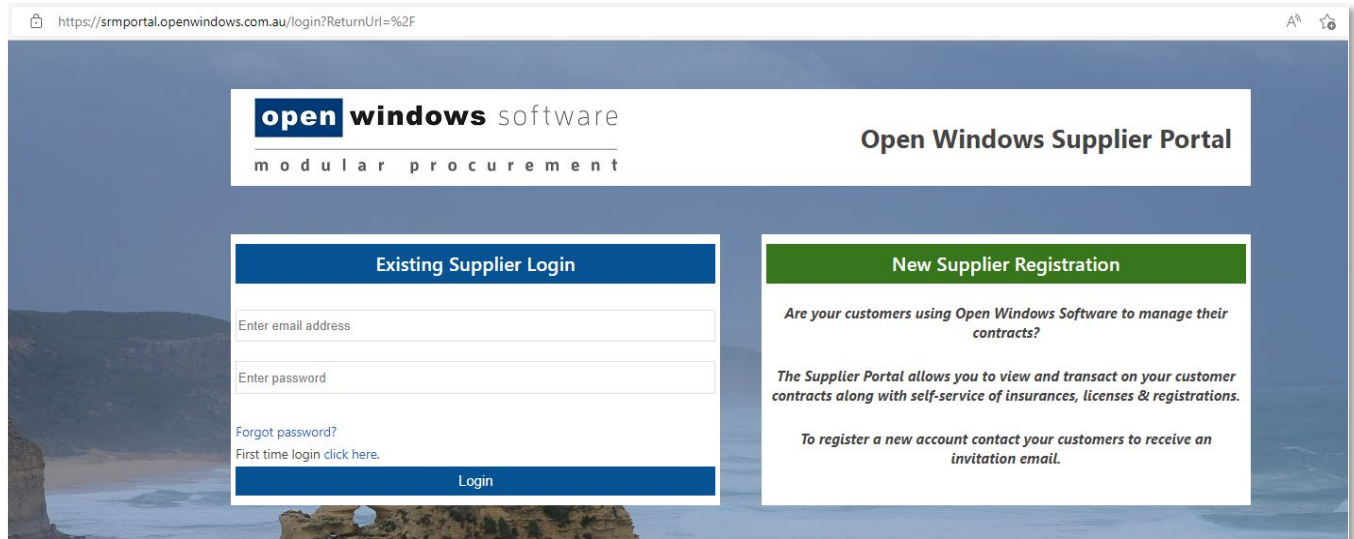




## SUPPLIER PORTAL Registration

To log into the SRM Portal enter the following address into your Web Browser:

<https://srmportal.openwindows.com.au>



If you are a new supplier to the Department of Finance, you will require an invitation to register for SRM Portal.

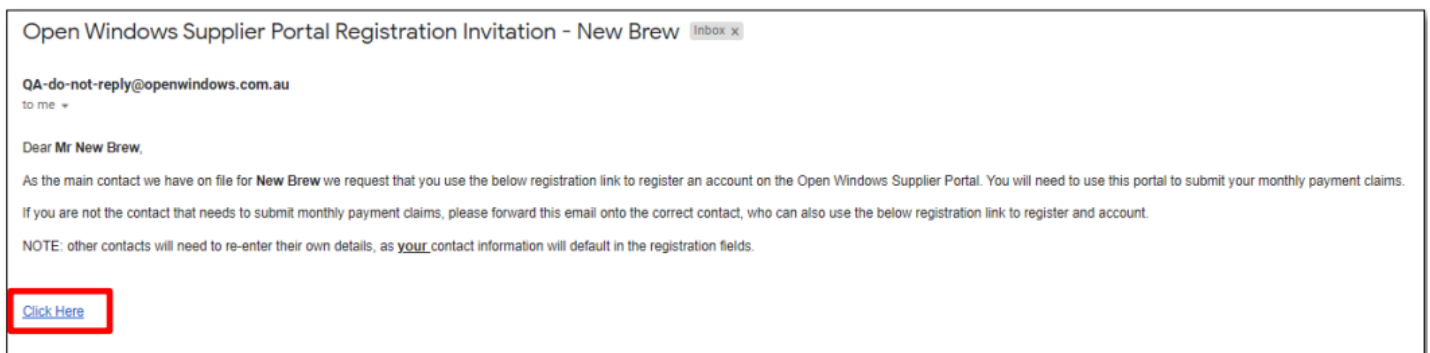
You can request access by emailing: [bmwssystemssupport@finance.wa.gov.au](mailto:bmwssystemssupport@finance.wa.gov.au)

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

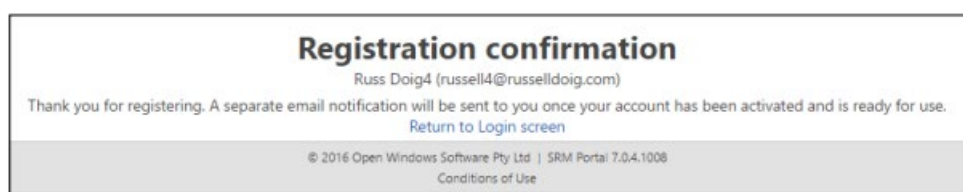
**Note:** Your email address will be used as the login identifier and must be unique to you. No generic email addresses are accepted ie: **accounts@**

You will receive an invitation email, with a link '[Click Here](#)' for you to register your new account.

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



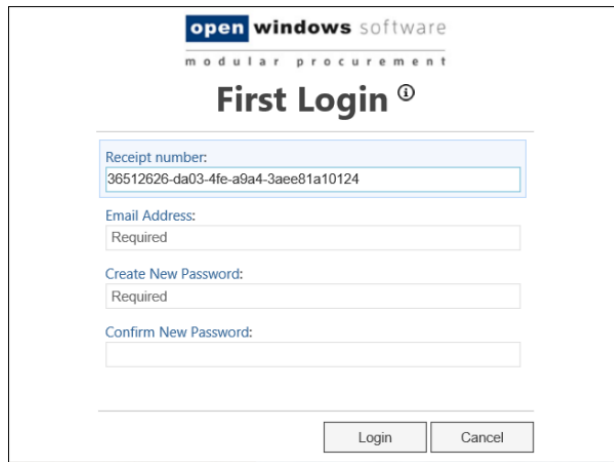
Once you have registered you will receive an email confirmation from Readytech Open Windows titled "Thank you for registering for the SRM Portal".



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.



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 [REDACTED], An email with subject Welcome! Your Account Request has been Approved for the SRM Portal has been sent to your email [REDACTED]. Please check your inbox including junkmail folders and click the link to proceed.

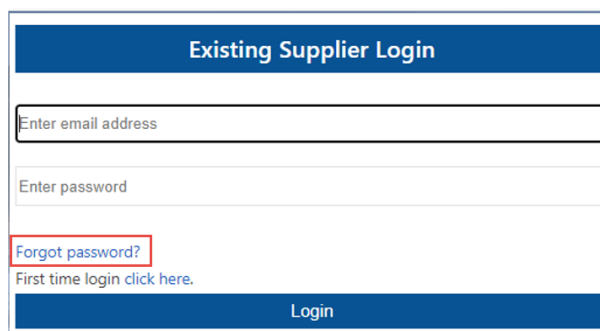
## Logging into the SUPPLIER Portal

To log into the SUPPLIER Portal (SRM Portal) enter the following address into your Web Browser:

<https://srmportal.openwindows.com.au>

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.



# 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.

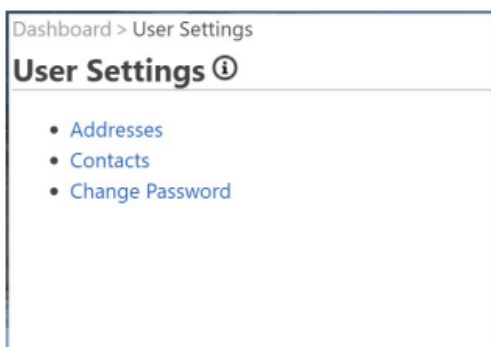
The screenshot shows the Readytech Supplier Portal interface. At the top left is the Readytech logo. The page title is 'Supplier Portal'. In the top right corner, the user's name 'Sharon [redacted]' is displayed, along with their email address '@live.com.au' and a 'Logout' link. Below the header, there are several main sections: 'My Menu' with a grid of options like License/Registrations, My Questionnaires, Payments, Claims, Variations & Adjustments, Supplier Insurances, and Contract Insurances; 'My Contracts' with a list of contracts under the heading 'Building Management and Works'; 'Available Questionnaires' with a message stating 'There are no customer questionnaires linked to your account.'; 'Noticeboard' with a welcome message and instructions; 'My Self-disclosure' with a list of statements like 'Modern Slavery Statement (Not Submitted)'; and 'Recent Activities' with a message 'No activities available.'

## User Settings

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



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.

Amanda Supplier  
p\_sneakers@hotmail.com (Logout)  
Amanda Supplier (Change)



## My Contracts

Each of your Customers will be displayed in your My Contracts Widget and you will need to select the Customer to access the contract list for that specific customer.



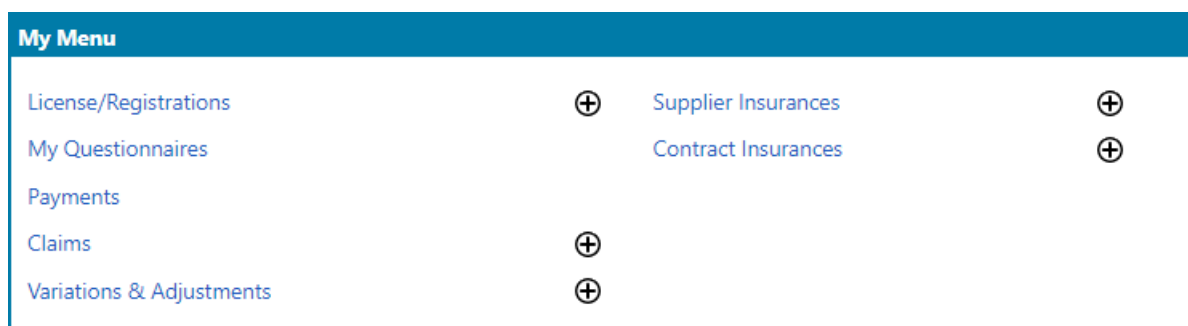
Once you select your customer a list of contracts will be displayed. Your name must be added to the contract for the contract to appear in the display list.



**NOTE:** You will have to select the relevant contract before you go to any other pages in the SRM Portal. If your contract is not displayed, please contact your Dept of Finance Contract Manager who will need to add you against the contract in the system.

## My Menu

The My Menu Widget allows you to access your company details relating to contracts with specific customers. Once you select a customer from the My Contracts widget, the **My Menu** will display any contract related functions you have enabled.



## 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

The screenshot shows the Readytech Supplier Portal interface. A help pop-up window is open over the 'Payments' section. The pop-up contains the following text:

This function allows you to add and review Payment records. The payments associated to current user and the Contract selected at the top of screen are displayed. Find an existing record by using the Search Text field or simply paging forwards / backwards. The information being displayed can be downloaded directly into MS Excel using the Excel icon.

At any time, only one payment per contract can be submitted for approval. Payment can have the following status:

- **Saved** - the payment has been saved, but yet to be submitted for approval. The payment can be updated and submitted for approval or deleted.
- **In Progress** - the payment has been submitted for approval. The payment becomes locked until the approval request been approved or denied.
- **Approved** - the payment has been approved. The payment cannot be saved, submitted and deleted.
- **Denied** - the payment has been denied. The payment can be updated and resubmitted for approval.

Click on an existing payment record to view further details or click on the hyperlink "**Create new Payment**" to add a new payment record.

The background shows a 'Payment List' table with columns for Payment Number, Date, Status, and Grand Total (Inc. Tax). The table contains several rows of data, including payment numbers 93, 92, 91, 90, 89, 88, 87, and 86.

## 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 Statement (Not Submitted)	✘
Work Health & Safety (WHS/OH&S) (Not Submitted)	✘
Environmental & Sustainability Policy Details (Not Submitted)	✘

## Recent Activities

This widget will display a list of the recent activities that you have undertaken in the SRM Portal.

### Recent Activities (Last 30 days)

**Monday, 5 October 2020**  
12:19 PM Sent communication : 'Contract Query' [CON/24 - New Car]

**Wednesday, 30 September 2020**  
02:22 PM Sent communication : 'Contract Query' [19.242 - Grassing Works]

**Wednesday, 23 September 2020**  
01:49 PM Started Questionnaire: 'Work Health & Safety (WHS/OH&S)'

## Variations & Adjustments

Any adjustment/variation to your contract, must be submitted via the SRM Portal for approval by your Contract Manager.

To create an Adjustment:

1. From the “My Menu”, select “Variations & Adjustments”.

### My Menu

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

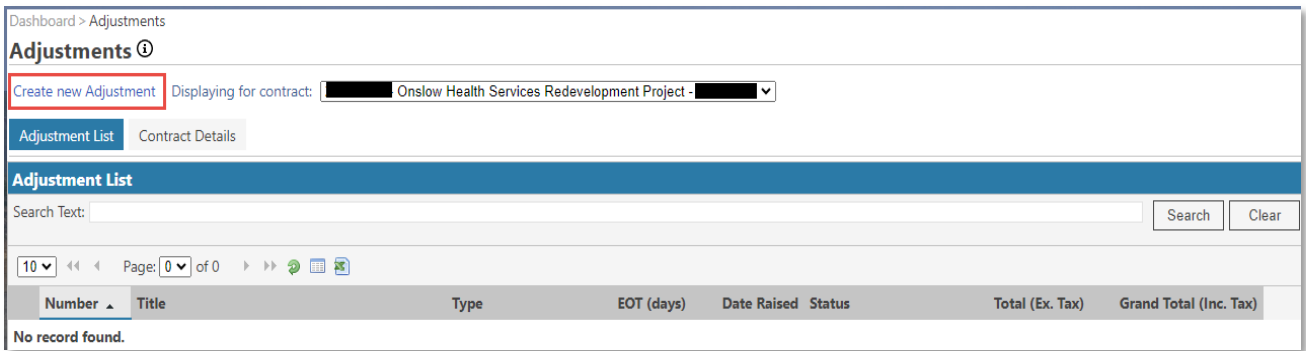
2. You will be directed to choose a contract. Click ‘Ok’ and a drop down list of your contracts will appear.

### Select Contract

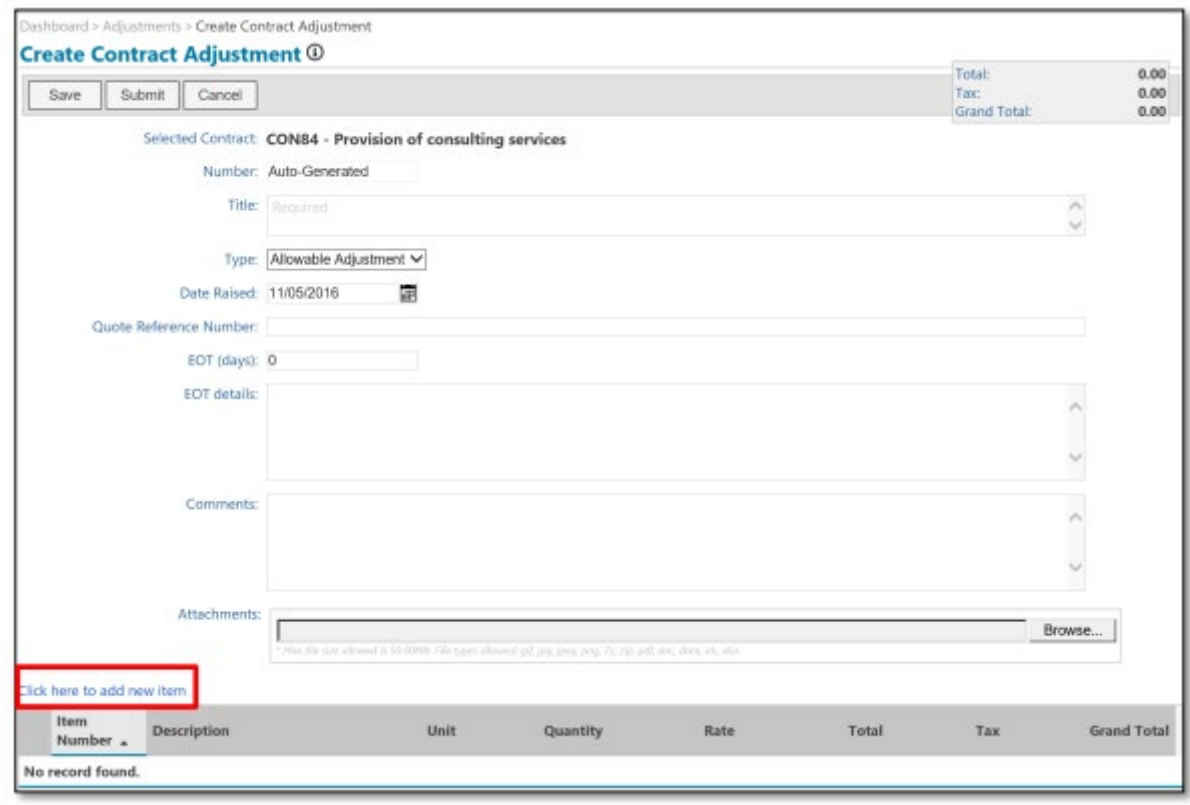
Select the Contract you would like to add a new Adjustment to.

Ensure the correct contract is selected and click “Create a new Adjustment”.





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



- To add financial items to the adjustment, click the hyperlink **“Click here to add a new item”**.
- 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 Details**

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

**Note: Quantity will always be 1 except when the variation is for a negative amount then ONLY the Quantity will be -1 (Unit and Rate fields) will remain as a positive amount.**

**Item Details**

Item Number: Auto-Generated

Description: TEST

Unit: 750

Quantity: -1

Rate: \$750.00

Total: -\$750.00

Tax: -\$75.00

Grand Total (Inc. Tax): -\$825.00

Save Cancel

6. Once you have entered all the required details you can either:
- “Save”** the record, which will save this for you to edit later, but it will not be submitted to the client.
  - “Submit”** the record, which will save and send this information to the client.
  - “Cancel”**, which will return you to the Adjustments list screen without saving changes.



Dashboard > Adjustments > Create Contract Adjustment

## Create Contract Adjustment ⓘ

Save Submit Cancel

Total: 1,500.00  
Tax: 150.00  
Grand Total: 1,650.00

Selected Contract: **CON84 - Provision of consulting services**

Number: Auto-Generated

Title: Scope change

Type: Allowable Adjustment

Date Raised: 11/05/2016

Quote Reference Number:

EOT (days): 0

EOT details:

Comments:

Attachments:  Browse...

\* Max file size allowed is 50,000KB. File types allowed: pdf, jpg, png, zip, 7z, zip, pdf, doc, docx, xls, xlsx.

[Click here to add new item](#)

Item Number	Description	Unit	Quantity	Rate	Total	Tax	Grand Total
X	Variation	lump sum	1	\$1,500.00	\$1,500.00	\$150.00	\$1,650.00

## Contract Claims for Payment

This screen allows you to submit a claim for payment as well as track the progress of payment approvals. The screen will display a list of current and previous payments along with the status of that payment for the selected contract. You can click on a payment to view or edit (you cannot edit a payment that has been submitted or approved).

Note: You need to select the relevant contract from the “My Contracts” menu **before you select Payments**. Wait for the contract to be highlighted in grey before proceeding

My Contracts	Building Management and Works
21587607-nPS DBFM Independent Certifier	<span>ⓘ</span>
21587969-Onslow Health Services Redevelopment Project	<span>ⓘ</span>
21590383- Collie Health Stage 02 Redevelopment - Lead Consultant	<span>ⓘ</span>
21592725-(TEST) 15311 WAPF Baldivis PS Cost manager (TEST)	<span>ⓘ</span>

To submit a Payment request.

1. Select “Claims” from the “My Menu” once you have selected your contract and it is highlighted grey.

My Menu	
License/Registrations	<span>⊕</span>
My Questionnaires	<span>⊕</span>
Payments	<span>⊕</span>
Claims	<span>⊕</span>
Variations & Adjustments	<span>⊕</span>
Supplier Insurances	<span>⊕</span>
Contract Insurances	<span>⊕</span>

2. Ensure the correct contract is selected. Click “Create new Claim”.

Dashboard > Claims

## Claims ?

[Create new Claim](#) Displaying for contract: 21592725 - (TEST) DCWC 15311 WAPF Baldivis PS Cost manager (TE)

[Claim List](#) [Contract Details](#)

### Claim List

Search Text:

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	Claim Number	Reference Number	Claim Period From	Claim Period To	Issue Date	Status	Total Claim (Ex. Tax)
	3	Inv 28887	02/05/2023	03/05/2023	04/05/2023	In Progress	\$42,000.00
	2	test	01/05/2023	02/05/2023	04/05/2023	Approved	\$4,500.00
	1	W22108.001-01	01/08/2022	31/08/2022	06/09/2022	Approved	\$1,500.00

3. Enter the following payment header details:

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

Dashboard > Claims > Create Contract Claim

### Create Contract Claim ?

[Save](#) [Submit](#) [Cancel](#)

Total: 40,817.36  
Tax: 4,081.74  
Grand Total (Inc. Tax): 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:

Claim Period To:

Comments:

Does this claim include claims from Subconsultants? If yes, details are attached:

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:  No file chosen

\* Max file size allowed is 512 KB. File types allowed: pdf, jpg, png, eps, zip, ppt, doc, docx, xls, xlsx

Once the above details have been added, you can start to add claim details in the matrix below.

Claim Matrix								
The below matrix is a two-dimensional entry point to make payments against contracts and phases. Note empty and '0.00' values 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	\$0.00
	Previous Payments	\$3,000.00	\$4,500.00	\$15,000.00	\$1,500.00	\$0.00	\$16,817.36	\$24,000.00
	Total This Payment	\$0.00	\$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	\$24,000.00

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.

Dashboard > Claims > Create Contract Claim

### Create Contract Claim ⓘ

Save Submit Cancel

Selected Contract: **21591747 - Ratan - TEST SVC CONT - 18Aug21**

Claim Number: Auto-Generated

Reference Number:

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	+	Supplier Insurances	+
My Questionnaires		Contract Insurances	+
Payments			
Claims	+		
Variations & Adjustments	+		

2. Click "Create a new Contract Insurance".

Dashboard > Contract Insurances

## Contract Insurances ⓘ

**Create new Contract Insurance** Displaying for contract: CON-S263 - Catering Services - Julie ▼

Insurance List | Contract Details

### Insurance List

Search Text:

10 ◀ ▶ Page: 0 ▼ of 0 ▶ ▶ 🔄 📄 🗑️

Insurer	Policy Number	Amount Insured	Insurance T
No record found.			

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)

Dashboard > Contract Insurances > Create Contract Insurance

## Create Contract Insurance ⓘ

Save | 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:

Attachments:  Browse...

\* Max file size allowed is 50,000KB. File types allowed: pdf, png, jpeg, jpg, gif, zip, doc, docx, xls, xlsx.

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.

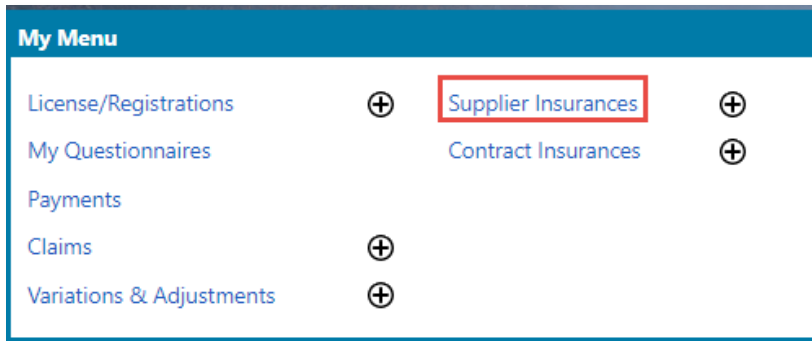
When you submit an insurance record, you will receive an email confirmation. The contract manager will receive an email notification of your new or updated insurance information. They will then review and approve the changes. You will then receive an email notification of the approval, and the insurance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

# Supplier Insurances

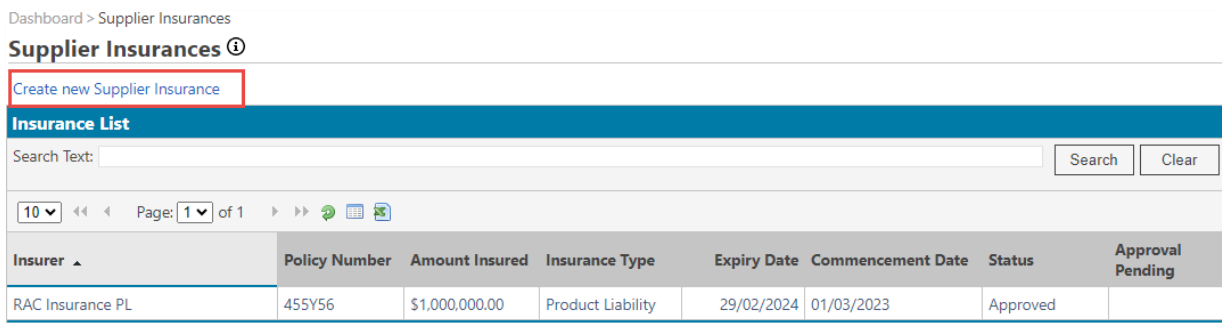
This screen allows you to add and review Supplier Insurance records. The list of existing records displayed on the screen are associated to the Supplier you belong to. Find an existing record by using the Search Text field or simply paging forwards / backwards.

To create a Supplier Insurance:

1. From the “My Menu”, select “Supplier Insurance”.



2. Click “Create a new Supplier Insurance”.



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.

Dashboard > Supplier Insurances > Create Supplier Insurance

### Create Supplier Insurance ⓘ

Save Cancel

Insurance Type:

Currency:

Insurer:

Policy Number:

Amount Insured:

Commencement Date:

Expiry Date:

Remarks:

Attachments:

\* Max file size allowed is 50,000MB. File types allowed: gif, jpg, jpeg, png, 7z, zip, pdf, doc, docx, xls, xlsx.

4. Once you have entered all the required details you can either:
- 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.