

Delivery Partner Portal user guide

March 2023



Introduction

Welcome! I am pleased to share this user guide which is designed to provide you with clear, comprehensive instructions for using Hort Innovation's Delivery Partner Portal.

Representing a significant step forward, the Portal will become your 'go-to' platform for managing key aspects of projects and investments in partnership with Hort Innovation. It integrates seamlessly with the investment management portal used by our internal team, known as 'Hive'.

Importantly, the Portal delivers a number of benefits in simplifying and streamlining project management, removing the need for manual processes and providing a centralised, real-time view on the status of contracts and projects. The Delivery Partner Portal forms part of Hort Innovation's focus on continuous improvement under pillar 3 of our organisational strategy, along with the enhancement of processes, templates and documents that underpin the way we work with our delivery partners.

We are committed to ensuring a smooth transition to using the Portal, and support is also available beyond this user guide through our team members or by email to portal.support@horticulture.com.au

Thank you for your partnership with Hort Innovation. We look forward to continuing to work with you to drive shared success for the benefit of Australia's horticulture industry.

Regards,

Brett Fifield
Chief Executive Officer

Share your thoughts

We strive to provide the best experience possible for our delivery partners. Please share your feedback on how we can improve this document for you and other delivery partners in the future by email at communications@horticulture.com.au

Thanks for your feedback and time.

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Overview

The Hort Innovation Delivery Partner Portal is a secure online platform where delivery partners can manage key aspects of their agreements with Hort Innovation.

Benefits

The Delivery Partner Portal (the Portal) is a new centralised technology platform to manage projects and milestone reporting with Hort Innovation projects. It replaces many manual processes for milestone submissions, project variations, contract changes and reporting.

The Portal provides a number of excellent benefits including centralised, streamlined processes, and greater visibility of the status of investments and projects through a dynamic dashboard leveraging a document coediting interface directly with Hort Innovation.

Key functionality

There are a number of actions you can take using the Portal:

Contracts and milestones

- View contracts and milestones
- Review a specific milestone and the achievement criteria details
- Submit milestone reports
- Collaborate with Hort Innovation project owners on changes to milestone reports
- View payment status of milestones
- View project status
- Download approved milestone reports

Contract variations

- Lodge an intent to vary on a contract and view the status
- Submit variations and view the status of variation
- Collaborate with Hort Innovation project owners on changes to variations
- View updated contracts

Organisational change requests

- Request changes to your business entity
- Update your business information

Access to resources and templates

Project resources are referenced in the project's commercial agreement with Hort Innovation and are necessary for undertaking a project successfully. Various resources and templates developed by Hort Innovation are available. These include guides and templates for milestones and final reports; project M&E templates and resources; and talent release forms.

The Portal provides a link to these resources. You can also access them directly on the Hort Innovation website [here](#).

Register

Accessing the Portal for the first time requires a sign-up process **by invitation only**. Hort Innovation will invite you to register for the Portal via a dedicated email. **Only Project Leaders and Project Administrators (Contract Administrators) have access to the Portal by invitation, limited to maximum of 3 Project contacts per Contract. 1 x Project Leader and 2 x Contract Administrators.**

Microsoft account and Hort Innovation Portal

The Portal leverages Microsoft technology. As with other Microsoft tools and services, this requires users to have a Microsoft account to use these applications.

Overview of registration process

Registration process (one-off)
Create a Microsoft account (if one is not available). Connect permissions with Hort Innovation Delivery Partner Portal
Start sign-up to Hort Innovation Portal
Complete Hort / Multifactor Authentication form selecting the way you would like to authenticate in the future
Accept terms and conditions

Creating a Microsoft account

Click on the **'REGISTER NOW'** link that is in the invitation email you received from Hort Innovation. The system will recognise that **you don't have a Microsoft account** and ask you to create one.

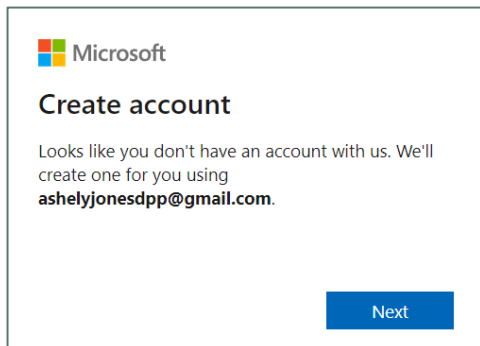
This account is free and easy to set up.

Follow the steps below to set up your Microsoft account.

Step 1

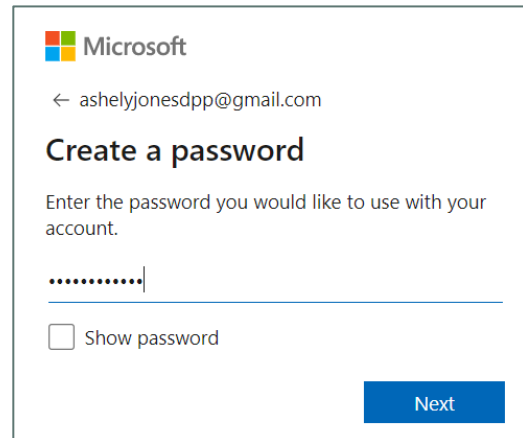
Once you have **clicked on 'Register Now'** in the Hort Innovation email you will be taken to the page below. This is the first step in creating a Microsoft account.

📄 **Click 'Next'.**



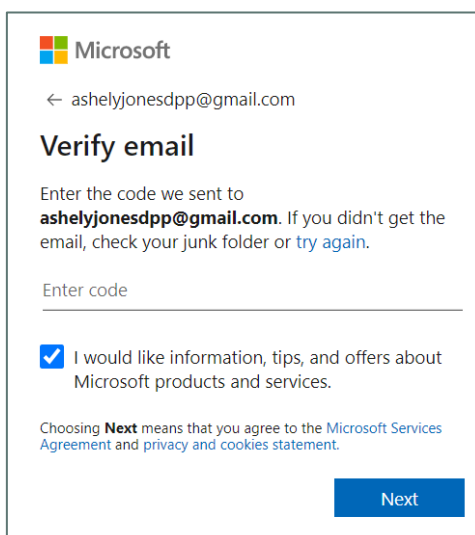
Step 2

📄 **Enter a password.** This will be the password for the portal login.



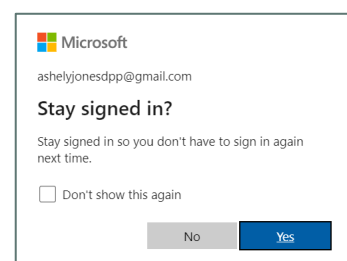
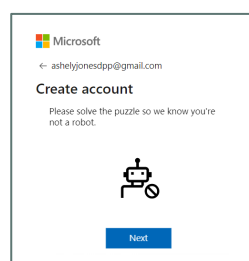
Step 3

📄 **Enter verification code that was sent to your registered email.** This is a four-digit code.



Step 4

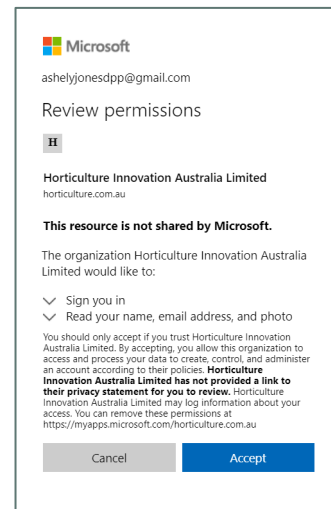
📄 **Complete additional authentication required by Microsoft.** Decide if you stay signed in. If you say 'YES' every time you access the Portal you will not have to log into your Microsoft account again.



Step 5

Finally, click **'Accept'** to consent to use MS credentials with Hort Innovation Delivery Partner Portal.

Once the account is created, you will be taken to the **Hort Innovation Sign up page**. Continue with the account registration as detailed below.

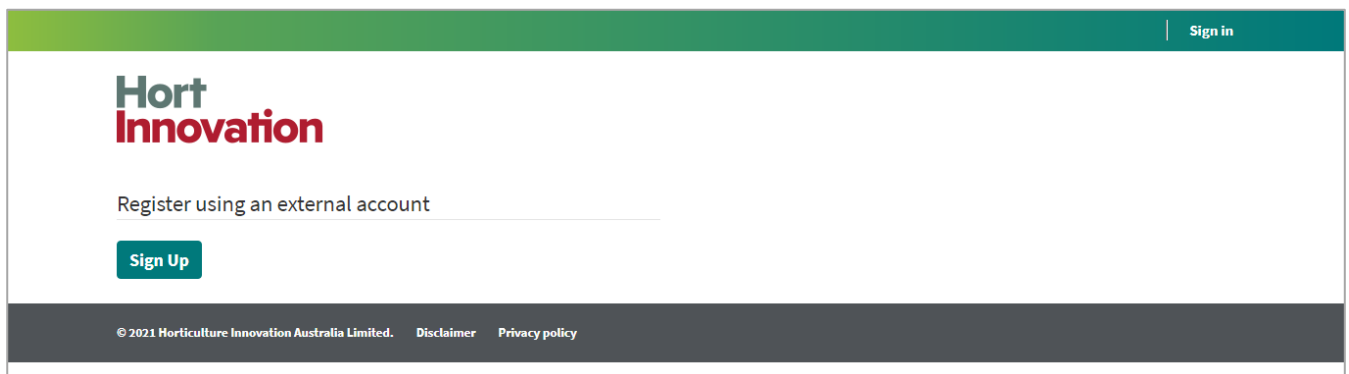


Hort Innovation Portal Sign Up

Click on the **'REGISTER NOW'** link that is in the invitation email you received from Hort Innovation. The system will recognise that **you have a Microsoft account** and ask you to sign you in.

Click **'Accept'** in the Review permissions screen that will appear to consent to use MS credentials with Hort Innovation Delivery Partner Portal.

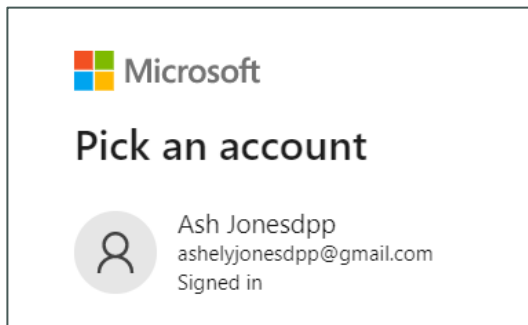
You will be taken to the Hort Innovation Sign Up page – **Click 'Sign up'**.



Follow the steps below to complete the Hort Innovation / Multifactor Authentication process and finalise sign-up.

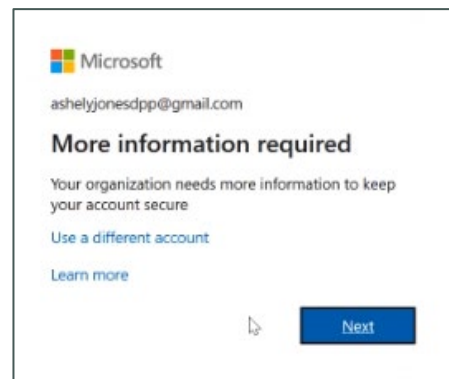
Step 1

Select your Microsoft account.



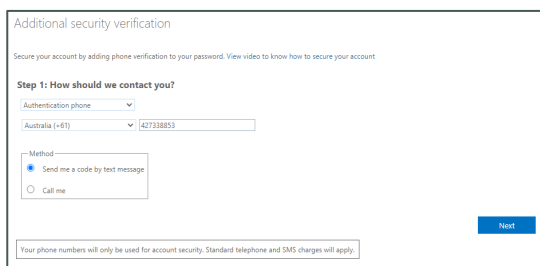
Step 2

Click 'Next' to initiate the Hort Innovation multifactor authentication. This is used to ensure all information on the Portal is secure.



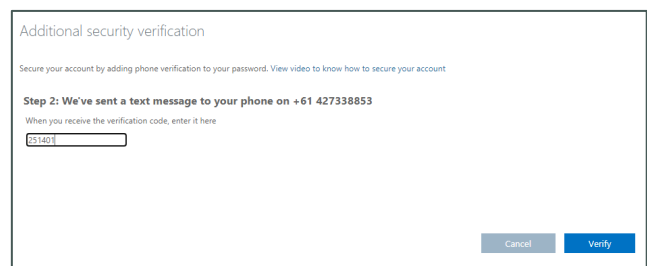
Step 3

Enter your phone number and select authentication method. Click 'Next'.



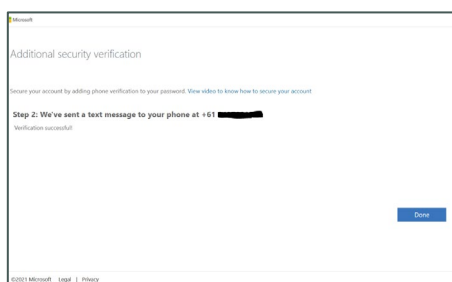
Step 4

Enter the code sent to your mobile number and click 'Verify'.



Step 5

Once your verification is successful, click 'Done'. You will be taken to the Hort Innovation Portal Terms and Conditions page.



Step 6

Accept the terms and conditions. You will now be on the Portal HOME page and the registration process is complete.



Registration/Login for users with multiple email accounts

Microsoft automatically picks up the login credentials of the profile you use on a regular basis. If the email address that you have received your invitation to register to the Delivery Partner portal is different from your official email then:

1. Use a different browser when working with the Portal, and in this way keep the email accounts separately (OR)
2. If you are using Chrome as your default browser, you can create a new browser profile for your DPP registration and sign in from there.

Once you are in another browser or using a different browser profile, then:

1. Copy the URL from the 'Register Now' hyperlink in the Hort invitation email.
2. Paste the URL in the new browser and progress with the registration (see pages 8 and 9 of this guide).
3. For subsequent sign ins, remember to access the portal via the new browser or browser profile.

Creating a new user profile in Chrome

1. Open the Chrome browser.
2. In the top right corner of the browser, click on the image icon for the user profile.
3. In the Pop-up screen that opens, under 'Other Profiles' section, click on '+Add'.
4. Another popup will open and click on 'Sign In'.
5. Enter the Sign-in credentials of the email address that is invited for the delivery partner portal.
6. Your new profile is created and ready for use; Select this browser profile for subsequent sign-in to the delivery partner portal.

Sign in (post registration)

Once registered, when you return to the Portal, you will only have to **sign in**. In order to sign in, you need to be signed into your Microsoft account. If you are not, the system will require you do this first.

Open Hort Innovation Portal URL (<https://hort.powerappsportals.com>).

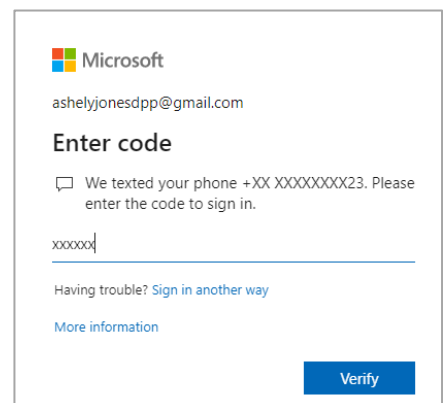
Sign in

1. Enter email address that was registered in the Portal. **Click 'Next'**.
2. Enter password. **Click 'Sign in'**.
3. Enter the code sent to your mobile. **Click 'Verify'**.

You should now have access to the Portal.

Need more help?

If you have any problems registering or signing up, or have a query that is technical or relates to using the Portal please contact the Portal support desk by email at portal.support@horticulture.com.au



Portal tabs and pages

Home page

When you sign up for the first time, you will be presented with the Portal home page.

Here you can find a link to this user guide for future reference and also link to additional resources and templates to assist you in your project submissions.

You can also access your Dashboard by clicking the teal-colour **'View Dashboard'** button on the right side of your screen.

Hort Innovation

Hort Innovation

Delivery Partner Portal

Welcome

Access Hort Innovation's Delivery Partner Portal, the one-stop-shop to manage your projects [View Dashboard](#)

What is the portal?

The new Hort Innovation Delivery Partner Portal is a secure online platform where delivery partners can manage all aspects of their agreements with Hort Innovation. This includes:

- Submitting milestones and final reports
- Requesting project variations
- Delivering end-of-project outputs.

Using the portal

The portal is intuitive and easy to use. To assist users, a User Guide is available with detailed instructions on how to use the portal, with some handy tips that will assist new users.

[View the Delivery Partner Portal User Guide](#)

Providing a better experience

The portal provides a simple, streamlined experience for delivery partners to meet the requirements of undertaking a successful project with Hort Innovation. The portal provides greater visibility and real-time tracking on the project status for both parties.

The ability to submit documents and requests via the portal will lead to more efficient project management, and this will contribute to successful project delivery and better results for the horticulture sector.

Access resources

Various resources and templates developed by Hort Innovation are available for delivery partners to assist in successful project management. This includes:

- Guides and templates for milestones and final reports
- Project M&E templates and resources
- Talent release forms.

Access these documents on the [project resources page of the Hort Innovation website here](#)

Feedback

We value your feedback at: portal.support@horticulture.com.au

Help and support

All of the information you will need to use the platform successfully can be found in the [Delivery Partner Portal user guide](#).

If you would like any further help or support, you can reach out to:

- Your usual contact at Hort Innovation if you need advice about requirements for project management or milestone reporting
- The portal support desk by email at portal.support@horticulture.com.au if your query is technical or relates to using the portal.

Tab: Dashboard

Once you return to the Portal you will be taken straight to your **'Dashboard'** page.

This page will be your landing page upon sign in and go-to page to see a summary of items that require your attention.

This includes items such as:

1. Number of executed contracts
2. Overdue milestones (MS101-MS190[Final Report])
3. Upcoming milestones due in next 30 days and milestone that need re-submission
4. Intent to vary contract (Accepted by HORT) that requires formal variation submission
5. Contract variations action items (Draft and Resubmission requests)
6. Contract Change requests action items

Your dashboard is your first entry point to your contract milestone, variation and change request information via the **'Executed contracts'** link. Section headings for 4,5 & 6 will be visible only if there is an item that awaits the user action

Hort Innovation

Hort Innovation > Dashboard

Home Dashboard My Profile My Organisation Organisation Changes Contracts

Dashboard Page Instructions Show

Welcome to the Hort Innovation Delivery Partner Portal. The dashboard below provides a summary of items that require your attention, such as:

- Details of executed contracts
- Upcoming milestones
- Overdue milestones and milestones that need to be re-submitted
- Contract variation action items
- Change request action items

To access your contract and milestones, please click on the 'Executed Contracts' link below.

Hello Sangeetha,
The dashboard provides a summary of items that need your attention

Summary

Full name: [Sangeetha Natarajan](#)

Organisation name: [Random Thoughts Learning Solutions](#)

Executed contracts: [8 Contracts](#)

Upcoming milestones and reports: **1 Milestone**

Contract Variations and Change Requests

Accepted Intent to Vary:

- ▶ [Intent to vary contract - 16 November 2022](#)

Draft/Resubmit Variation Requests:

- ▶ [BA19004 - Variation to contract budget](#)

Draft Change Requests:

- ▶ [Contract change Request - BA19004 - 05-Oct](#)

Overdue Milestones

Project Code	Contract Number	Milestone Number	Due Date
BA19004	CON001889	103	1/05/2021

Upcoming Milestones (next 30 days) and Milestone Resubmission

Project Code	Contract Number	Milestone Number	Due Date
BA19004	CON001889	106	30/11/2022

Tab: My Profile

The **'My Profile'** page enables you to update your personal information.

The Portal connects with Hort Innovation's CRM, so by keeping your profile up to date you are ensuring that we have your current contact details.

Hort Innovation

Hort Innovation > My Profile

My Profile

Yudit Buitrago

Please review your information on file.
If you need to update your email or organisation name then please get in contact with us.

Your information

Salutation	Work Phone
<input type="text" value="Mrs"/>	<input type="text" value="Provide a telephone number"/>
First Name *	Mobile Phone
<input type="text" value="Yudit"/>	<input type="text" value="Provide a telephone number"/>
Last Name *	Job Title
<input type="text" value="Buitrago"/>	<input type="text" value="Consultant"/>
Email	Organisation Name
<input type="text" value=""/>	Random Thoughts Learning Solutions

[Update](#)

[← Dashboard](#)

Tab: My Organisation and Organisation Changes

The **'My Organisation'** and **'Organisation Changes'** pages have a similar purpose and help Hort Innovation keep Delivery Partner details up to date.

Information on the **'My Organisation'** page can only be modified by submitting a Change Business Details form, which is also available through the **'Organisation Changes'** page.

That is:

- Click on 'Add Business Entity' changes' button for changes such as a new business that takes over the contract from the existing entity.
- Click on 'Add Business Details change' button for changes in address, banking and finance contact details.

Hort Innovation

Hort Innovation > My Organisation

Home Dashboard My Profile **My Organisation** Organisation Changes Contracts

My Organisation Page Instructions Show

The 'My Organisation' page connects with Hort Innovation's CRM system. Information on this page can only be modified by Contract Administrators.

Trading Name *	ABN
Random Thoughts Learning Solutions	49 604 754 912
Legal Name	Phone
BRIEFBOARD PTY. LTD.	Provide a telephone number
Address	Website
	—

Download Templates:

- Business Entity Change
- Change Business details

+ Add Business Entity Change **+ Add Business Details Change**

[Dashboard](#)

Hort Innovation

Hort Innovation > Organisation Changes

Home Dashboard My Profile My Organisation **Organisation Changes** Contracts

Organisation Changes Page Instructions Show

Download Templates:

- Business Entity Change
- Change Business details

+ Add Business Entity Change **+ Add Business Details Change**

Date Submitted	Type	Request Outline	Status	Actions
29/09/2021	Change in Business Entity	Change in ABN	Submitted	View

Tab: Contracts

The **'Contracts'** page shows your active and completed projects. In addition to the Dashboard tab, it is your first point of entry to your contract and any action you want to take.

From here you can:

- Initiate a contract variation intent (by clicking on 'Add Contract Variation Intent' link).
- View a contract variation intent (by clicking on 'View Contract Variation Intents' link).
- Add a contract variation for an accepted intent to vary (by clicking on 'Add Contract Variation Request' link).
- View a contract variation and contract change request (by clicking on 'View Variations & Changes' link).
- Request a change in the contract (by clicking on 'Add Contract Change Request' link).

Some of these links will be visible only as you progress in a particular submission process.

Hort Innovation > Contracts

Home Dashboard My Profile My Organisation Organisation Changes **Contracts**

Contracts

Page Instructions Show

The 'Contracts' page displays your active and completed projects. In addition to the dashboard, it is another point of entry to view your contracts where you are able to perform tasks. From here you can:

- View all contract milestones and their details
- Initiate a contract variation intent (click on the 'Add Contract Variation Intent' link)
- Request a change in the contract (click on 'Add Contract Change Request' link).

To select a contract, click on the 'Project Code' or the 'Project Title' links to open the contract and view milestone information.

Active contracts Completed contracts

Project Code	Contract Number	Project Title	Start date	End date	Project Leader	Contract Administrator	Contract Status	Variation & change requests
TG20000	CON002197	HV21000-Market Access and Trade Development	15/09/2021	31/12/2022	Yudit Buitrago	Y Buitrago	Contract Executed	Add Contract Variation Intent Add Contract Change Request
MT19014	CON002093	MT19014-Field Based Testing for Fall Army Worm	23/04/2021	30/11/2021	Yudit Buitrago	Y Buitrago	Contract Executed	View Contract Variation Intents Add Contract Change Request View Variations & Changes
PW20004	CON002115	PW20004-Sweetpotato Export Strategy	31/05/2021	30/11/2021	Yudit Buitrago	Y Buitrago	Contract Executed	Add Contract Variation Intent Add Contract Change Request

Delivery partner 'how to' section



View contracts, milestones and achievement criteria information



“I want to view my contracts and review milestone and achievement criteria information”.

Step 1: Locate your contract

There are three different ways to find a contract to view information.

1. From your ‘Dashboard’ page, **click on the ‘Executed Contracts’** link.
2. **Click on ‘Contracts’** tab in the navigation ribbon on the top of the page.
3. **Click on your username** and select ‘List Contracts’.

The screenshot shows the Hort Innovation Delivery Partner Portal dashboard. At the top right, the user's name 'Yudit Buitrago' is displayed with a dropdown menu containing 'Dashboard', 'My Profile', 'My Organisation', 'List Contracts' (highlighted with a red circle 3), and 'Sign out'. Below this is a navigation ribbon with 'Home', 'Dashboard', 'My Profile', 'My Organisation', 'Organisation Changes', and 'Contracts' (highlighted with a red circle 2). The main content area is titled 'Dashboard' and includes a 'Page Instructions' button. A welcome message states: 'Welcome to the Hort Innovation Delivery Partner Portal. The dashboard below provides a summary of items that require your attention, such as:'. A list of items includes 'Details of executed contracts', 'Upcoming milestones', 'Overdue milestones and milestones that need to be re-submitted', 'Contract variation action items', and 'Change request action items'. Below this, a message says: 'To access your contract and milestones, please click on the ‘Executed Contracts’ link below.' The user is greeted with 'Hello Yudit, The dashboard provides a summary of items that need your attention'. The 'Summary' section shows: Full name: [Yudit Buitrago](#), Organisation name: [Random Thoughts Learning Solutions](#), Executed contracts: [3 Contracts](#) (1), and Upcoming milestones and reports: [1 Milestone](#). The 'Overdue Milestones' table shows one entry: Project Code MT19014, Contract Number CON002093, Milestone Number 102, Due Date 5/06/2021. The 'Upcoming & Re-submission Milestones (30 Days)' table shows one entry: Project Code PW20004, Contract Number CON002115, Milestone Number 102, Due Date 30/09/2021. The 'Contract Variations and Change Requests' section shows a draft change request: [This is a change request](#).

Step 2: Open your contract

Click on 'Project Code' or on the 'Project Title' link to open the contract and view project milestones.

Hort Innovation > Contracts

Home Dashboard My Profile My Organisation Organisation Changes **Contracts**

Contracts Page Instructions Show

Active contracts Completed contracts

Project Code	Contract Number	Project Title	Start date	End date	Project Leader	Contract Administrator	Contract Status	Variation & change requests
TG20000	CON002197	HV21000-Market Access and Trade Development	15/09/2021	31/12/2022	Yudit Buitrago	Y Buitrago	Contract Executed	Add Contract Variation Intent Add Contract Change Request
MT19014	CON002093	MT19014-Field Based Testing for Fall Army Worm	23/04/2021	30/11/2021	Yudit Buitrago	Y Buitrago	Contract Executed	View Contract Variation Intent Add Contract Change Request View Variations & Changes
PW20004	CON002115	PW20004-Sweetpotato Export Strategy	31/05/2021	30/11/2021	Yudit Buitrago	Y Buitrago	Contract Executed	Add Contract Variation Intent Add Contract Change Request

[Dashboard](#)

Step 3: View milestone information

The Portal allows you to see contract milestone information. This includes 1) milestone number, 2) due date and 3) the status of the milestones (i.e. Pending, Submitted, Resubmit, Achieved, or Paid) that is captured under each contract. Depending on this status, you will see different actions available in the 'Options' column.

Options column

- If a milestone has been '**achieved**', '**submitted**', or '**paid**' you will only be able to view its information
- If a milestone is still '**pending**' you can check the due date and use the 'Submit Milestone' link to 'edit' or 'enter' information. See Submit a Milestone Report for more details.
- If a milestone status is '**resubmit**', this means that there is a need to make some modifications to the milestone information or milestone report before this milestone can be considered achieved and paid. **Use the 'Resubmit' link to edit and submit again.** See Resubmit a milestone report for more details.

IMPORTANT: Milestone information can ONLY be edited via the Submit or Re-Submit milestone links.

Hort Innovation

Hort Innovation > Contracts > Contract Milestones List

Home Dashboard My Profile My Organisation Organisation Changes Contracts **Milestones**

Contract Milestones List

Page Instructions Show

The 'Contract milestones' page displays contract milestone information. This includes the status of contract milestones (i.e. Pending, Submitted, Resubmit, Achieved or Paid) and a due date.

- If the status of a milestone report is 'pending', the due date will be available. To submit a completed milestone report, click the 'Submit Milestone' link.
- If the status of a milestone report is 'resubmit', some modifications are required to the milestone report before it can be considered achieved. To resubmit a milestone report, click the 'Resubmit Milestone' link.

Contract details: CON002016 - CT17008 - [Test]Protecting Australia's citrus genetic material - CT17008

Milestone number	Due date	Resubmit due date	Description	Status	Options
101	4/11/2020		HV20000 - MS101 - 4/11/2020	Paid	View Milestone
102	4/11/2020	29/10/2021	HV20000 - MS102 - 4/11/2020	Paid	View Milestone
103	11/11/2020	6/11/2021	HV20000 - MS103 - 11/11/2020	Paid	View Milestone
130	30/11/2021		HV20000 - MCS 130 -30/11/2021	Received	View Milestone
190	30/12/2021		HV20000 - MD TEST 13.10.2021	Pending	View Milestone Submit Milestone

List Contracts

Step 4: View milestone achievement criteria

Click the 'milestone number' or the 'View milestone' link. This will take you to the Milestone Details information page.

On this page you can:

- See milestone information
- Review if criteria in the 'Milestone Achievement Criteria' section, are in line with the contract document.
- Review your self-assessment from the drop-down menu "Delivery Partner Assessment". You may also provide justification to your self-assessment by clicking "add comment" and providing a brief statement on each of the achievement criteria. Further details may be captured in the Milestone Report/Final Report.
- Review any comments shared by Hort Innovation Portfolio Manager for each of the achievement criteria under the 'Justification' column (only if this milestone had been previously submitted via the portal).
- Review any comments shared by Hort Innovation Portfolio Manager in the 'Additional Comments' section (only if this milestone had been previously submitted via the portal).
- Review the contents in other sections of the form (e.g. Public Summary) if the milestone had been previously submitted via the portal, otherwise these sections will be blank.
- Download the approved version of milestone documents (If the submission was done via portal).

Hort Innovation > Contracts > Contract Milestones List > View Milestone Details

Home Dashboard My Profile My Organisation Organisation Changes Contracts **View Milestone Details**

View Milestone Details Page Instructions Show

▶ Contract details: CON002197 - HV21000-Market Access and Trade Development - TG20000

Contract #	CON002197	Status	Pending
Project Code	TG20000	Due Date	5/12/2021
Project Title	HV21000-Market Access and Trade Development		Re-submission Due Date
Milestone Number	102	Date Last Submitted	

▶ Milestone Achievement Criteria

Achievement Criteria	Delivery Partner Assessment	Justification	Hort Innovation Assessment ↑
Milestone report be submitted to Hort Innovation on outcomes to date	Achieved	Add comment	Pending
Project Reference Group established, including terms of reference and linkages to related projects i.e. TG18004, TG19000	Achieved	Add comment	Pending
Program logic and monitoring and evaluation plan with linkage to Hort Innovation and industry/fund objectives		Add comment	Pending
A project risk management plan		Add comment	Pending

< 1 2 >

▶ Documents

Hort Innovation requires that you provide the required documents including Milestone Reports, M&E Reports, Risk Registers and more, using the latest templates. These are available on Hort Innovation's website [here](#). Documents need to be edited with track changes 'ON'

Name	Document Type	Confidentiality	Share with Growers?	Uploaded by
Milestone_report_MS102.docx	Presentation	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	Delivery Partner

[Contract Milestones](#)

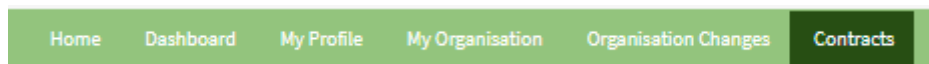
Submit a milestone



“I want to set up milestone details and upload a milestone report”.

The Portal allows you to enter milestone information and submit all the documentation required to receive the milestone payment as per the contract terms. The information entered into the portal compliments a Milestone Report / Final Report that is uploaded in the documents section below.

Go to your Contracts tab on the navigation bar.



Step 1: Open your milestone report submission form

1. Select the contract for which an upcoming milestone is due for milestone report submission. **Click on 'Project Code'** or on the **'Project Title'** link to open the contract and view milestone information.
2. **Click on 'Submit milestone'** link.

Hort Innovation > Contracts

Home Dashboard My Profile My Organisation Organisation Changes **Contracts**

Contracts

Page Instructions Show

The 'Contracts' page displays your active and completed projects. In addition to the dashboard, it is another point of entry to view the status and perform key tasks relating to your contracts. From here you can:

- Initiate a contract variation intent (click on the 'Add Contract Variation Intent' link)
- View contract variations that have been initiated (click on the 'View Contract Variation Intents' link)
- Request a change in the Contract Administrator (click on 'Add Contract Change Request' link).
- View contract variations and changes (click on the 'View Variations & Changes' link)

You can also view all contract milestones and their details for each contract by clicking on the relevant 'Project Code' or the 'Project Title' links.

Active contracts Completed contracts

Project Code	Contract Number	Project Title	Start date	End date	Project Leader	Contract Administrator	Contract Status	Variation & change requests
CT17008	CON002016	CT17008 - [Test] Protecting Australia's citrus genetic material	11/2020	10/2021	Sangeetha N	Yudit Buitrago	Contract Executed	Add Contract Variation Intent View Contract Variation Intents Add Contract Change Request View Variations & Changes

Dashboard

Hort Innovation > Contracts > Contract Milestones List

Home Dashboard My Profile My Organisation Organisation Changes Contracts **Milestones**

Contract Milestones List

Page Instructions Show

The 'Contract milestones' page displays contract milestone information. This includes the status of contract milestones (i.e. Pending, Submitted, Resubmit, Achieved or Paid) and a due date.

- If the status of a milestone report is 'pending', the due date will be available. To submit a completed milestone report, click the 'Submit Milestone' link.
- If the status of a milestone report is 'resubmit', some modifications are required to the milestone report before it can be considered achieved. To resubmit a milestone report, click the 'Resubmit Milestone' link.

Contract details: CON002016 - CT17008 - [Test]Protecting Australia's citrus genetic material - CT17008

Milestone number	Due date	Resubmit due date	Description	Status	Options
101	4/11/2020		HV20000 - MS101 - 4/11/2020	Paid	View Milestone
102	4/11/2020	29/10/2021	HV20000 - MS102 - 4/11/2020	Paid	View Milestone
103	11/11/2020	6/11/2021	HV20000 - MS103 - 11/11/2020	Paid	View Milestone
130	30/11/2021		HV20000 - MCS 130 -30/11/2021	Received	View Milestone
190	30/12/2021		HV20000 - MD TEST 13.10.2021	Pending	View Milestone Submit Milestone

List Contracts

Step 2: Add achievement criteria assessment

In the 'Milestone achievement criteria' section of the form:

1. Provide your self-assessment from the drop-down menu "Delivery Partner Assessment" to indicate whether the achievement criteria has been 'Achieved', 'Partially Achieved' or 'Not Achieved'.
2. Add a comment under 'Justification' explaining your self-assessment.

Repeat actions 1 and 2 for each achievement criteria.

Home Dashboard My Profile My Organisation Organisation Changes Contracts **Milestone Report Submission**

Milestone Report submission form Page Instructions Show

▶ Contract details: CON002197 - HV21000-Market Access and Trade Development - TG20000

Contract #	CON002197	Status	Pending
Project Code	TG20000	Due Date	5/12/2021
Project Title	HV21000-Market Access and Trade Development		Re-submission Due Date
Milestone Number	102	Date Last Submitted	

▶ Milestone Achievement Criteria

Achievement Criteria	Delivery Partner Assessment	Justification	Hort Innovation Assessment ↑
Milestone report be submitted to Hort Innovation on outcomes to date	Achieved 1	Add comment 2	Pending
Project Reference Group established, including terms of reference and linkages to related projects i.e. TG18004, TG19000	Achieved	Add comment	Pending

Step 3: Complete the rest of the milestone information form

1. Enter a 'Public Summary' for the milestone.
2. In the Project Management section, flag any issues and risks identified, IP creation (if relevant to the milestone), and indicate confidentiality sections of the milestone report document.

If you selected 'Yes' to these options, corresponding documents must be attached through the Documents section below. A Risk Register template and IP Register template is available from the Hort Innovation website. If these have previously been supplied, they can be updated and resubmitted. Further narrative against these items are to be captured in the Milestone Report or Final Report template which are uploaded separately.



Any new risks identified during a project need to be noted in the Hort Innovation Delivery Partner Portal and an updated risk register submitted via the DPP.

3. Leave relevant comments for your Hort Innovation Portfolio Manager. Comments are optional.

1 **Public summary**

This summary should focus on progress made during the last reporting period and will be used by Hort Innovation to communicate about how the project is progressing and what outcomes are being achieved for industry. It should be stripped of all confidential information so that it is suitable for public dissemination and should be no longer than 500 words in length. It is imperative that the summary is written in clear, everyday language - avoid jargon.

Please note: All final reports will be communicated to industry and other stakeholders by Hort Innovation. Confidentiality: Do not include any confidential information in the public summary.

You have 0 words

Expand ↗

2 **Project Management**

Were any issues and risks identified during this Milestone period?
 No Yes

Was new IP created in this Milestone period?
 No Yes

Is this Milestone Report confidential?
 No ▾

If sections of the report are confidential, list them here:

3 **Additional Comments**

Add comment

Date ↓	Created by Delivery partner	Created by Process owner	Comment
There are no records to display.			

Adding a comment

You can use the Portal to communicate with your Hort Innovation Portfolio Manager and avoid emailing back and forth. Comments are optional.

1. Click on 'Add comment'.

Milestone Report comments

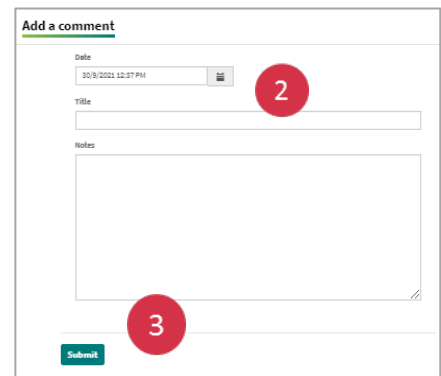
Published Comments

1 **Add comment**

Date	Author	Comment title	Notes
There are no records to display.			

2. Complete the 'Add a comment' pop-up box.
3. Click 'Submit'.

Please note that once you submit a comment you cannot go back and delete or change. You can, however, leave as many comments as you like related to the same milestone.



Step 4: Upload documents

Upload your milestone report and any other required documentation.

1. Click on the 'Upload Document' button. Choose the file from your system and upload. Wait until you see 'File successfully uploaded' message on screen.
2. Once the upload is complete, select from the drop down menu the document type.
3. Decide and tick the box (Yes or No) if this document can be shared with growers. Milestone Reports and documents marked as confidential will not be disseminated. Documents marked yes will be disseminated through Hort Innovation and other Delivery Partner communication and extension channels.

Repeat steps for multiple reports. All reports will be listed in the documents section.

Report Templates

In the 'Document Upload' section, click on the Hort project resources page to download the latest project report template you need to prepare your documentation before uploading.

When you do this, you will be redirected to Hort Innovation project resources page. Click on the required template(s) and download it locally to your system. Complete and have ready to upload in the portal.

The screenshot shows a document upload interface. At the top, there is an 'Upload Document' button (callout 1). Below it is a table with columns: Name, Document Type, Confidentiality, Share with Growers?, Uploaded by, and Options. A dropdown menu is open under 'Document Type', with 'Milestone Report' selected (callout 2). Below the table, there are 'Submit' and 'Save as draft' buttons (callout 3). A confirmation box at the bottom left contains the text: 'I confirm that I have the authority to submit this on behalf of the delivery partner and that all information contained within is true and correct and not misleading' with a checkbox, and 'I have read and understood Hort Innovation's Privacy Policy' with a checkbox.

Step 5: Submit the milestone

Tick the form confirming you have authority to submit on behalf of the delivery partner. You will also need to confirm that you have read our Privacy Policy.

Once all information is complete, you can **'Submit'** and the status will change to 'Received'. Once submitted, the milestone report cannot be altered.

Please note that any time you click **'Save as draft'** across the Portal, your information will be saved and the following message will appear: **'Completed Successfully'**. This means that the draft information has been saved, **NOT** that you have submitted your documents successfully. Clicking on 'Save as draft' will also close the submission form page.

To continue the submission, **click on the 'Contract Milestones'** link on the bottom of the page. Select the milestone again and continue the process.

The screenshot shows the 'Milestone Report submission form' page. At the top is the Hort Innovation logo. Below it is a breadcrumb trail: 'Hort Innovation > Contracts > Contract Milestones List > Milestone Report submission form'. A navigation bar contains links: Home, Dashboard, My Profile, My Organisation, Organisation Changes, Contracts, and Milestone Report Submission. The main heading is 'Milestone Report submission form' with a 'Page Instructions Show' button. Below this is a text box: 'The portal allows you to enter information about a milestone and submit a milestone report so that it is considered achieved and will proceed to payment.' A contract details section shows: 'Contract details: CON002197 - HV21000-Market Access and Trade Development - TG20000'. A large green banner at the bottom says 'Completed Successfully' with a close button. At the very bottom is a 'Contract Milestones' link.

Milestone 190 and Statement of Receipts (SOR)

If you are submitting Milestone 190, the final report must be accompanied by a Statement of Receipts and Expenditure (SOR) – a full financial reconciliation of project expenditure against budget activities – as Hort Innovation will not make final payment until it has been received. We recommend that your finance team complete the SOR.

► Documents

Hort Innovation requires that you provide the required documents including Milestone Reports, M&E Reports, Risk Registers and more, using the latest templates. These are available on Hort Innovation's website [here](#). Documents need to be edited with track changes 'ON'

[Upload Document](#)

Name	Document Type	Confidentiality	Growers?	Uploaded by	Options
DPP MS registration_v1 27.09.2021.docx	Milestone Report	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	Delivery Partner	Edit
DPP SOR_v1 27.09.2021.docx	Statement of Receipts and Expenditure	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	Delivery Partner	Edit

► Submitting the milestone

I confirm that I have the authority to submit this report on behalf of the delivery partner and that all information contained within is true and correct and not misleading

I have read and understood [Hort Innovation's Privacy Policy](#)

Statement of Receipts (SOR) submitted separately

The Statement of Receipts (SOR) can also be submitted separately from the final milestone report.



If a SOR document is outstanding, you will see an icon appear under to the contract number. See the section 'Submitting Statement of Receipts' below for steps on how to upload.

Hort Innovation

Hort Innovation > Contracts

Home Dashboard My Profile My Organisation Organisation Changes **Contracts**

Contracts [Page Instructions](#) [Show](#)

Active contracts Completed contracts

Project Code	Contract Number	Project Title	Start date	End date	Project Leader	Contract Administrator	Contract Status	Variation & change requests
TG20000	CON002197	HV21000-Market Access and Trade Development	15/09/2021	31/12/2022	Yudit Buitrago	Y Buitrago	Contract Executed	View Contract Variation Intents Add Contract Change Request

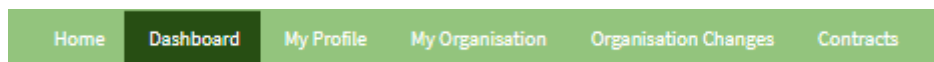
Re-submit a milestone



“I want to re-submit my milestone report”.

If a milestone requires re-submission, you will receive an email notification and it will also appear on your Dashboard. You will need to resubmit a revised milestone that addresses the feedback provided by the Hort Innovation Portfolio Manager.

Go to your Dashboard tab.



Step 1: Open milestone that needs re-submission

1. From the 'Upcoming / Re-submission Milestones (30 days)' table, **click on the milestone number** (OR)
2. From the summary section, **click on the contracts** to see the contracts list and **click on Project code or Project Title** for the contact. In the 'Contract milestones list' **click on the 'Resubmit milestone'** link in the 'Options' column.

Hort Innovation

Hort Innovation > Dashboard

Home Dashboard My Profile My Organisation Organisation Changes Contracts

Dashboard Page Instructions Show

Hello Yudit,
The dashboard provides a summary of items that need your attention

Summary	
Full name:	Yudit Buitrago
Organisation name:	Random Thoughts Learning Solutions
Executed contracts:	3 Contracts
Upcoming milestones and reports:	1 Milestone

Overdue Milestones			
Project Code	Contract Number	Milestone Number	Due Date
MT19014	CON002093	102	5/06/2021

Upcoming & Re-submission Milestones (30 Days)			
Project Code	Contract Number	Milestone Number	Due Date
PW20004	CON002115	102	30/09/2021

Hort Innovation > Dashboard

Home Dashboard My Profile My Organisation Organisation Changes Contracts

Dashboard

Page Instructions Show

Hello Yudit,
The dashboard provides a summary of items that need your attention

Summary

Full name: [Yudit Buitrago](#)

Organisation name: [Random Thoughts Learning Solutions](#)

Executed contracts: [3 Contracts](#) 2

Upcoming milestones and reports: **1 Milestone**

Overdue Milestones

Project Code	Contract Number	Milestone Number	Due Date
MT19014	CON002093	102	5/06/2021

Contract Variations and Change Requests

Draft Change Requests:

- [▶ This is a change request](#)

Upcoming & Re-submission Milestones (30 Days)

Project Code	Contract Number	Milestone Number	Due Date
PW20004	CON002115	102	30/09/2021

Hort Innovation > Contracts

Home Dashboard My Profile My Organisation Organisation Changes Contracts

Contracts

Page Instructions Show

The 'Contracts' page displays your active and completed projects. In addition to the dashboard, it is another point of entry to view the status and perform key tasks relating to your contracts. From here you can:

- Initiate a contract variation intent (click on the 'Add Contract Variation Intent' link)
- View contract variations that have been initiated (click on the 'View Contract Variation Intents' link)
- Request a change in the Contract Administrator (click on 'Add Contract Change Request' link).
- View contract variations and changes (click on the 'View Variations & Changes' link)

You can also view all contract milestones and their details for each contract by clicking on the relevant 'Project Code' or the 'Project Title' links.

Active contracts Completed contracts

Project Code	Contract Number	Project Title	Start date	End date	Project Leader	Contract Administrator	Contract Status	Variation & change requests
TG20000	CON002197	HV21000-Market Access and Trade Development	23/08/2021	30/09/2021	Yudit Buitrago	Y Buitrago Sangeetha Natarajan	In Variation	View Contract Variation Intents Add Contract Change Request View Variations & Changes

2

Hort Innovation > Contracts > Contract Milestones List

Home Dashboard My Profile My Organisation Organisation Changes Contracts **Milestones**

Contract Milestones List Page Instructions Show

▶ Contract details: CON002197 - HV21000-Market Access and Trade Development - TG20000

Milestone number	Due date	Resubmit due date	Description	Status	Options
101	15/09/2021		HV21000 - MS101 - 15.09.2021	Achieved	View submitted Milestone
102	5/12/2021	6/10/2021	HV21000 - MS102 - 05.12.2021	Re-Submit Milestone	View submitted Milestone Resubmit Milestone 2
103	30/06/2022		HV21000 - MS103 - 30.06.2022 - \$0	Pending	View submitted Milestone
190	31/12/2022		HA21000 - MS190 - 31.12.2022	Pending	View submitted Milestone

[List Contracts](#)

Step 2: Update milestone information form

Once you are in the milestone submission form:

1. **Review the comment** shared by your Hort Innovation Portfolio Manager in the milestone comments section. You can also review comments for each of the achievement criteria(s).
2. Add your own comments for the milestone or for the achievement criteria(s) if required. You can leave comments by **clicking on the 'add comment' link**.
3. If requested, **update sections of the form** as per the comments from your Hort Innovation Portfolio Manager.

Step 3: Update existing milestone report

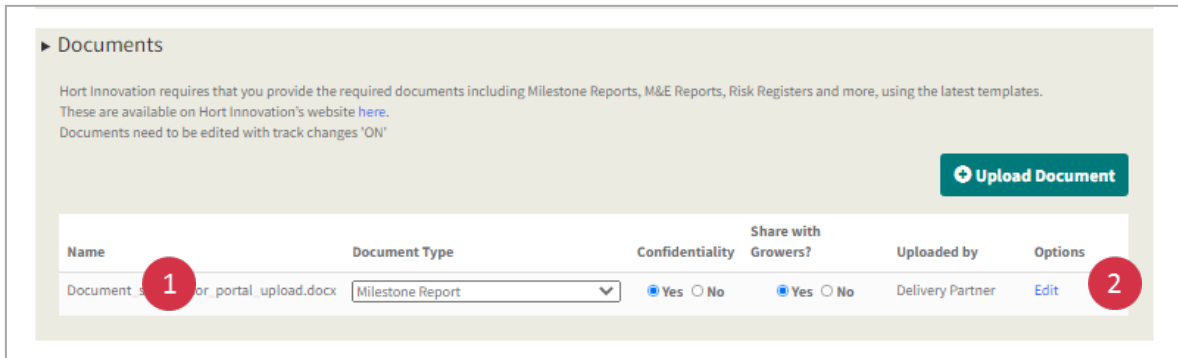
If you are required to further edit a milestone report:

1. **Scroll down to the 'Document' section (bottom of the page)**, and find the document that needs modifying.
2. **Click on 'Edit' option** to open the document reviewed by Hort Innovation Portfolio Manager and see what changes may be required (look for the tracked changes / comments). An online Word document opens in a new browser tab.

Make changes to document using track changes and comments. **Close the word document in the browser**, once update is complete. Your changes will be automatically saved.

Note: See 'Co-editing document function' section below for instructions on how to work with "Track Changes' and leave comments in the document.

Note: Repeat steps 1 and 2 to edit other documents. If desired, download a copy of the submitted documents to your local drive for your records, as once a document is submitted, it cannot be further downloaded.



You can also use the **'Upload document'** button if you want to add any additional documents. See **Step 4 "Upload a documents"** in the 'Submit a milestone' section of this guide.

Use the **'Update'** link if you want to change the document type of an existing document in the drop down menu. Please note that the document type will automatically save. There is no 'Submit' button required to complete this change.

Co- editing documents function

The Delivery Partner Portal offers you the possibility to co-edit a document together with your Hort Innovation Portfolio Manager. If a document needs further amendments, you are now able to edit directly on the Portal without the need to email versions back and forth.

Shared Location

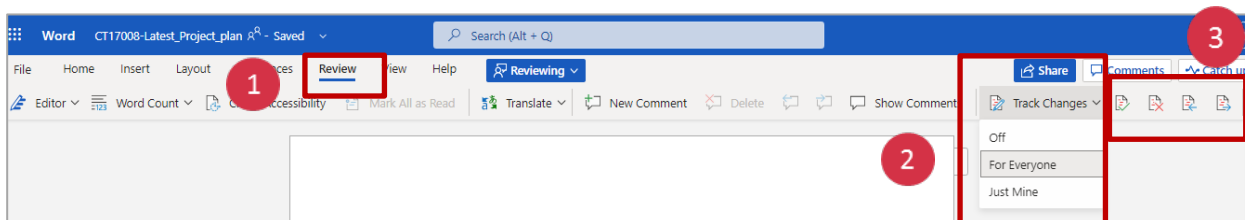
When you edit a document on the Portal, this document will automatically open in a shared location accessible to both you and the Hort Innovation Portfolio Manager.

One critical moment to enable co-editing is to ensure that the document has 'Track Changes' on. Your Hort Innovation Portfolio manager will have already activated this in the document. However, if you are uploading a different file please make sure that you turn this feature on before making your changes.

Tips for using 'Track Changes'

Turning 'Track Changes' ON and accepting / rejecting edits

1. Click on the 'Review' tab in the program top ribbon.
2. Click the 'Track Changes' button and select 'For Everyone'.
3. Use the 'Accept' and 'Reject' buttons to move through the changes left by the Hort Innovation Portfolio Manager.

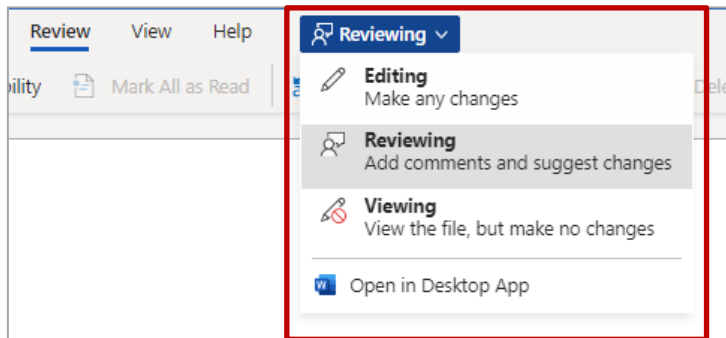


Once 'Track Changes' is activated, a 'Reviewing' button will also appear showing you options on how to work with the document. Keep the 'Reviewing' selected when making edits. Clicking 'Editing' will turn your 'Track Changes' off.

Downloading your document

Once you have made your changes online, you can click on 'Open in Desktop App' and download this version of the document to your local drive or computer.

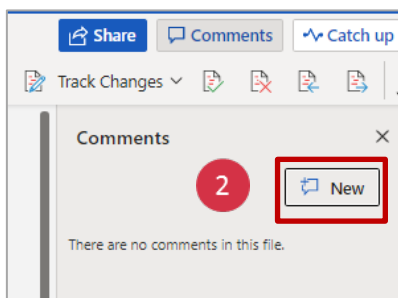
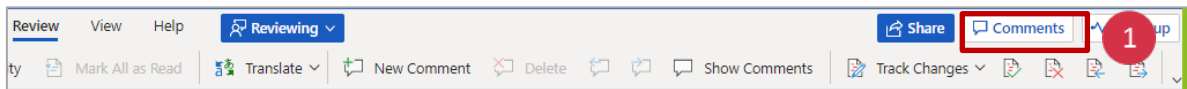
IMPORTANT: If you make changes outside of 'Co-editing' function (i.e. using the online document), you need to make sure that you always turn on 'Track Change' before editing and uploading the document to the Portal.



Leaving 'Comments' in a document

In addition to making changes to the document, you can also add comments. These comments will appear on the side of the main text. To leave a comment:

1. Click on the 'Comments' button.
2. Click the 'New' button and start typing your comment.



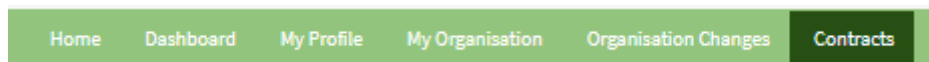
Submit Statement of Receipts (SOR)



“I want to submit my Statement of Receipts and Expenditure (SOR) to finalise my contract and receive final payment”.

The statement of Receipts and Expenditure can also be submitted separately from the final milestone report.

When you are ready to submit the SOR go to your Contracts tab on the navigation bar.



Upload SOR

1. Click on the **contract number** or **SOR icon** that appears under it.
2. Click **'Add files'** and upload document.
3. The uploaded SOR document will appear in the document section (bottom of page).

Please note that the document will automatically save. There is no **'Submit'** button required to complete the submission process.

Note: The Hort Innovation Finance team will notify you via email if amendments to the SOR need to be made. In this case, make the advised changes and upload updated document again following the steps described above.

Hort Innovation > Contracts

Home Dashboard My Profile My Organisation Organisation Changes **Contracts**

Contracts Page Instructions Show

Active contracts Completed contracts

Project Code	Contract Number	Project Title	Start date	End date	Project Leader	Contract Administrator	Contract Status	Variation & change requests
T	CON002197	HV21000-Market Access and Trade Development	15/09/2021	31/12/2022	Yudit Buitrago	Y Buitrago	Contract Executed	View Contract Variation Intents Add Contract Change Request

Hort Innovation

Hort Innovation > Contracts > View Contract

Home Dashboard My Profile My Organisation Organisation Changes Contracts

View Contract Page Instructions Show

Project Code:	TG20000	Project Title:	Table Grapes Market Access and Trade Development
Project Lead:			

Contract Number:	CON002197	Contract Title:	HV21000-Market Access and Trade Development
Contract Administrator:	Y Buitrago		

The contract is ready for you to upload the final Statement of Receipts.

Document Upload

2 Add files

Name	Modified by	Options
There are no folders or files to display.		

[List Contracts](#)

Hort Innovation

Hort Innovation > Contracts > View Contract

Home Dashboard My Profile My Organisation Organisation Changes Contracts

View Contract Page Instructions Show

Project Code:	TG20000	Project Title:	Table Grapes Market Access and Trade Development
Project Lead:			

Contract Number:	CON002197	Contract Title:	HV21000-Market Access and Trade Development
Contract Administrator:	Y Buitrago		

The contract is ready for you to upload the final Statement of Receipts.

Document Upload

Add files

Name	Modified by	Options
DPP SOR_v1 27.09.2021.docx	Delivery Partner	3 Edit

[List Contracts](#)

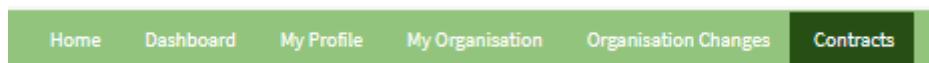
Submit a contract variation intent



“I want to get approval to submit a contract variation request”.

Before you request a contract variation through the Portal, you will need to submit an **‘Intent to vary’** form which must be approved by Hort Innovation. An **Intent to vary** can be submitted at any time.

Go to the **Contracts** tab.



Step 1: Open the ‘Intent to Vary’ form

1. Select the contract you intend to vary. Check if the contract status = Contract Executed.
2. In ‘Variation & Change requests’ column, **click on the ‘Add Contract Variation intent’** link.

Hort Innovation > Contracts

Home Dashboard My Profile My Organisation Organisation Changes **Contracts**

Contracts Page Instructions Show

Active contracts Completed contracts

Project Code	Contract Number	Project Title	Start date	End date	Project Leader	Contract Administrator	Contract Status ↓	Variation & change requests
MT19014	CON002093	MT19014-Field Based Testing for Fall Army Worm	23/04/2021	30/11/2021	Yudit Buitrago	Y Buitrago	Contract Executed	View Contract Variation Intents Add Contract Change Request View Variations & Changes
PW20004	CON002115	PW20004-Sweetpotato Export Strategy	31/05/2021	30/11/2021	Yudit Buitrago	Y Buitrago	Contract Executed	Add Contract Variation Intent Add Contract Change Request
TG20000	CON002197	HV21000-Market Access and Trade Development	15/09/2021	31/12/2022	Yudit Buitrago	Y Buitrago	Contract Executed	Add Contract Variation Intent Add Contract Change Request

← Dashboard

Step 2: Complete 'Intent to Vary' form

1. Complete the form.

Request outline: Provide a brief description of the intention to vary the project

Rationale: Provide a detailed justification regarding the intention to vary the project

2. Tick the Agreement & **Click 'Submit'**.

Confirm you have authority to submit on behalf of the delivery partner. You will also need to confirm that you have read our Privacy Policy

A successful submission message will appear on the screen. Close to continue working in the Portal.

Hort Innovation

Hort Innovation > Contracts > Add Intent to Vary

Home Dashboard My Profile My Organisation Organisation Changes Contracts **Add Intent To Vary**

Add Intent to Vary Page Instructions Show

The 'Add Intent to Vary' page allows you to advise Hort Innovation of your intention to vary your contract. This is the first stage in progressing with a contract variation.

Under 'Request Outline' briefly state the nature of the variation and under 'Rationale' provide the reasons for it. This detail will be considered by Hort Innovation to determine if the variation will proceed to the second stage. You can view the status of your intention to vary by clicking on the 'View Contract Variation Intents' on the Contracts page.

▶ Contract details: CON002197 - HV21000-Market Access and Trade Development - TG20000

1

Request Outline *

Rationale *

▶ Agreement **2**

I confirm that I have the authority to submit this report on behalf of the delivery partner and that all information contained within is true and correct and not misleading

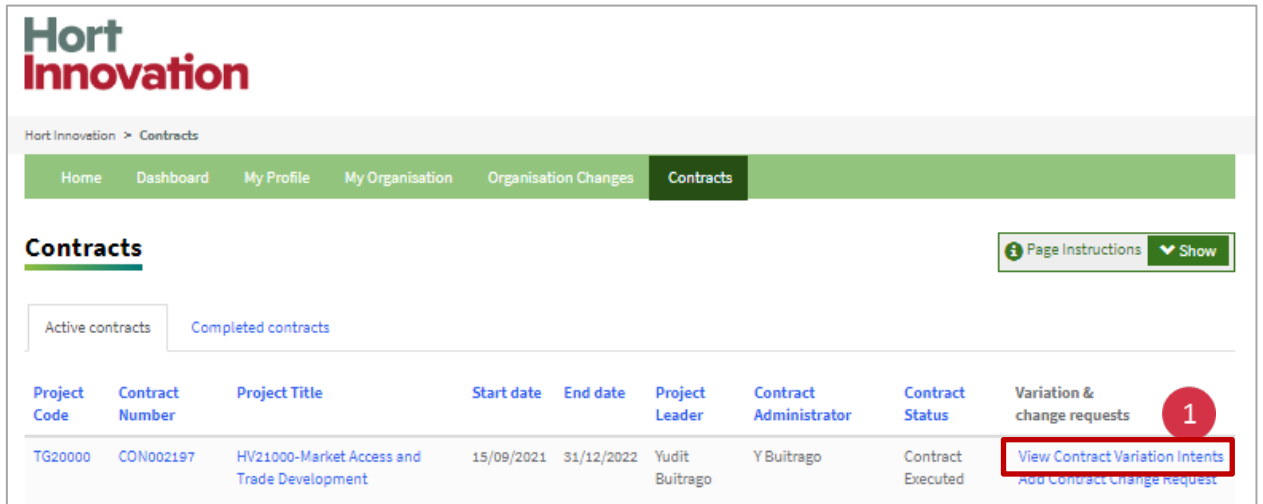
I have read and understood [Hort Innovation's Privacy Policy](#)

Submit

Step 3. Review the status of your request

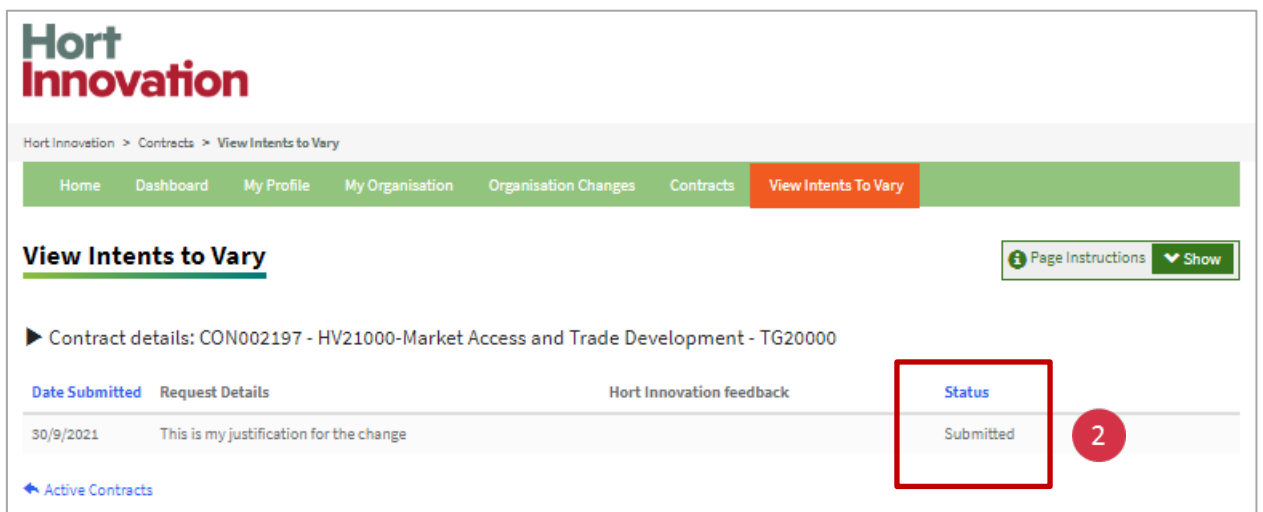
Once you have submitted your intent to vary, you can monitor approval.

1. From the Contracts tab, click on 'View Contract Variation Intents' link.



2. Check the status of your request. There are three types of status:

- **Submitted:** This means your request is still under review by Hort Innovation.
- **Variation Not Required:** This means that your request to vary has not been approved by Hort innovation.
- **Allow Variation:** This means that your request has been accepted by Hort Innovation and you can continue with the submission of a contract variation request.



If your request is accepted or has not been approved, check the column 'Hort Innovation feedback' where a reason for this status may be displayed.

Hort Innovation

Hort Innovation > Contracts > View Intents to Vary

Home Dashboard My Profile My Organisation Organisation Changes Contracts **View Intents To Vary**

View Intents to Vary

[Page Instructions](#) [Show](#)

▶ Contract details: CON002197 - HV21000-Market Access and Trade Development - TG20000

Date Submitted	Request Details	Hort Innovation feedback	Status
30/9/2021	This is my justification for the change	Your intent to vary the contract is accepted. Please go ahead and submit variation with track changes in MRT and upload supporting document(s)	Allow Variation

[Active Contracts](#)

Submit a contract variation request

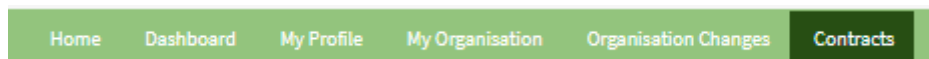


“My intent to vary was approved and I want to submit a contract variation”.

The outcome of your ‘Intent to vary’ request will be displayed on your dashboard. If approved, you can proceed to submit a contract variation.

The screenshot shows the Hort Innovation dashboard. At the top, there is a navigation bar with tabs: Home, Dashboard, My Profile, My Organisation, Organisation Changes, and Contracts. The 'Dashboard' tab is selected. Below the navigation bar, the dashboard title 'Dashboard' is displayed, along with a 'Page Instructions' button and a 'Show' dropdown. A greeting 'Hello Yudit,' is followed by a summary of items needing attention. The 'Summary' section lists: Full name: Yudit Buitrago, Organisation name: Random Thoughts Learning Solutions, Executed contracts: 3 Contracts, and Upcoming milestones and reports: 1 Milestone. The 'Contract Variations and Change Requests' section is highlighted with a red box and contains: Accepted Intent to Vary: Change description (with a right-pointing arrow), and Draft Change Requests: This is a change request (with a right-pointing arrow). To the right, there are two tables: 'Overdue Milestones' and 'Upcoming & Re-submission Milestones (30 Days)'. The 'Overdue Milestones' table has columns: Project Code, Contract Number, Milestone Number, and Due Date. It contains one row: MT19014, CON002093, 102, 5/08/2021 with a red bell icon. The 'Upcoming & Re-submission Milestones (30 Days)' table has the same columns and contains one row: PW20004, CON002115, 102, 30/09/2021.

From the Contract Variations and Change Requests section in the dashboard, **click on the Accepted Intent to Vary** record to submit variation (OR) click on the **Contracts** tab on the navigation bar.



Step 1: Create a variation for the contract

1. Select the contract you intend to vary. Click on 'Add Contract Variation Request' link.
2. Update the details in 'Request outline' and 'Rationale' fields in the variation form if they differ from what was previously provided.
3. Review the feedback provided by the Hort Innovation Project contact

Hort Innovation

Hort Innovation > Contracts

Home Dashboard My Profile My Organisation Organisation Changes **Contracts**

Contracts

Page Instructions Show

Active contracts Completed contracts

Project Code	Contract Number	Project Title	Start date	End date	Project Leader	Contract Administrator	Contract Status	Variation & change requests
TG20000	CON002197	HV21000-Market Access and Trade Development	15/09/2021	31/12/2022	Yudit Buitrago	Y Buitrago	Contract Executed	View Contract Variation Intents Add Contract Variation Request Add Contract Change Request

Hort Innovation

Hort Innovation > Contracts > Add Variation Request

Home Dashboard My Profile My Organisation Organisation Changes **Contracts**

Add Variation Request

Page Instructions Show

▶ Contract details: CON002197 - HV21000-Market Access and Trade Development - TG20000

Step 1 of 2

Request Outline *

Change description

Rationale *

This is my justification for the change

Hort Innovation feedback

The request to vary the contract is accepted. Kindly amend the attached project plan with changes to the contract

Step 2: Update project proposal

1. Navigate to the 'Document' section (bottom of page) and **click on 'Edit'** to open the project proposal document uploaded by Hort Innovation. Enable 'Track Changes' option, make all necessary changes and close the document.

NOTE: Refer back to pages 30-31 of this guide for instructions on how to work with 'Track Changes'.

2. Click on **'Upload Document'** if there is a need to upload any additional supporting documents for variation.

Once all information is complete, you can **'Submit'** and the status will be updated to **'Submitted'**.

Please note that any time you click **'Save as draft'** across the Portal, your information will be saved and the following message will appear: **"Completed Successfully"**. This means that the draft information has been saved NOT that you have submitted your documents successfully. Clicking on 'Save as draft' will also close the variation request page.

Hort Innovation

Hort Innovation > Contracts > Add Variation Request

Home Dashboard My Profile My Organisation Organisation Changes Contracts

Add Variation Request Page Instructions Show

▶ Contract details: CON002197 - HV21000-Market Access and Trade Development - TG20000

Step 1 of 2

Request Outline *

Change description

Rationale *

This is my justification for the change

Hort Innovation feedback

The request to vary the contract is accepted. Kindly amend the attached project plan with changes to the contract

Step 2 of 2

2 Upload Document

Name	Uploaded by	Options
Contract_MRT_for_HV21000.docx	Hort Innovation	1 Edit

▶ Agreement

I confirm that I have the authority to submit this report on behalf of the delivery partner and that all information contained within is true and correct and not misleading

I have read and understood [Hort Innovation's Privacy Policy](#)

Submit Save as Draft

[View Variation & Change Requests](#)

Checking the status of your submission

Click the ‘View Variations and Changes’ link in the ‘Variation and change’ requests column.

There are two types of status:

- **Draft:** If you have saved as a draft and intend to submit at a later date.
- **Submitted:** This means your request is still under review by Hort Innovation.
- **Resubmission request:** Some changes are still requested by Hort Innovation to complete the contract variation request.

Hort Innovation > Contracts

Home Dashboard My Profile My Organisation Organisation Changes **Contracts**

Contracts

Page Instructions Show

The 'Contracts' page displays your active and completed projects. In addition to the dashboard, it is another point of entry to view your contracts where you are able to perform tasks. From here you can:

- View all contract milestones and their details
- Initiate a contract variation intent (click on the 'Add Contract Variation Intent' link)
- Request a change in the contract (click on 'Add Contract Change Request' link).

To select a contract, click on the 'Project Code' or the 'Project Title' links to open the contract and view milestone information.

Active contracts Completed contracts

Project Code	Contract Number	Project Title	Start date	End date	Project Leader	Contract Administrator	Contract Status	Variation & change requests
TG20000	CDN002197	HV21000-Market Access and Trade Development	15/09/2021	31/12/2022	Yudit Buitrego	Y Buitrego	In Variation	Add Contract Variation Intent View Contract Variation Intents Add Contract Change Request View Variations & Changes

Re-submit a contract variation request



“My variation was reviewed and amendments were requested. I want to re-submit a contract variation”.

Hort Innovation

Hort Innovation > Dashboard

Home Dashboard My Profile My Organisation Organisation Changes Contracts

Dashboard Page Instructions Show

Welcome to the Hort Innovation Delivery Partner Portal. The dashboard below provides a summary of items that require your attention, such as:

- Details of executed contracts
- Upcoming milestones
- Overdue milestones and milestones that need to be re-submitted
- Contract variation action items
- Change request action items

To access your contract and milestones, please click on the 'Executed Contracts' link below.

Hello Sangeetha,
The dashboard provides a summary of items that need your attention

Summary	
Full name:	Sangeetha Natarajan
Organisation name:	Random Thoughts Learning Solutions
Executed contracts:	8 Contracts
Upcoming milestones and reports:	1 Milestone

Overdue Milestones			
Project Code	Contract Number	Milestone Number	Due Date
BA19004	CON001889	103	1/05/2021

Contract Variations and Change Requests			
Accepted Intent to Vary:			
▶ Intent to vary contract - 16 November 2022			
Draft/Resubmit Variation Requests:			
▶ Change description			
Draft Change Requests:			
▶ Contract change Request - BA19004 - 05-Oct			

Upcoming Milestones (next 30 days) and Milestone Resubmission			
Project Code	Contract Number	Milestone Number	Due Date
BA19004	CON001889	106	30/11/2022

Step 1: Open variation that needs re-submission

From the Contract Variations and Change Requests section in the dashboard, **click on the 'Draft/Resubmit Variation Requests'** record to make amendments to variation request

(OR)

1. Click on the Contracts tab in the navigation bar
2. Click on 'View Variation and Changes'

3. Click the 'Resubmit' link.

Hort Innovation > Contracts

Home Dashboard My Profile My Organisation Organisation Changes **Contracts**

Contracts

The 'Contracts' page displays your active and completed projects. In addition to the dashboard, it is another point of entry to view your contracts where you are able to perform tasks. From here you can:

- View all contract milestones and their details
- Initiate a contract variation intent (click on the 'Add Contract Variation Intent' link)
- Request a change in the contract (click on 'Add Contract Change Request' link).

To select a contract, click on the 'Project Code' or the 'Project Title' links to open the contract and view milestone information.

Active contracts Completed contracts

Project Code	Contract Number	Project Title	Start date	End date	Project Leader	Contract Administrator	Contract Status	Variation & change requests
TG20000	CON002197	HV21000-Market Access and Trade Development	15/09/2021	31/12/2022	Yudit Buitrago	Y Buitrago	In Variation	Add Contract Variation Intent View Contract Variation Intents Add Contract Change Request View Variations & Changes

Hort Innovation > Contracts > Contract Variation and Contract Change List

Home Dashboard My Profile My Organisation Organisation Changes Contracts **View Variation And Changes**

Contract Variation and Contract Change List

Contract details: CON002197 - HV21000-Market Access and Trade Development - TG20000

+ Add Intent to Vary + Add Contract Change Request

Date Submitted	Type of Request	Request Outline	Status	Actions
30/9/2021	Variation	Change description	Re-submission Requested	View Resubmit

Active Contracts

Step 2: Update project proposal

1. Review the 'Resubmit Reason' provided by the Hort Innovation project contact
2. Make the required changes and upload any additional documents as described in Step 2. under the 'Submit a contract variation request' section
3. Submit again. The status will remain 'Submitted' until the final decision is taken by Hort Innovation.

If the variation is approved, you will receive notification from Hort Innovation outside of the portal including the updated contract for signature. This will be provided via email from contracts@horticulture.com.au or Docu-Sign.

When the contract variation has been counter-signed by Hort Innovation, the changes will be reflected in the Delivery Partner Portal (e.g. change of milestone due date).

Hort Innovation

Hort Innovation > Contracts > Contract Variation Request submission form

Home Dashboard My Profile My Organisation Organisation Changes Contracts

Contract Variation Request submission form

Page Instructions Show

▶ Contract details: CON002197 - HV21000-Market Access and Trade Development - TG20000

1 Resubmit Reason: Supporting document for budget change is not included in the submission. Kindly resubmit

Step 1 of 2

Request Outline

Change description

Rationale

This is my justification for the change

Step 2 of 2

2 Upload Document

Name	Uploaded by	Options
Contract_MRT_for_HV21000.docx	Hort Innovation	Edit

3 Submit Save as Draft

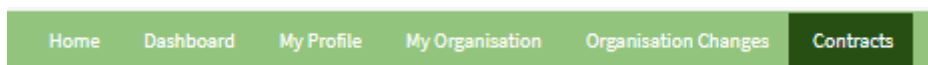
[View Variation & Change Requests](#)

Submit a contract change request



“I want to change details at the contract level related to a contract administrator”.

Go to the **Contracts** tab on the navigation bar.



Step 1: Start a contract change request

1. Select the contract you intend to change. Click on ‘Add Contract Change Request’ link.

Hort Innovation > Contracts

Home Dashboard My Profile My Organisation Organisation Changes **Contracts**

Contracts Page Instructions Show

Active contracts Completed contracts

Project Code	Contract Number	Project Title	Start date	End date	Project Leader	Contract Administrator	Contract Status	Variation & change requests
TG20000	CON002197	HV21000-Market Access and Trade Development	15/09/2021	31/12/2022	Yudit Suintrego	Y Buitrego	In Variation	Add Contract Variation Intent View Contract Variation Intents 1 Add Contract Change Request View Variations & Changes
MT19014	CON002093	MT19014-Field Based Testing for Fall Army Worm	23/04/2021	30/11/2021	Yudit Suintrego	Y Buitrego	Contract Executed	View Contract Variation Intents Add Contract Change Request View Variations & Changes
PW20004	CON002115	PW20004-Sweetpotato Export Strategy	31/05/2021	30/11/2021	Yudit Suintrego	Y Buitrego	Contract Executed	Add Contract Variation Intent Add Contract Change Request

[Dashboard](#)

Step 2: Complete 'Add Change Request' form

1. Update the details in **'Request outline and rationale' fields** in the change request form. Please include contact details for the new contract administrator or project personnel (Full name, contact number, email address).

This can now be used to update project leader if there are no other variations to the contract. If time, scope or budget is changing please put through an intent to vary for those changes separately or together with the project leader change details.

2. Click **'Next'**.

Hort Innovation > Contracts > Add Change Request

Home Dashboard My Profile My Organisation Organisation Changes Contracts **Add Change Request**

Add Change Request

Page Instructions Show

Contract details: CON002197 - HV21000-Market Access and Trade Development - TG20000

Step 1 of 2

Request Outline *

This is a change request 1

Rationale *

This is my justification.

Next 2

[View Variation & Change Requests](#)



Important: Once you **click 'NEXT'**, please wait until the system finalises the loading process. This will take a few seconds. If you **click the 'Upload Document'** button during this process you may receive an error message.

Step 2 of 2

Upload Document

Name Uploaded by Options

Submit Save as Draft Loading...

[View Variation & Change Requests](#)

Step 3: Upload document (optional)

1. Upload any supporting documentation that may be required.
2. Confirm you have authority to submit on behalf of the delivery partner. You will also need to confirm that you have read our Privacy Policy
3. Click **'Submit'** if you are ready, or **'Save as a draft'** to complete your request at a later stage.

Hort Innovation

Hort Innovation > Contracts > Contract Variation an... > Edit Change Request

Home Dashboard My Profile My Organisation Organisation Changes Contracts

Edit Change Request

Page Instructions Show

Contract details: CON002197 - HV21000-Market Access and Trade Development - TG20000

Step 1 of 2

Request Outline *

This is a change request

Rationale

This is my justification

Step 2 of 2

1 Upload Document

Name	Uploaded by	Options
Loading...		

2 Agreement

I confirm that I have the authority to submit this report on behalf of the delivery partner and that all information contained within is true and correct and not misleading

I have read and understood [Hort Innovation's Privacy Policy](#)

3 Submit Save as Draft

[View Variation & Change Requests](#)

Once you submit, you will see a confirmation message and will land on the overall 'Contract Variation and Contract Change list. This list includes all your submitted and draft change requests. You will be able to follow up on the status of your request. You will also be able to submit any change requests that you have saved as a draft.

Hort Innovation

Hort Innovation > Contracts > Contract Variation and Contract Change List

Home Dashboard My Profile My Organisation Organisation Changes Contracts **View Variation And Changes**

Contract Variation and Contract Change List

Page Instructions Show

▶ Contract details: CON002197 - HV21000-Market Access and Trade Development - TG20000

+ Add Intent to Vary + Add Contract Change Request

Date Submitted	Type of Request	Request Outline	Status	Actions
30/9/2021	Change Request	This is a change request	Submitted	View
30/9/2021	Variation	Change description	Submitted	View

[Active Contracts](#)

This is the end of the process on the Portal.



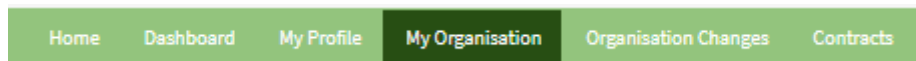
Hort Innovation will reach out via email if further information is required. If there is a change to the contract administrator, Hort Innovation will invite them to register for the portal via a dedicated email.

Submit a business change request



“I want to change business entity details such as advice of a new ABN or change organisational details such as updated bank account details”.

Go to the **My Organisation** tab on the navigation bar.



Step 1: Download template related to the required change

Under 'Download Templates' **click on the template** relevant to your change. Update the change details in the document. Save to your computer.

Hort Innovation

Hort Innovation > My Organisation

Home Dashboard My Profile **My Organisation** Organisation Changes Contracts

My Organisation

Page Instructions Show

The 'My Organisation' page connects with Hort Innovation's CRM system. Information on this page can only be modified by Contract Administrators.

Trading Name *	ABN
Random Thoughts Learning Solutions	48 604 754 912
Legal Name	Phone
BRIEFBOARD PTY. LTD.	Provide a telephone number
Address	Website
	—

Download Templates:

- Business Entity Change
- Change Business details

+ Add Business Entity Change + Add Business Details Change

Dashboard

Step 2: Upload your document

Once you complete the template, upload to the Portal.

1. Click on 'Add Business Entity Change' OR 'Add Business Details Change' buttons.

Home Dashboard My Profile **My Organisation** Organisation Changes Contracts

My Organisation

Page Instructions Show

Trading Name *	Phone
Random Thoughts Learning Solutions	Provide a telephone number
Membership Contact	Fax
—	—
Address	Website
	—

Download Templates:

- Business Entity Change
- Change Business details

+ Add Business Entity Change + Add Business Details Change 1

Dashboard

2. Fill in the request details in the 'Add Organisation Change' request form and click 'Next'.

Add Organisation Change

Page Instructions Show

Step 1 of 2

Type *

Change in Business Entity

Request Outline *

Rationale *

Next 2

Organisation Changes

3. Click **'Upload document'** and upload change request document & supporting documents.
4. Confirm you have authority to submit on behalf of the delivery partner. You will also need to confirm that you have read our Privacy Policy and Click **'Submit'**.



You will not be able to submit until a document is uploaded. If you completed step 1 and 2 and now go back, a draft form will be saved. You can view and submit at a later stage.

Add Organisation Change - Document Upload

Page Instructions Show

Step 1 of 2

Type *
Change in Business Entity

Request Outline *
Test this

Rationale *
Test this

Step 2 of 2

3 Upload Document

Name	Uploaded by	Options
There are no folders or files to display.		

4 Agreement

I confirm that I have the authority to submit this report on behalf of the delivery partner and that all information contained within is true and correct and not misleading

I have read and understood [Hort Innovation's Privacy Policy](#)

Submit

After submitting a request, if you have missed any documents or want to make other changes to the request, go into the **'Organisation changes'** tab. You will see a list of all your change requests.

Select the change request you want to modify or add to, click **'View'** and upload additional documents.

Hort Innovation > Organisation Changes

Home Dashboard My Profile My Organisation **Organisation Changes** Contracts

Organisation Changes

Page Instructions Show

Download Templates:

- Business Entity Change
- Change Business details

+ Add Business Entity Change + Add Business Details Change

Date Submitted	Type	Request Outline	Status	Actions
29/09/2021	Change in Business Entity	Change in ABN	Submitted	View

This is the end of the process on the Portal. Next steps regarding these change requests are managed via email.

Business Details Change

Hort Innovation will confirm via email when business details have been updated.

Business Entity Change

Hort Innovation will review the business entity change and liaise via email to execute a Deed of Agreement for all contracts affected by the change.

Frequently Asked Questions

For any technical issues please email portal.support@horticulture.com.au

For other types of enquiries or to share feedback please email communications@horticulture.com.au

Here are a few questions we have most frequently received.

Q. Can the portal be accessed offline?

A. No. The Portal requires internet access, however documents that will be uploaded can be worked on offline. Once finalised, they can be uploaded to the Portal.

Q. Can the account be shared to other team members?

A. No, due to security settings.

Q. Does the Portal work on apple devices?

A. Yes

Q. I don't have a Microsoft account, what do I do?

A. Check instructions on pages 6 and 7 of this guide for creating a Microsoft account.

Q. I am not sure if the email from work is a Microsoft account or not?

A. You can check with your local IT or helpdesk if the email is hosted on Microsoft Exchange.

Q. I need to reset my password for the portal?

A. Because the portal uses your Microsoft account for authentication, you would need to manage your password reset through your local IT or Microsoft portal directly.

Q. I have lost my phone or need to change the mobile number that I initially registered for Multi-Factor Authentication (MFA) and require to reregister MFA with a new number?

A. You will need to contact portal.support@horticulture.com.au. For security purpose we will only respond to the registered email address and contact # for the contract administrator or the project lead within our system, therefore it's important to ensure your profile within the Portal accurately reflects the correct details.

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