

Buyer Portal – Multi-Goal Compliance

How to use Multi-Goal Compliance on the OFA platform

The functionality to create a Multi-Goal policy is permission controlled. Please contact your Organisation's Admin to enable the "Compliance Policy Configuration" permission. Any user with "Supply Chain" app access will be able to select and apply a Multi-Goal policy once it has been created.

Multi-Goal Compliance

You can customise a Compliance Policy for your new and existing segments using Multi-Goal Compliance. After creating a new Compliance Policy, you can select it again for other segments.

You will need to select "Manage Supply Chain", then "Supply Chain" on the portal menu.

When creating or editing a segment in "Supply Chain", you will see the "Compliance Policy" drop-down menu here.

[Back to Segments](#)

Create a segment

Set up a segment to manage risk – ensure suppliers are always compliant

Segment Details

Name of Segment*

e.g. Electric, ground work, plumbing

Segment Type*
Choose Segment Type

Location
Enter a postcode

Segment Overview

Provide a brief summary of the segment

e.g. all of my North East suppliers that can work at heights

Compliance Policy*

After selecting this, you will have the option to select an existing Community Goal (from Constructionline, Facilitiesline, Material Supplier or Builder's Profile), a Private Goal if you have one set up, or the option to "Create New".

Platinum

Gold

Silver

Cannot find policy you are searching for

Create New +

Once you have selected “Create New”, you will be navigated to the “Create Compliance Policy” page.

[Back to Create a Segment](#)

Create Compliance Policy

Policy Title *

Policy Title

Policy Description (optional)

Please enter policy description

Select Goals and/or Requirements

Find by Name

Please select at least one level

Goals & Requirements	Include in Policy	Include in Status
Associate	☐	☐
Bronze	☐	☐
Builder's Profile	☐	☐
Building Safety Act - Higher Risk Buildings	☐	☐
Building Safety Act - Standard Construction	☐	☐

Cancel

Save

Please resolve the issues above

Name the new Compliance Policy and optionally add a description.

You will then select the Goals or Requirements you require using the checkboxes.

You can also search for a Goal or Requirement name at the top.

Select Goals and/or Requirements

Find by Name

Please select at least one level

Goals & Requirements	Include in Policy	Include in Status
Associate	☐	☐
Bronze	☐	☐
Builder's Profile	☐	☐
Building Safety Act - Higher Risk Buildings	☐	☐
Building Safety Act - Standard Construction	☐	☐
Data Sharing	☐	☐
Facilities Bronze	☐	☐
Facilities Gold	☐	☐
Gold	☐	☐
Marketplace	☐	☐
Materials Plus	☐	☐
Materials Premier	☐	☐
Platinum	☐	☐
Silver	☐	☐
Social Enterprise	☐	☐
Social Value	☐	☐
SSIP Accredited	☐	☐
SSIP DTS	☐	☐

Cancel

Save

Please resolve the issues above

Use the drop-down menus to see individual Requirements within a Goal.

Gold

Requirement	Include in Policy	Include in Status
Primary Contact	☐	☐
Registered Office	☐	☐
Head Office	☐	☐
Branch Office	☐	☐
Director/Partner Detail	☐	☐
Related Companies	☐	☐

You can see you have the option to select **“Include in Policy”** and **“Include in Status”**.

- By selecting the **“Include in Policy”** option, this makes the requirement mandatory in your segment. Suppliers must complete this requirement for the Buyer Connection to show as verified
- If you unselect **“Include in Status”**, this indicates that you are interested in collecting this information, but it is not mandatory to be compliant

By default, any goal or requirement included in the policy will also be included in the status. This will make it necessary for your suppliers to have these requirements completed and verified to appear as verified in your segment.

After you have selected the requirements or goals for your Compliance Policy, complete the rest of the details of your segment and **“Save”**.

When you add your suppliers to that segment, you will be able to view these goals on their profile in **“Your Connections”**.

Brighton Plumbing |
Not Verified

- Unit

0 of 7 Requirements Completed

Status	Requirement Name	Issues	Valid From	Expiry Date	
✖	Environment & Sustainability Environmental Management	🔍	28/02/2024	Expired	<button>View</button>
✖	Business Ownership Equal Opportunity and Diversity	🔍	28/02/2024	Expired	<button>View</button>
✖	Mental Health and Wellbeing Health and safety	🔍	28/02/2024	Expired	<button>View</button>
✖	Memberships & Accreditations Memberships and Accreditations	🔍	28/02/2024	Expired	<button>View</button>
✖	Community Engagement Social Value	🔍	28/02/2024	Expired	<button>View</button>
✖	Social Value Social Value	🔍	28/02/2024	Expired	<button>View</button>
✖	Working Conditions Social Value	🔍	28/02/2024	Expired	<button>View</button>

If you have selected a goal or requirement that does not already appear on the supplier’s profile as part of their existing membership, the supplier will be prompted to upgrade to have access to those goals.

Buyer Connections

5 upgrade requests

Buyer: All

Brighton Plumbing • Project • Stage: Approved

Requires upgrade to Membership

UPGRADE

You can also select this new Compliance Policy when editing or creating a new segment.

Compliance Policy*

Silver

BSA Building Safety Act - Standard Construction

Additional Requirements

Additional Requirements plus Bronze

Cannot find policy you are searching for?

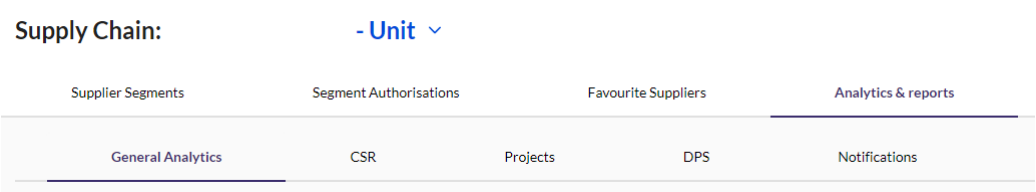
Create New +

Compliance Policy Analysis

You can view analytics for the suppliers in a segment with Multi-Goal Compliance set in the “**Compliance Policy Analysis**” section of “**Analytics and Reports**”.

In the “**Supply Chain**” app, select “**Manage Supply Chain**”.

Now select “**Analytics & reports**”. You will be navigated to the “**General Analytics**” group of reports.



At the bottom of the page, use the arrow button to find the “**Compliance Policy Analysis**” report.

Compliance Policy Analysis

Organisation Unit		Segment Type		Segment		Compliance Goal		Verif. Status		Main Work Gate		Enterprise Size		Range No Empl.	
All		All		All		All		All		All		All		All	
Web URL	Supplier Name	CL Reg Number	Company House Number	UTR Number	Target Level	Verification Status	Segment	Compliance Policy	Compliance Policy Status	Associate	Bronze	Builder's Profile	Covid-19		
					Gold	Verified	***DEMO S SUPPLY CHAIN	Bronze	FullyMet		Verified				
								Bronze	FullyMet		Verified				
							Ealing	Bronze	FullyMet		Verified				
					Gold	Unverified	***DEMO S SUPPLY CHAIN	Bronze	NotMet		Unverified				
								Bronze	NotMet		Unverified				
					Gold	Unverified	* Subcontractors and Consultants	Bronze	NotMet		Unverified				
							***DEMO S SUPPLY CHAIN	Bronze	NotMet		Unverified				

Directors Info

Compliance Policy Analysis

BSA Assessment - Status Overview

HRB Assessment - Compliance Overview

HRB Assessment - Question Compliance

SC Assessment - Compliance Overview

SC Assessment - Question Compliance

This report contains data about the Segments you have created, the Compliance Policy set for each segment and if the supplier is verified.

The first four columns include supplier data, such as their company name and Platform Registration Number.

The “**Target Level**” refers to the membership that the supplier currently has. “**Verification Status**” directly to the right of this column is the status of that membership.

The “**Segment**” will detail which segment the supplier is in. If you would like to filter by Segments, you can do so with the filter “**Segment Name**”.

Compliance Policy Analysis

Organisation Unit

Segment Type

Segment

All

All

All

Web URL

Supplier Name

CL Reg Number

Company Number

Search

Select all

* New Segment.

* Subcontract...

“**Compliance Policy**” refers to the Compliance Policy for the listed segment. Your Multi-Goal policies will show here. The “**Compliance Policy Status**” will show one of three results.

- **NotMet** – the supplier is not yet verified on all requirements of the Compliance Policy
- **PartiallyMet** - the supplier is verified on some requirements of the Compliance Policy
- **FullyMet** - the supplier is verified on all requirements of the Compliance Policy

By using the scroll bar, you can view the different Community Goals or Private Goals that the Compliance Policy includes.

If you have filtered the report by Segment, the Goals that appear will only be those in the Compliance Policy of the selected Segment.

Compliance Policy Analysis

Organisation Unit		Segment Type		Segment		Compliance Goal		Verif. Status	Main Work Cate.	Enterprise Size	Range No Empl.
All		All		All		All		All	All	All	All
Web URL	Supplier Name	CL Reg Number	Company House Number	UTR Number	Target Level	Verification Status	Segment	Compliance Policy	Compliance Policy Status	Bronze	Additional Requirements
					Silver	Unverified	plus Bronze	Additional requirements plus Bronze	NotMet	Unverified	Unverified
					Gold	Verified	plus Bronze	Additional requirements plus Bronze	FullyMet	Verified	Verified
					Gold	Verified	plus Bronze	Additional requirements plus Bronze	PartiallyMet	Verified	Unverified
					Gold	Unverified	plus Bronze	Additional requirements plus Bronze	PartiallyMet	Unverified	Verified