4,** *Publishing to the open data portal*.

5. Roles and responsibilities

5.1 OCA-P responsibilities

OCA-P is responsible for custodianship and management of the Queensland Procurement Policy and guidelines, specifically:

- coordinating the identification and implementation of any future review, changes or upgrades to the Queensland Procurement Policy, guidelines and user manuals
- providing templates and instructions about contract disclosure
- consulting with agency representatives on any global changes required.

5.2 Agency responsibilities

Each agency is responsible for:

- allocating dedicated resources to prepare and publish their contract disclosure updates in line with the QPP and Contract disclosure guidelines. It is strongly recommended that all agencies have a resource trained to backfill when required
- collecting data and creating the Comma separated value (CSV) file and uploading to open data as outlined in **Section 9**, to prepare contract disclosure reporting. Data should be refreshed periodically in line with QPP and Contract disclosure guidelines. Data is to be approved by each agency's relevant governance body or delegate prior to refreshing
- refreshing the data in the production environment (i.e. open data)
- cross-checking the accuracy of the contract disclosure data loaded to open data in the production environment following each refresh
- retaining a copy of each dataset on the agency's own network drive or electronic documents records management system to provide a historical record or for right to information requests. Only the current resources will be available in open data
- responding to any media requests for their agency's contract disclosure, which are displayed on the contract disclosure open data portal.

5.3 Smart Service Queensland responsibilities

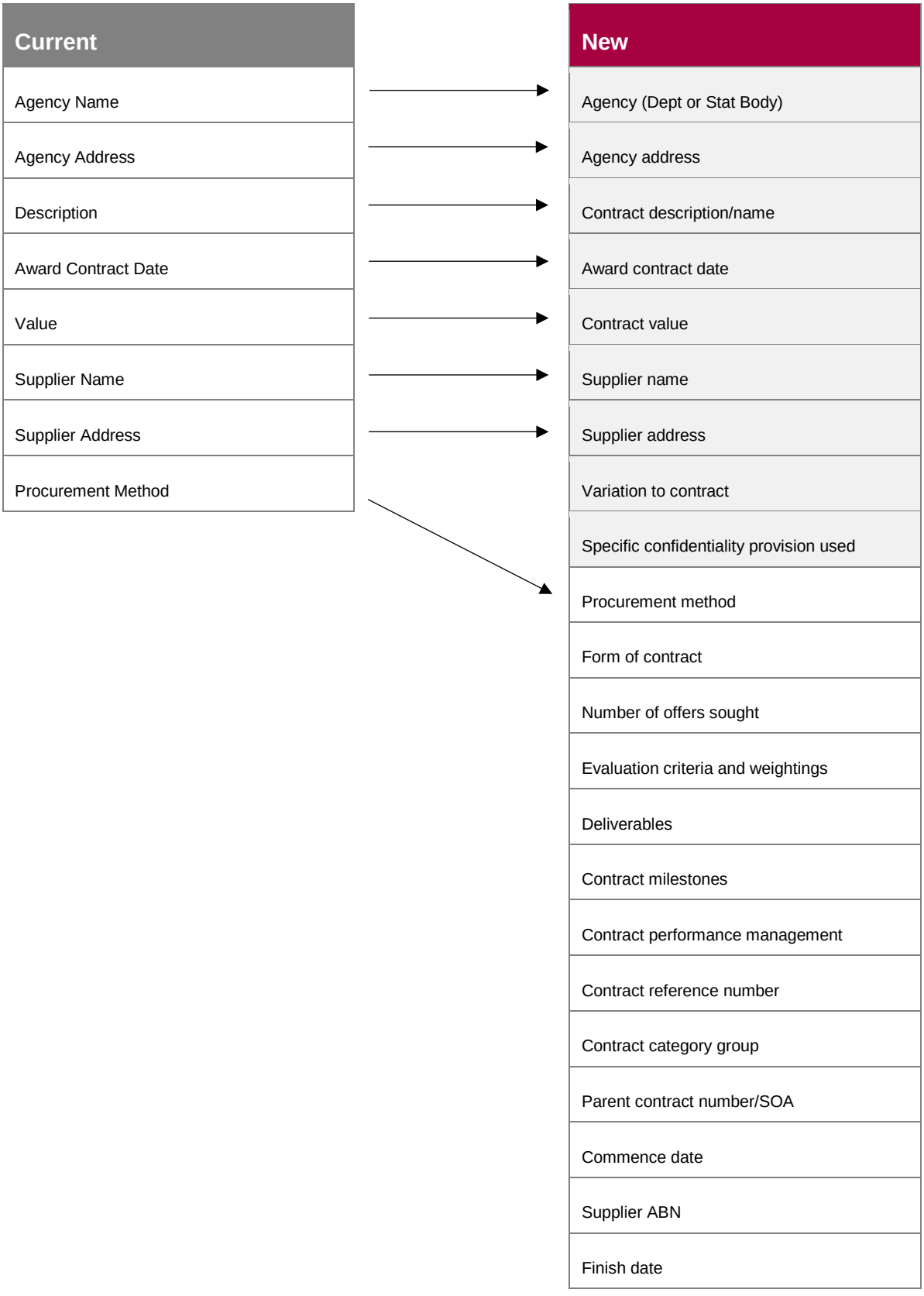
Smart Service Queensland is responsible for:

- providing assistance to agencies, as required, to identify and resolve any open data platform related issues for future refreshes
- investigating non-urgent issues and to respond within three working days
- investigating urgent requests where there are extenuating circumstances
- implementing changes to the data attributes as requested by OCA-P, following consultation with the agencies
- updating static global data as requested by OCA-P.

6. Information dataset

6.1 Mapping of old data structure to new structure

Below is a visual structure of the changes to the fields required to be completed from the old structure to the new structure.



6.2 Data disclosure fields

The following table provides data field names and short descriptions of the information provided for the contract disclosure dataset and how each field maps to Queensland Government Procurement's Procurement Key Data Sets (KDS) and the international, open standard Open Contracting Data Standard (OCDS).

Contract disclosure fields

Mandatory for contracts over $10k
Mandatory for contracts over $500 K
Mandatory for contracts over $10 M additional fields to complete
Optional

OCDS name	KDS	Contract disclosure field name	Description	Status	Type	Comment
		Agency	Name of agency	Mandatory	Text	
		Agency address	The address of the agency procuring the services	Mandatory	Text	For multiple addresses, separate each address using the semi-colon (;) character. For example: Address 1; Address 2; Address 3
Contracts/title	Contract name	Contract description/name	Short name for purpose of contract e.g. "Cleaning for Nambour customer service centre"	Mandatory	Text	
Contracts/date signed	Contract	Award contract date	Date contract was awarded to the supplier	Mandatory	Date	DD/MM/YYYY

OCDS name	KDS	Contract disclosure field name	Description	Status	Type	Comment
Contracts/value/amount	Executed contract value	Contract value	Dollar value of the contract at the time the contract is signed (executed)	Mandatory	Number	$Value of the contract
Parties additional identifiers/id	Not assessed	Supplier name	Registered business name (e.g. legal name as per the contract)	Mandatory	Text	
Parties/address	Not assessed	Supplier address	Street address of the office where the supplier is based	Mandatory	Text	For multiple addresses, separate each address using the semi-colon (;) character. For example: Address 1; Address 2; Address 3
		Variation to Contract	Identify if the item is a variation to the original contract	Mandatory	Drop down list	Yes/No
		Specific confidentiality provision used	A specific confidentiality provision has been included in the contract	Mandatory	Drop down list	Yes/No
Tender procurement method	Contract type	Procurement method		Additional fields only required for contracts over $500,000	Drop down list	As required. Refer to the list in section 8.5

OCDS name	KDS	Contract disclosure field name	Description	Status	Type	Comment
		Form of contract		Additional fields only required for contracts over $10 Million	Text	As required
		Number of offers		Additional fields only required for contracts over $10 Million	Text	As required
		Evaluation criteria and weightings		Additional fields only required for contracts over $10 Million	Text	As required
		Deliverables		Additional fields only required for contracts over $10 Million	Text	As required
		Contract milestones		Additional fields only required for contracts over $10 Million	Text	As required
		Contract performance management		Additional fields only required for contracts over $10 Million	Text	As required
Contracts/award ID	Tender number	Contract reference number	Agency's specific identifier/number which uniquely	Optional	Text	

OCDS name	KDS	Contract disclosure field name	Description	Status	Type	Comment
			identifies the contract within the agency e.g. TMR5516			
Contracts/items/classification/description	Contract group	Contract category group	Classification of the transaction into one of six (6) Qld government category groups	Optional	Drop down list	Refer to the list of contract category groups in section 8.4
Contracts	Contracts	Parent contract number/SOA	Parent contract number if one exists	Optional	Text	A list of additional / supplemental identifiers for the organisation or participant, using the organisation identifier guidance. This could be used to provide an internally used identifier for this organisation in addition to the primary legal entity identifier.
Contracts/period/start date	Planned commencement date	Commence date	Date supplier is expected to commence activity as stipulated in the contract	Optional	Date	DD/MM/YYYY
Parties/identifier/URI	Not assessed	Supplier ABN	If ABN or ACN is known	Optional	Text	
Contracts/period/end date	Planned finish date	Finish date	Date supplier expected to	Optional	Date	DD/MM/YYYY

OCDS name	KDS	Contract disclosure field name	Description	Status	Type	Comment
			complete activity as stipulated in the contract			

7. Process to prepare contract disclosure reports

Agencies are now responsible for managing their contract disclosure reporting and uploading to the open data portal. The following provides the steps required to prepare contract disclosure data:

- refer to the Contract disclosure guideline for details on requirements to prepare your report
- this contract disclosure CSV file must be used to complete your reporting and upload to the open data portal. The contract disclosure CSV file, with all fields identified in the template, must be **created each financial year** and appended see section 9.3 Data formatting requirements
- the contract disclosure CSV file must be refreshed in the open data portal monthly or as prescribed by the Contract disclosure guidelines. (Note: only one file is loaded to the open data portal and this file is refreshed periodically. Agencies must retain copies of all reporting within their local storage repositories)
- agencies must have a custodian with access to the open data portal to manage all uploads. Refer to 9.4 Open data portal publishing requirements for details
- agencies must retain copies of financial year disclosure reports for their records and be able to make them available if requested for audit and review.

8. Data field clarifications

This section provides further clarification about the type of information supplied for specific fields refer to the template for detailed instructions.

8.1 Data publisher name

Full name of the agency that published the dataset.

8.2 Agency address

The agency's physical address should be in the following format:

- unit/building number (if relevant)
- street number
- street name
- street Address
- suburb
- postcode
- state

8.3 Variation of contract

Identify if the item is a variation to the original contract

- Yes
- No

8.4 Category group

This refers to the Queensland Government Procurement six category groups as follows:

- Building Construction and Maintenance
- General Goods and Services
- Information and Communication Technology
- Medical
- Social Services
- Transport Infrastructure and Services.

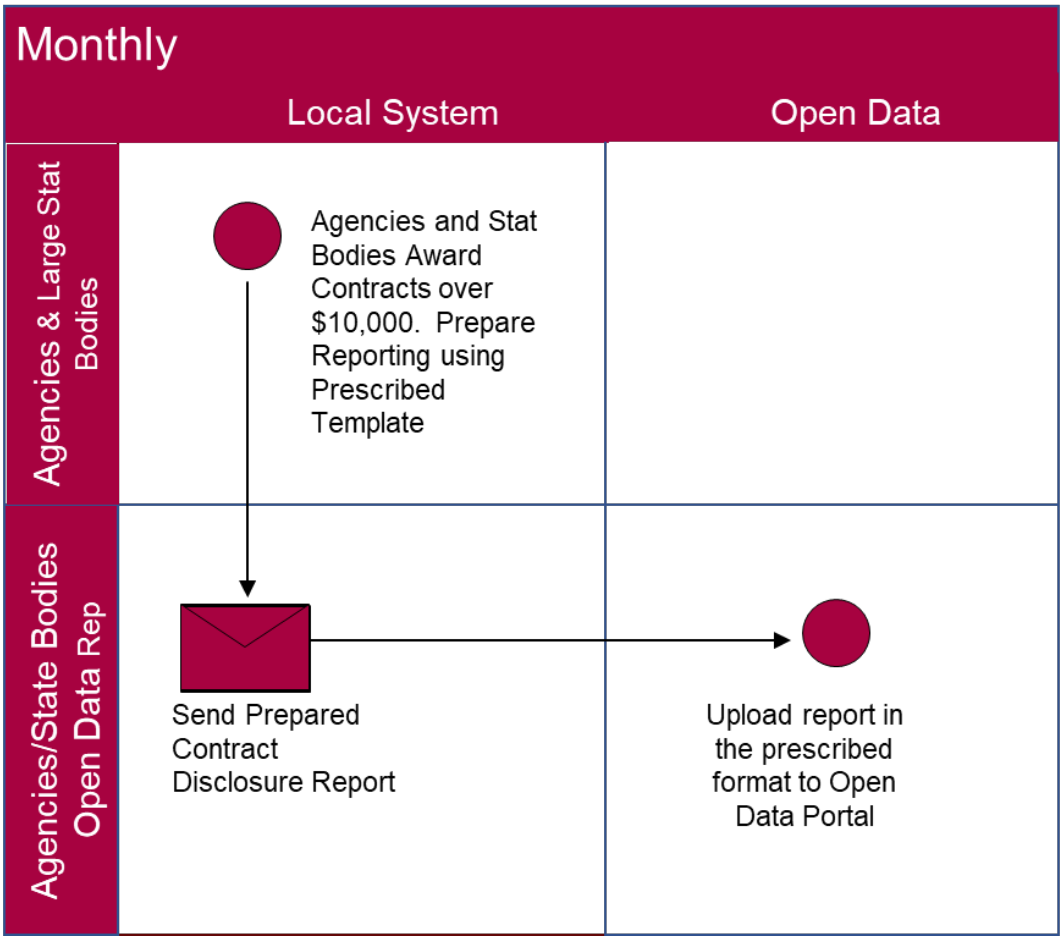
8.5 Procurement method

Procurement method that was used to result in a contract:

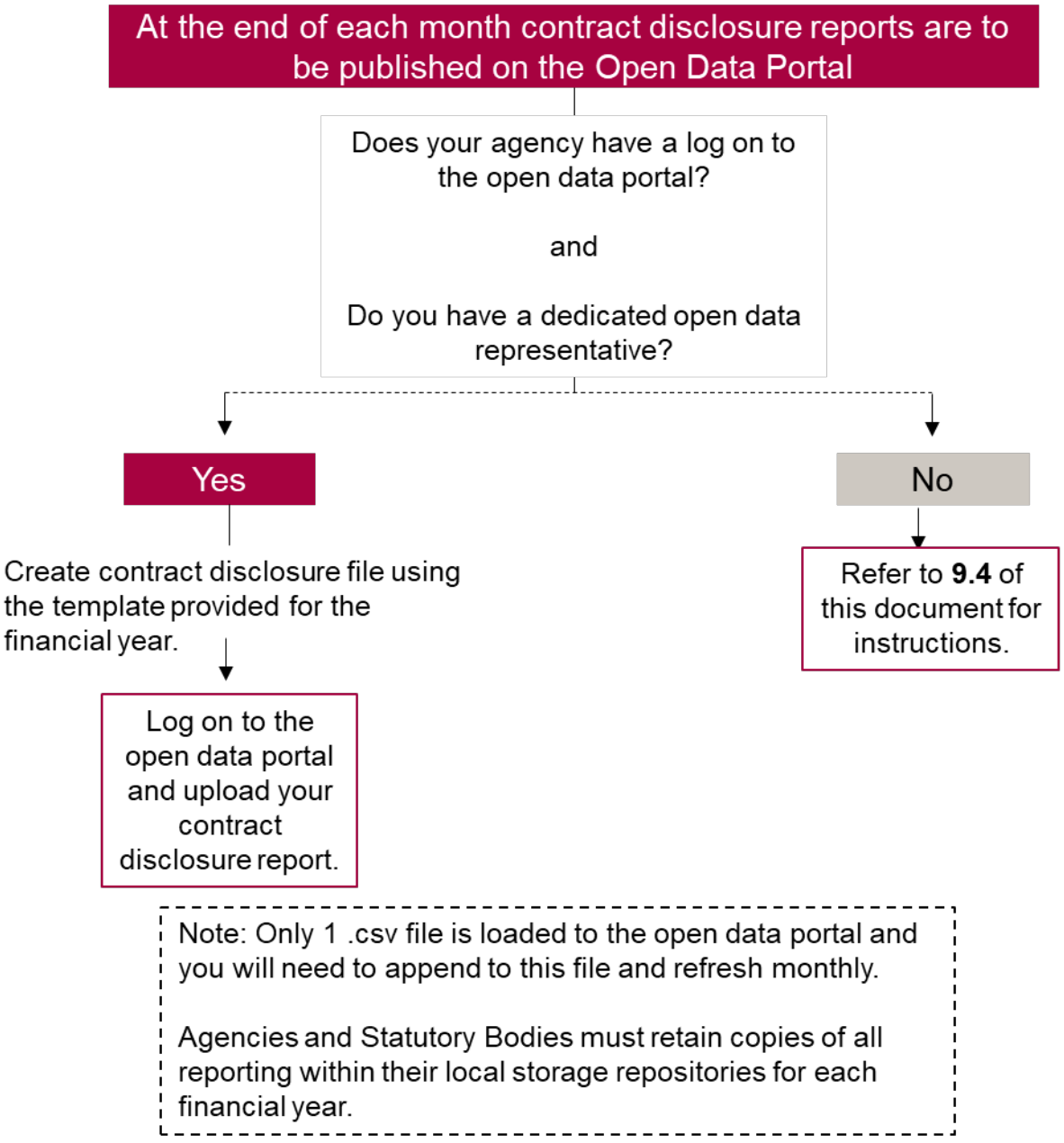
- open
- select
- limited

9. Data update process and tools

9.1 New contract disclosure process



9.2 New detailed contract disclosure publishing process



9.3 Data formatting requirements

There should only be one dataset created for contract disclosure reporting for their agency. Each financial year, a new resource (csv file) must be created and this file should be updated monthly with the appropriate data. DO NOT CREATE a new dataset or resource (CSV file) for each month.

Download and use as the basis for your contract disclosure reporting, the contract disclosure reporting template located here: http://hpw.qld.gov.au/SiteCollectionDocuments/ContractDisclosureTemplate.xlsx This is provided in the .xlsx format to allow the inclusion of instructions and the use of Yes/No drop-down cells. **Prior to publishing, however, this file must be saved in the Comma Separated Values (CSV) format.**

To create a CSV using Microsoft Excel:

- Ensure the Contract Disclosure Template sheet is active (displayed)
- In the top menu bar, Select **File**
- Select **Save As**
- Choose or create an appropriate destination location for the file
- Name your file in accordance with the naming convention specified in the 'Technical Specifications' table below
- In the dropdown box featuring 'Excel Workbook (*.xlsx)', change this to 'CSV (Comma delimited) (*.csv)' as the format
- Click the **Save** button
- If a dialog box appears warning that CSVs do not support multiple sheets, click **OK** (only the active sheet will be saved as a csv file can only contain one sheet.)

Technical Specifications

#	Category	Requirements	Comments
1	Resource (data file) naming convention	[Agency_Name]_Contract disclosure report_20**-**	One csv resource is created under the agency/stat body's contract disclosure dataset for each financial year. The csv file has the relevant financial year appended to the name. This differentiates the resource when further year's resources are added to the dataset
2	Data file size limit	200MB per file	File size cannot exceed 200MB per financial year.
3	Resource (data file) write mode	Add all records to the same table (sheet) until the end of the financial year	There must only one contract disclosure resource/file per financial year created using the prescribed file naming convention. Through-out the financial year, the file will be updated with new information.

When compiling this data, the following requirements must also be met:

- **Do not change the header row in the Contract Disclosure Template**
- Avoid using commas within cells. Where it is necessary to include a comma, start and end the cell with double quotes e.g. "DPHW, TMR"

Some applications used to open CSV files will read the comma as a delimiter, creating another column within that row and making the data very difficult to use.

- Do not use commas within a number (e.g. 10,000)
- Use the correct date format, DD/MM/YYYY
- Do not use the % symbol in cells
- Use whole numbers only, not fractions or decimals
- Adhere to the QGov online resource formatting requirements available via the open data publishing standards site - https://www.publications.qld.gov.au/dataset/publishing-standards-data-qld-gov-au

9.4 Open data portal publishing requirements

Affected entities must publish contract disclosure reports to the open data portal, accessible through this link: https://www.data.qld.gov.au/.

In order to publish contract disclosure reporting to the open data portal, users must possess a publisher account. This is obtained through the completion of the online publishing account request form: https://www.forgov.qld.gov.au/request-publishing-access-data-and-publications-portals

For detailed instructions on creating datasets, entering data and updating data in the open data portal, please refer to the publishing guide: https://www.publications.qld.gov.au/dataset/publishing-standards-data-qld-gov-au/resource/dec19332-69cc-4bee-9364-53c386a6cc83

For further information on open data standards and formatting guides, please refer to the publishing standards: https://www.publications.qld.gov.au/dataset/publishing-standards-data-qld-gov-au

Refer to 9.3 Data Formatting requirements of this document to ensure the data file has been formatted appropriately before publishing to the open data portal**.**

The below tables should be read in conjunction with the publishing guide. Once at the stage of creating a dataset, refer to these tables to ensure the metadata fields are completed correctly for contract disclosure reporting. An example of the completed fields is provided in the Open Data Metadata Form Contract Disclosure Example

'Create Dataset' field guidance (How to complete the fields when publishing a dataset)

#	Category	Requirements	Comments
1	Title	[Agency Name] Contract disclosure report	The dataset title is added when publishing to the open data portal and this remains as entered. A URL is automatically created based on this title, replacing spaces with underscores. This dataset will be the container for all year's contract disclosure reports for the agency
2	Description	[Agency name] contract disclosure reporting for all awarded contracts over $10,000	This is a description of the dataset, relevant to the nature of your agency's contract disclosure.
3	Tags	Contract disclosure	Assists with discovery of contract disclosure data.

#	Category	Requirements	Comments
4	Licence	Creative Commons Attribution 4.0	Follow this link for more information: https://creativecommons.org/choose/
5	Organisation	Agency	All departments, but only selected agencies and statutory bodies, are listed as organisations. Select your organisation or that which is aligned with your agency or statutory body.
6	Organisation	Agency	All departments, but only selected agencies and statutory bodies, are listed as organisations. Select your organisation or that which is aligned with your agency or statutory body.
7	Visibility	Public	Where there is a desire to internally review the published dataset and resources prior to them being publicly visible, 'Private' can be selected for this field and later edited to make it 'Public'.
8	Source		Leave this field blank. No action is required here.
9	Version	1.0	Enter '1.0' in this field unless changes have been made to the title or description. Minor changes – +0.1, major changes - +1 to the version number.
10	Email	agency contact email address	Add the group email for the agency team responsible for publishing the contract disclosure reports
11	Security Classification	PUBLIC	The files published should have a security classification of 'PUBLIC'.
12	Used in data driven application	NO	Leave this on the default setting of "NO"
13	Update frequency	As per QGP contract disclosure guideline	Change this field reflect the appropriate period of update frequency for the data.

‘Add data’ field guidance (How to complete the fields when publishing a resource)

#	Category	Requirements	Comments
14	Name	[Agency Name] Contract disclosure report 20**-**	This is the resource title displayed on the web page and will have the same structure as the related csv resource filename. The csv file has the relevant financial year appended to the name.
15	Format	Comma Separated Values (CSV)	**Do NOT publish in Excel formats (,xls or .xlsx)**
#	Category	Requirements	Comments
16	Description	[Agency name] contract disclosure reporting for all awarded contracts over $10,000 for financial year 20**-**	A description of the data, relevant to the nature of your agency’s contract disclosure. Do not use the financial year here as this dataset will be the container for all current and future year’ contract disclosure reporting.
17	Size	N/A if the file was ‘Upload’-ed.	Do not ‘Link’ to a file hosted elsewhere.
18	Data Schema	N/A	No action required here
19	Validation options	N/A	No action required here

Once the dataset has been successfully added to the open data portal, it must be added to a ‘Group’. Follow the process as outlined in the publishing guide.

#	Category	Requirements	Comments
1	Group	Government	Nominating a Group makes the dataset more discoverable for users looking for data within particular areas of interest.

9.5 Reference material and contacts

- Contract Disclosure Data publishing template:
  - For the data template, please visit the following website:

    http://hpw.qld.gov.au/SiteCollectionDocuments/ContractDisclosureTemplate.xlsx

- Where can I find more information about the contract disclosure requirements and open data?
  - For more information about the policy requirements, please visit the following website:

    https://www.forgov.qld.gov.au/procurement-policy
  - For more information about contract disclosure please refer to the procurement guidelines:

    https://www.hpw.qld.gov.au/SiteCollectionDocuments/ProcurementGuideContractDisclosure.pdf
  - For more information about open data please visit the following website:

    https://www.data.qld.gov.au/article/standards-and-guidance/faq

- Where can I get help?
  - For policy requirements and contract disclosure related enquiries please email:

    betterprocurement@hpw.qld.gov.au
  - For open data related enquiries please email:

    opendata@qld.gov.au