

Using Programmed Vendor Portal (Vendor Employee or Technician)– User Guide

D365 Project

31 May 2023

Prepared for:

Programmed`s
Vendor Employee or
Technician

Prepared by:

D365 Training Team

FS_VOB – Using Programmed Vendor Portal (Vendor Employee or Technician) – User Guide



Purpose:	The purpose of this User Guide is to assist Vendor Employees and Technicians in logging into and using the Programmed Vendor Portal . It will also cover additional steps for Vendor Technicians who need to setup access to the Field Service Mobile App , prior to logging into the mobile app.
Overview:	<p>After your Vendor Admin has added you as a vendor employee on the Programmed Vendor Portal, and enabled you for access to the portal. You will receive an email with a link and login credentials to login.</p> <p>As a Vendor Employees and Technicians. you can use this portal to complete your Programmed Induction, upload your relevant licenses and qualifications and retrieve your Programmed Contractor Induction card so you are able to gain access to Programmed sites.</p> <p>If you are a Vendor Admin, then please refer to the user-guide below on :</p> <ul style="list-style-type: none">• Accessing the portal as a vendor admin and adding an employee- <i>Using Programmed Vendor Portal as a Vendor Admin</i>• Booking your technician to a Work Order - <i>Using Programmed Vendor Portal To Manage Work Orders</i>
Assistance:	For any assistance, <ul style="list-style-type: none">• PMS.Procurement@programmed.com.au• vendormanagement@programmed.com.au- For PFM WA vendors

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1 Accessing the Portal

As a Vendor Employees and Technicians. you can use this portal to complete your Programmed Induction, upload your relevant licenses and qualifications and retrieve your Programmed Contractor Induction card so you are able to gain access to Programmed sites.

The steps below outline how to log into the Programmed Vendor Portal.



Please ensure that you use a **Google Chrome browser** to log into the portal. Other browsers may not display details/forms in the portal correctly.

1.1 Login for the first time

1. You will receive an email from Microsoft Invitations on behalf of Programmed inviting you to log in. This email will also provide the link to the Vendor Portal. This email will be from: invites@microsoft.com

To create your login credentials, open up the email sent from Microsoft on behalf of Programmed:

2. Click on **Accept invitation**

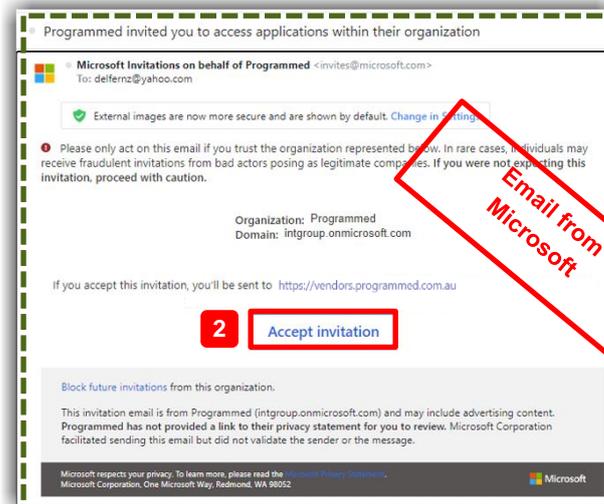
If your email account is associated with any of the following Microsoft accounts then go to [section 1.1.2.](#)

- ✓ @Hotmail.com
- ✓ @Live.com
- ✓ @Outlook.com
- ✓ @MSN.com
- ✓ @Microsoft.com

Note: This include all the other variations/domains such as .com.au or .com.nz etc

If not a Microsoft account, then go to [section 1.1.1.](#)

If using your organization domain related email account, go to [section 1.1.3.](#)

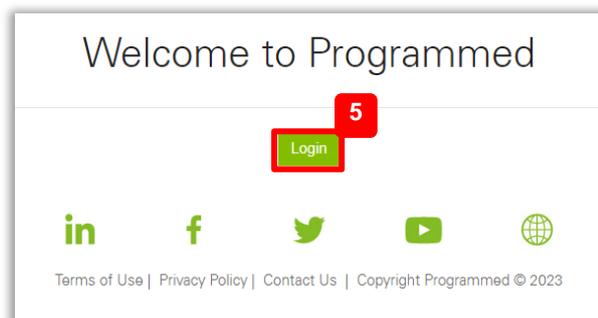
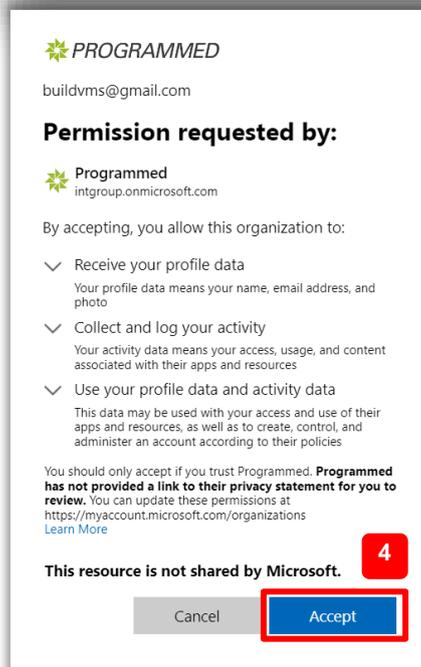
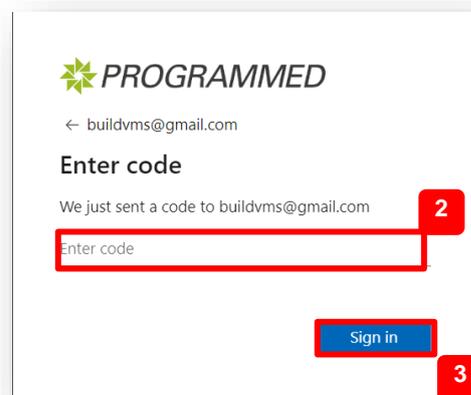
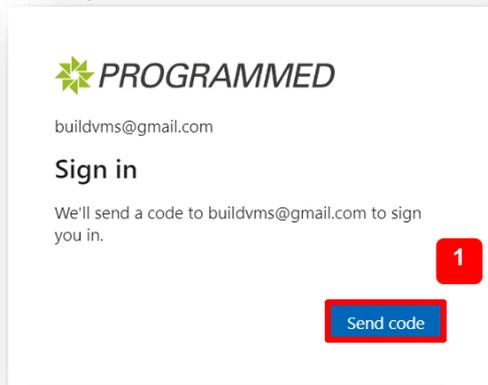


If you haven't received the email, please check your **Junk/Spam** folder in your mailbox. If the issue persists, please contact Programmed to help you.

1.1.1 IF YOU HAVE A NON MICROSOFT ACCOUNT

To login to the Programmed Vendor Portal: Click on the [Accept invitation](#) button, you have received from Microsoft ([invites@microsoft.com](#)) on behalf of Programmed. Follow the steps and the associated screenshots below.

1. Click **Send Code**
2. Copy and enter the code sent to your email
3. Click **Sign In**
4. Review the permissions and click **Accept** to proceed
5. Click on **Login**

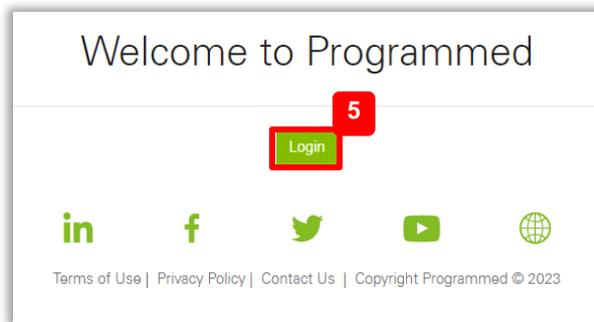
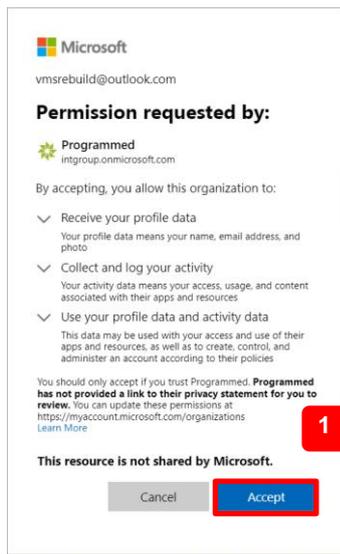


RESULT: Your login credentials have been created to log into the Programmed Vendor Portal. You will now be directed to the Vendor Portal. Remember to save the Programmed Vendor Portal as a Favourite in your browser using Google Chrome.

1.1.2 IF YOU HAVE A MICROSOFT ACCOUNT

To login to the Programmed Vendor Portal: Click on the **Accept invitation** button, you have received from Microsoft (*invites@microsoft.com*) on behalf of Programmed. Follow the steps and the associated screenshots below.

1. Review the permissions and click **Accept** to proceed
2. Click on **Login**

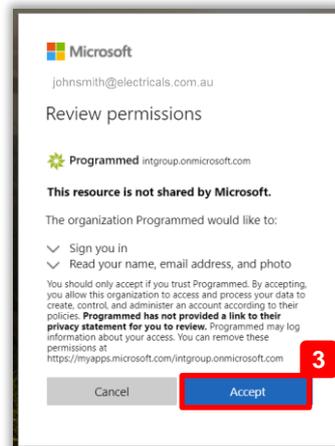
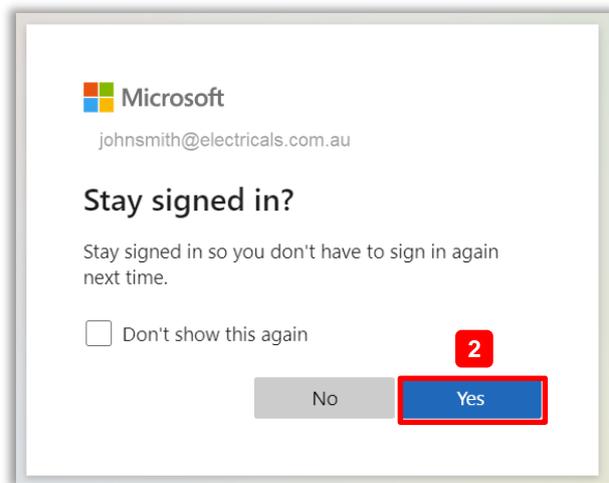
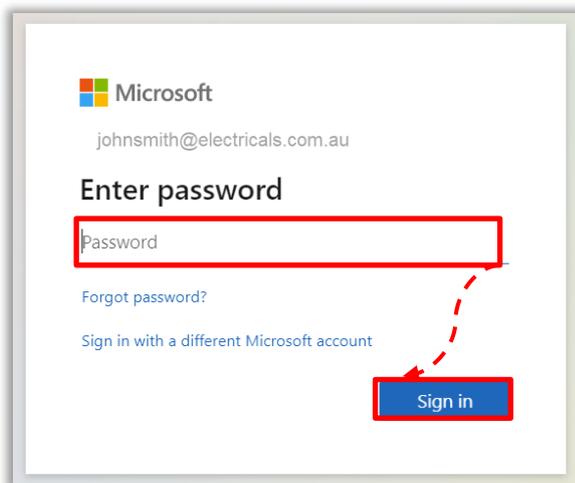


RESULT: Your login credentials have been created to log into the Programmed Vendor Portal. You will now be directed to the Vendor Portal. Remember to save the Programmed Vendor Portal as a Favourite in your browser using Google Chrome.

1.1.3 IF YOU HAVE A ORGANISATION ACCOUNT

To login to the Programmed Vendor Portal: Click on the **Accept invitation** button, you have received from Microsoft (*invites@microsoft.com*) on behalf of Programmed. Follow the steps and the associated screenshots below.

1. Enter the password relating to your company email account and click **Sign in**
2. Click **Yes**
3. Review the permissions and click **Accept** to proceed.



RESULT: Your login credentials have been created to log into the Programmed Vendor Portal. You will now be directed to the Vendor Portal. Remember to save the Programmed Vendor Portal as a Favourite in your browser using Google Chrome

1.2 Update Profile

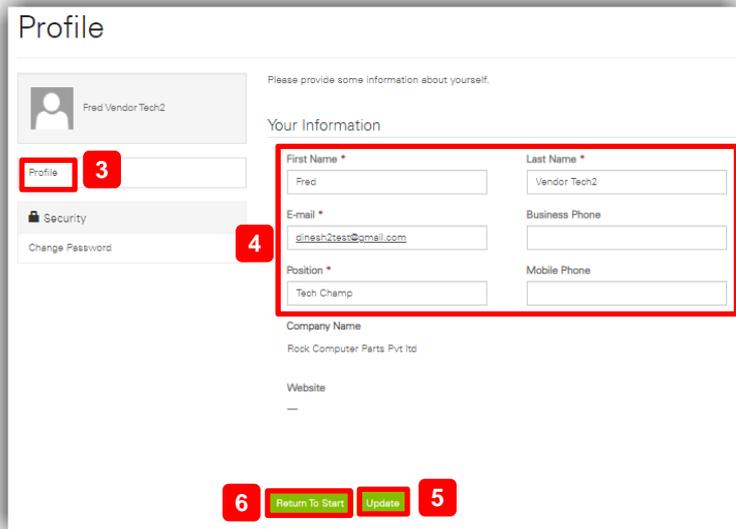
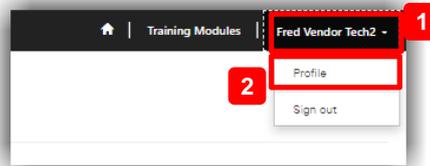
To update your profile details:

1. Click on your **username**
2. Click on **Profile**

RESULT: The **Profile Pane** is displayed.

3. Click on **Profile**
4. Update the required information
5. Click **Update**
6. Click on **Return to Start** to go to the homepage

RESULT: The **Home Page** is displayed.



2 Update Qualifications/ License

It is important that this section is completed to proceed with completing a Programmed Induction.

To update your qualifications or licenses:

1. Read all the instructions and **Steps** on the homepage
2. Click on the **My Qualifications**
3. After reading all the instructions on this page, click on **Add Qualification**
4. Complete the following fields: **Qualification/License Name, State Jurisdiction, Evidence Type, Restriction, Document Number, Issue Date and Expiry Date**
5. Click **Choose File**, and select the file you want to upload on your computer and click **Open** (.txt, .docx, .xls, .xlsx, .pdf, .jpg, .png).
6. Click on **Add Qualification**
7. Read and click on the declaration

RESULT: Your qualification/license has been uploaded. Ensure that your licenses and qualifications are always up to date.

8. Click on **Return to Main Menu**

The screenshot shows the 'My Qualifications' page. At the top, there are two navigation buttons: 'My Qualifications' (callout 2) and 'Subcontractor Handbook'. Below this is a section titled 'My Qualifications' containing a list of document types (callout 3) and a declaration box (callout 7). At the bottom of this section is an 'Add Qualification' button (callout 3). Below the declaration is a 'Create' form (callout 4) with fields for: Qualification/License Name, State Jurisdiction, Evidence Type, Restriction, Document Number, Issue Date, and Expiry Date. Below the form is an 'Attach a file' section with a 'Choose File' button (callout 5) and an 'Add Qualification' button (callout 6).

3 Review the Subcontractor Handbook and Programmed Policies and Procedures

It is always important and expected to keep yourself updated and familiar with the Subcontractor Handbook and Programmed Policies and Procedures.

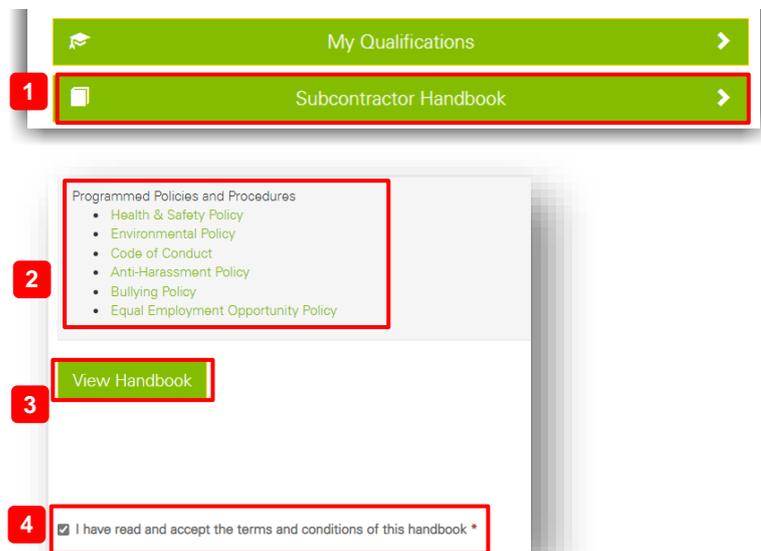
 It is important that this section is completed to proceed with completing a Programmed Induction.

To view the Handbook and Polices/Procedures:

1. Click on the **Subcontractor Handbook**
2. Read all instructions on this page and click on the **link** to view the relevant Programmed Policies and Procedures
3. Click on **View Handbook**, to view the subcontractor handbook
4. Accept the declaration

RESULT: You can view the Handbook and relevant Polices/Procedures.

5. Click on **Return to Main Menu**



The screenshot shows a user interface with a green header bar containing 'My Qualifications' and a right-pointing arrow. Below this is a green bar with a document icon and 'Subcontractor Handbook' with a right-pointing arrow. A red box labeled '1' highlights this bar. Below is a white box with the heading 'Programmed Policies and Procedures' and a list of links: Health & Safety Policy, Environmental Policy, Code of Conduct, Anti-Harassment Policy, Bullying Policy, and Equal Employment Opportunity Policy. A red box labeled '2' highlights this list. Below is a green button labeled 'View Handbook' with a red box labeled '3' around it. At the bottom is a checkbox labeled 'I have read and accept the terms and conditions of this handbook *' with a red box labeled '4' around it.

4 Complete Programmed Induction

The Programmed Subcontractor Induction has been designed for Programmed subcontractors and it is mandatory for it to be successfully completed prior to commencing work on a Programmed site.

You will not be able to access the ‘Programmed Induction’ section until you have completed the My Qualification and Subcontractor Handbook Sections

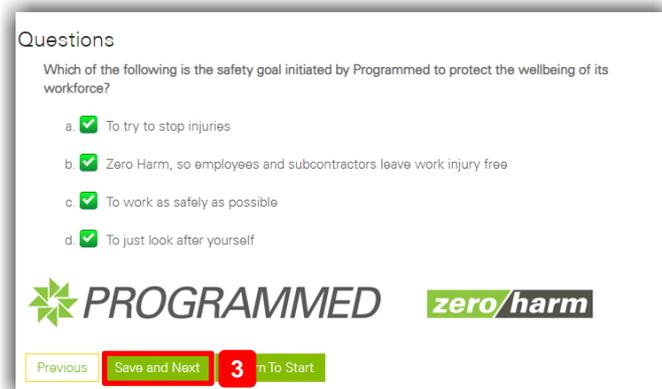
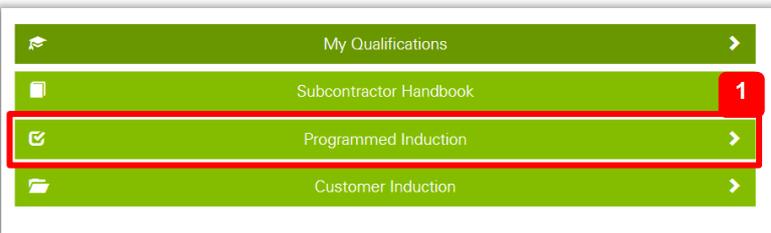
To complete your induction:

1. Click on **Programmed Induction**
2. Read all the instruction and click on **Save and Next** to proceed

It is important that you read and understand all sections of the induction, including the **Subcontractor Handbook**.

3. There are assessments during the induction. Ensure you select the correct answer and then click on **Save and Next**

The system doesn't allow you to save and quit the induction midway, so ensure that you complete the induction fully.



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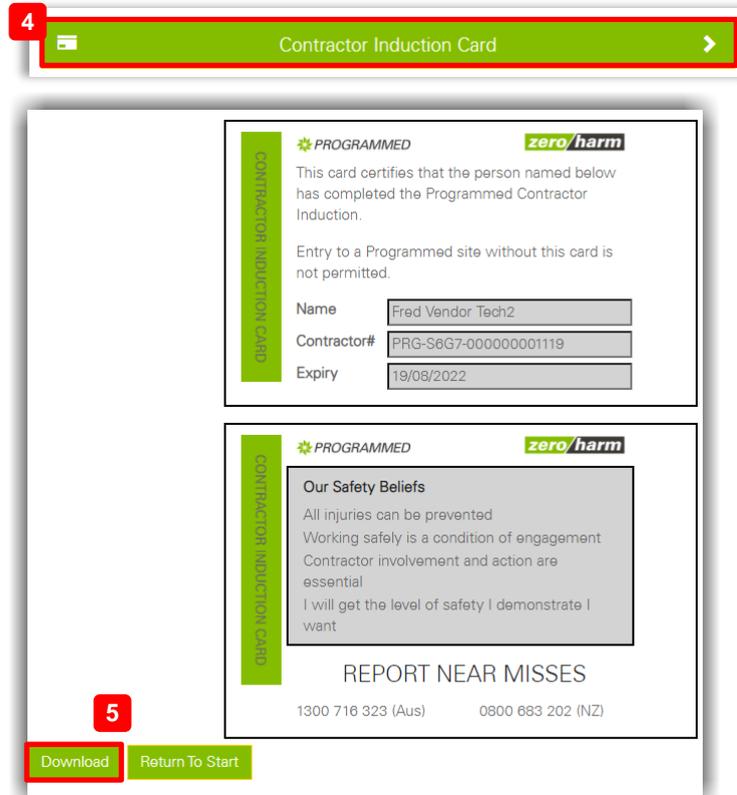


After you have successfully completed, you will be able to view and download your induction card. To download your Induction Card:

4. On the homepage, click on **Contractor Induction Card**
5. Click on **Download** to download and print your induction card

 You must print and carry the induction card with you when visiting any work order sites.

RESULT: Your induction is completed.



4 Contractor Induction Card

5

Download Return To Start

PROGRAMMED **zero/harm**

CONTRACTOR INDUCTION CARD

This card certifies that the person named below has completed the Programmed Contractor Induction.

Entry to a Programmed site without this card is not permitted.

Name	Fred Vendor Tech2
Contractor#	PRG-S8G7-000000001119
Expiry	19/08/2022

Our Safety Beliefs

All injuries can be prevented
Working safely is a condition of engagement
Contractor involvement and action are essential
I will get the level of safety I demonstrate I want

REPORT NEAR MISSES

1300 716 323 (Aus) 0800 683 202 (NZ)

5 Troubleshooting

Below are some troubleshooting guides which may assist in logging into the Programmed Vendor Portal in case of errors.

5.1 When having issues with logging into the portal:

When accessing the Programmed Vendor Portal, there are some common errors that may occur upon login. Please refer to the below to first clear up these potential errors whilst logging in.

5.1.1 DO YOU HAVE MULTI-FACTOR AUTHENTICATION? (SINGLE SIGN-ON)

If a multi-factor authentication has been set, an authentication process will need to be followed. It requires a unique email address set up against a Microsoft account. This authentication can be completed by setting up the Microsoft Multi-Factor Authentication App on your mobile device and can be downloaded from the Apple Store or Google Play.

More information on the Multi-Factor Authentication can be found here:

- [What is Multi-Factor Authentication](#)
- [How does Single Sign-On Work](#)
- [Reasons why the Authentication doesn't work](#)

5.1.2 HAVE YOU REFERRED TO THE GUIDES AVAILABLE TO YOU?

Some of the guides available to you include:

- Using Programmed Vendor Portal as a Vendor Admin (current guide)
- Using Programmed Vendor Portal as a Vendor Employee or Technician
- Accessing the Programmed Vendor Portal
- Manage Knowledge Articles

5.1.3 IF USING A DESKTOP, ARE YOU USING THE RECOMMENDED BROWSER?

There are some recommended applications that can be used for the Programmed Vendor Portal for desktop devices. These are Google Chrome and Microsoft Edge. Speak to your organisational IT representative to assist you in downloading these applications on your device.

Using Private / Incognito mode:

By using private or incognito mode on your web browser, it is easier to over-ride your existing passwords and access the Programmed Vendor Portal.

- These are the instructions on how to access the [Google Chrome Incognito Mode](#)
- These are the instructions on how to open a [InPrivate Window in Microsoft Edge](#)

5.1.4 IS A PHONE BEING USED?

As a rule of thumb, it is not recommended to use mobile phones to complete or access information in the Programmed Vendor Portal. This is because the compatibility for the screens displays a lot better on desktop, laptop and tablet devices.

Having said that, an iPhone can also be used to access the Programmed Vendor Portal, as long as the Safari web browser is used.

5.1.5 IS IT A SHARED DEVICE OR A PERSONALISED DEVICE?

Although using a shared device to access the Vendor Portal is possible, it is important to use individual credentials to log into the portal and access the on-boarding and induction information. If a previous user has remained logged into the Microsoft account on the device, or the portal is defaulted to their name, refer to the next step on clearing the browser history.

5.1.6 IS THE BROWSER HISTORY AND CACHE CLEARED?

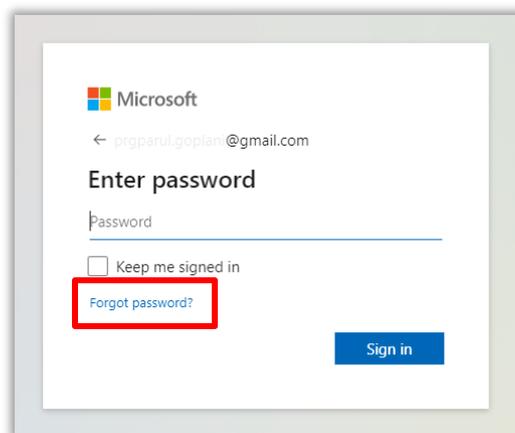
Sometimes, the previously used websites leave a trail that blocks new websites from being opened. This may need to be cleared so that the Vendor Portal displays. It is also recommended to close all the open websites on the device when completing this process of clearing history and cache.

- Google describes how to clear this browser history and cache [here](#)
- Microsoft Edge describes how to clear this browser history and cache [here](#)

5.1.7 IS THE CORRECT PASSWORD BEING USED FOR THE MICROSOFT ACCOUNT?

When logging into the Programmed Vendor Portal, there is a requirement to have a Microsoft Account set up. The password for this account may be different to the organisational account passwords and does not update if the organisational account is updated.

If the Microsoft password has been forgotten, this can be reset following the Forgotten Password link on the Microsoft login page.



5.1.8 ARE ORGANISATIONAL SECURITY PERMISSIONS RESTRICTING THE PORTAL?

Some organisations build in restrictions to the devices supplied by them to restrict unfamiliar websites from being accessed in the system. If there are security restrictions, that are not permitting the login for the system, it is led by the organization.

Options to permit the use of the Programmed Vendor Portal include:

- Add Programmed and Microsoft Accounts to the whitelist of organizational systems
- Provide another email id that accepts invitations from Programmed and Microsoft

5.1.9 INITIAL LOGIN ISSUES NOT RESOLVED BY THE ABOVE?

If the above tips have not ended in a successful login, it is suggested to do the following:

- Contact your internal IT department to see if there are any restrictions on the device that may be blocking access
- Create a new Outlook account as a different credential to use for logging into the portal.

5.1.10 LOG IN AFTER THE FIRST SUCCESSFUL LOGIN?

When logging into the Programmed Vendor Portal the first time, an access link is sent to vendors for access into the portal. Once the initial login process is complete, the access link is no longer a valid method of accessing the portal.

Please use the following website to log into the system: <https://vendors.programmed.com.au>

It is recommended to have this website saved as one of your favourites on the web browser being used.

5.2 For Vendor Employees:

Vendor employees, including vendor administrators, may have errors when accessing the Programmed Vendor Portal.

5.2.1 PROGRAMMED INDUCTION HAS EXPIRED

When the on-boarding and site inductions required by Programmed are close to expiring, a reminder email to complete them is sent to the employee email ID. These reminders are sent from the system 1 month prior to the actual induction expiry date and alerts vendor employees of the requirement to update.

For most qualifications and licenses, they can be updated prior to the expiry date.

However, for the Sub-Contractor Induction Card, there is a requirement that the induction can only be updated after the expiry is complete. To update the Sub-contractor induction before the expiry date, navigate to the [Programmed Vendor Portal](#) instead and complete the induction from there. If this induction is not completed prior to the expiry date, the system will automatically place all the work orders on hold until this is completed.

If you have any questions about this process or need help, please reach out:

- PMS.Procurement@programmed.com.au
- vendormanagement@programmed.com.au- For PFM WA vendors