

Government of **Western Australia** Department of **Finance** 





### Quick Reference Guide

This QRG aligns with the Project Management Framework

	SUPPLIER PORTAL	Registration	
To log into the SRM Po	rtal enter the following address into your	Neb Browser:	
https://srmportal.c	openwindows.com.au		
https://srmportal.openwindo	ws.com.au/login?ReturnUrl=%2F		A" 20
	the second s		
	open windows software	Open Windows Supplier Portal	
	modular procurement		
	Existing Supplier Login	New Supplier Registration	
Re	Enter email address	Are your customers using Open Windows Software to manage their contracts?	
	Enter password	The Supplier Portal allows you to view and transact on your customer contracts along with self-service of insurances, licenses & registrations.	
	Forgot password? First time login click here.	To register a new account contact your customers to receive an invitation email.	
1-0-0	Login		
	Press Station and Station		
If you are a new supplie	er to the Department of Finance, you will	equire an invitation to register for SRM Porta	al.

You can request access by emailing: <u>bmwsystemssupport@finance.wa.gov.au</u>

Registration invitation email will be sent to you from Readytech Open Windows.

**Note:** Your email address will be used as the login identifier and must be unique to you. No generic email addresses are accepted ie: accounts@

You will receive an invitation email, with a link '<u>Click Here'</u> for you to register your new account.

This link will take you to the SRM Portal Supplier Registration page.

Open Windows Supplier F	Portal Registration Invitation - New Brew Interx
QA-do-not-reply@openwindows.com.a to me *	u l
Dear Mr New Brew,	
As the main contact we have on file for New	Brew we request that you use the below registration link to register an account on the Open Windows Supplier Portal. You will need to use this portal to submit your monthly payment claims.
If you are not the contact that needs to subr	mit monthly payment claims, please forward this email onto the correct contact, who can also use the below registration link to register and account.
NOTE: other contacts will need to re-enter t	heir own details, as your contact information will default in the registration fields.
<u>Click Here</u>	
, .	ed you will receive an email confirmation from Readytech Open Windows titled <b>ring for the SRM Portal</b> ".
	Registration confirmation

Russ Doig4 (russell4@russelldoig.com) Thank you for registering. A separate email notification will be sent to you once your account has been activated and is ready for use. Return to Login screen

© 2016 Open Windows Software Pty Ltd | SRM Portal 7.0.4.1008

Conditions of Use

Once your account request has been approved, you will receive an additional email titled: **"Welcome! Your Account Request has been Approved."** 

Within this email you will see a link to sign-in. This is a unique link containing your receipt number which is required to complete your account registration.

Click the link in the account confirmation email to be taken to the first login screen and create a password for your account.

First Login <sup>®</sup>	
eceipt number:	
6512626-da03-4fe-a9a4-3aee81a10124	
mail Address:	
Required	
reate New Password:	
Required	
onfirm New Password:	

Suppliers that have registered in the Portal and have not validated their email address within one hour following the registration will receive the following SMS from Readytech Open Windows:

Dear , An email
with subject Welcome!
Your Account Request
has been Approved for
the SRM Portal has been
sent to your email
algua n <del>na a</del> u,
Please check your inbox

including junkmail folders and click the link to proceed.

### Logging into the SUPPLIER Portal

To log into the SUPPLIER Portal (SRM Portal) enter the following address into your Web Browser: <u>https://srmportal.openwindows.com.au</u>

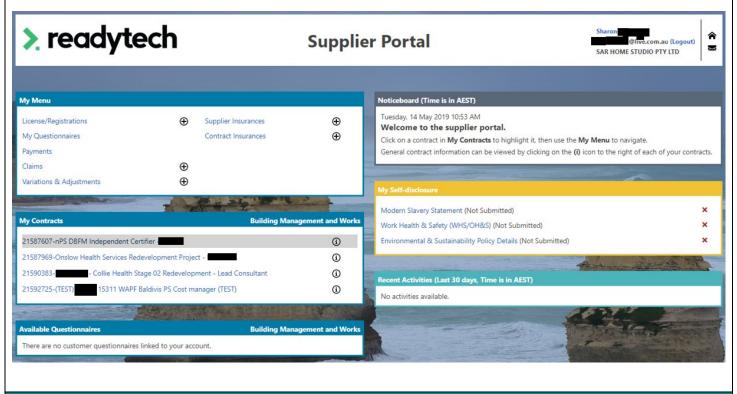
This will take you to the login screen where you will need to enter your Email Address and the Password you created in your First Login screen.

If you forget your password, click the Forgot Password? Link. A temporary password will be emailed to you from OPEN WINDOWS.

	Existing	g Supplier I	Login	
Enter email addre	SS			
Enter password				
Forgot password?	]			
First time login cli	ck here.			
		Login		

## Navigating the SUPPLIER Portal

Where the Dept of Finance is your ONLY customer please login using your current registered email and password. If you are a supplier that only have contracts with one Open Windows customer, that customer's 'My Menu' configuration will automatically be applied when you log into the portal. If you are a supplier with contracts across multiple Open Windows customers, the My Menu Widget will change as different customers are selected from the My Contracts Widget.

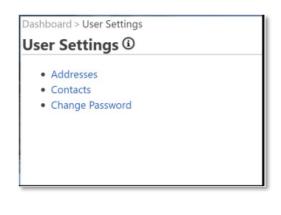


## **User Settings**

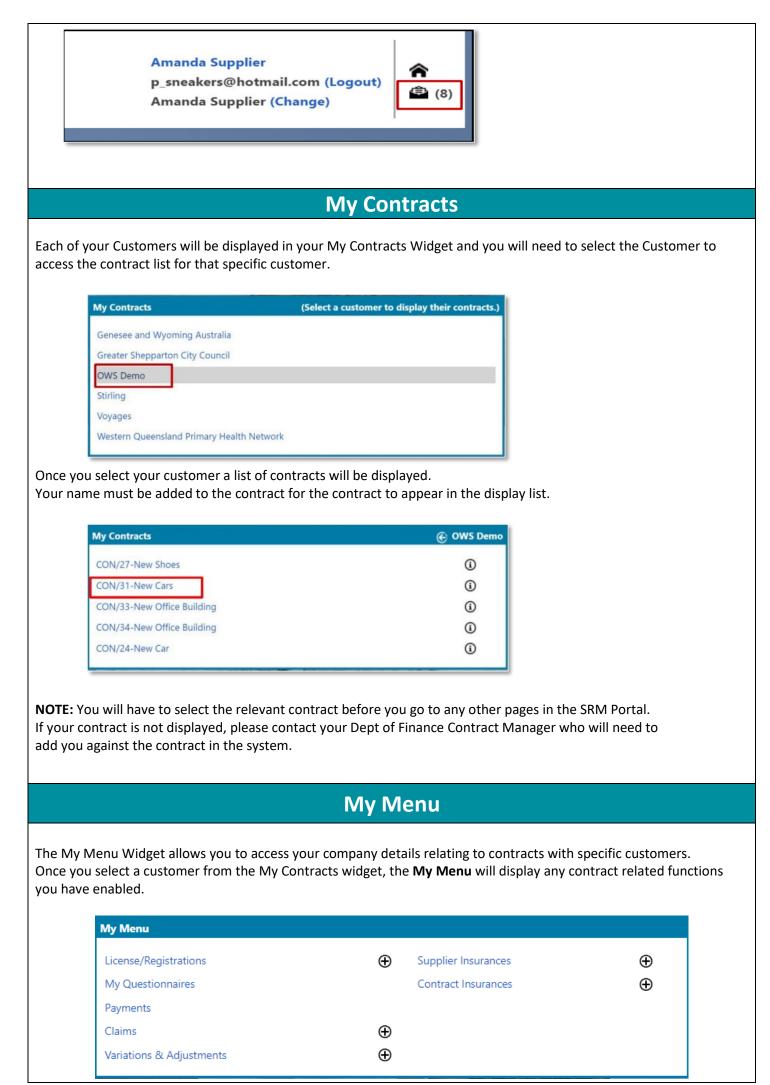
1. Click on your name at the top right-hand corner of the screen.

Supplier Portal	Amanda Supplier p_sneakers@normall.com (Logout) Amanda Supplier (Change)	<b>(8</b> )
		141

2. Here you can add/edit your personal details like, addresses, contacts and change your password.



3. Click on the envelope icon to the right of your user settings.



### Noticeboard

This widget displays the date and time, welcome message and minor instructions on how to navigate around the portal.

#### Noticeboard (Time is in AEST)

Tuesday, 14 May 2019 10:53 AM

Welcome to the supplier portal.

Click on a contract in My Contracts to highlight it, then use the My Menu to navigate.

General contract information can be viewed by clicking on the (i) icon to the right of each of your contracts.

## **Online Help**

Online Help is available, you will see the Help icon displayed next to the screen name. Clicking this icon will display the help information for the screen you are currently viewing in a pop-up window. Click anywhere outside of the help window to close it

	>	, re	adyte	ch		Supplie	er Portal
P D S	<b>'ay</b> Disp Pay Pay	vments vments vment List vment list	This function allows payments associated the top of screen ar the Search Text field information being di Excel using the Excel At any time. only on approval. Payment cr • Saved - the paym for approval. The approval or delete • In Progress - the	to current user and the displayed. Find an ello r simply paging for isplayed can be down icon. He payment per contra an have the following : hent has been saved, li payment can be upd id.	w Payment records. The the Contract selected a existing record by using wards / backwards. The loaded directly into M loaded directly into M loct can be submitted for status: but yet to be submitted for submitted for approva approval request bee	t demans V demans V r r L	Grand Total (Inc. Tax)
	_	93	cannot be saved, s	payment has been a submitted and deleted		broved	\$2,750.00
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		87	08/12/2020	08/02/2021		Approved	\$10,505.30
	0	86	27/10/2020	27/10/2020		Approved	\$8,169.50

# Available Questionnaires and My Self-disclosure

Please note that the Dept of Finance does not require you to self-disclose any information or answer any questionnaires using the SRM Portal.

 Available Questionnaires
 Building Management and Works

 There are no customer questionnaires linked to your account.

My Self-Disclosure Widget: This widget displays any questionnaires or any information that you maybe required to disclose such as pre-qualification details. You can complete them through this widget, and they will be submitted to your Contract Manager.

	My Self-disclosure				
	Modern Slavery State	ement (Not Submitted)		×	
		y (WHS/OH&S) (Not Submi		×	
	Environmental & Sus	tainability Policy Details (N	ot Submitted)	×	
		Recent Act	ivities		
This widget will display a	a list of the recent	activities that you ha	ve undertaken	in the SRM Porta	al.
Recent Activi	ties (Last 30 days)				
	October 2020 Sent communicatio	n : 'Contract Query' [C	ON/24 - New Ca	ar]	
	<b>7, 30 September 20</b> Sent communicatio	<b>120</b> n : 'Contract Query' [1	9.242 - Grassing	J Works]	
	<b>r, 23 September 20</b> Started Questionna	<b>20</b> ire: 'Work Health & Sa	fety (WHS/OH&	(S)'	
	-				
	Va	riations & A	djustmen	ts	
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/lanager.					
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1. From the My N	ienu , select varia	ations & Adjustments			
My Menu					
License/Registrat	ions 🕀	Supplier Insurances	Ð		
My Questionnaire	25	Contract Insurances	Ð		
Payments					
Claims	$\oplus$				
Variations & Adju					
2. You will be dired	cted to choose a co	ontract. Click 'Ok' and	a drop down li	ist of your contra	acts will appear.
Select Contrac					
Select the Contract you	would like to add a new Adj	ustment to.			
-	Ok				
<b>–</b>		cted and click "Create			
Ensura the corre	oct contract is solo	rtad and click "Croate	a now Adjucte	nont"	

Dashboard > Adjustments Adjustments ③				
Create new Adjustment Displaying for contract:	Onslow Health Services Rec	development Project -		
Adjustment List Contract Details				
Adjustment List				
Search Text:				Search
10 ▼ 44 4 Page: 0 ▼ of 0 → → ②	1			
Number 🔺 Title	Туре	EOT (days) Date Raised Status	Total (Ex. Tax)	Grand Total (Inc. Ta
No record found.				

3. Enter relevant information as to your Adjustment including the Type of adjustment, details, comments, and attachments.

Save	Submit	Cancel						Total: Tax: Grand Total:	0.00
			CON84 - Pro Auto-Generate	vision of consultin	g services				
		Title:						0	
		Type:	Allowable Adju	ustment 🗸					
			11/05/2016	1					
Q	uote Reference	Number: OT (days):	0						
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	add new item	1							
Item Numbe	Descrip	tion		Unit	Quantity	Rate	Total	Так	Grand Tota

- 4. To add financial items to the adjustment, click the hyperlink "Click here to add a new item".
- 5. Record the details of the Item:
  Description: What the variation is for
  Unit: Enter the amount \$
  Quantity: Will always be 1
  Rate: Enter the amount of variation
  Total: Auto-populated based on the Rate and Quantity entered
  Tax: GST tax amount
  Grand Total: Total + Tax
  Click "Save".

Item Number:	Auto-Generated			
Description:	Required			
Unit:	Required			
Quantity:	Required			
Rate:	0			
Total:	\$0.00			
Tax:	\$0.00			
Grand Total (Inc. Tax):	\$0.00			
	Save Cancel			
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- b. "Submit" the record, which will save and send this information to the client.
- c. "Cancel", which will return you to the Adjustments list screen without saving changes.

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<b>Contract Claims for Payment</b> en allows you to submit a claim for payment as well as track the progress of payment approvals. The s by a list of current and previous payments along with the status of that payment for the selected contri on a payment to view or edit (you cannot edit a payment that has been submitted or approved). In need to select the relevant contract from the "My Contracts" menu <b>before you select Payments</b> . hit for the contract to be highlighted in grey before proceeding My Contracts	Contract Claims for Payment         en allows you to submit a claim for payment as well as track the progress of payment approvals. The scay a list of current and previous payments along with the status of that payment for the selected contration a payment to view or edit (you cannot edit a payment that has been submitted or approved).         u need to select the relevant contract from the "My Contracts" menu before you select Payments.         ait for the contract to be highlighted in grey before proceeding         My Contracts       Building Management and Works         21587607-nPS DBFM Independent Certifier       ①         21587969-Onslow Health Stage 02 Redevelopment - Lead Consultant       ①         21592725-(TEST)       15311 WAPF Baldivis PS Cost manager (TEST)	Variation		Lumma and	1	61 500.00	\$1,500,00	\$150.00	£1.65
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	board > Claims						
Cla	ims 🛈						
Crea	ate new Claim Dis	playing for contract: 21	592725 - (TEST) DCW	C 15311 WAPF Baldivis	PS Cost manager (	TEV	
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Cla	im List Contract	Details					
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	rch Text:						
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Sear	rch Text:	1♥ of 1 → → 🦻	II 2				
Sear	rch Text:		Claim Period From	Claim Period To	Issue Date	Status	Total Claim (Ex.
Sear	rch Text: ▼ 44 4 Page:		_	<b>Claim Period To</b> 03/05/2023	<b>Issue Date</b> 04/05/2023		
Sear	rch Text:	Reference Number	Claim Period From			In Progress	<b>Total Claim (Ex.</b> \$42,00 \$4,50

- 3. Enter the following payment header details:
  - a) **Payment Number:** this is automatically populated. Your payment will not be allocated a payment number until it has been approved by the client.
  - b) Reference Number: this is your reference number for the claim
  - c) Issue Date: Date claim is entered
  - d) Claim Period From: the date from which you are claiming.
  - e) Claim Period to: the date to which you will be claiming to for work completed.
  - f) **Comments:** this is a non-mandatory field where you can add further details specific to the payment.
  - g) Attachments: you can attach relevant documentation here ie: your invoice. (at least one document is required)

Save Submit Cancel	Total: Tax: Grand Total (inc. Tax):	40,817.36 4,081.74 44,899.10
Selected Contract:	21591747 - Ratan - TEST SVC CONT - 18Aug21	
Claim Number:	Auto-Generated	
Reference Number:		
Issue Date:	07/12/2021	
Claim Period From:	dd/mm/yyyy	
Claim Period To:	dd/mm/yyyy	
Comments:		
Does this claim include claims from Subconsultants? If yes, details are attached:	G	
Calculations which provide the basis of the claim for the fee payable are attached:		
Copies of receipts or invoices to substantiate disbursement claims (if applicable) are attached:		
Have any matters arisen which affect total fee payable? If yes, details are attached:		
N/A:		
Attachments:	Choose File No file chosen * Mar file size allowed a 524.00ML File types allowed: gill jpg, jpeg, preg. 72, 29; pdf, dec, etc., stc, star.	

		annensional energ point	to make payments again	ist contracts and phases.	Note empty and 0.00 W	aloes are not processed.		
Contract		Brief/PDef	Schem. Design	Design Develop.	Contract Doc.	Contract Admin.	Disbursements	Total Fee Com
Ratan - TEST SVC CONT - 18Aug21	This Payment	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
L TAG Architects	Previous Payments	\$3,000.00	\$4,500.00	\$15,000.00	\$1,500.00	\$0.00	\$16,817.36	\$24
	Total This Payment	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
	Total Previous Payments	\$3,000.00	\$4,500.00	\$15,000.00	\$1,500.00	\$0.00	\$16,817.36	\$24

4. Once complete, click "Save" or "Submit".
Save will only save your entry.
Submit will save and submit the claim which will populate in the PACMan application where the Contract Manager will be able to process your claim.

**Note:** Multiple claims can be SAVED except only one can be submitted at a time.

The **Submit Button** does not appear for the next claim to be submitted until the previous one has been actioned by the Contract Manager.

Save	Submit Cance	el la		
	Selected Con	tract: 21591747 - Ratan - TEST SVC CONT - 18Aug21		
		nber: Auto-Generated		
	Claim Nur	nder. Auto-Generated		
	Reference Nur	nber:		
	Issue	Date: 07/12/2021		

### **Contract Insurances**

The Contract Insurances screen allows you to add and maintain information regarding insurance policies that you have taken out against your contracts. The screen initially displays a list of existing insurances for the contract that is selected in the drop-down list.

To create a Contract Insurance:

1. From the My Menu, select "Contract Insurances".

My Menu			
License/Registrations My Questionnaires	Ð	Supplier Insurances Contract Insurances	⊕ ⊕
Payments			Ũ
Claims Variations & Adjustments	⊕ ⊕		

2. Click "Create a new Contract Insurance".

Contract Insurances		
	Displaying for contract: CON-S263 - Cater	ring Services - Julie $\vee$
Insurance List Contract Detai	ls	
Insurance List		
Search Text:		
10 V 44 4 Page: 0 V of 0	) > >> 🤪 🥅 🗃	
Insurer	Policy Number	Amount Insured Insurance

- 3. Enter the following details:
  - a) Insurance Type
  - b) Insurer
  - c) Policy Number
  - d) Amount insured
  - e) Commencement date
  - f) Expiry date
  - g) Remarks (this is a non-mandatory field that you can use to add additional information regarding the policy)
  - h) Attachments (it is recommended that you attach a scanned version of your policy)

ave Submit Cancel		
Selected Contract:	CON-S263 - Catering Services - Julie	
Insurance Type:	Public Liability	
Insurer:	Alliance	
Policy Number:	9879879797987	
Amount Insured:	\$10,000,000.00	
Commencement Date:	23/07/2019	
Expiry Date:	23/07/2020	
Remarks:		

- 4. Once you have entered all the required details you can either:
  - a) "Save" the record, which will save this for you to edit later,
  - b) **"Submit"** the record, which will save and send this information to the Contract Manager
  - c) "Cancel", which will return you the Contract Insurances list screen without saving changes.

When you submit an insurance record, you will receive an email confirmation. The contract manager will receive an email notification of your new or updated insurance information. They will then review and approve the changes. You will then receive an email notification of the approval, and the insurance status will be updated to "Approved". Once an insurance record has been approved it cannot be edited.

## Supplier Insurances

This screen allows you to add and review Supplier Insurance records. The list of existing records displayed on the screen are associated to the Supplier you belong to. Find an existing record by using the Search Text field or simply paging forwards / backwards.

To create a Suppler Insurance:

1. From the "My Menu", select "Supplier Insurance".

My Menu			
License/Registrations My Questionnaires	Ð	Supplier Insurances Contract Insurances	⊕ ⊕
Payments			
Claims	$\oplus$		
Variations & Adjustments	$\oplus$		

2. Click "Create a new Supplier Insurance".

Dashboard > Supplier Insurances							
Supplier Insurances (i)							
Create new Supplier Insurance							
Insurance List							
Search Text:						Sear	ch Clear
10 • • • Page: 1 • of 1	>>> 👂 📰 🔊						
Insurer 🔺	Policy Number	Amount Insured	Insurance Type	Expiry Date	Commencement Date	Status	Approval Pending
RAC Insurance PL	455Y56	\$1,000,000.00	Product Liability	29/02/2024	01/03/2023	Approved	

- 3. Enter the following details:
  - a) Insurance Type: select the type of policy from the drop down.
  - b) Insurer: Enter the name of Insurer
  - c) Policy Number: Enter the policy number
  - d) Amount insured: the amount that the policy covers you for.
  - e) Commencement Date: the date the policy starts
  - f) Expiry Date: the expiry date of the policy.
  - g) Remarks: this is a non-mandatory field that you can use to add additional information regarding the policy. Attachments: it is recommended that you attach a scanned version of your policy.
  - h) Attachments: it is recommended that you attach a scanned version of your policy.

Save Cancel		
Insurance Type:	V	
Currency:	Not Set 🗸	
Insurer:		
Policy Number:		
Amount Insured:		
Commencement Date:		
Expiry Date:		
Remarks:		0
Attachments	* Max file size allowed is 50.00MB. File types allowed: all, jpg, jpeg, prg, 7z. zig, pdf, doc, docs, wit, slas	Browse

- a) "Submit" the record, which will send the insurance to the relevant internal contact for approval.
- b) "Cancel", which will return you the Securities list screen without saving changes.