

# Using Programmed Vendor Portal (Vendor Admin)– User Guide

---

D365 Project

14 December 2022

**Prepared for:**

**Programmed`s  
Vendor**

**Prepared by:**

**D365 Training Team**

<b>Purpose:</b>	The purpose of this User Guide is to assist Vendor Administrators in logging into and using the Programmed Vendor Portal.
<b>Overview:</b>	<p>Once a company's pre-qualification has been approved, the Vendor Portal can be used to update and view:</p> <ul style="list-style-type: none"><li>• Company Details including any changes to bank details</li><li>• Company Documents</li><li>• Work Orders-Please refer to <b>Using Programmed Vendor Portal To Manage Work Orders - User guide</b></li><li>• Financial Documents which includes <b>submitting invoices</b></li><li>• Employee Information, including creating employee records and giving them access to the portal so that they can complete their Programmed induction and update any required qualifications or licenses</li><li>• Subcontractor Handbook</li></ul> <p>If you are a vendor employee or technician, then please refer to the user-guide <b>below</b> on:</p> <ul style="list-style-type: none"><li>• Accessing the portal as a vendor employee and completing your induction- <b>Using Programmed Vendor Portal as a Vendor Employee/Technician</b></li></ul>
<b>Assistance:</b>	<p>For any assistance,</p> <ul style="list-style-type: none"><li>• <a href="mailto:PMS.Procurement@programmed.com.au">PMS.Procurement@programmed.com.au</a></li><li>• <a href="mailto:VendorManagement@programmed.com.au">VendorManagement@programmed.com.au</a> – PFM WA Vendors</li></ul>

## Contents

1	Accessing the Portal .....	4
1.1	Login for the first time .....	4
1.1.1	If you have a Non Microsoft Account .....	5
1.1.2	If you have a Microsoft Account.....	7
1.1.3	If you have a Organisation Account .....	8
1.2	Login After First Successful Attempt .....	9
2	Update Company Details .....	10
3	Update Company Documents .....	11
3.1	View All Company Documents.....	11
3.2	Update Qualifications/License.....	11
3.3	Update Insurance Policies .....	13
4	Upload Financial Documents .....	14
5	Manage Relevant Employee Information and Access.....	17
5.1	Add Relevant Employee and Enable Portal Access.....	17
5.2	Add a New 3 <sup>rd</sup> Party Subcontractor and Enable Portal Access.....	18
5.3	Confirm Employee Access Type and Upload Their Qualification Evidences .....	19
5.4	Remove an Employee from the Vendor Portal.....	20
6	Troubleshooting .....	21
6.1	When having issues with logging into the portal: .....	21
6.1.1	Do you have Multi-Factor Authentication? (Single Sign-On).....	21
6.1.2	Have You Referred to the Guides available to you? .....	21
6.1.3	If Using a Desktop, are you Using the Recommended Browser? .....	21
6.1.4	IS a Phone Being Used?.....	22
6.1.5	Is it a Shared Device or a Personalised Device? .....	22
6.1.6	Is the Browser History and Cache Cleared? .....	22
6.1.7	Is the correct Password being used for the Microsoft Account? .....	22
6.1.8	Are Organisational Security Permissions restricting the PORTal? .....	23
6.1.9	Initial Login Issues not Resolved by the Above?.....	23
6.1.10	Log in after the First Successful Login? .....	23
6.2	For Vendor Admins .....	23
6.2.1	When managing Employee Profiles with Repeated Email IDs.....	23
6.2.2	When managing Employee Profiles with Issues Accessing Inductions.....	23
6.2.3	Errors Updating Certificates of Currency or Business Details.....	24
6.3	For Vendor Employees (Including Administrators):.....	24
6.3.1	Programmed Induction has Expired.....	24



## 1 Accessing the Portal

You will have to log into the Programmed Vendor Portal as Vendor Admin to view and update Company details and documentation and add employees.

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 two (2) emails:

- ✓ **Email 1:** From Programmed with the information about the Programmed Vendor Portal. This email will be from: [pms.procurement@programmed.com.au](mailto:pms.procurement@programmed.com.au)
- ✓ **Email 2:** From Microsoft Invitations on behalf of Programmed inviting you to authenticate your login. This email will also provide the link to the Vendor Portal. This email will be from: [invites@microsoft.com](mailto:invites@microsoft.com)

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

2. Click on **Accept invitation**

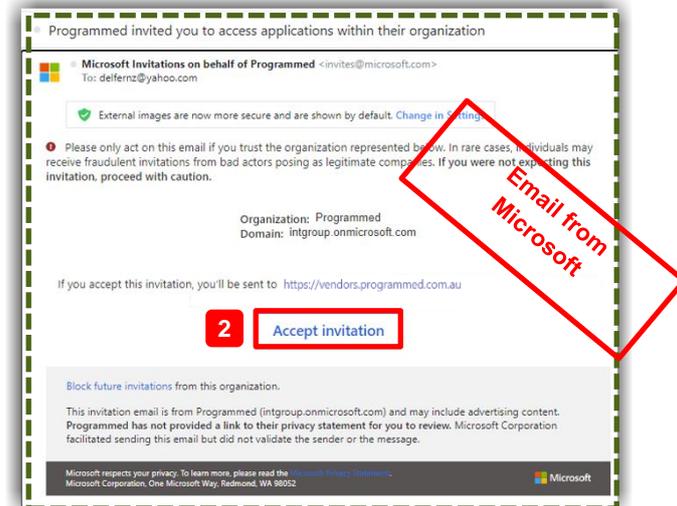
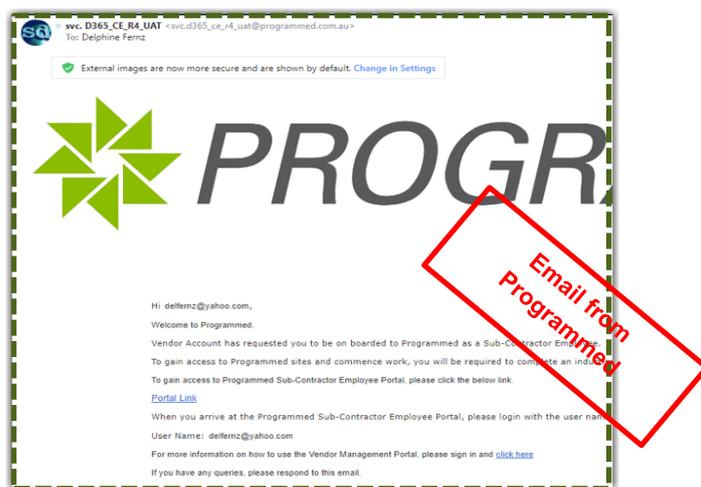
If your email account is associated with any of the following Microsoft accounts then go to [section 1.1.2](#),

- ✓ @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](#).

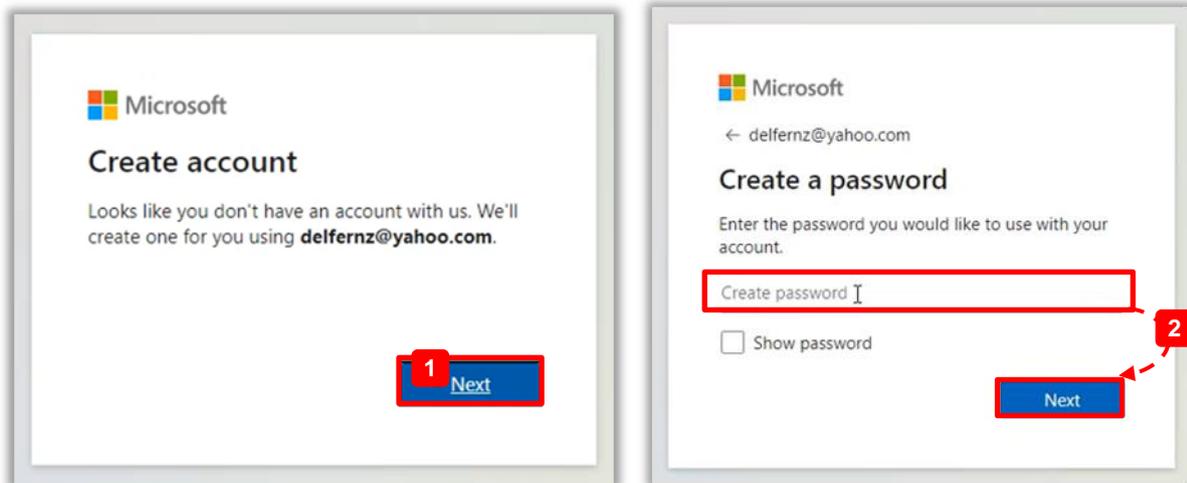


If you haven't received the email, please check your **Junk/Spam** folder in your mailbox. If the issue persists, please contact Programmed to help you.

## 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](mailto:invites@microsoft.com)) on behalf of Programmed. Follow the steps and the associated screenshots below.

1. Click **Next** (screen shot 1)
2. Create a new password and click **Next**
3. Microsoft will send a **security code** to your email, that you are using to authenticate. Enter the **Code** to verify your email
4. Click **Next**
5. Enter the characters or follow instructions to complete puzzles as required.
6. Click **Next**
7. Click **Looks good!**
8. Select **Yes** to stay signed in
9. Review the permissions and click **Accept** to proceed



**3** Verify your email address

Microsoft account team <account-security-noreply@accountprotection.microsoft.com>  
To: delfernz@yahoo.com

Microsoft account

### Verify your email address

To finish setting up your Microsoft account, we just need to make sure this email address is yours.

To verify your email address use this security code: 2044

If you didn't request this code, you can safely ignore this email. Someone else might have typed your email address by mistake.

Thanks,  
The Microsoft account team

**4** Microsoft

delfernz@yahoo.com

### Verify email

Enter the code we sent to **delfernz@yahoo.com**. If you didn't get the email, check your junk folder or try again.

Enter code

I would like information, tips, and offers about Microsoft products and services.

Choosing **Next** means that you agree to the Microsoft Services Agreement and privacy and cookies statement.

**4** Next

**5** Microsoft

delfernz@yahoo.com

### Create account

Before proceeding, we need to make sure a real person is creating this account.

New  
Audio

Enter the characters you see

**5**

**6** Next

**7** Microsoft

delfernz@yahoo.com

### Is your security info still accurate?

We just want to make sure this security info is up-to-date, so we can use it to verify your identity or alert you if there's ever a problem with your account.

- delfernz@yahoo.com

I don't have any of these

**7**

Update now **Looks good!**

**8** Microsoft

delfernz@yahoo.com

### Stay signed in?

Stay signed in so you don't have to sign in again next time.

Don't show this again

No **Yes**

**8**

**9** Microsoft

delfernz@yahoo.com

### Review permissions

Programmed intgroup.onmicrosoft.com

**This resource is not shared by Microsoft.**

The organization Programmed would like to:

- Sign you in
- Read your name, email address, and photo

You should only accept if you trust Programmed. By accepting, you allow this organization to access and process your data to create, control, and administer an account according to their policies. **Programmed has not provided a link to their privacy statement for you to review.** Programmed may log information about your access. You can remove these permissions at: <https://myapps.microsoft.com/intgroup.onmicrosoft.com>

Cancel **Accept**

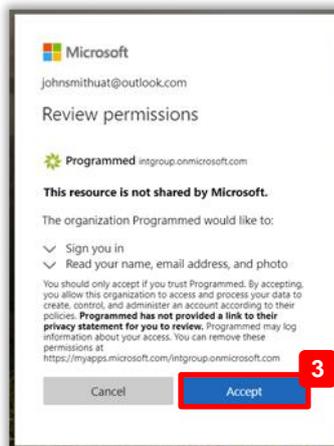
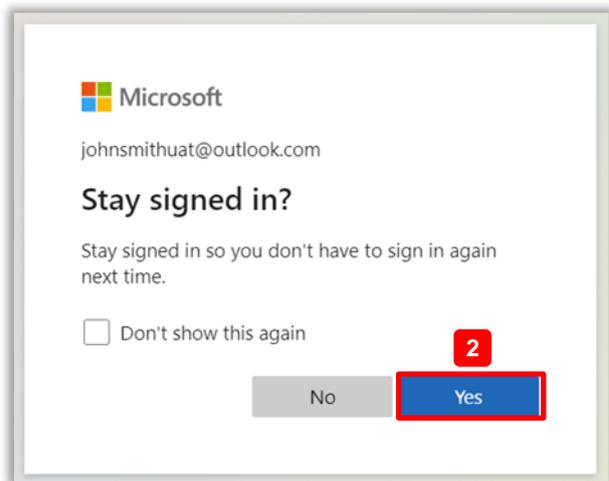
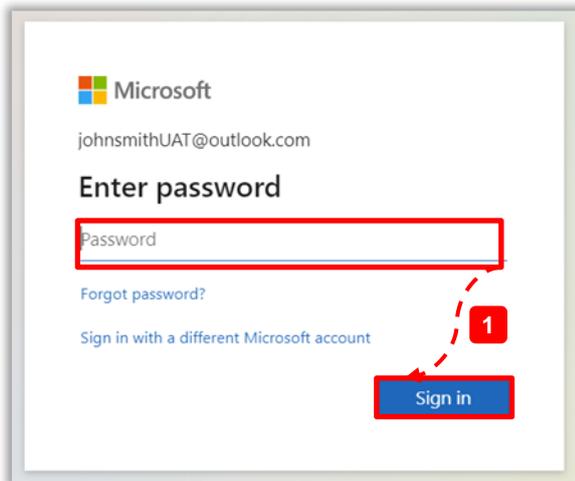
**9**

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

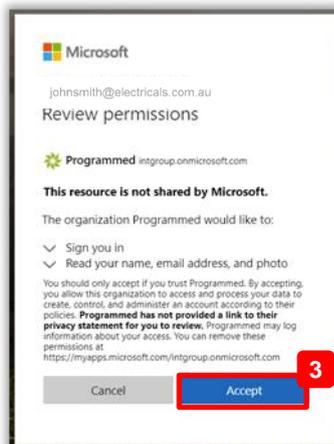
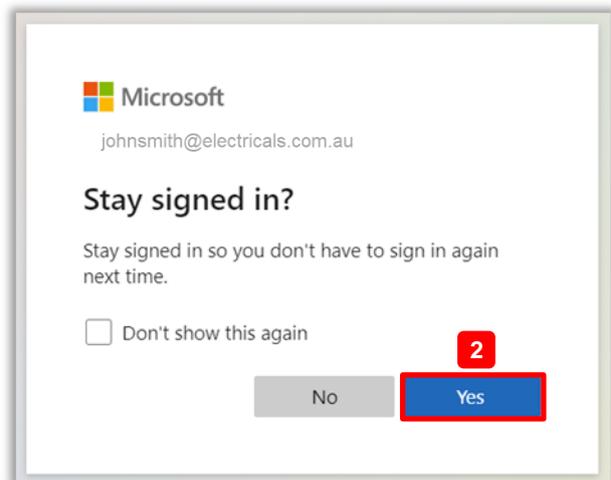
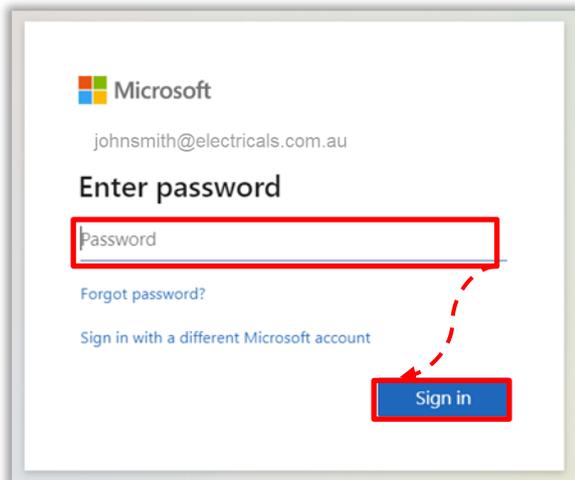


**RESULT:** Your login credentials have been created to log into the Programmed Vendor Portal. You will now be directed to the Vendor Portal. Remember to save the Programmed Vendor Portal as a Favourite in your browser using Google Chrome.

## 1.1.3 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 Login After First Successful Attempt

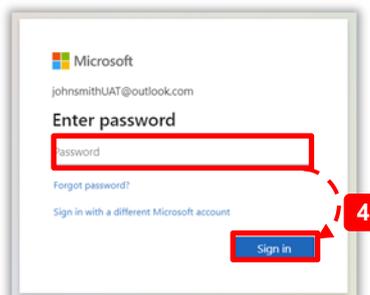
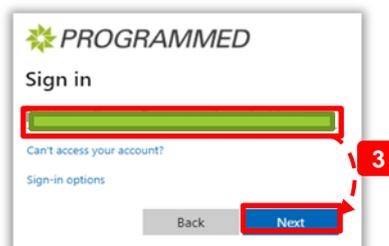
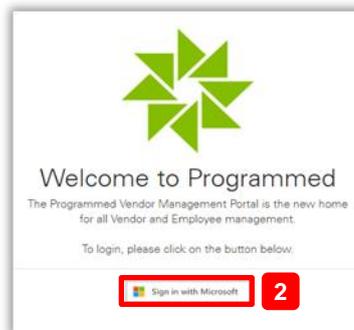
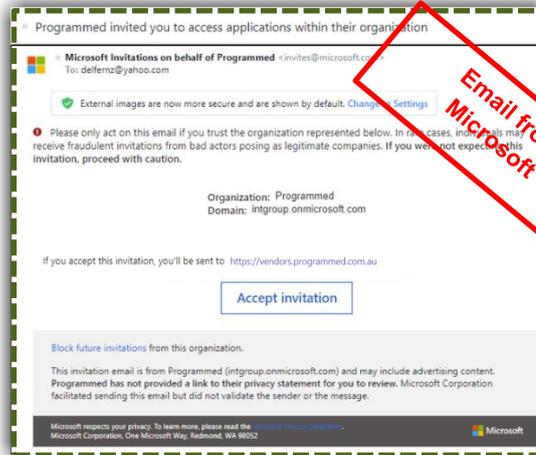
After you have completed the authentication setup process, you can then continue to log into the Programmed Vendor Portal when required:

1. Click on the hyperlink: (<https://vendors.programmed.com.au>) you received from Microsoft Invitations in section 1.1
2. Click on **Sign in with Microsoft**
3. Enter **your email as the username** and click **Next**

**Note:** This is the email you used in section 1.1(Login for the first time)

4. Enter the password relating to your email account and click **Sign in**

**RESULT:** You have now logged into the Programmed Vendor Portal. Remember to save the Programmed Vendor Portal as a Favourite in your browser using Google Chrome.



## 2 Update Company Details

You can update your organisation’s bank details, address and contact details. Some changes which are made will need to be reviewed and approved by Programmed.

**Note:** The document should be an official document such as a bank slip which displays the BSB and account number, company name and address.

To update Company Details:

1. On the Vendor Portal home page, click on **Company Details**
2. Click on **Edit Information**
3. Enter/Edit the required information

If you have updated the **Bank Details** then, please attach evidence (such as a bank deposit slip) in the **Company Document** section, which clearly shows the Account Name, BSB and Account Number.

4. Click on **Save and Complete**
5. Click on **Return to Start**

**RESULT:** The relevant changes to **Company Details** have been saved and submitted.

To come back to the Vendor Portal home page, click on the **Home** button in the top menu.

If the bank details are being updated, the contact nominated as the Director in this account will be notified via email of the requested change.

The screenshot shows the 'Programmed Vendor Portal' interface. At the top, a navigation menu includes 'Company Details' (highlighted with a red box and number 1) and 'Company Documents'. Below the menu, a message states: 'Welcome Joanne Bloggs to the Rock Computer Parts Pvt Ltd Vendor Administration Portal. You can use this portal to maintain your company details, documents and employee information.' A red box with number 2 highlights the 'Edit Information' button. Below this is a 'Company details edit form' (highlighted with a red box and number 3) containing fields for Account Name, Trading Name, ACN, ABN, Email, Website, Main Phone, Registered Address (Street, Suburb, Unit, State, Country, ZIP/Post Code), and Head Office (Street, Suburb, Unit, State, Country, ZIP/Post Code). At the bottom, two buttons are highlighted with red boxes and numbers: 'Save and Complete' (4) and 'Return To Start' (5).

## 3 Update Company Documents

The documents submitted during and after the Pre-Qualification process are visible here. Your organisation can submit additional documents which may be required as evidence, such as new insurance certificates or documentary evidence for new bank details updated in the Company Details section.

### 3.1 View All Company Documents

To view submitted Company Document:

- On the Vendor Portal home page, click on **Company Documents**
- Click on **View Details**
- Click on the document **Name**, to download the file
- At the bottom left of your Chrome browser, click on the file to open.

**RESULT:** The document is now downloaded and viewable.

**Programmed Vendor Portal**

Welcome Joanne Bloggs to the Rock Computer Parts Pvt Ltd Vendor Administration Portal  
You can use this portal to maintain your company details, documents and employee information.

1 **Company Documents**

**Company Documents**

Please find below a list of the documents uploaded in your Pre-Qualification Questionnaire. Should you need to update any of these documents please contact the Programmed Procurement Team at [pms.procurement@programmed.com.au](mailto:pms.procurement@programmed.com.au)

Historical

Description	Document Type	Approval Status	Created On
ISO14001 Certificate	ECBP ISO14001	Approved	06/07/2020 07:29 PM
Pricing Schedule	PMSL Price List	Approved	06/07/2020 08:41 PM
Electrical Licence Test Case	Trade Qualifications	Approved	06/07/2020 04:24 PM
Insurance Certificate	Insurance	Approved	17/08/2020 09:48 AM
Insurance Certificate	Insurance	Approved	17/08/2020 09:47 AM
Insurance Certificate	Insurance	Approved	17/08/2020 09:48 AM
Insurance Certificate	Insurance	Approved	17/08/2020 09:39 AM

2 **View details**

**Sharepoint Documents**

Name	Modified
Police Check.csv (1 KB)	13/08/2020 09:59 AM

3 **Police Check.csv**

4 **Police Check.csv**

### 3.2 Update Qualifications/License

To update Qualifications and License:

- In the Company Documents page, click on **Add/View Qualifications License**
- Click on **Add Qualification/License**

**RESULT:** The **Vendor Account- Trade Qualifications And Licensing Form** will appear.

1 **Add/View Qualifications License**

2 **Add Qualification / License**

Qualification/License Name	State Jurisdiction	Document Number	Expiry Date	Issue Date	Description	Created On
Police Check	Australia - VIC	VP12121	12/08/2021	12/08/2020		12/08/2020 09:13 PM

3. Complete the following fields: **Qualifications Name, Evidence Type, Issuer, Issue Date, State Jurisdiction, Document Number and Expiry Date**
4. Click on **Save and Next**
5. Click on **Add Qualification / License**
6. Enter a **Description**
7. Click **Choose File**, and select the file you want to upload on your computer and click Open (.txt,.docx, .xls, .xlsx, .pdf, .jpg, .png).
8. Click on **Submit**
9. Click on **Save and Complete**
10. Click on **Return to Start**

**RESULT:** The **Qualification/License** has been uploaded and will be reviewed and approved by Programmed.



When the company licence is due to expire, it will send an automatic email to the vendor administrator requesting the updated information.

The screenshot shows the 'Vendor Account - Trade Qualifications And Licensing Form' with the following elements highlighted by numbered callouts:

- 3:** A red box highlights the main form fields: Qualification/License Name, State Jurisdiction, Evidence Type, Issuer, Document Number, Issue Date, and Expiry Date.
- 4:** A green button labeled 'Save and Next' is highlighted.
- 5:** A green button labeled 'Add Qualification / License' is highlighted.
- 6:** A red box highlights the 'Description' field in the 'Create' dialog box.
- 7:** A red box highlights the 'Choose File' button in the 'Attach a file' section of the 'Create' dialog box.
- 8:** A red box highlights the 'Submit' button in the 'Create' dialog box.
- 9:** A green button labeled 'Save and Complete' is highlighted.
- 10:** A green button labeled 'Return To Start' is highlighted.

## 3.3 Update Insurance Policies

To update Insurance Policies:

1. In the Company Documents page, click on **Add/View Insurance Policies**
2. Click on **Add an Insurance Policy**
3. Complete the following fields: **Insurance Policy Type, Coverage Amount, Policy Number, Expiry Date, Insurer Name**
4. Click on **Save and Next**
5. Click on **Attach Evidence**
6. Enter a **Description**
7. Click **Choose File** and select the file you want to upload on your computer and click Open (.txt, .docx, .xls, .xlsx, .pdf, .jpg, .png).
8. Click on **Submit**
9. Click on **Save and Complete**
10. Click on **Return to Start**

**RESULT:** The **Insurance Policy** has been uploaded and will be reviewed and approved by Programmed.



When the insurance policies is due to expire, it will send an automatic email to the vendor administrator requesting the updated information.

The screenshot shows the 'Vendor Account - Insurance Policies Form' with the following steps highlighted:

1. Click on **Add/View Insurance Policies** in the top right corner.
2. Click on **Add an Insurance Policy** in the top right corner of the form.
3. Complete the form fields: **Insurance Policy Type**, **Coverage Amount**, **Policy Number**, **Expiry Date**, and **Insurer Name**.
4. Click on **Save and Next**.
5. Click on **Attach Evidence**.
6. Enter a **Description** in the text box.
7. Click on **Choose File** to upload a document.
8. Click on **Submit**.
9. Click on **Save and Complete**.
10. Click on **Return To Start**.

## 4 Upload Financial Documents

In the Vendor Portal, you can upload financial documents such as Invoices and Credit Notes. This feature will only be available for Programmed Entities connected to Dynamics 365 FinOps.

To upload financial documents in the Vendor Portal:

1. On the Vendor Portal home page, click **Financial Documents**

**RESULT:** Your My Invoice Dashboard displays. You will be able to see the AP status of any invoices ever submitted.



This data is refreshed periodically throughout the working day.

The information displayed reflects what values AP have entered against your invoice. It **could be different** to the information that was included at invoice submission (e.g.: PO updated after instructions from Branch staff, incorrect GST value updated etc.).

2. Click **Upload Invoice**
3. Click **Upload New Invoice**

**Programmed Vendor Portal**

Welcome **Prash Test 1407** Vendor Administration Portal  
You can use this portal to maintain your company details, documents and employee information.

- Company Details
- Company Documents
- Work Orders
- Financial Documents** (highlighted with red box and '1')
- My Qualifications

**My Invoice Dashboard**

Welcome to your Invoice Dashboard!

Please click on Upload Invoice to submit an invoice for payment directly to AP.

The table below provides the AP status of any invoices that have been submitted.

Note that listed invoice information reflects what values AP have entered against your invoice. E.g. PO updated after instructions from Branch staff, incorrect GST value updated etc.

Please contact the Accounts Payable team utilising the messaging function to raise any queries.

**Upload Invoice** (highlighted with red box and '2')

**INVOICE SUMMARY**

KPIs

Invoice No: Tout | Invoice Status: Tout

Filtres: Recher... | Filtres dans cette page: VendorCode, est (Tout)

**Vendor Invoice Upload History**

To submit a new invoice to the Accounts Payable team, please click on the Upload New invoice button. Below is record of all invoices and associated details that has been previously submitted. To view a copy of the invoice attachment or to contact the Accounts Payable team directly, please click on the drop down arrow to the right of each line.

**Upload New Invoice** (highlighted with red box and '3')

Vendor Account	Party Number (Vendor Account)	Vendor Invoice Date	Vendor invoice Number	Vendor Invoice #	Vendor Invoice Total Amount	Vendor Invoice GST	Vendor Invoice Type	Created On
Prash Test 1407	A004577	05/08/2020	2773399	10011851	\$249.27	\$22.66	Invoice	10/08/2020 09:13 AM

4. Use the **Magnifying glass** to select the **Legal Entity** (make sure to pick the correct one)
5. Input the **PO Number** (only numbers, no letters)
6. Input the **Invoice Number**, exactly as per the issued invoice
7. Select the **Invoice Date**, as per the issued invoice
8. Select the **Invoice Type** (Invoice or Credit Note)
9. Check the **Currency** is correct and update if required
10. Input the **Total Amount, including GST**, as per the issued invoice
11. Input the **GST Amount**, as per the issued invoice
12. Click **Save and Next**

**RESULT:** The Vendor Invoice record is created, now you must attach the invoice to complete the process.

**Only one attachment can be submitted per invoice submission** with maximum file size of 10MB.

**PDF** is Programmed's **preferred** file type for all invoices.

13. In the **Add Documents** section, click **+Add files**
14. Click **Choose Files**
15. Select the relevant document on your computer and click **Open**

If you keep **Overwrite existing files** ticked, the file will replace any document with the same name.

16. Click **Add files**

**RESULT:** The File displays in the Add Documents section.

17. Click **Save and Complete** to submit the invoice to the AP team or click **Save and New** if you want

Legal Entity \* **4**

Please ensure the Legal Entity chosen is the Programmed company that your invoice is made out to

PO Number \* **5**

Please enter a numerical value only. ie, PO10010767 should be entered as 10010767 only

Invoice Number \* **6**

Please enter the invoice number exactly as indicated on the issued invoice. E.g. INV-12345 should be entered with INV-included

Invoice Date \* **7**

Please enter the invoice date as indicated on the issued invoice. If today's date is required, type T and today's date will populate automatically.

Invoice Type \* **8**

Currency \* **9**

Total Amount inc GST \* **10**

Please enter the total invoice amount including GST as indicated on the issued invoice

GST Amount \* **11**

Please enter the GST amount only as indicated in the issued invoice

**Save and Next** **12**

Add Documents **13**

Add files

Choose files **14**  INV22334455.pdf

Overwrite existing files

**16**

Name ↑	Modified	
INV22334455.pdf (6 KB)	15/08/2020 12:05 PM	

**17**

If you uploaded the wrong file, you can delete it: click on the **drop-down icon** next to the file and select **Delete**. Then, follow **steps 13 – 17** to upload the correct document.

to add an additional invoice / credit note.

**RESULT:** Once submitted, a confirmation will be sent to your registered email address.

If you want to see the details of any invoice you submitted, you can use the View Details tab in the Vendor Invoice Upload History screen:

1. Next to the invoice you want to see the details for, click the **drop-down arrow** at the right of the line
2. Select **View details**

**RESULT:** You will be able to see more details of the invoice and a preview of the document previously uploaded.

Vendor Account	Party Number. (Vendor Account)	Vendor Invoice Date	Vendor Invoice GST	Vendor Invoice Type	Created On
Prash Test 1407	A004577	03/08/2020	\$15.00	Invoice	19/08/2020
Prash Test 1407	A004577	02/08/2020	\$30.00	Invoice	

**View details**

Legal Entity	Invoice Type
PPSA	Invoice
PO Number	Currency
10011884	AUD
Invoice Number	Total Amount inc GST
SIT043A_TC201 BF	\$165.00

If you need to contact the AP team, you can use the messaging tab in the Vendor Invoice Upload History screen:

1. Next to the invoice you have a query for, click the **drop-down arrow** at the right of the line
2. Select **Send Message**
3. Verify the **Legal Entity** you want to contact is correct
4. Enter a **message** with your contact details
5. Click on **Send Message**

**RESULT:** The message will be sent to the relevant AP team.

Vendor Account	Party Number. (Vendor Account)	Vendor Invoice Date	Vendor Invoice GST	Vendor Invoice Type	Created On
Prash Test 1407	A004577	03/08/2020	\$15.00	Invoice	19/08/2020
Prash Test 1407	A004577	02/08/2020	\$30.00	Invoice	

**Send Message**

3 Legal Entity: PPSA

To Email: ppsaccounts payable@programmed.com.au

4 Message:

5 Send Message

## 5 Manage Relevant Employee Information and Access

### 5.1 Add Relevant Employee and Enable Portal Access

1. On the Vendor Portal home page, click on **Employee/ 3<sup>rd</sup> Party Subcontractor Information**
2. Click on **Add New Employee**
3. Fill in the mandatory fields (indicated with a \*)
4. Select the relevant portal access level



The access options available here can be used as the following:

- **Enable as Financial User:** gives employee the access to uploading invoices
- **Enable as Technician:** Used to be Enable as Employee
- **Enable as Dispatcher:** gives the employee access to allocating the Work Orders across the technicians

**RESULT:** The employee will be created and displayed on the Employee Summary page.

6. Repeat the steps according to the number of employees you want to add.



Once add the employee, an invitation will be sent to the employee automatically. The invited employees will be able to edit their contact details, complete the Programmed Induction, get their Programmed Induction Card, update their Qualifications and review the Programmed Handbook and Policies Procedures.

Programmed Vendor Portal

Welcome Vendor Admin to the Kim Riley - Test Vendor Administration Portal  
You can use this portal to maintain your company details, documents and employee information.

- Company Details
- Company Documents
- Work Orders
- Financial Documents
- Questionnaire
- Employee/3rd Party Subcontractor Information**
- Subcontractor Handbook

**2** Add a New Employee Add a New 3rd Party Subcontractor

Onboarding - Add a New Employee

**3**

Full Name \*

Job Title

Email \*

Home Phone  
Provide a telephone number.

Mobile Phone  
Provide a telephone number.

Date of Birth  
DD/MM/YYYY

Confirm Employee Access Level

Enable as Technician  Enable as Dispatcher  Enable as Financial User

**4**

Save and Complete Save and New Return To List

**5**

## 5.2 Add a New 3<sup>rd</sup> Party Subcontractor and Enable Portal Access

1. On the Vendor Portal home page, click on **Employee/ 3<sup>rd</sup> Party Subcontractor Information**
2. Click on **Add a New 3<sup>rd</sup> Party Subcontractor**
3. If this is subcontractor which has been onboarded with Programmed already then you can search and select it from the drop down **ELSE** enter the:
  - Subcontractor Company Name
  - Subcontractor Registered Name
  - Subcontractor ABN
4. Fill in the mandatory fields (indicated with a \*)
5. Select the relevant portal access level



The access options available here can be used as the following:

- **Enable as Financial User:** gives employee the access to uploading invoices
- **Enable as Technician:** Used to be Enable as Employee
- **Enable as Dispatcher:** gives the employee access to allocating the Work Orders across the technicians

6. Click on **Save and Complete**

**RESULT:** The 3<sup>rd</sup> party subcontractor will be created and displayed on the Employee Summary page.

Programmed Vendor Portal

Welcome Vendor Admin to the Kim Riley - Test Vendor Administration Portal  
You can use this portal to maintain your company details, documents and employee information.

- Company Details
- Company Documents
- Work Orders
- Financial Documents
- Questionnaire
- Employee/3rd Party Subcontractor Information** (1)
- Subcontractor Handbook

Add a New Employee Add a New 3rd Party Subcontractor (2)

Onboarding - Add a New Employee 3rd Party Subcontractor

3rd Party Subcontractor Details (3)

Company Lookup

Subcontractor Company Name (3)

Subcontractor Registered Name

Subcontractor ABN \*

Full Name \* (4)

Job Title

Email \*

Home Phone  
Provide a telephone number

Mobile Phone  
Provide a telephone number

Date of Birth  
DD/MM/YYYY

Confirm Employee Access Level (5)

Enable as Technician  
 Enable as Financial User  
 Enable as Dispatcher

Save and Complete (6) Save and New Return To List

## 5.3 Confirm Employee Access Type and Upload Their Qualification Evidences

As a Vendor Administrator, you can upload qualification evidences on behalf of your employees:

1. On the Vendor Portal home page, click on **Employee/ 3<sup>rd</sup> Party Subcontractor Information**
2. Click on the **drop-down arrow** next to the employee you would like to upload the qualification evidence for.
3. Click on **Modify Employee**
4. Provide the employee with the appropriate access in the **Confirm Access Level** options



The access options available here can be used as the following:

- **Enable as Resource:** Is selected automatically once the employee is created
- **Enable as Financial User:** gives employee the access to uploading invoices
- **Enable as Technician:** Used to be Enable as Employee
- **Enable as Dispatcher:** gives the employee access to allocating the Work Orders across the technicians

5. Click on **Add Qualification**
6. Fill in the **mandatory fields**
7. Click on **Choose file**
8. Select the document you would like to upload from your computer
9. Click on **Open**
10. Click on **Add Qualification**

**RESULT:** The document displays on the page.

11. Click on **Save Changes**

**RESULT:** The documents will be uploaded on the **Vendor Portal** and will be available to the employee when they

Document Number	Issue Date	Expiry Date	Jurisdiction	Subcontractor Company
15	05/03/2020	16/12/2021		

**Create**

Document Title \* [Text Field] State Jurisdiction [Dropdown]

Evidence Type \* [Dropdown]

Restriction [Text Field] Document Number [Text Field]

Issue Date \* [Text Field] Expiry Date \* [Text Field]

7 Attach a file \*  
Choose File No file chosen

10 Add Qualification



When the employee's certificate is due to expire, it will send an automatic email to the employee requesting the updated information, as well as a Microsoft sign on link if they have not logged into the portal before.

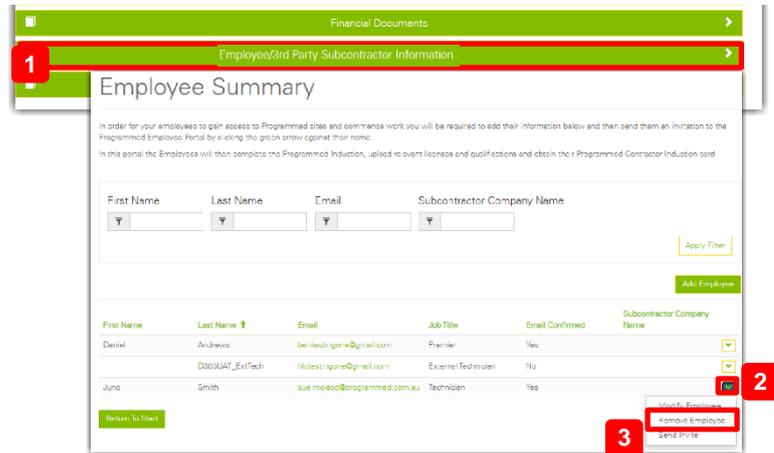
log into the portal, under **My Qualifications** section.

## 5.4 Remove an Employee from the Vendor Portal

As a Vendor Administrator, you can remove an employee from the list that appears in employee summary:

1. On the Vendor Portal home page, click on **Employee/ 3<sup>rd</sup> Party Subcontractor Information**
2. Click on the **drop-down arrow** next to the employee you would like to remove
3. Click on **Remove Employee**

**RESULT:** The employee's status for Invited to Portal will change from Yes to No.



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

- [PMS.Procurement@programmed.com.au](mailto:PMS.Procurement@programmed.com.au)
- [VendorManagement@programmed.com.au](mailto:VendorManagement@programmed.com.au)

## 6 Troubleshooting

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

### 6.1 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.

#### 6.1.1 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](#)

#### 6.1.2 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

#### 6.1.3 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](#)

## 6.1.4 IS A PHONE BEING USED?

**As a general 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.

## 6.1.5 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.

## 6.1.6 IS THE BROWSER HISTORY AND CACHE CLEARED?

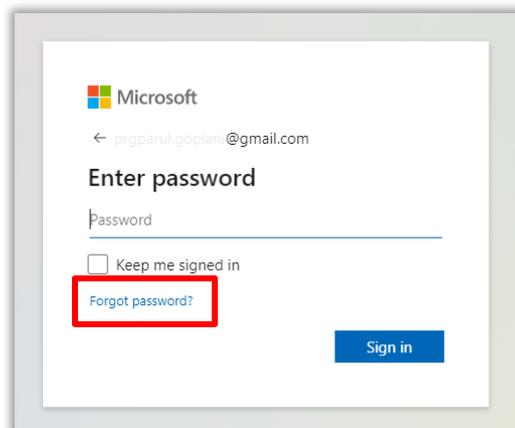
Sometimes, the previously used websites leave a trail that blocks new websites from being opened. This may need to be cleared so that the Vendor Portal displays. It is also recommended to close all the open websites on the device when completing this process of clearing history and cache.

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

## 6.1.7 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.



## 6.1.8 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

## 6.1.9 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.

## 6.1.10 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.

## 6.2 For Vendor Admins

Vendor Admins are responsible for maintaining the records of their organizational employees, providing them with access and updating the vendor portal as required. As such, there are some troubleshooting tips specific to them.

### 6.2.1 WHEN MANAGING EMPLOYEE PROFILES WITH REPEATED EMAIL IDS.

If a new contact is being created in the Programmed Vendor Portal, it is a requirement of the system to use a unique email address for each contact. Therefore, create a new unique email address for the employee so they can access the portal and be set up as a new contact.

If this is not something that is possible, contact Programmed for a resolution.

### 6.2.2 WHEN MANAGING EMPLOYEE PROFILES WITH ISSUES ACCESSING INDUCTIONS.

If you, or one of the employees you are supporting, are unable to access the on-boarding induction, contact Programmed to confirm.

## 6.2.3 ERRORS UPDATING CERTIFICATES OF CURRENCY OR BUSINESS DETAILS

Please refer to page 12 of this document to review how to update these details. If errors persist, contact Programmed for support with updating the information.

## 6.3 For Vendor Employees (Including Administrators):

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

### 6.3.1 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.