

Open data portal publishing user manual for contract disclosure

Queensland Government Procurement



Open data portal publishing manual for contract disclosure
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Queensland Government Procurement is committed to continuous improvement. If you have any suggestions about how we can improve this guide, or if you have any questions, contact us at betterprocurement@epw.qld.gov.au.

Disclaimer

This document is intended as a guide only for the internal use and benefit of government agencies. It may not be relied on by any other party. It should be read in conjunction with the Queensland Procurement Policy, your agency's procurement policies and procedures, and any other relevant documents.

The Department of Energy and Climate disclaims all liability that may arise from the use of this document. This guide should not be used as a substitute for obtaining appropriate probity and legal advice as may be required. In preparing this document, reasonable efforts have been made to use accurate and current information. It should be noted that information may have changed since the publication of this document. Where errors or inaccuracies are brought to attention a reasonable effort will be made to correct them.

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1 Terms and definitions

Abbreviations	Descriptions
Agency/Agencies	For the purpose of this guide means budget sector agencies, departments, large statutory bodies and special purpose vehicles
Construction Services	<p>The definition of 'construction services' for the purposes of contract disclosure is aligned to the Commonwealth Procurement Rules (Section 9.7)</p> <p>Construction services – procurements related to the construction of buildings and procurements of works as defined by the Public Works Committee Act 1969 (Cth) and State Development and Public Works Organisation Act 1971 (Qld).</p>
CPTPP	Comprehensive and Progressive Agreement for Trans-Pacific Partnership
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
FTA	Free-Trade Agreements are international treaties between Australia and one or multiple economies with the objective to reduce and eliminate barriers to international trade and investment.
ICT	Information and Communications Technology
KDS	Key Data Set
Limited	<p>This is a procurement method where the agency invites a supplier/s of its choice to offer.</p> <p>Limited tenders usually only occur in very specific circumstances, such as under states of emergency or if goods and services can only genuinely be provided by one supplier (e.g. where a supplier holds exclusive rights/patents for an essential good). Other terms sometimes used to refer to a 'limited offer method' include sole supply, sole source, single sourcing, and direct supply.</p> <p>For clarity, a 'limited offer method' <i>does not necessarily</i> include directly approaching a supplier from an arrangement already established (see Section 1.5 of the Procurement Guidelines: Contract Disclosure).</p>
OCDS	<p>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.</p> <p>It was created to support organisations to increase contracting transparency and allow deeper analysis of contracting data by a wide range of users.</p> <p>The Open Contracting Data Standard is a core product of the Open Contracting Partnership (OCP).</p> <p>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-</p>

	<p>operative under contract to OCP.</p> <p>More information can be found here: http://standard.open-contracting.org/latest/en/</p>
Open	<p>This is a procurement method where all interested suppliers may submit an offer.</p> <p>For example, an open tender is an 'open offer method'. In addition, common-use supply arrangements as defined in the QPP, including standing offer arrangements and panels, will usually be established via an open tender (where any interested supplier may submit an offer to be on the arrangement/panel).</p>
QGP	Queensland Government Procurement
QPP	Queensland Procurement Policy
Selective	<p>This is a procurement method where suppliers that have met pre-established criteria are invited to offer.</p> <p>For example, suppliers may be required to hold a certain qualification, accreditation, certification or licence that is relevant to the good/service being procured. Arrangements that may be 'selective' include:</p> <ul style="list-style-type: none"> ○ pre-registration processes/systems ○ Pre-Qualification System (PQC)

2 Background

Clause 31 of the [Queensland Procurement Policy](#) (QPP) requires budget sector agencies, large statutory bodies and special purpose vehicles (agencies) to publish certain information about awarded contracts valued at \$10,000 and over¹.

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 and the guide [Use and disclosure of confidentiality provisions in government contracts](#).

3 Purpose of this publication

The purpose of this user manual is to assist agencies to disclose details of the awarded contracts as required by clause 31 of the QPP 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 valued at \$10,000 and over in accordance with the QPP and data specifications

¹ All dollar values referred to in this guideline are inclusive of GST.

- guidance to disclose limited procurement method contracts
- specific technical requirements to upload the data file to open data portal.

4 Scope

4.1 Included

- Detailed information on publishing requirements 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 [Procurement Guidelines: Contract Disclosure](#) (the Guidelines).
- 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 **Appendix A, Publishing to the open data portal**.

5 Roles and responsibilities

5.1 QGP responsibilities

QGP is responsible for custodianship and management of the QPP and the Guidelines, specifically:

- coordinating the identification and implementation of updates to the QPP, the Guidelines and publishing user manual
- 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, validate and cleanse the data to meet specific publishing requirements and publish their contract disclosure updates in line with the QPP and the 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 the 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 QGP, following consultation with the agencies
- updating static global data as requested by QGP.

6 Information dataset

6.1 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 Procurement Key Data Sets (KDS) and the international, open standard Open Contracting Data Standard (OCDS).

Contract disclosure fields

Legend						
Mandatory for contracts over \$10,000						
Mandatory for contracts over \$500,000 additional field to complete						
Mandatory for goods and services contracts over \$500,000 and construction contracts over \$8.5 million additional field to comply with FTA obligations						
Mandatory for contracts over \$10 million additional fields to complete						
Optional fields recommended for comprehensive recordkeeping						
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	Mandatory	Text	

OCDS name	KDS	Contract disclosure field name	Description	Status	Type	Comment
			Nambour customer service centre"			
Contracts/date signed	Contract	Award contract date	Date contract was awarded to the supplier	Mandatory	Date	DD/MM/YYYY
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	REQUIRED Yes/No

OCDS name	KDS	Contract disclosure field name	Description	Status	Type	Comment
		Specific confidentiality provision used	A specific confidentiality provision has been included in the contract	Mandatory	Drop down list	REQUIRED Yes/No
Tender procurement method	Contract type	Procurement method		Additional fields only required for contracts over \$500,000	Drop down list	REQUIRED Refer to the list in section 8.5 Can only be - Open, selective or limited
		Reason for use of limited tendering	Providing an FTA compliant reason for use of a limited procurement method of tendering	Additional field only for contracts: - Goods and services valued >\$500,000 - Construction services valued >\$8.5 million	Drop down list	REQUIRED Refer to the list in section 8.6
		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

OCDS name	KDS	Contract disclosure field name	Description	Status	Type	Comment
		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 identifies the contract within the agency e.g. TMR5516	Optional	Text	
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

OCDS name	KDS	Contract disclosure field name	Description	Status	Type	Comment
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 complete activity as stipulated in the contract	Optional	Date	DD/MM/YYYY

7 Process to prepare contract disclosure reports

Agencies are 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:

1. Refer to the [Procurement Guidelines: Contract Disclosure](#) for details on requirements to create your CSV file.
2. Each financial year, create your **financial year file** in accordance with [9.2 New detailed contract disclosure publishing process](#) and [9.3 Specific technical requirements](#).
3. This file is updated (appended to) monthly, as specified in the contract disclosure guideline, and refreshed on the Open Data Portal.
4. At the end of each financial year the last period is reported, and the file is closed off and retained on the Open Data Portal.
5. As each new financial year starts a new file is created and the process repeats.

Agencies must have a custodian with access to the open data portal to manage all uploads. Refer to **Section 10** 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.

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 for all contracts valued at \$500,000 and above, restricted to the following definitions:

- Open
- Selective
- Limited

8.6 Reason for use of limited tendering

Rationale for use of a limited procurement method for tendering as required to meet FTA obligations, as extracted directly from [Chapter 15.10 Section 2](#) of the CPTPP.

A procuring entity may use limited tendering only under the following circumstances:

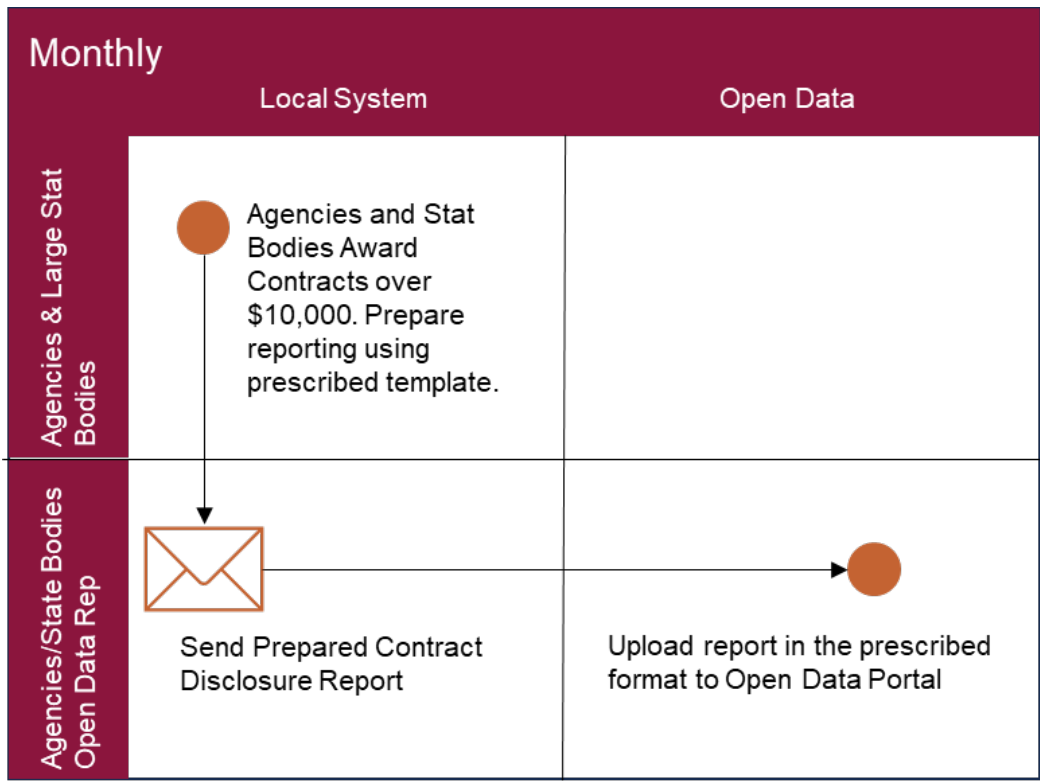
- a) *if, in response to a prior notice, invitation to participate or invitation to tender:*
 - (i) *no tenders were submitted or no suppliers requested participation;*
 - (ii) *no tenders were submitted that conform to the essential requirements in the tender documentation;*
 - (iii) *no suppliers satisfied the conditions for participation; or*
 - (iv) *the tenders submitted were collusive,*

provided that the procuring entity does not substantially modify the essential requirements set out in the notices or tender documentation;
- b) *if the good or service can be supplied only by a particular supplier and no reasonable alternative or substitute good or service exists for any of the following reasons:*
 - (i) *the requirement is for a work of art;*
 - (ii) *the protection of patents, copyrights or other exclusive rights; or*
 - (iii) *due to an absence of competition for technical reasons;*
- c) *for additional deliveries by the original supplier or its authorised agents, of goods or services that were not included in the initial procurement if a change of supplier for such additional goods or services:*
 - (i) *cannot be made for technical reasons such as requirements of interchangeability or interoperability with existing equipment, software, services or installations procured under the initial procurement, or due to conditions under original supplier warranties; and*
 - (ii) *would cause significant inconvenience or substantial duplication of costs for the procuring entity;*
- d) *for a good purchased on a commodity market or exchange;*
- e) *if a procuring entity procures a prototype or a first good or service that is intended for limited trial or that is developed at its request in the course of, and for, a particular contract for research, experiment, study or original development. Original development of a prototype or a first good or service may include limited production or supply in order to incorporate the results of field testing and to demonstrate that the prototype or the first good or service is suitable for production or supply in quantity to acceptable quality standards, but does not include quantity production or supply to establish commercial viability or to recover research and development costs. Subsequent procurements of these newly developed goods or services, however, shall be subject to this Chapter;*
- f) *if additional construction services that were not included in the initial contract but that were within the objectives of the original tender documentation have, due to unforeseeable circumstances, become necessary to complete the construction services described therein. However, the total value of contracts awarded for additional construction services may not exceed 50 per cent of the value of the initial contract;*
- g) *for purchases made under exceptionally advantageous conditions that only arise in the very short term, such as from unusual disposals, liquidation, bankruptcy or receivership, but not for routine purchases from regular suppliers;*
- h) *if a contract is awarded to the winner of a design contest, provided that:*
 - (i) *the contest has been organised in a manner that is consistent with this Chapter; and*
 - (ii) *the contest is judged by an independent jury with a view to award a design contract to the winner; or*

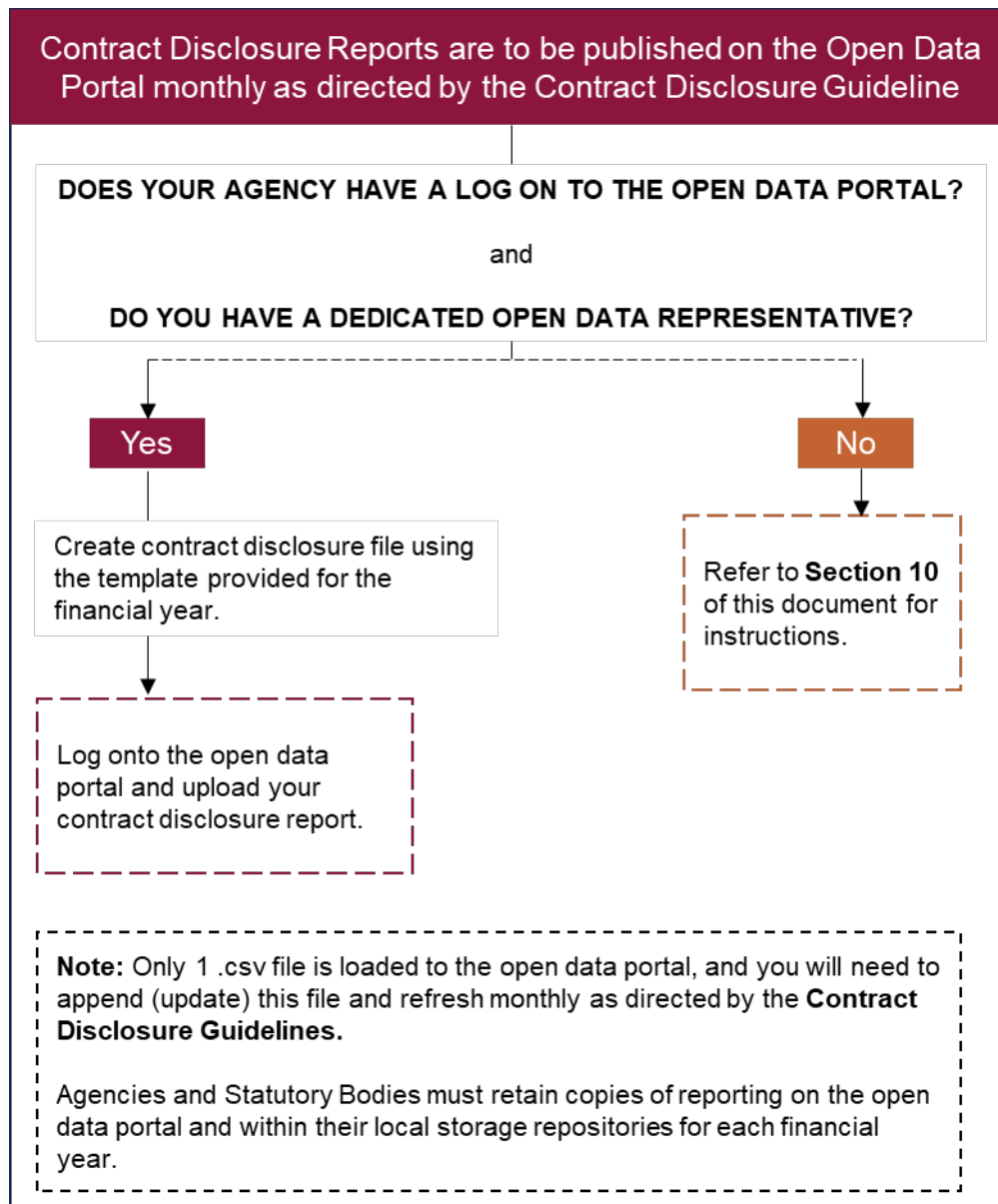
in so far as is strictly necessary if, for reasons of extreme urgency brought about by events unforeseeable by the procuring entity, the good or service could not be obtained in time by means of open or selective tendering.

9 Data update process and tools

9.1 New contract disclosure process



9.2 New detailed contract disclosure publishing process



9.3 Specific technical requirements

#	Category	Requirements	Comments
1	Data file format	Comma separated values (CSV)	Please ensure that all data fields are enclosed with double quotes before each comma separator e.g. "Agency 1", "Delivery address 1", "CONS111"
2	Data file size limit	200MB per file	File size cannot exceed 200MB per financial year.
3	Data file naming convention	Financial Year_Agency Name_Contract disclosure report	Financial Year_Agency name_Contract disclosure report
4	Dataset write mode	Append to file until end of financial year	There must only one contract disclosure file per financial year which will be created each new financial year using the prescribed file naming convention. Through-out the financial year the file will be updated or added with new information.
5	Data upload frequency	As per QGP contract disclosure guideline	
6	Open data tag/group	Contract disclosure	Data file must be uploaded using this data tag/group to ensure that it can be easily searched and grouped on open data portal
7	Dataset custodian	Agency	
8	Information classification	Public	

9.4 Formatting

The following formatting requirements must be met when compiling this data:

- minimise the use of capital letters
- use the correct date number format in the cell, DD/MM/YYYY (ensure your locale/location is set to English (Australia))
- do not use the % symbol in cells
- do not use commas in numeric cells (e.g. 1000000 not 1,000,000 or 1 000 000.00)
- use whole numbers only, not fractions or decimals
- do not change the heading row in the template
- remove hidden white spaces from the rows of files:
 - select the first empty new row by clicking on the row number
 - press ctrl+shift+down arrow - this will select everything after your last row with data
 - press delete - this will clear any hidden whitespaces
- remove hidden white spaces from the columns of files:
 - select the first empty new column by clicking on the column letter
 - press ctrl+shift+right arrow - this will select everything after your last column with data
 - press delete - this will clear any hidden whitespaces

- adhere to the QGov online resource formatting requirements available via the open data publishing standards site - <https://publications.qld.gov.au/dataset/publishing-standards-data-qld-gov-au>.

9.5 Reference material and contacts

- Contract disclosure data publishing template:
 - For data template please visit the following website:
https://www.forgov.qld.gov.au/data/assets/excel_doc/0033/513699/contract-disclosure-template.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 visit the following website:
<https://www.forgov.qld.gov.au/procurement-guides>
 - For more information about open data please visit the following website:
<https://www.data.qld.gov.au/article/standards-and-guidance/publishing-guides-standards/open-data-portal-publishing-guide>
<https://www.data.qld.gov.au/article/standards-and-guidance/strategies>
- Where can I get help?
 - For policy requirements and contract disclosure related enquiries please email:
betterprocurement@hpw.qld.gov.au
 - For open data related questions please use the contact form:
<https://data.qld.gov.au/article/contact>.

10 Publishing to the open data portal

The following details and links provide instruction on how affected entities can publish contract disclosure reports to the open data portal on both the staging and production sites. Users must be authorised to publish to the open data portal.

Remember that all white space must be removed, certain symbols such as percent signs and commas in number columns are not permitted, and there is only **one** .csv file involved: **Agency/stat body name_Contract disclosure report**.

Please note, that on open data, the dataset will still be called **Agency/stat body name_Contract disclosure report**.

Following are the links to the open data portals and how to obtain your username and password.

Data portal:

Training site: <https://staging.data.qld.gov.au/user/login>

Live site: <http://data.qld.gov.au/user/login>.

Publications portal:

Training site: <https://staging.publications.qld.gov.au/user/login>

Live site: <http://publications.qld.gov.au/user/login>.

If you do not have a username or password, contact the Online Products Team.
(onlineproducts@smartservice.qld.gov.au).

For detailed instructions on entering data into the open data portal, please refer to the [process guide](#).

For further information on open data standards and formatting guides visit [publishing standards](#).