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

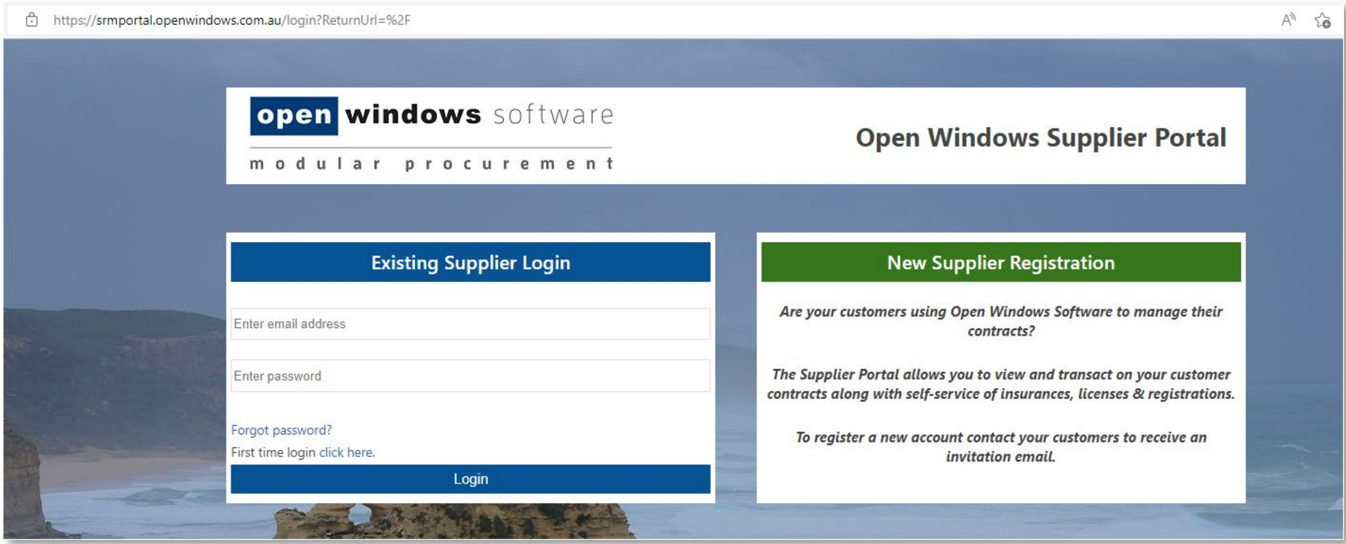
PACMan

Quick Reference Guide
This QRG aligns with the Project Management Framework

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.

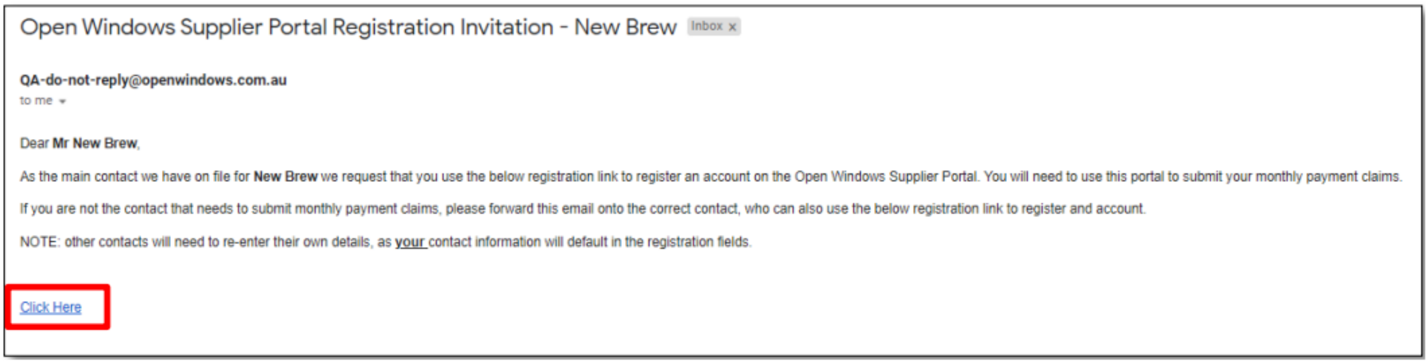
You can request access by emailing: bmwsystemssupport@finance.wa.gov.au

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

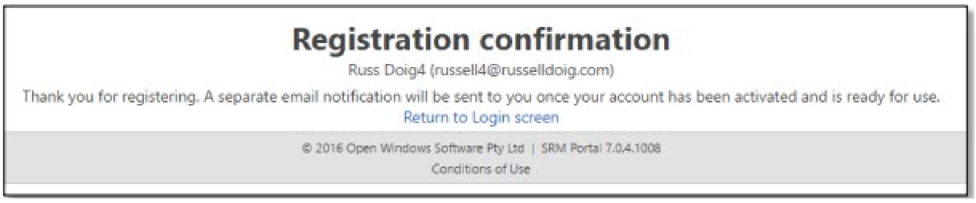
Note: Your email address will be used as the login identifier and must be unique to you. No generic email addresses are accepted ie: accounts@

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**".

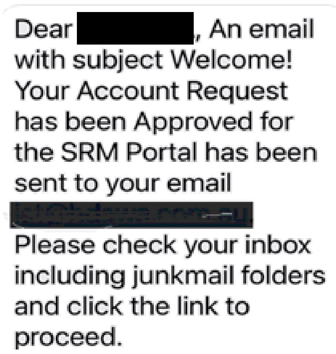


Once your account request has been approved, you will receive an additional email titled: **"Welcome! Your Account Request has been Approved."**

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:

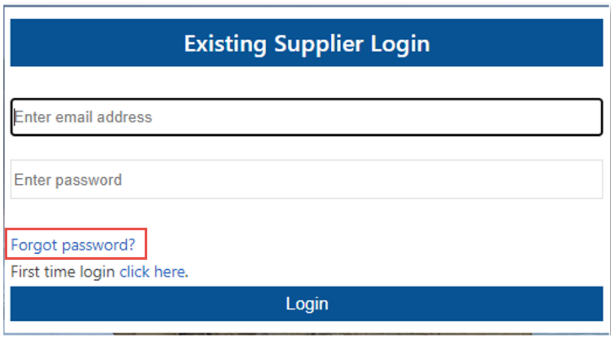


Logging into the SUPPLIER Portal

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

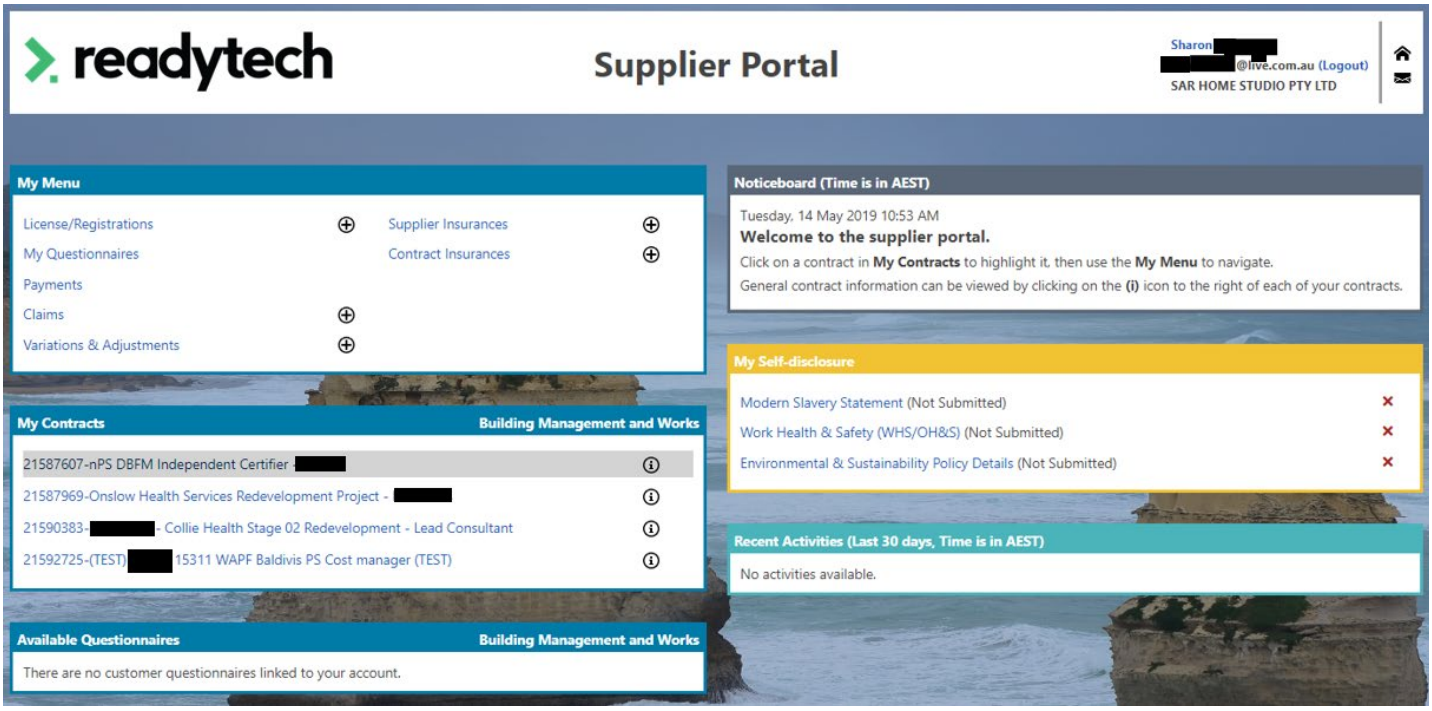
This will take you to the login screen where you will need to enter your Email Address and the Password you created in your First Login screen.

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

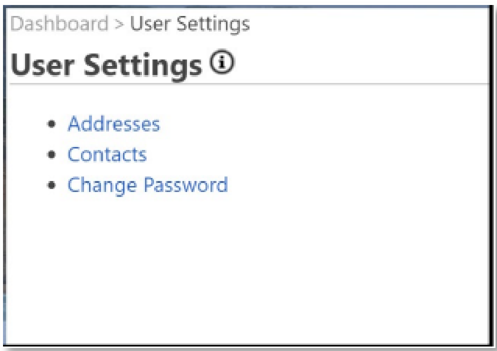
Where the Dept of Finance is your ONLY customer please login using your current registered email and password. If you are a supplier that only have contracts with one Open Windows customer, that customer's 'My Menu' configuration will automatically be applied when you log into the portal. If you are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



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.

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.

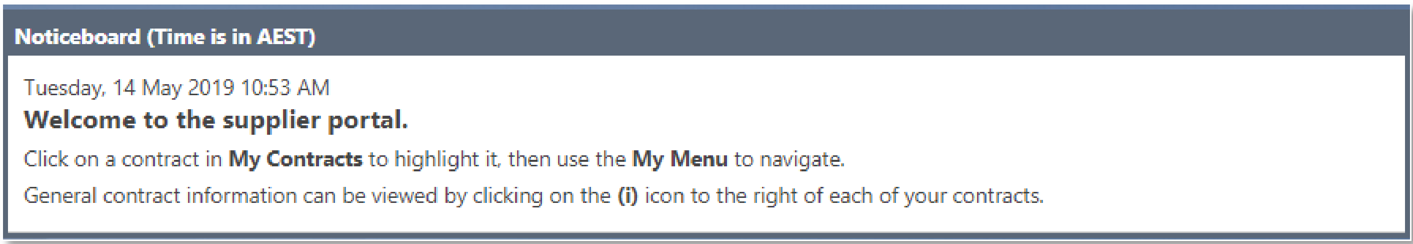
NOTE: You will have to select the relevant contract before you go to any other pages in the SRM Portal.
If your contract is not displayed, please contact your Dept of Finance Contract Manager who will need to add you against the contract in the system.

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.

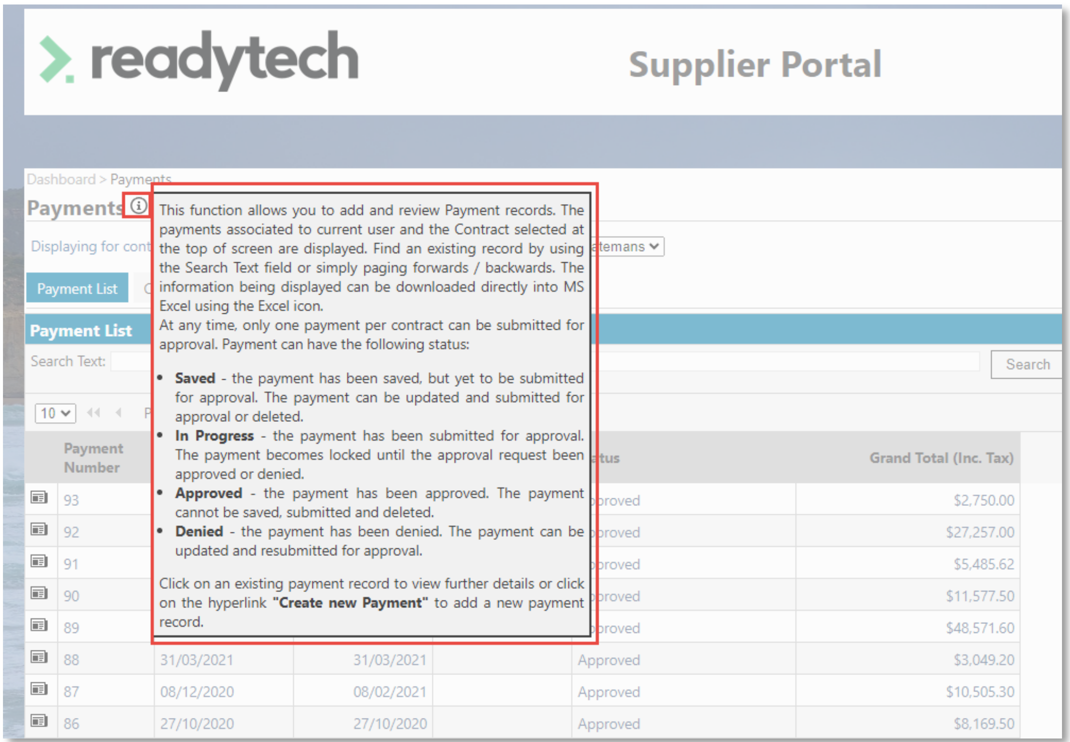
Noticeboard

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



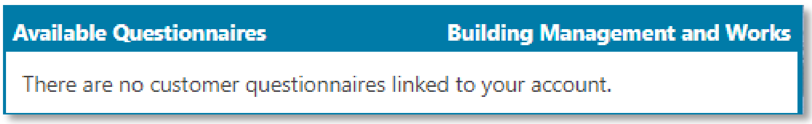
Online Help

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

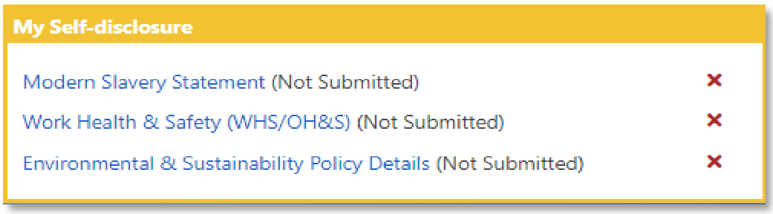


Available Questionnaires and My Self-disclosure

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



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.



Recent Activities

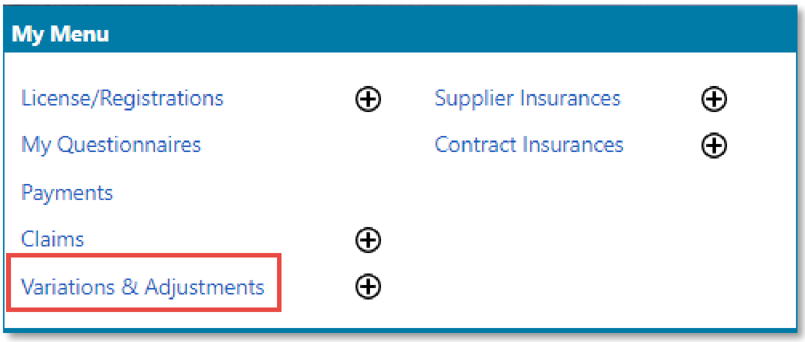
This widget will display a list of the recent activities that you have undertaken in the SRM Portal.

Variations & Adjustments

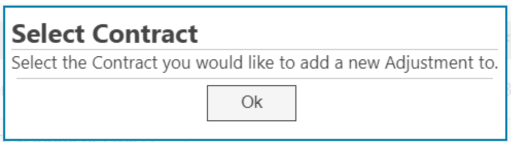
Any adjustment/variation to your contract, must be submitted via the SRM Portal for approval by your Contract Manager.

To create an Adjustment:

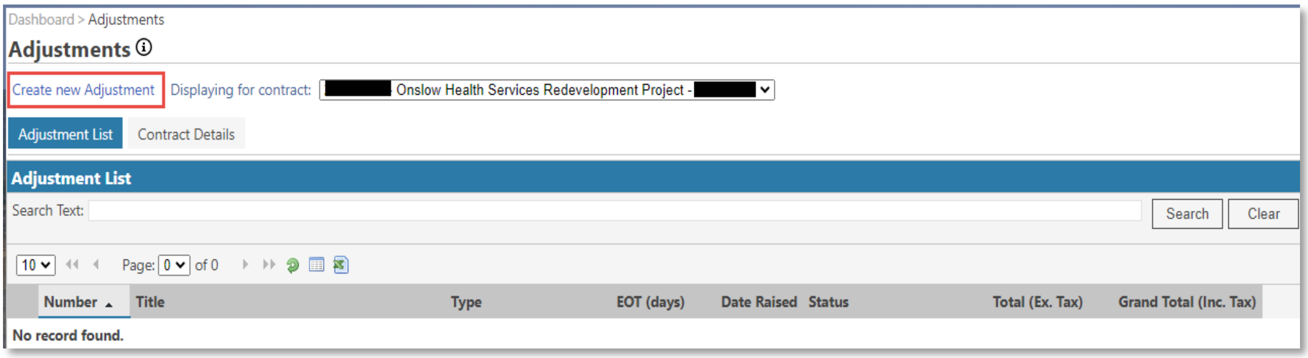
1. From the “My Menu”, select “Variations & Adjustments”.



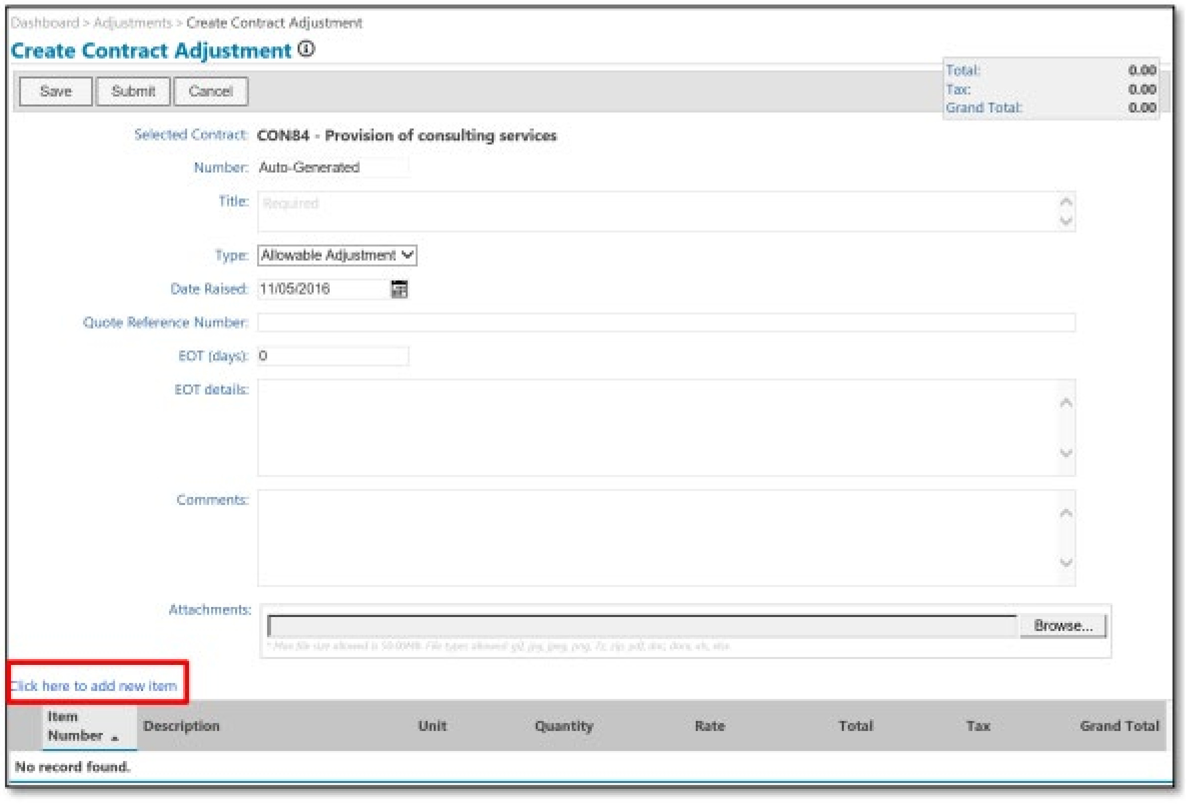
2. You will be directed to choose a contract. Click ‘Ok’ and a drop down list of your contracts will appear.



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

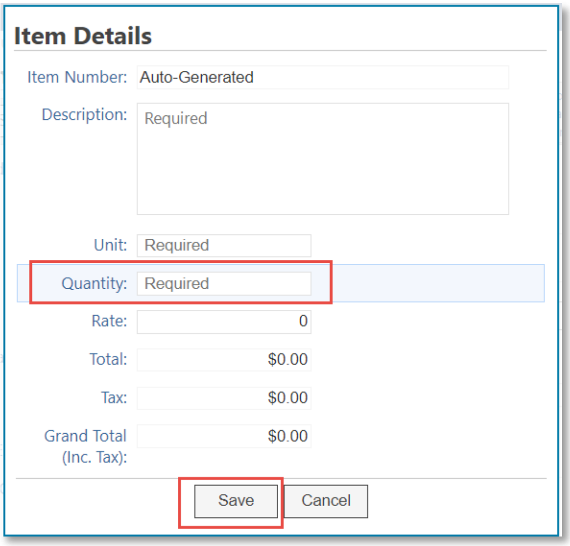


3. Enter relevant information as to your Adjustment including the Type of adjustment, details, comments, and attachments.

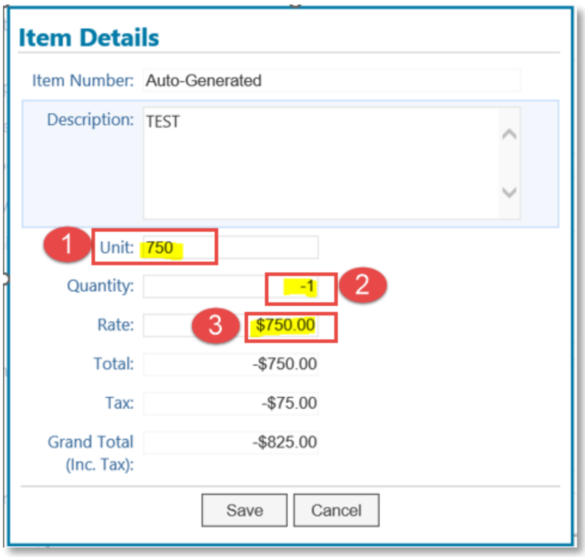


4. To add financial items to the adjustment, click the hyperlink **"Click here to add a new item".**

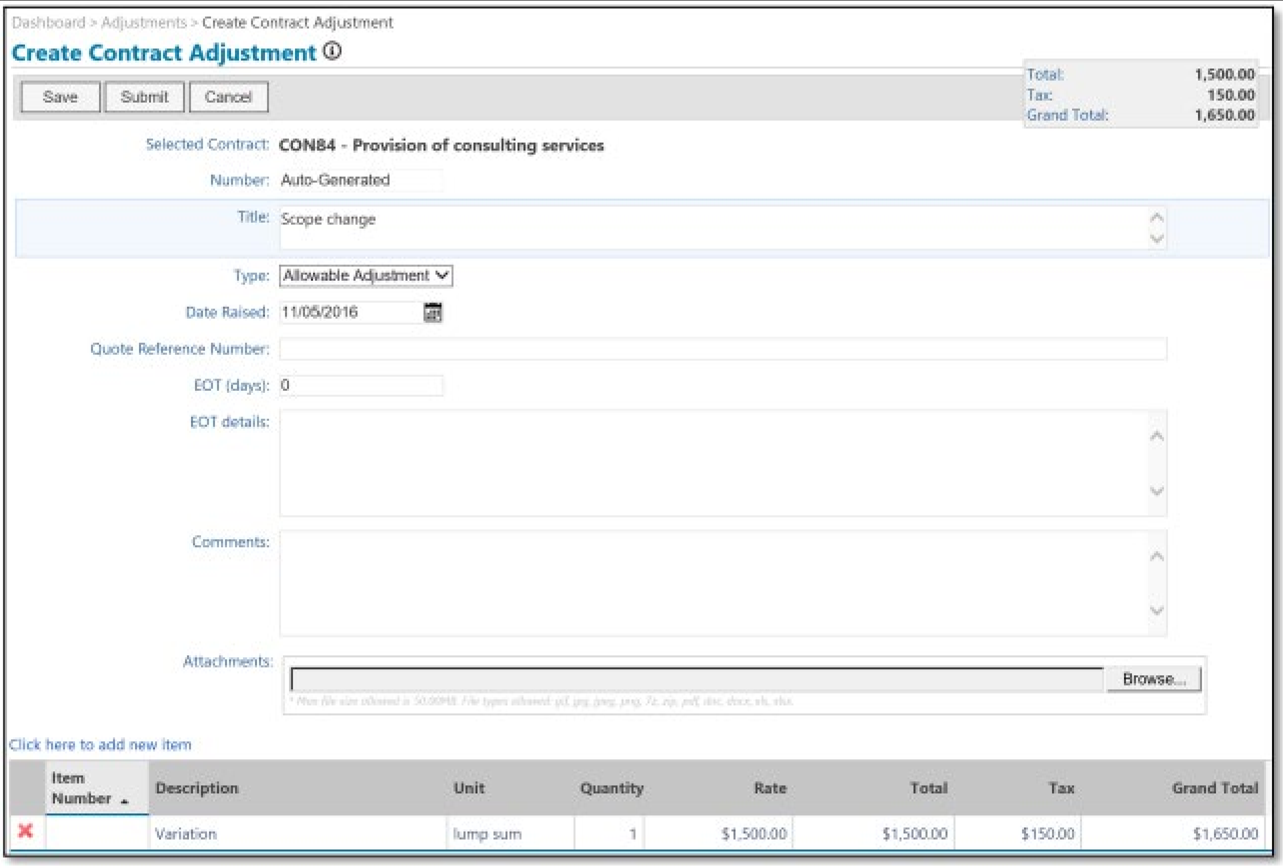
5. Record the details of the Item:
   Description: What the variation is for
   Unit: Enter the amount $
   Quantity: Will always be **1**
   Rate: Enter the amount of variation
   Total: Auto-populated based on the Rate and Quantity entered
   Tax: GST tax amount
   Grand Total: Total + Tax
   Click **"Save".**



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.



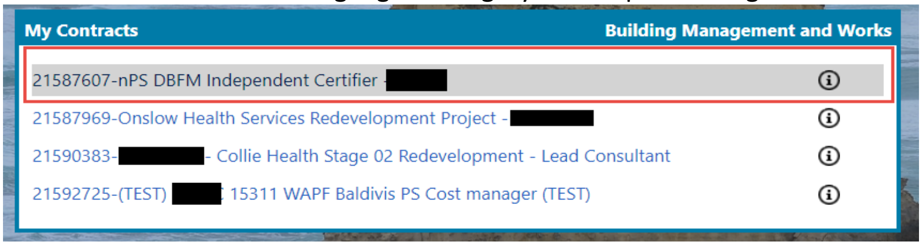
6. Once you have entered all the required details you can either:
   a**. "Save"** the record, which will save this for you to edit later, but it will not be submitted to the client.
   b. **"Submit"** the record, which will save and send this information to the client.
   c. **"Cancel",** which will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



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).

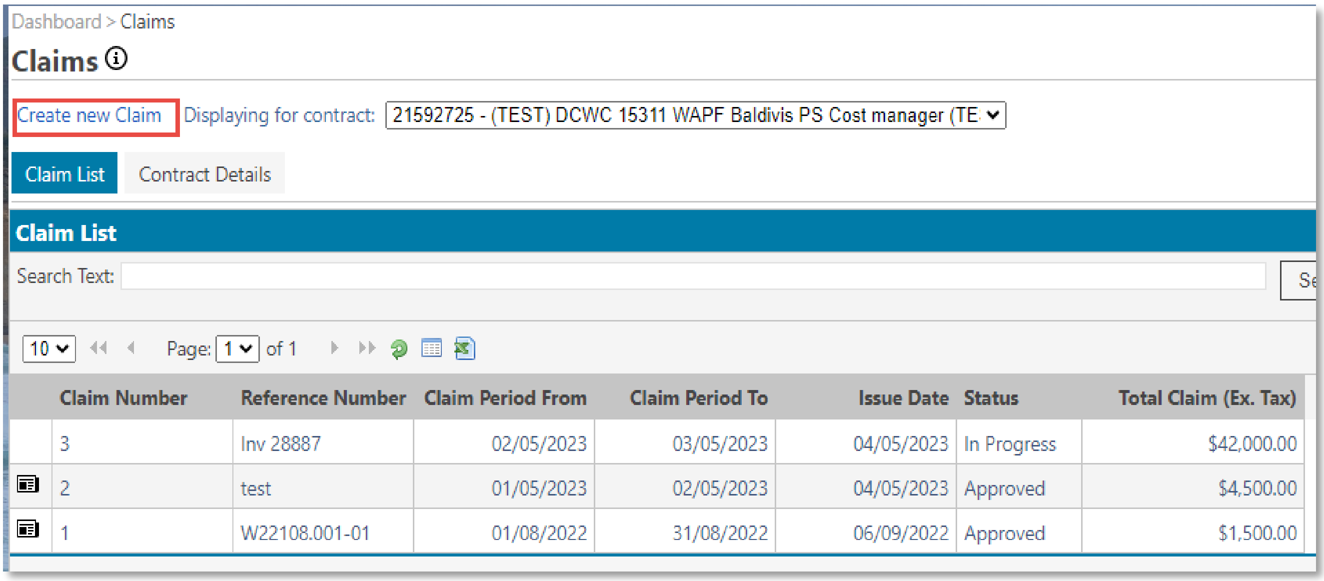
Note: You need to select the relevant contract from the "My Contracts" menu **before you select Payments**.
Wait for the contract to be highlighted in grey before proceeding



To submit a Payment request.

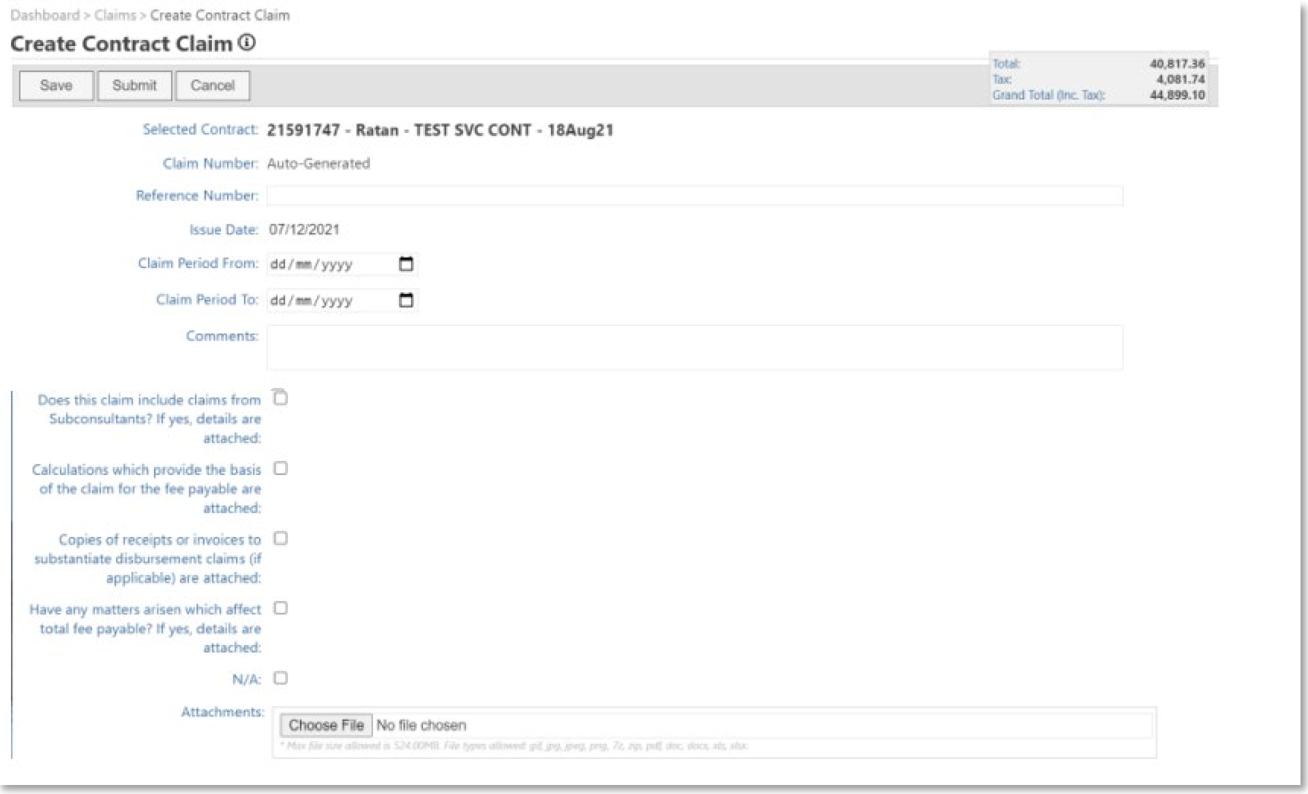
1. Select **"Claims"** from the **"My Menu"** once you have selected your contract and it is highlighted grey.

2. Ensure the correct contract is selected. Click **"Create new Claim".**

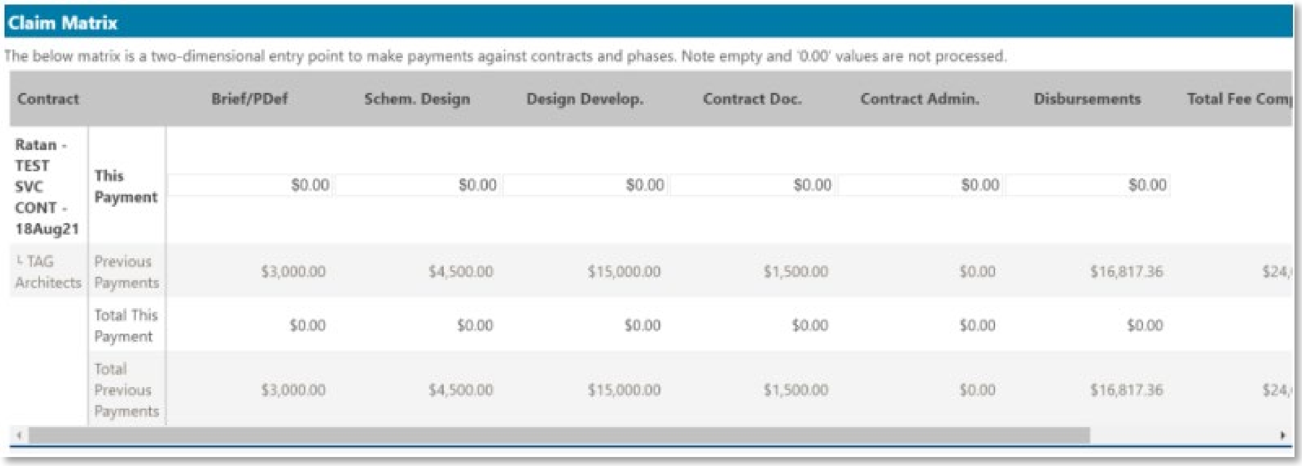


3. Enter the following payment header details:

    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)



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



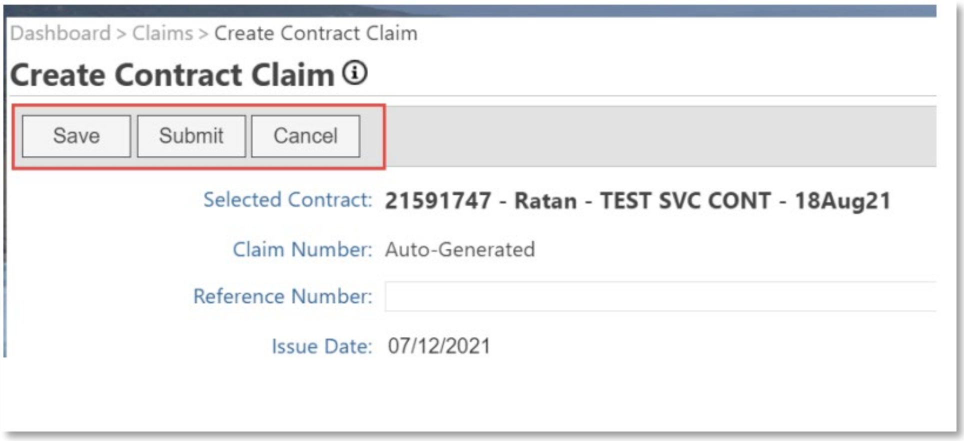
Claim Matrix

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	
└ 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.



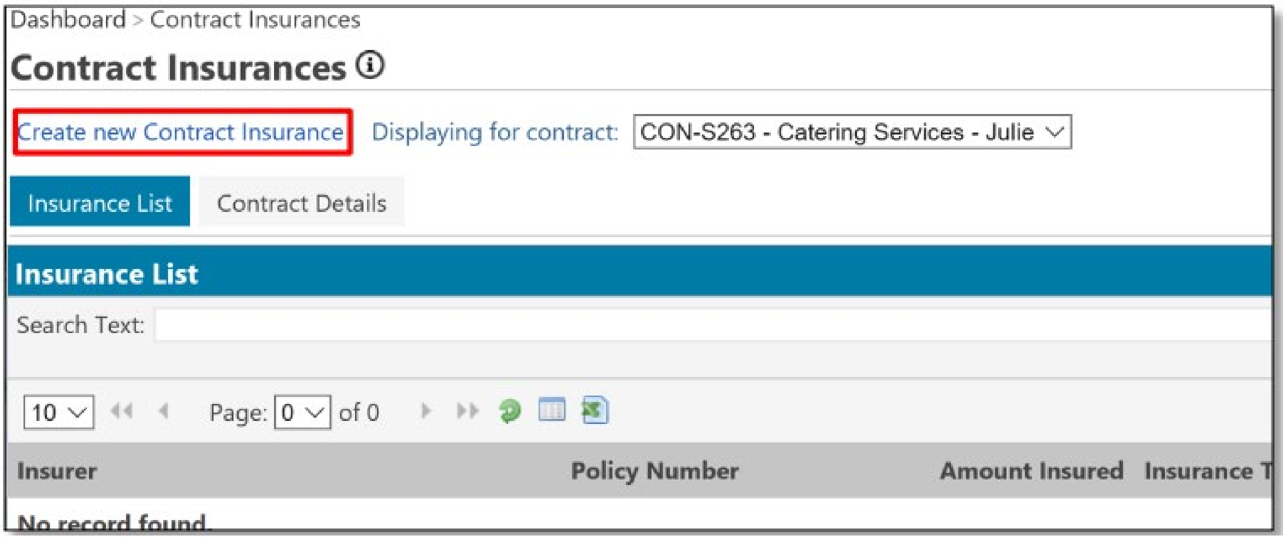
Contract Insurances

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:

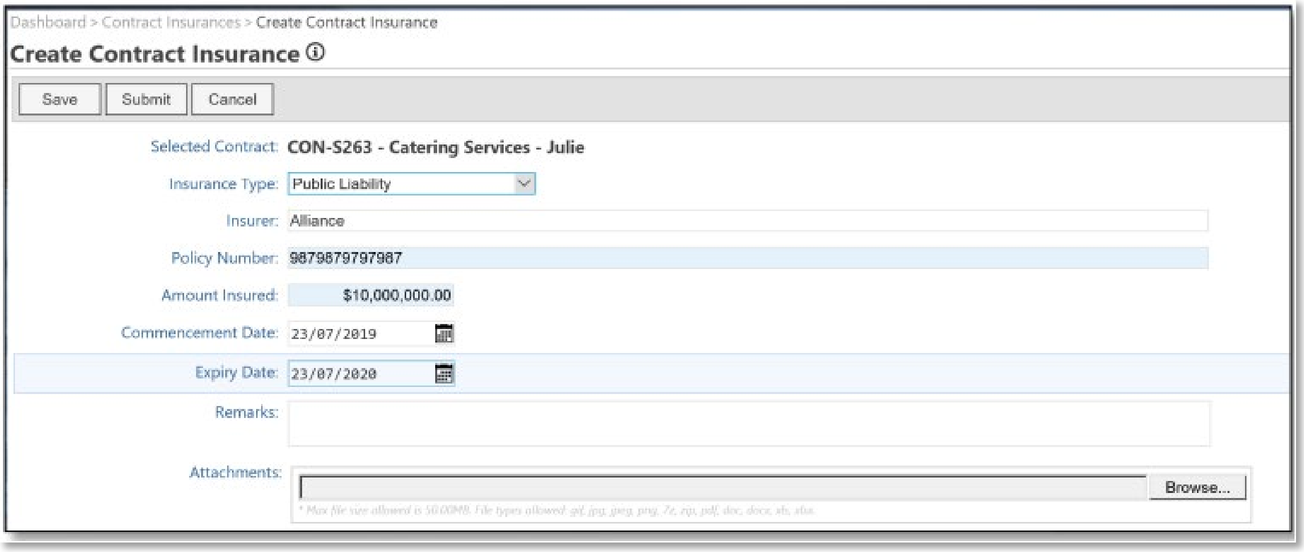
1. From the My Menu, select "**Contract Insurances".**

2. Click “Create a new Contract 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)



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.

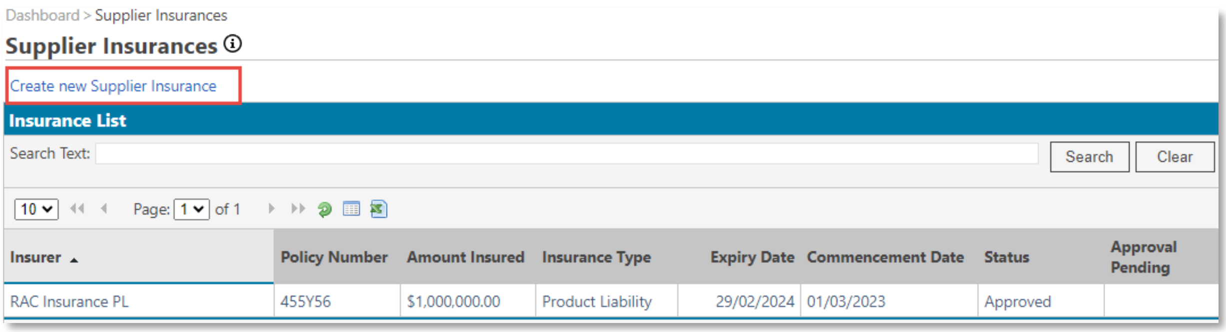
Supplier Insurances

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.

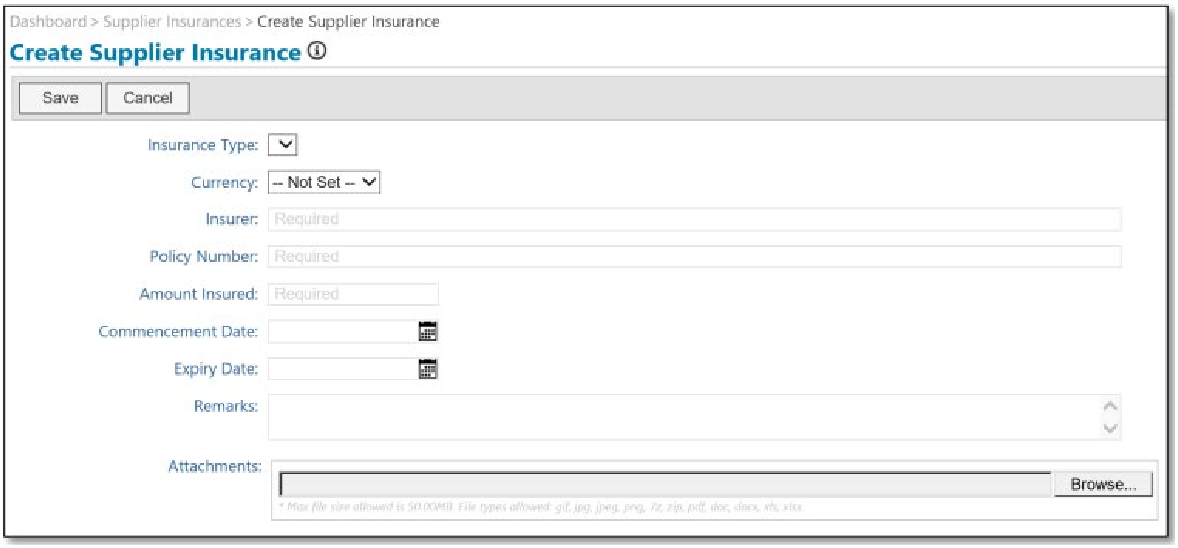
To create a Suppler Insurance:

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

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.



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.