Supplier Portal

User Guide

Overview

Welcome to the Workday Supplier Portal, your direct line into Swinburne's financial system. It is designed to give you more control over your data and faster insights into your payments.

Instead of waiting for email replies or calling the Accounts Payable team, you can use this secure, self-service hub to manage your transactions with us in real-time.

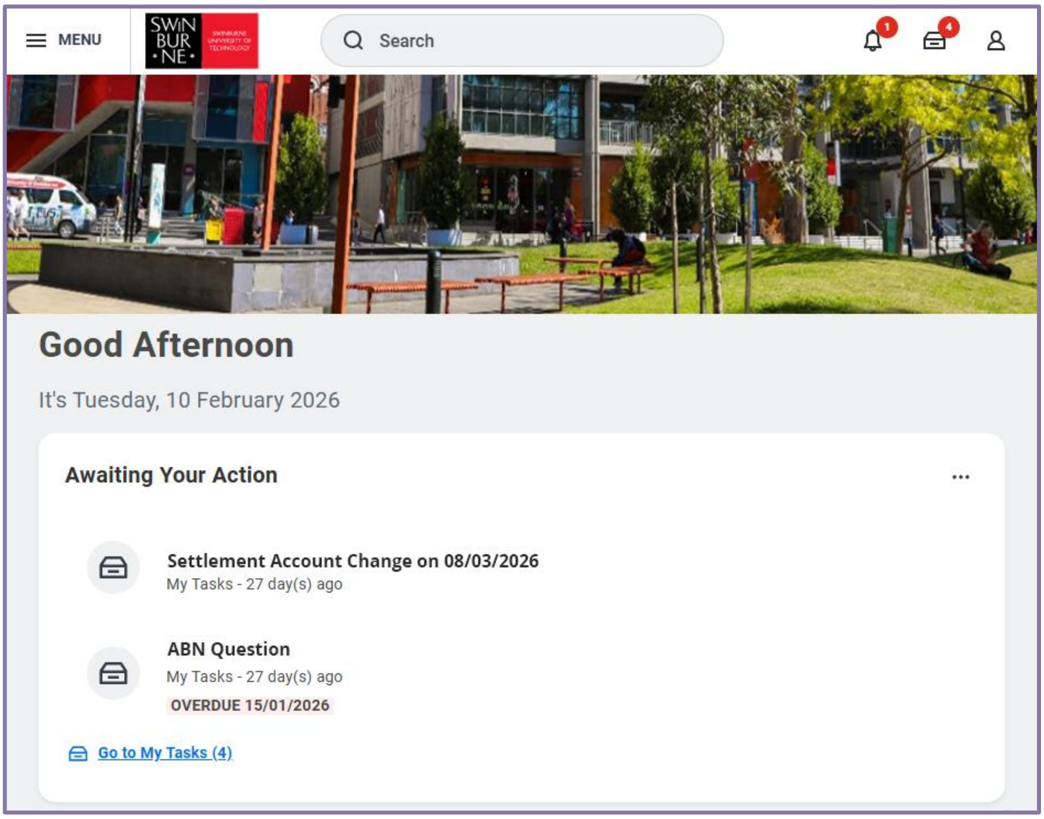
You'll be able to check the status of an invoice, all payment history, view purchase orders, and update your business profile.

Access

Once your profile is set up, you'll receive two emails:

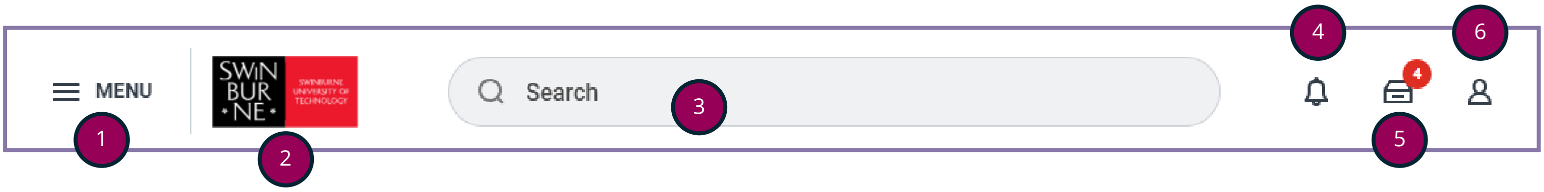
1. Contains your username and website URL.
2. Contains your temporary password (you can change this to something memorable later).

Logging in will take you to the home screen:



Moving around

Your desktop essentials – available at the top of every screen



1. **Menu (the 'Hamburger'):** Located in the top left, the dropdown **menu** gives you a full list of options regardless of which screen you are on, plus any shortcuts that you have added – think of these as your favourites that you want easy access to.

2. **Swinburne logo:** Select the logo to return to the home screen, your central hub.

3. **Search function:** Use the search bar to find things such as tasks, invoices, or actions. You don't need to enter full words; using shorthand works perfectly. For example, entering '**cre inv'** will find **Create Invoice**. It's easy to clear your search results too – just click the **X** in the search bar.

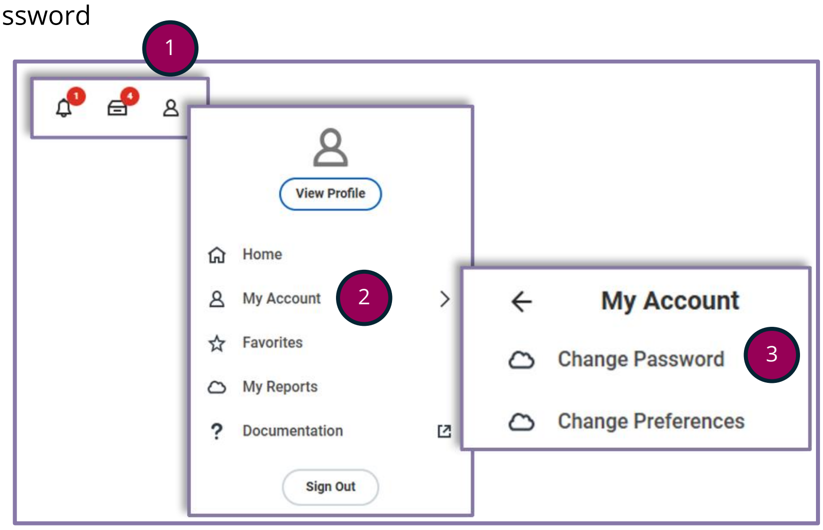
4. **Notifications:** The bell icon alerts you to status updates, completed processes, or mentions. These are for information only and don't usually require action.

5. **My Tasks (Inbox):** This is your 'to-do' list where you view items requiring your action. You will also receive an email to let you know you have some actions here. In the example above, you can see there are four tasks to be actioned.

6. **My Account / Profile:** Select the person icon in the top right to view your personal details, change settings, or sign out. If you add your photo to your profile, this will display instead of the icon.

   It's in here that you can change your password in three steps:

   1. My Account / Profile icon
   2. My Account
   3. Change Password



Enter your existing password and new password, then click OK.

Actioning your tasks

You will receive an email from Workday when there is something you need to action. Therefore, your main focus should be the Inbox icon in the top-right of the screen.

For example, if an invoice is sent back to you for correction, it will land here. 

You don't just view data, you trigger processes and make things happen. Here are the most common tasks you'll perform:

Managing your profile

You might move address or change bank accounts:

- **Action:** Select **Maintain Supplier Information**.
- **The process:** You submit the change, and it creates a change request. Once they are approved by Swinburne, you will see the updates in your profile.

Invoicing

The fastest way to get paid is to change a purchase order into an invoice:

- **Action:** Go to the Menu on the top left and then **POs and Catalogs** to create the invoice.
- **The benefit:** This pulls the details directly from the PO, such as quantities and prices, minimising the chance of a matching error that would delay your payment.

Tracking Payments

No need to send those *Where is my payment?* emails, just check the portal first!

- **Action:** View **Supplier Invoices** or **Payments**.
- **Status Check:** Look for In Progress (waiting to be approved), Approved (confirmed and waiting to be paid) or Paid (transaction is complete, and the funds are on the way). If an invoice is denied, click into it to see the reason.

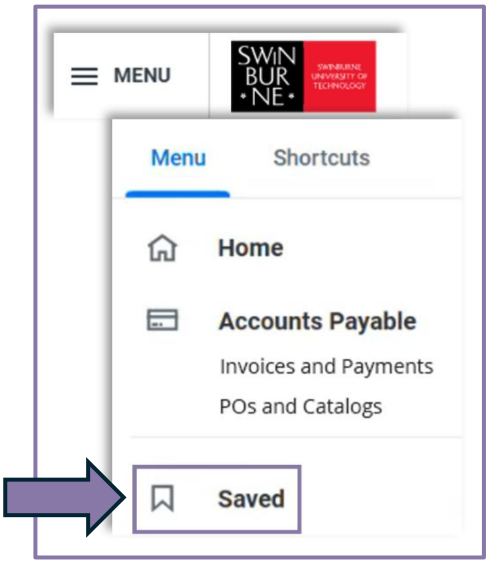
Dealing with rejections (Send Backs)

If Swinburne finds an error in something you submitted, you will receive a **Send Back**.

- **The Alert:** You'll get an email notification, and a new item in your Supplier Portal Inbox.
- **The Fix:** Open the task, read the **Comment** from the reviewer (usually at the top or bottom), edit the information, and hit **Submit** again. This puts you back in the queue for approval.

Tips

- **Apps:** Found on your home screen, these provide quick access to specific functional areas like *Expenses*, *Procurement*, or *My Reports*.
- **Dashboards:** Specialised pages that group related reports and charts together to give you a high-level overview of your data. Most dashboards also allow you to move or hide content – just look for the **gear icon** or **Configure** button to tailor the view to your needs.
- **Saved:** If you have a task you access regularly, you can make it easy to find every time! Select this icon, found on the top right of most screens, and then find that screen in the Saved section via the menu.

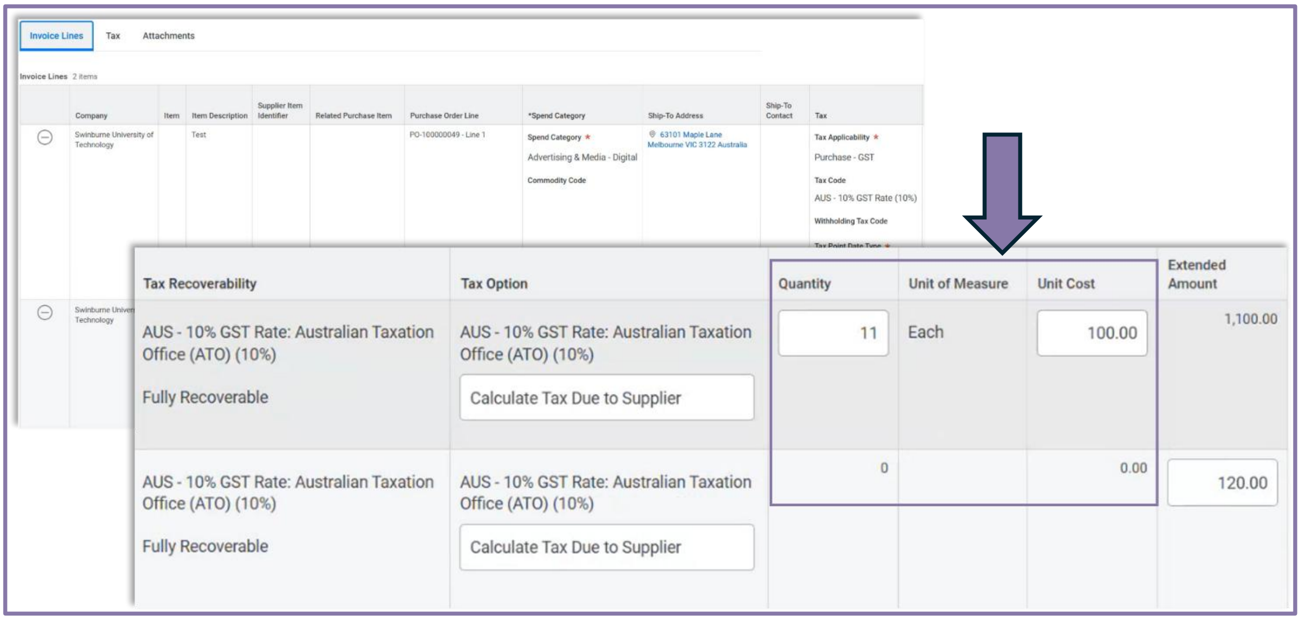


- **Hyperlinks:** Any text in **blue** is a clickable link that will take you directly to that specific record or report. Alternatively, you can keep your current page open and right-click the hyperlink and select **See in New Tab**. If the hyperlink has a **small box with three dots** appearing next to it, selecting this opens a menu of tasks you can perform on that item.
- **Drag and drop:** When uploading receipts or documents, you can simply drag files from your folder and drop them directly into the grey upload box.
- **Mandatory Fields:** Any field marked with an **asterisk*** must be filled out before you can submit or save your work.
- **Prompts:** Select the magnifying glass icon, found in data fields, to find a list of valid options.
- **Export:** Are you an Excel fan? Select this icon at the top of tables to download the data you're viewing into a spreadsheet

Things to look out for

Is there a warranty?

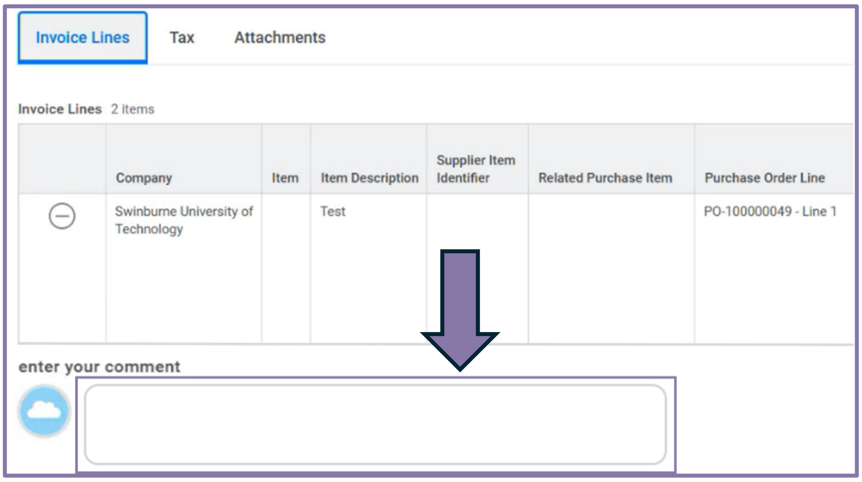
You might look at these two invoice lines and notice something a bit different. First, scroll over to the far right to the **Quantity** / **Unit of Measure** / **Unit Costs columns**.



Say for example that as a supplier you are selling electronic items and Swinburne requires a warranty. The first line is 11 items at $100 each, however the second line has a quantity of zero, a unit cost of zero, and an extended amount of $120. This designates a warranty purchase of $120 for the 11 items.

Comments

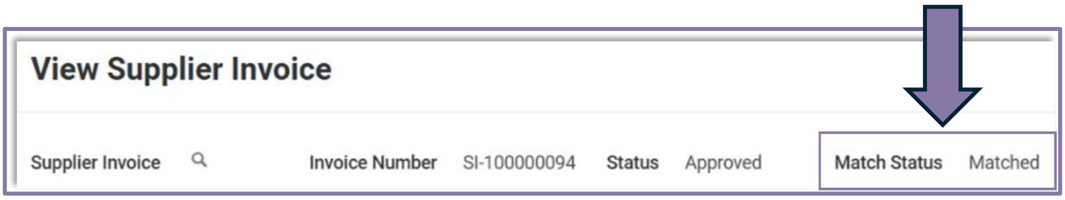
When viewing an invoice, there is a space for comments.



You can find these at the bottom, below the invoice lines – a perfect spot for a comment about a warranty that has been purchased, for example.

Match status

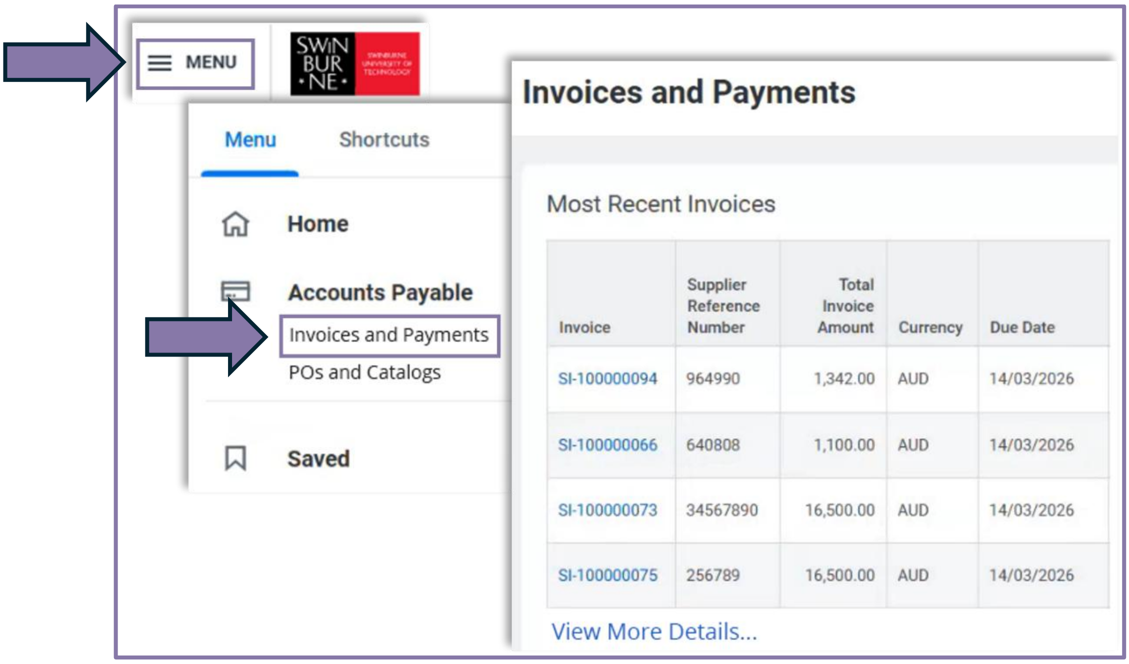
An invoice may show a different status throughout the process from beginning to end. There is also a Match Status, seen below on the right.



If the Match Status shows as *Matched*, this means that the PO, the receiving invoice and the supplier invoice are all aligned.

Where is that new invoice I just saw?

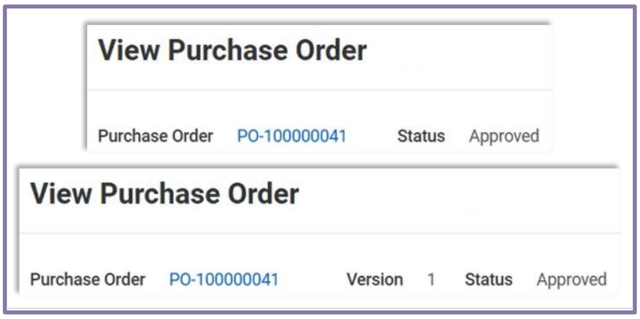
Looking for the most recent invoices? Easy! Just open the menu on the top left and select Invoices and Payments.



A list of the most recent invoices will be shown. If you want to see more, you can click **View More Details…** at the bottom.

Versions

For a PO, in most cases, there will be one version. Perhaps, however, there was a typo made, and Swinburne has fixed it; this will create another version. How can you spot the difference?



The first PO shows only that status of Approved – no version is shown. If you don't see a version listed, then it is the original.

The second PO shows Version 1 and a status of Approved. Think of Version 1 as Update 1, now displaying after the first update.

Support

If you would like more further information on certain processes, view our help guides on:

- How to create a credit note
- How to create an invoice adjustment
- How to update your settlement bank account, ABN and contact information.

If you have any questions or require additional support with the portal, contact the Swinburne Finance team via fpp@swin.edu.au.