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WRC BMS PORTAL USER GUIDE

WRC gives an opportunity to researchers on an annual basis to research funded topics around water and sanitation environments. Two types of calls are available: Open and directed. Open calls are proposals that are open to any topics within the water and sanitation environment, whereas as directed calls are linked to Terms of Reference that indicate a specific topic or research along with their outcomes.

All WRC proposals and projects are managed through the WRC Business Management System (BMS). Prospective WRC proposers and WRC stake holders such as Reviewers, Project Leaders and Reference Group Members will be required to use the BMS Portal.

What is the BMS Portal?

BMS Portal is the WRC's web-based system that enables external stakeholders of the WRC to login and access information relevant to the role they are fulfilling with the WRC. These roles include, but are not limited to:

- Proposers
- Project Leaders
- Reviewers
- Reference Group Members
- Contract Signatories
- Researchers
- Finance Officers
- Students

Purpose

The purpose of this user guide is to provide users with instructions on how to navigate the BMS portal and access the specific information that is relevant to their engagement with the WRC.

Support

If you have any queries regarding this guide, please contact the WRC Support Desk at bms-support@wrc.org.za.

Glossary of Terms

The following are is a list of terms and descriptions referenced throughout this document.

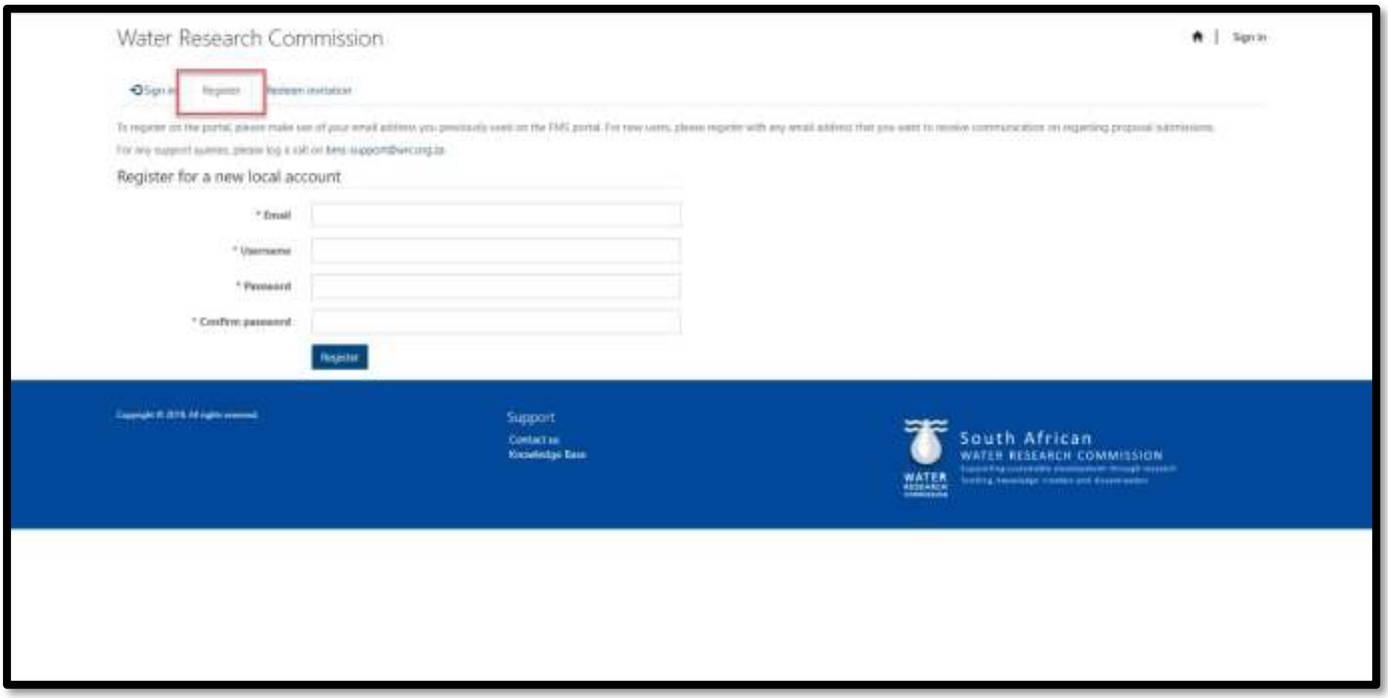
Term	Description
Navigation Menu	The menu bar at the top all pages that allows you to navigate to the different sections of the BMS Portal.
Proposer	The BMS Portal user is that is currently logged in when creating a proposal submission.
Record	A record is a complete set of information: for example, all the information about a proposal. There are many types of records in the BMS portal, including your profile, proposals, projects, contracts, reviews, service requests, etc.
Related Record	A record related to a primary record. For example, a Researcher record that is captured as part of a proposal submission and is a related record to the proposal.
WRC	Water Research Commission

Table of Contents

Register for the BMS Portal

1. Navigate to the BMS Portal by visiting the website https://wrc.microsoftcrmportals.com, which will direct you to the *Home* page.
2. Click on the **Sign in / Register** link at the top right of the home page, which will direct you to the *Sign in* page.

3. On the *Sign in* page, click on the *Register* tab. The *Register for a new local account* page is displayed.

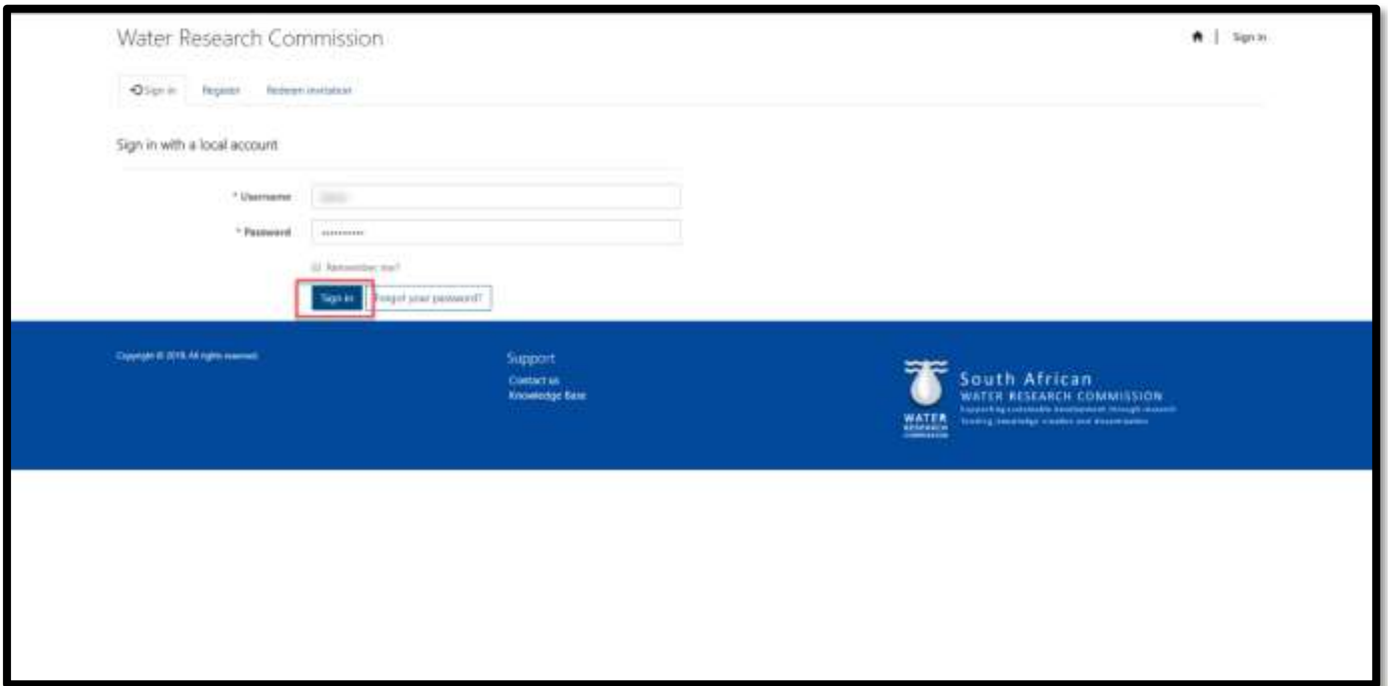


4. Enter your email address, a username, and a password. The same password must be entered in both the *Password* and *Confirm Password* fields.
5. **Note**: Your password must meet the following criteria:
    a. Must be at least 8 characters;
    b. Must contain characters from at least three of the following four classes:
        i. Uppercase
        ii. Lowercase
        iii. Digit
        iv. Non-alphanumeric (special)
6. **Note**: If you previously used the WRC's FMS portal, enter the same email addressed you used on the FMS portal. New users can use any email address to which they want to receive communications and notifications from the WRC.
7. When you have completed all the above information, click on the **Register** button. You will be re-directed to the *Profile* page.
8. To view and update your profile, follow the steps as detailed in the Profile Page section below.

Sign in to the BMS Portal

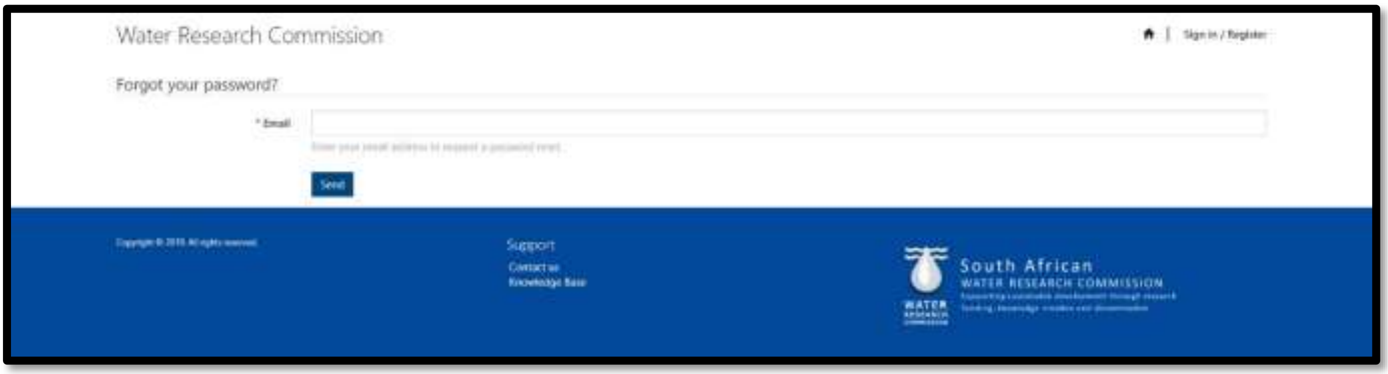
9. Navigate to the BMS Portal by visiting the website https://wrc.microsoftcrmportals.com, which will direct you to the *Home* page.
10. Click on the **Sign in / Register** link at the top right of the home page, which will direct you to the *Sign in* page.

11. On the *Sign in* page, enter your Username and Password as selected when you registered. When completed, click on the **Sign in** button to complete the sign in process.



Forgot Password

1. If you have forgotten your BMS password, click on the **Forgot your password?** button on the *Sign In* page, which will direct you to the *Forgot Password* page.



2. Enter the email address that you used when you registered for the portal and click the **Send** button.
3. An email will be sent to you with a link to reset your password.
4. Click on the Reset Password link in the email, which will redirect you to the *Reset Password* page. Enter your new password in the *New password* and *Confirm new password* fields and click the **Reset** button to complete the process.

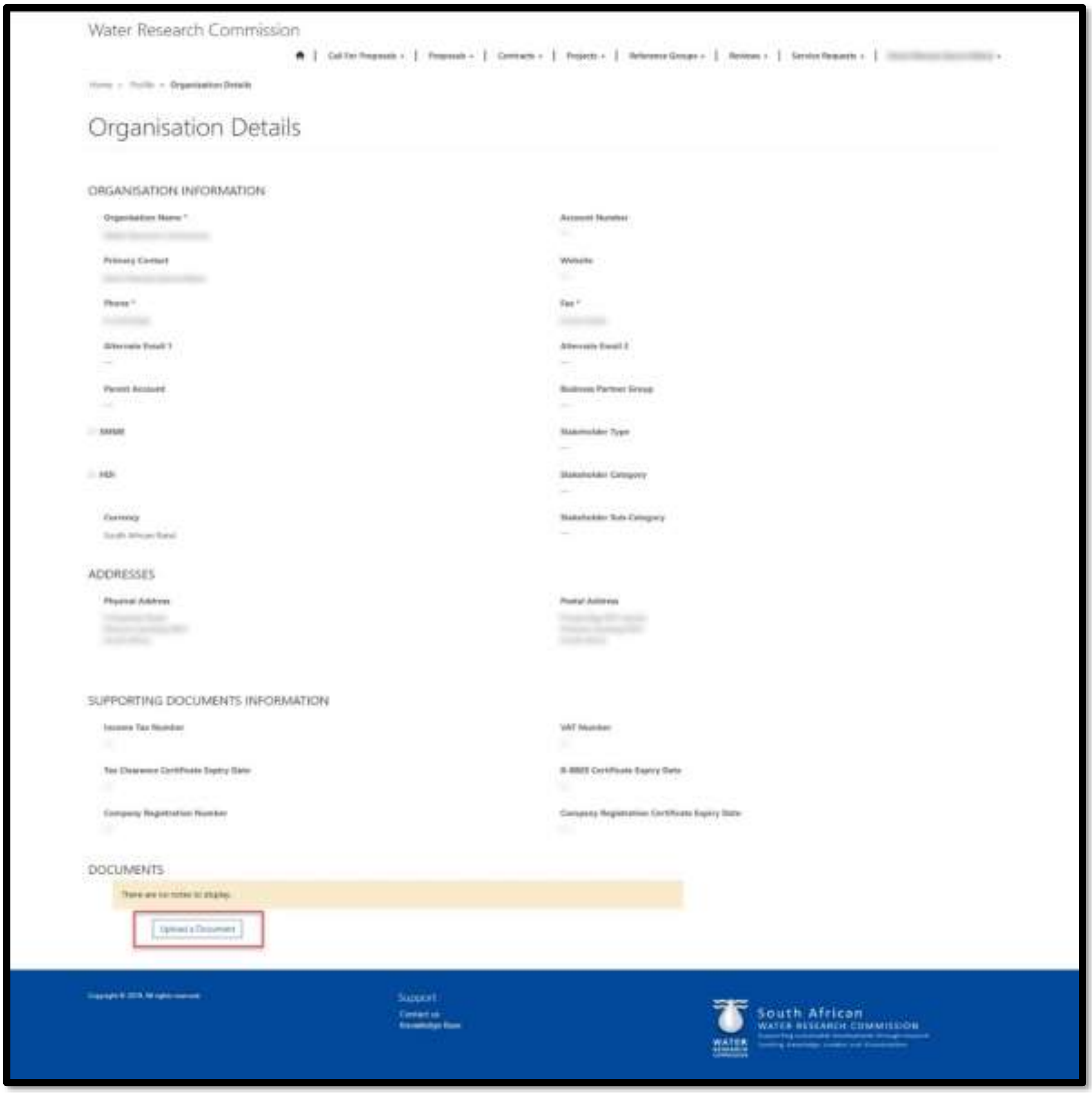
Profile Page

1. Once signed in, the *Profile* page is displayed. On this page you can update your profile details, which includes adding Qualifications, Areas of Expertise, and Areas of Interest.
2. You can also view the *Profile* page at any time by clicking on your name on the far-right side of Navigation Menu and then selecting the **Profile** option.

3. To save the changes to your profile, click on the **Save & Update** button at the bottom of the page (see screenshot located on the next page).
4. **Note**: If you were re-directed to this page after registering, please remember to complete the following mandatory fields and save & update your profile before you leave the profile page or log out of the portal:
    a. First Name
    b. Last Name
    c. Mobile Phone

5. If you are the *Primary Contact* of your organization, the organization will be listed in the *Organisation* section of the profile page. Click on the arrow on the far right of the record and select the **View Organisation Details** option to view the *Organisation Details* page.

6. On the *Organisation Details* page, you can view the details of your organization and upload supporting documents by using the **Upload a Document** button at the bottom of the page (see screenshot on the next page).



BMS Portal Navigation Menu

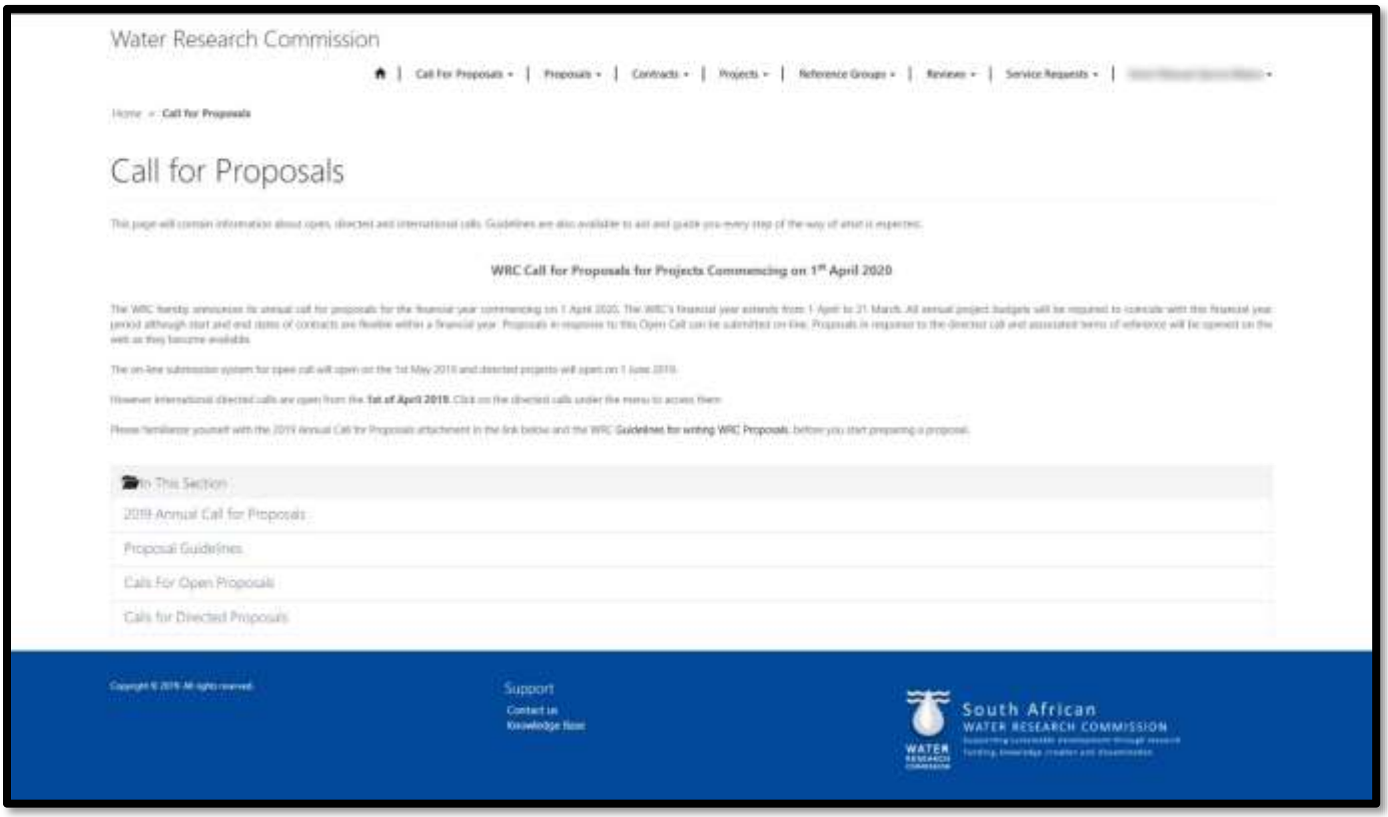
Call For Proposals

This section details the pages and actions found in the **Call for Proposals** section in the Navigation Menu of the BMS Portal.

Call for Proposals Page

1. To view the *Call for Proposals* page, click on the **Call For Proposals** option in the Navigation Menu and then click on **Call For Proposals**.

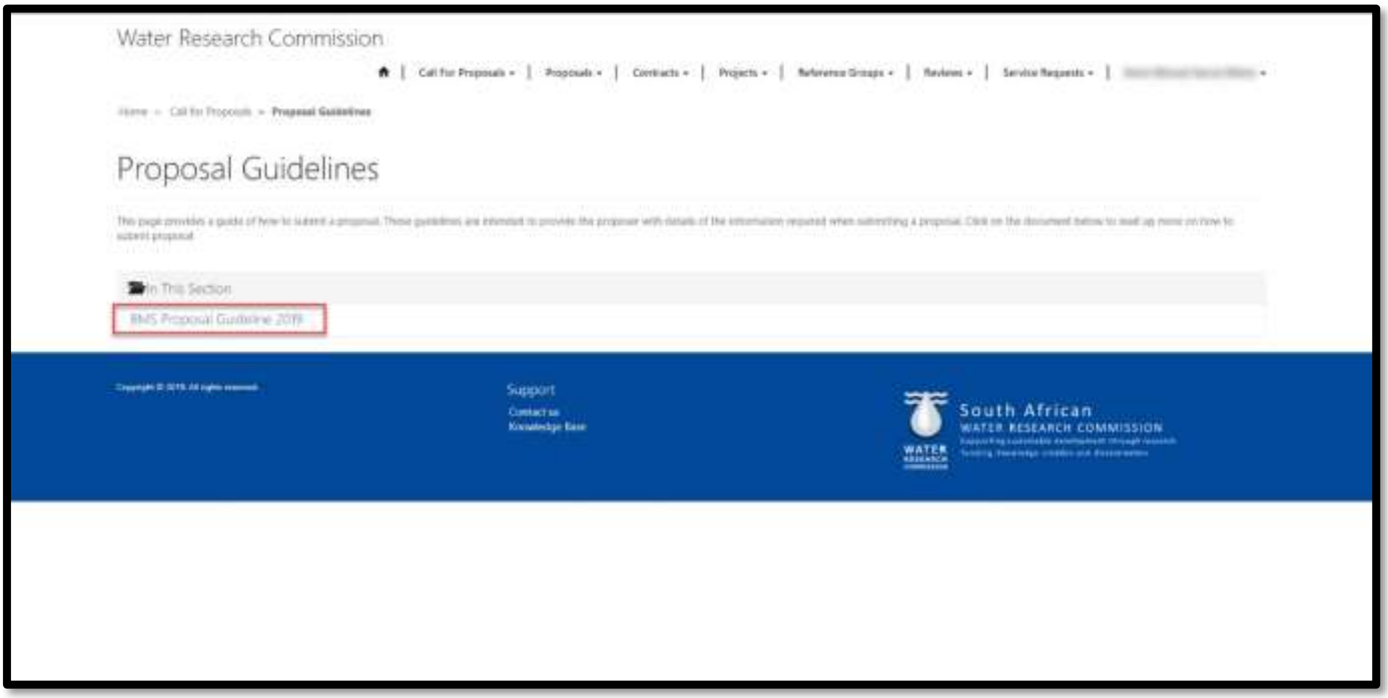
2. The *Call for Proposals* page contains information about open, directed and international calls for proposals that are advertised by the WRC. To view the related pages, you can click on the links under the **In This Section** section at the bottom of the form.



Proposal Guidelines Page

1. To view the *Proposal Guidelines* page, click on the **Call for Proposals** option in the Navigation Menu and then click on **Proposal Guidelines**.

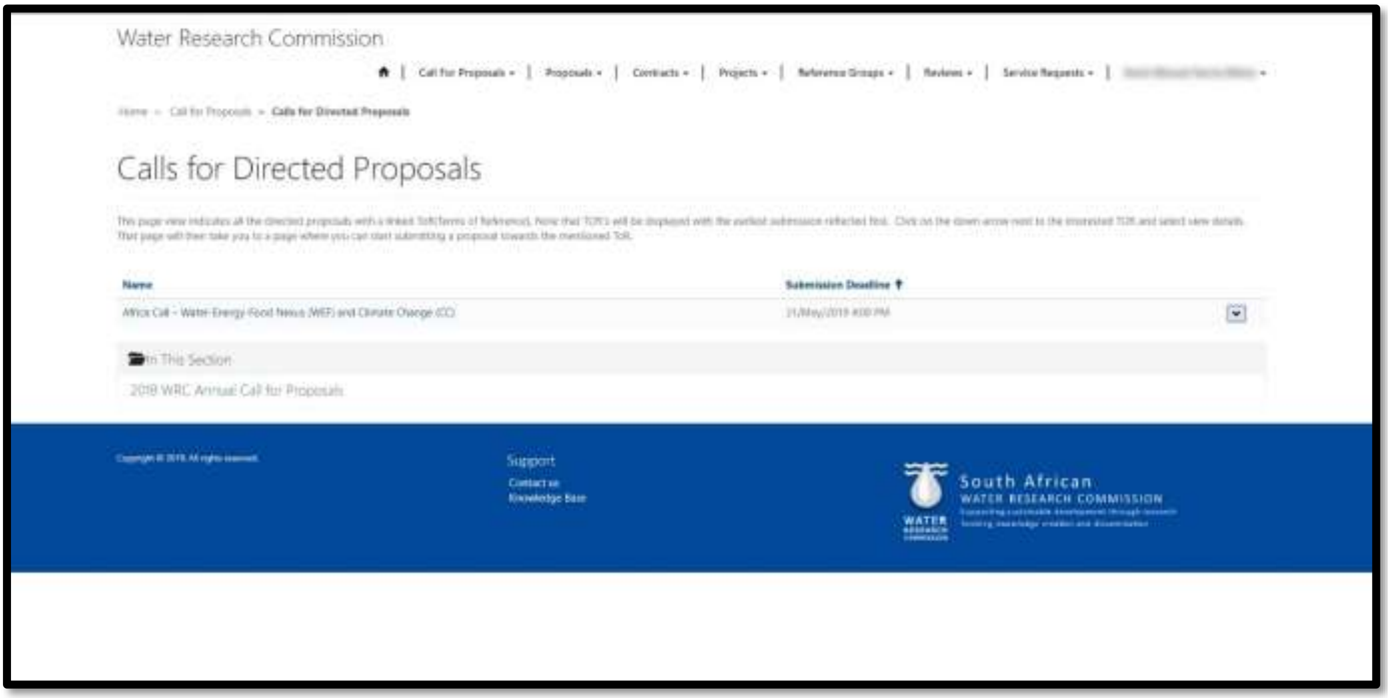
2. The *Proposal Guidelines* page provides information regarding the guidelines on how to submit proposals to the WRC. Click on the **BMS Proposal Guideline** link on the page to download the guidelines document.



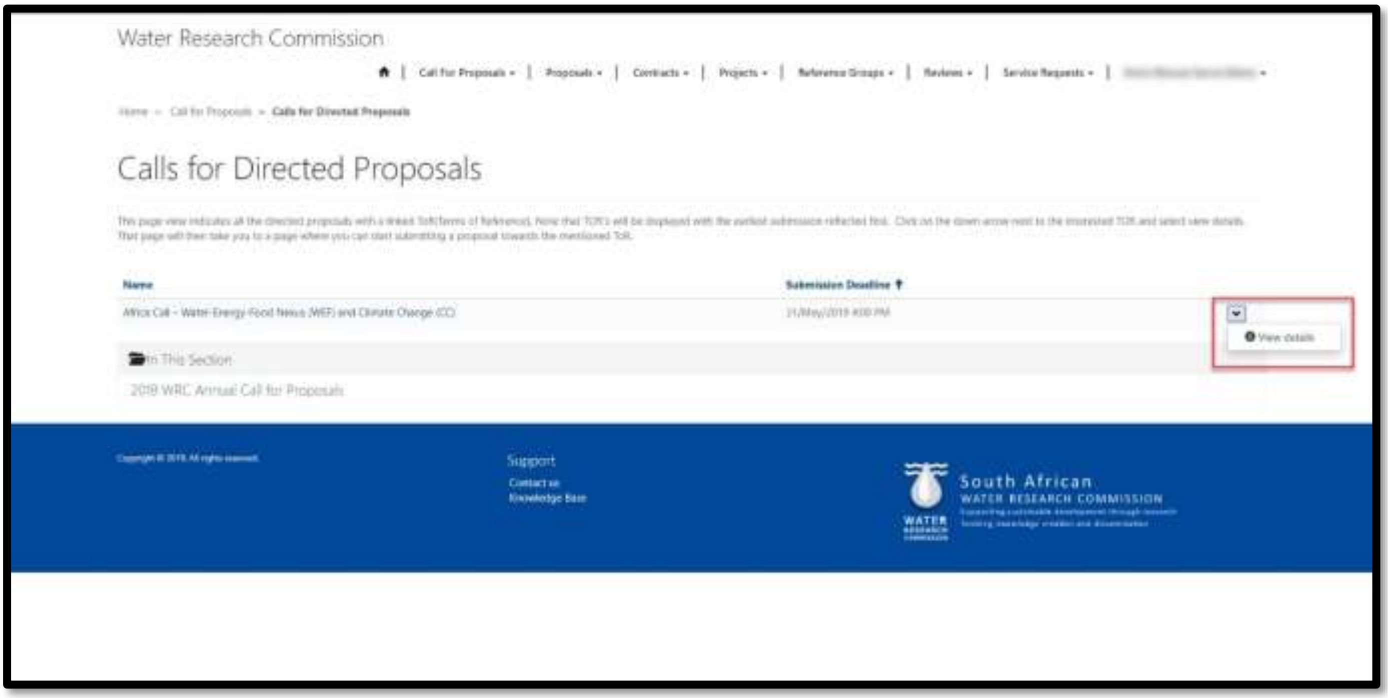
Call for Directed Proposals Page

1. To view the *Call for Directed Proposals* page, click on the **Call for Proposals** option in the Navigation Menu and then click on **Call for Directed Proposals**.

2. The *Call for Directed Proposals* page will list any WRC directed calls for proposals that are currently open for submissions. Additionally, click on the links in the *In This Section* section of the page to download documents containing additional information about the call.

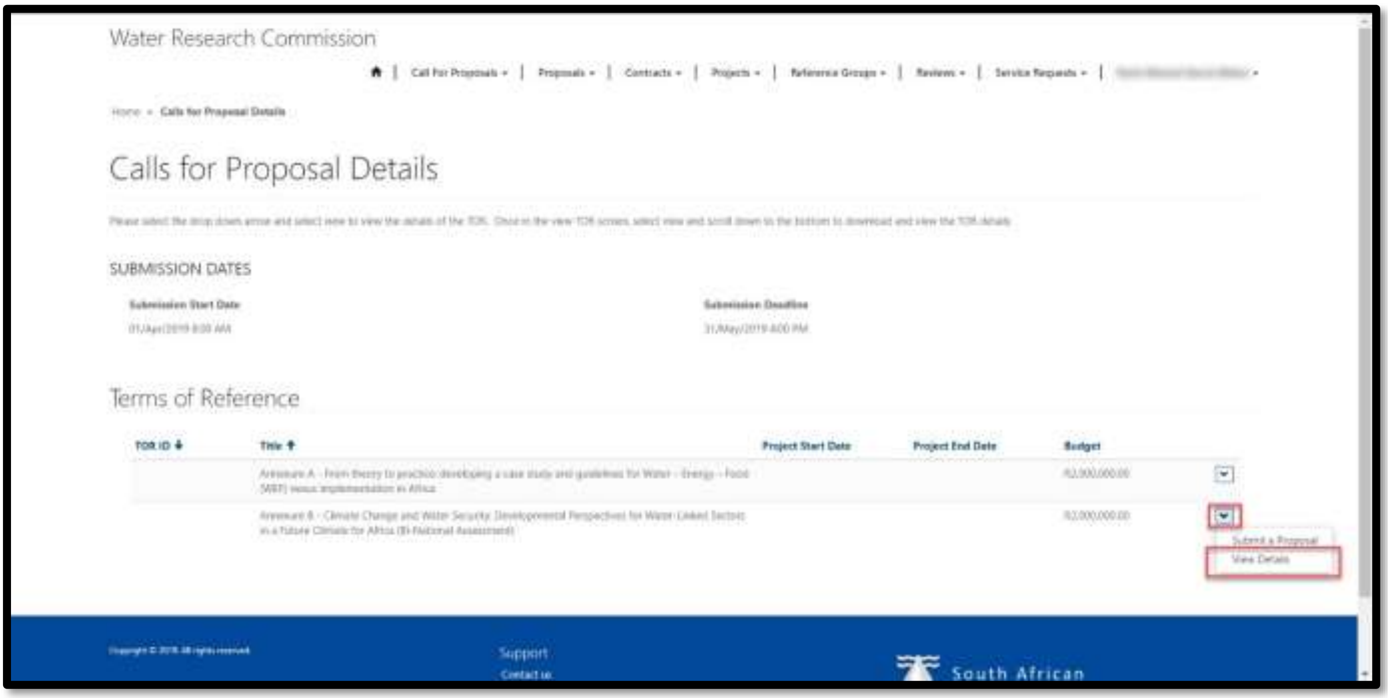


3. To view the details of the directed call for proposal, click on the arrow at the far right of the call for proposal record and select the **View Details** option. This will redirect you to the *Call for Proposal Details* page



4. The *Call for Proposal Details* page will display any *ToR (Terms of Reference)* records that are linked to this directed call for proposals.

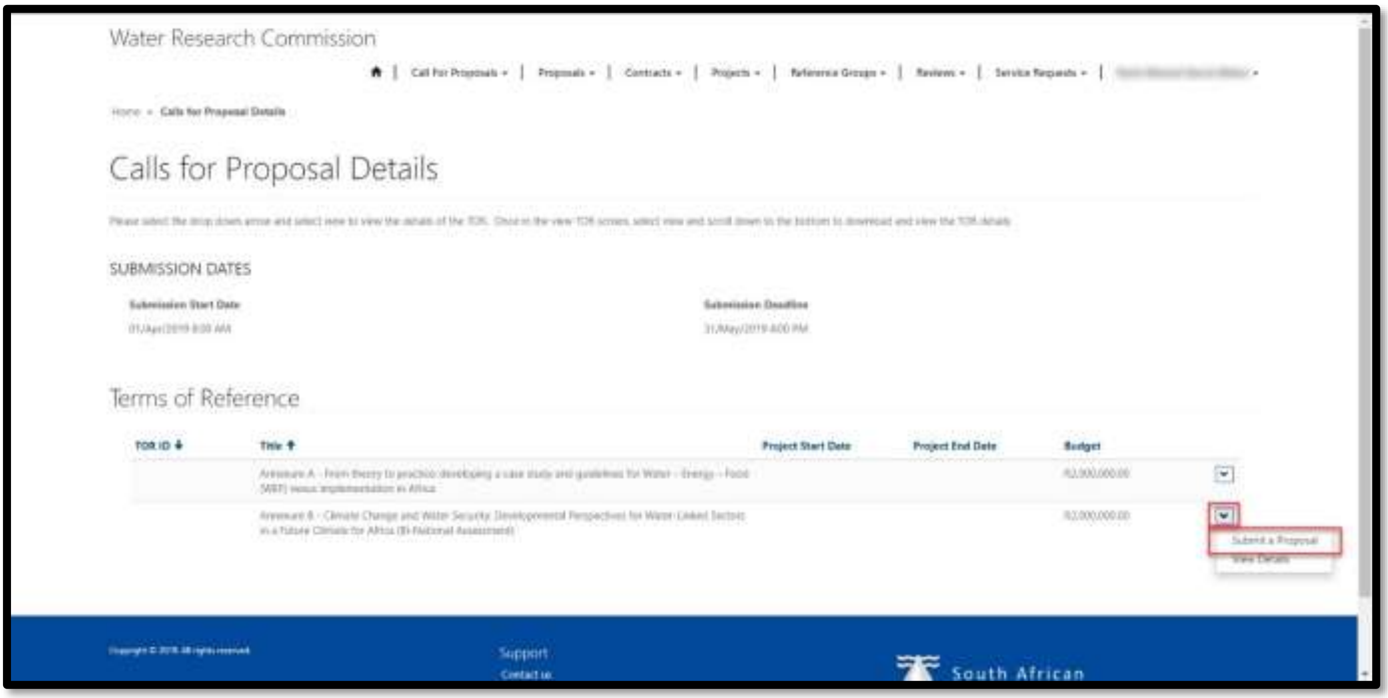
5. To view the details of the ToR, click on the arrow on the far right of the record and select the **View Details** option.



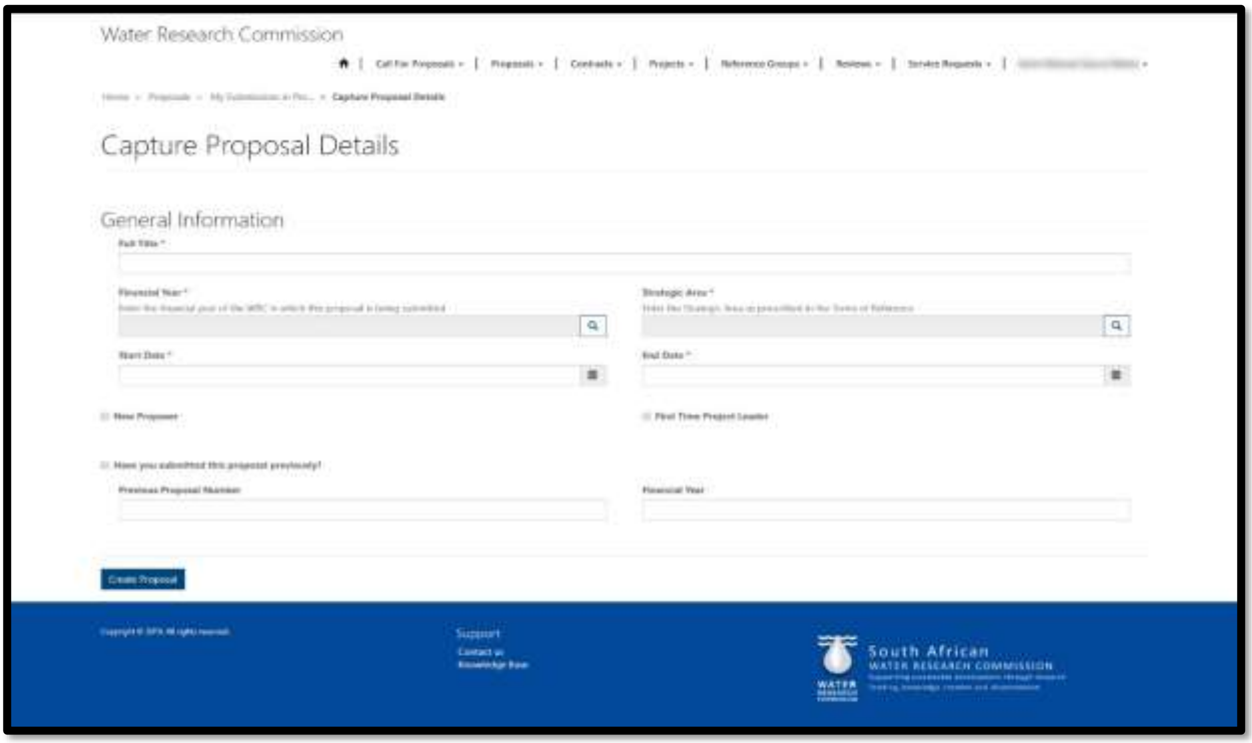
6. This will redirect you to the *Terms of Reference* page where you can view the details of the ToR. There is also a document version of the ToR at the bottom of the page that you can view or download.

Submit a Proposal for a Directed Call

1. To create a proposal submission for a directed call for proposals, from the *Call for Proposal Details* page, click on the arrow on the far right of the Terms of Reference (ToR) record and select the **Submit a Proposal** option.



2. The *Capture Proposal Details* page is displayed. Fields with the * asterisk symbol indicate that they are required in order to create a proposal record.
3. Capture the rest of the required information on the page and click the **Create Proposal** button at the bottom of the page to create the proposal submission (see screenshot on the next page).



NB: COMPULSORY AREAS TO COMPLETE

- General Information
- Administrative Staff
- Research Information
- Lead Organisation
- Collaborating Organisations
- Researchers
- Deliverables
- Human Resource Costs
- Operational Expenses
- Capital Expenses
- Dissemination/Uptake Activity Expenses
- Budget Summary
- Attach Supporting Documents

*******NB: Make sure that the completed EOI template is uploaded onto the BMS system***

NB: AREAS TO SKIP FOR THE WADER PROPOSAL

(you can enter N/A in the fields to allow for the page to save)

- Abstract
- Rationale
- Aims
- Methodology
- Products
- Innovation
- Background Intellectual Property
- Knowledge Dissemination
- Capacity Building
- Institutional Development
- Community Development
- 3rd Party Funding
- Other Information

4. Once the proposal record has been created, you will be redirected to the *My Submissions in Progress* page. Please follow the steps in the **My Submissions in Progress** section in this document to edit and complete the proposal.

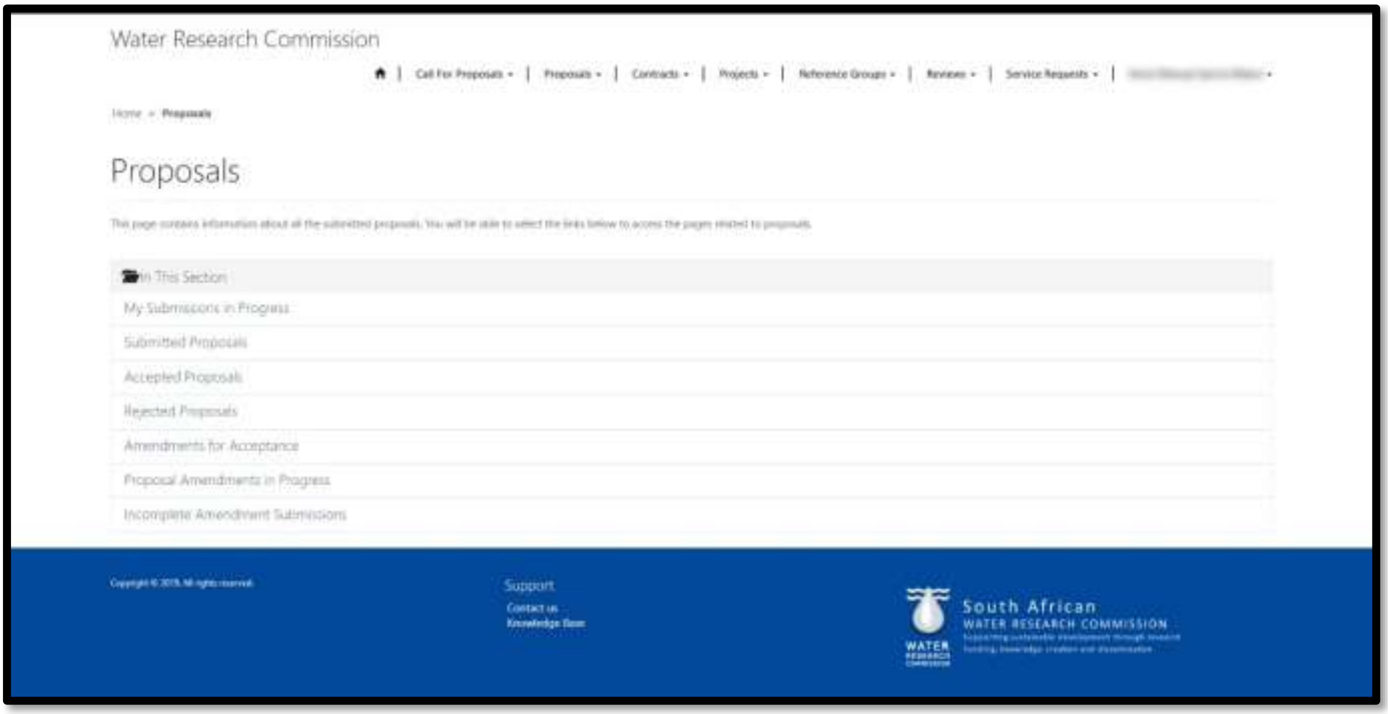
Proposals

This section details the pages and actions found in the **Proposals** section in the Navigation Menu of the BMS Portal.

Proposals Page

1. To view the *Proposals* page, click on the **Proposals** option in the Navigation Menu and then click on **Proposals**.

2. The *Proposals* page contains links to the related pages that display information regarding proposals you have submitted to the WRC as the *Proposer*. To view the related pages, you can click on the links under the **In This Section** section at the bottom of the form.



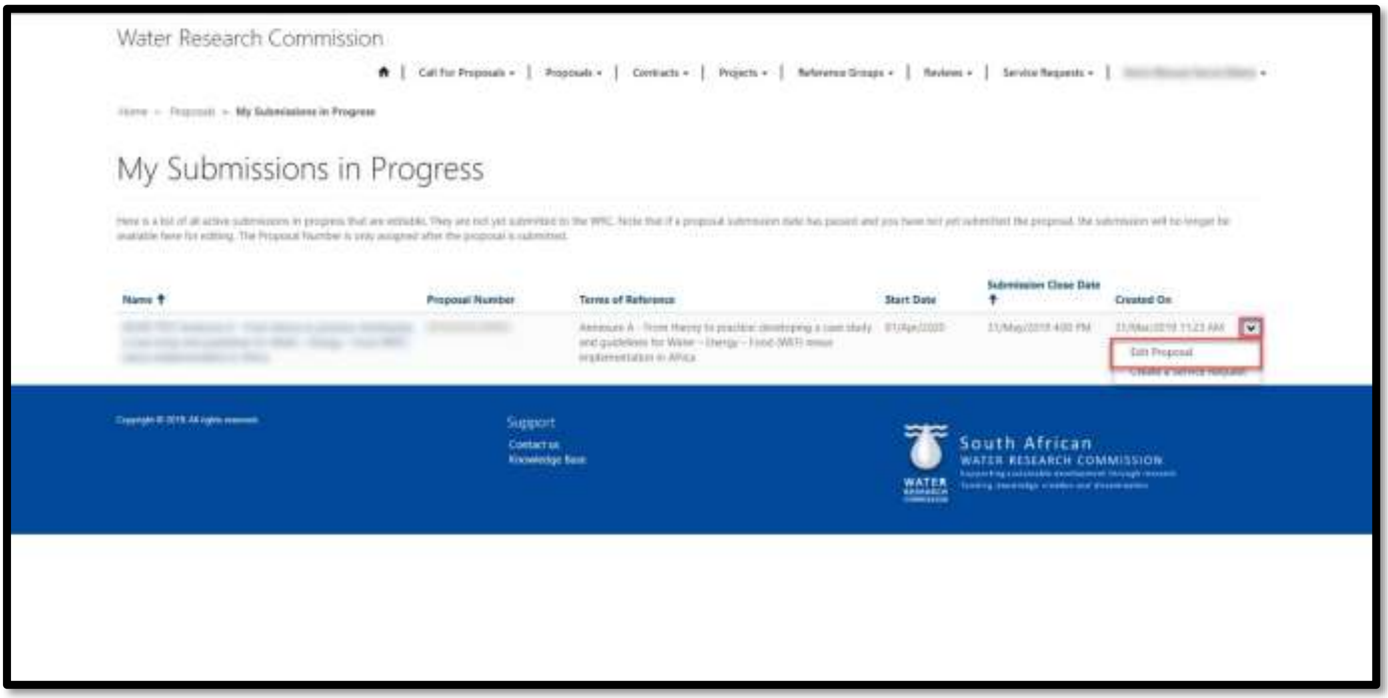
My Submissions in Progress Page

1. To view the *My Submissions in Progress* page, click on the **Proposals** option in the Navigation Menu and then click on **My Submissions in Progress**.

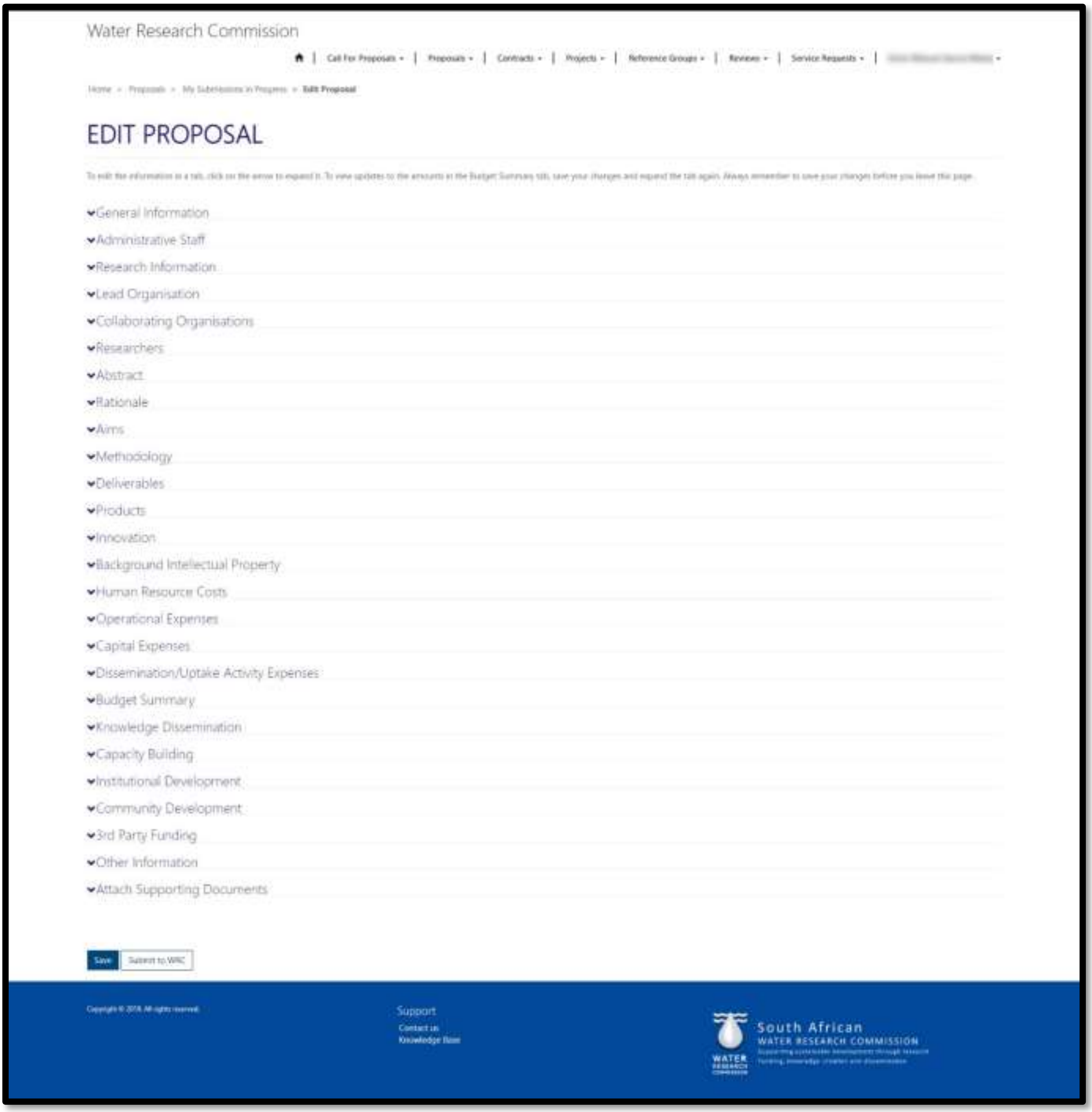
2. The *My Submissions in Progress* page displays a list of all proposal submissions that you have created but have not yet submitted to the WRC. You can use this list to edit and submit your proposals before the *Submission Close Date* that is displayed for each proposal.

Edit Proposal Page

1. To edit a proposal, click on the arrow on the far right of the proposal record and select the **Edit Proposal** option. You will be redirected to the *Edit Proposal* page.



2. On the *Edit Proposal* page, all the details of your proposal are available for editing and are separated into tabs.



3. To edit the information in a tab, click on the name of the tab to expand it. Multiple tabs can be expanded at the same time. If a tab is expanded, click on the name again to collapse it.

4. You can also add, view, edit, and delete related records such as Researchers, Deliverables, Expenses, and attach supporting documents. Related records are saved to your proposal each time you create or edit them.

5. You can save any changes to your proposal at any time by clicking on the **Save** button at the bottom of the *Edit Proposal* page. **Note**: **<u>Please remember to save your changes often</u>**!

Submit a Proposal to WRC

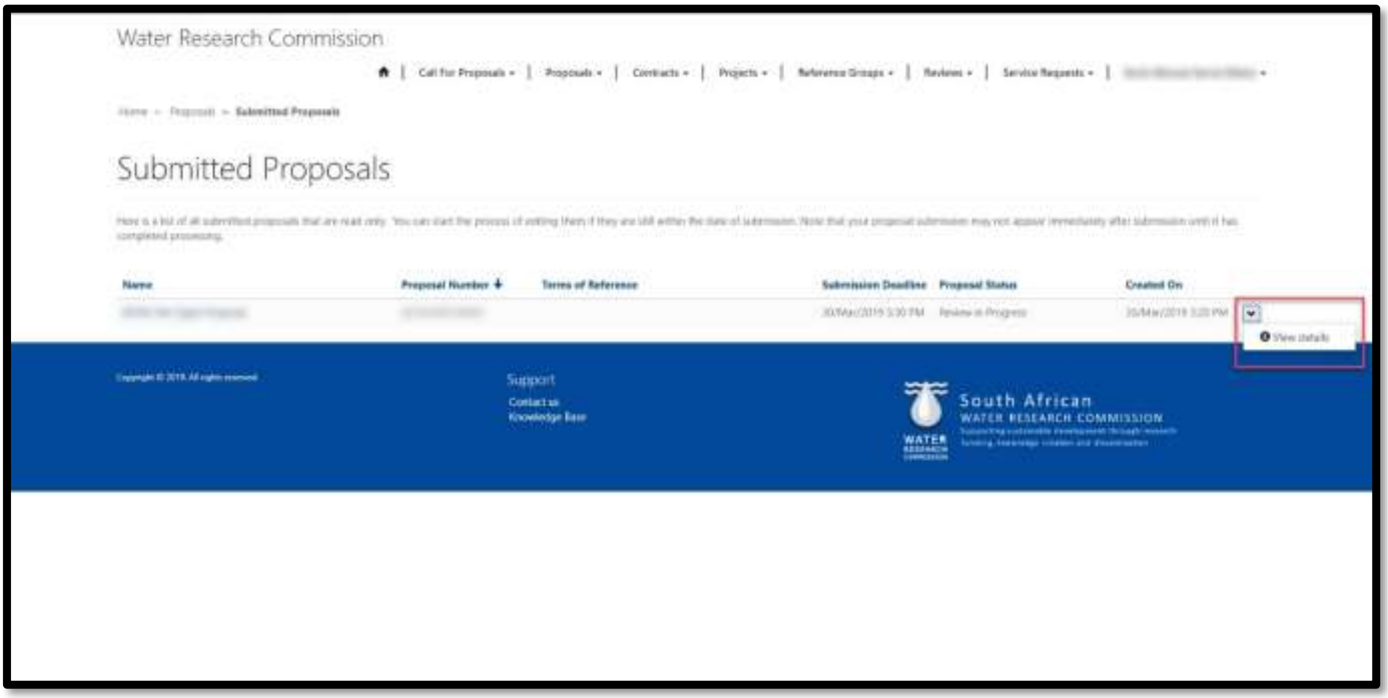
1. When your proposal is completed, you can save any final changes and submit the proposal to the WRC by clicking on the **Submit to WRC** button at the bottom of the *Edit Proposal* page. You will be re-directed to the *Submitted Proposals* page.

2. **Note**: If you fail to submit your proposal to the WRC before the date and time shown in the *Submission Close Date* column for the proposal, your proposal will no longer appear on the *My Submissions in Progress* page or the *Submitted Proposals* page, and will be considered by the WRC to be incomplete.

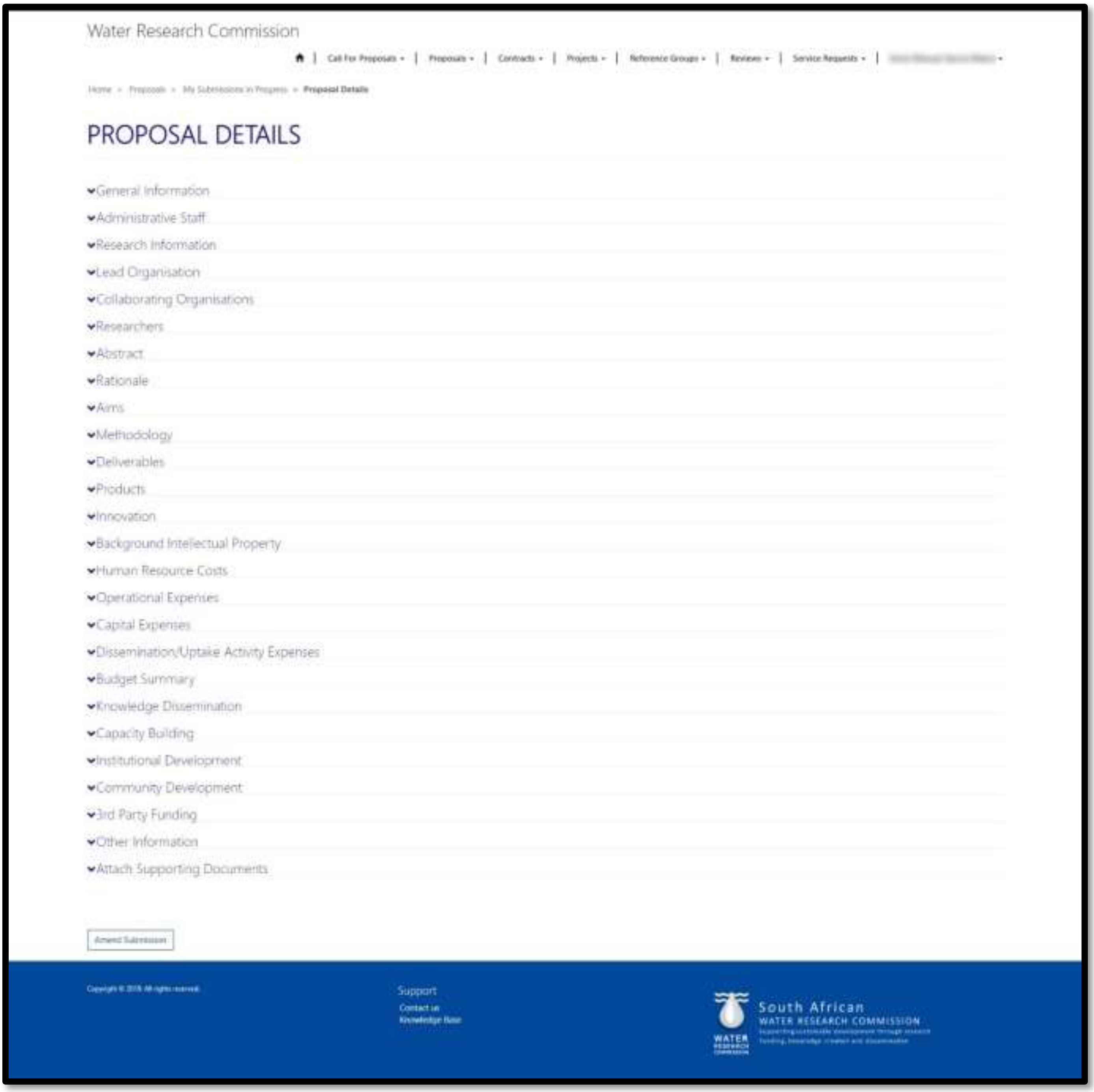
Submitted Proposals Page

1. To view the *Submitted Proposals* page, click on the **Proposals** option in the Navigation Menu and then click on **Submitted Proposals**.

2. The *Submitted Proposals* page displays a list of proposals that have been submitted to the WRC. Once a proposal has been submitted, it can no longer be edited.
3. You can track the progress of your proposal submission over time by checking the status in the *Proposal Status* field for the respective proposal.
4. To view the details of the submitted proposal, click on the arrow on the far right of the proposal record and select the **View details** option. This will re-direct you to the *Proposal Details* page.



5. On the *Proposal Details* page, you can view the details of the proposal by clicking on the tab names to expand and collapse them (see screenshot on the next page).


Water Research Commission
Call For Proposals
Proposals
Contracts
Projects
Reference Groups
Reviews
Service Requests
Home > Proposals > My Submissions in Progress > Proposal Details
PROPOSAL DETAILS
General Information
Administrative Staff
Research Information
Lead Organisation
Collaborating Organisations
Researchers
Abstract
Rationale
Aims
Methodology
Deliverables
Products
Innovation
Background Intellectual Property
Human Resource Costs
Operational Expenses
Capital Expenses
Dissemination/Uptake Activity Expenses
Budget Summary
Knowledge Dissemination
Capacity Building
Institutional Development
Community Development
3rd Party Funding
Other Information
Attach Supporting Documents
Amend Submission
Support
Contact us
Knowledge Base
South African
WATER RESEARCH COMMISSION

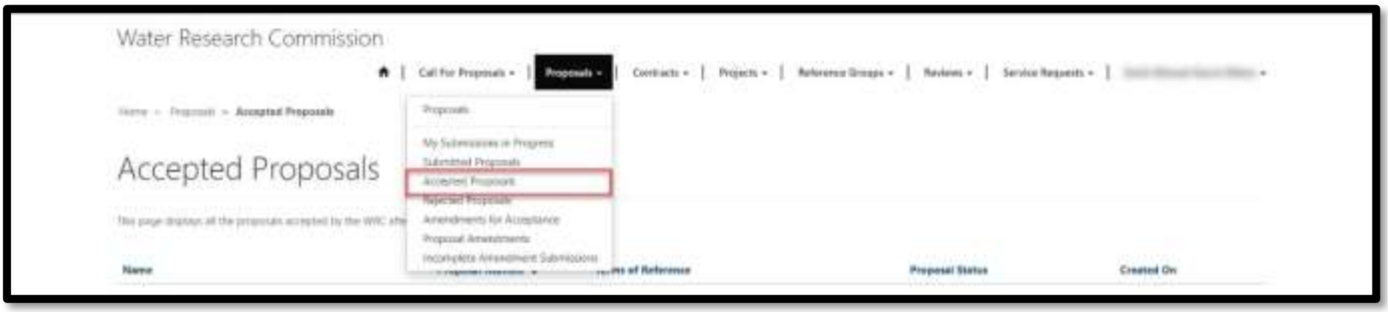
Amend a Proposal Submission

1. If you have submitted your proposal to the WRC, and the current date and time is *before* the Submission Close Date and time displayed on the *Submitted Proposals* page, you can recall and amend your proposal submission by clicking on the **Amend Submission** button at the bottom of the *Proposal Details* page.

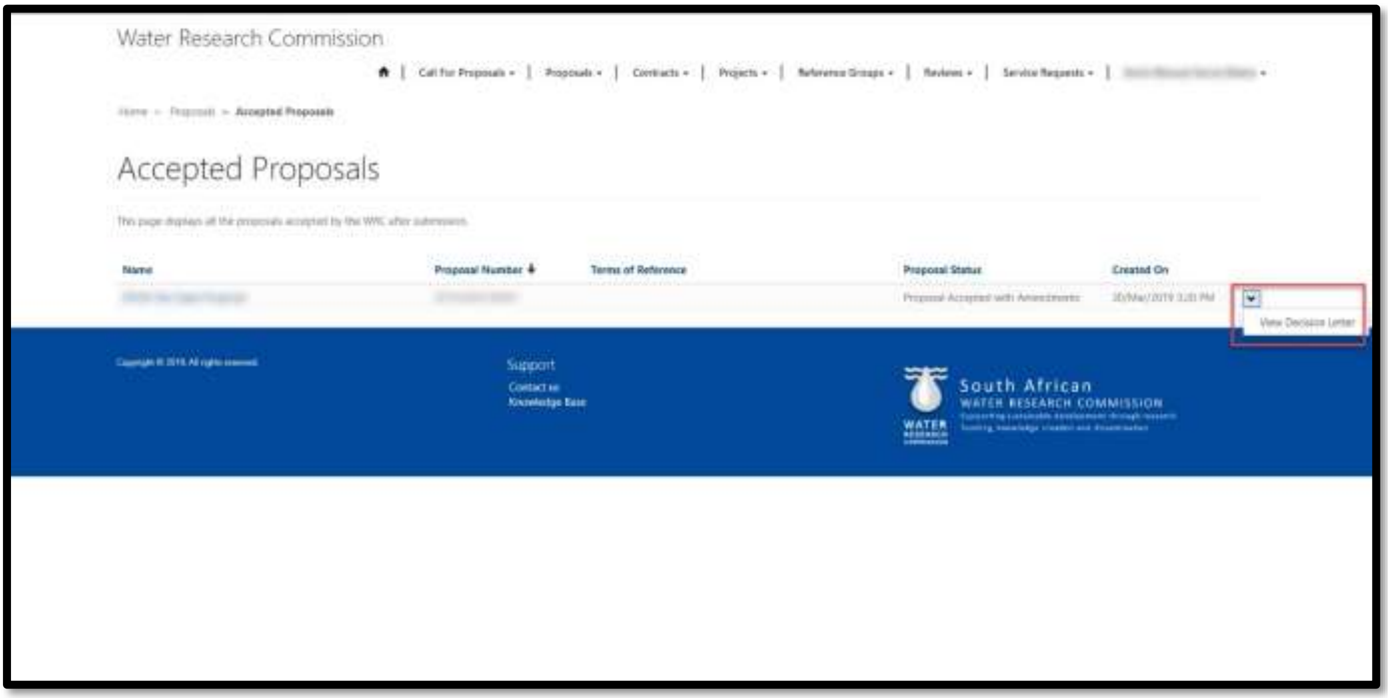
2. You will be re-directed to the *My Submissions in Progress* page, where you can continue to edit your proposal submission by following the steps in the My Submissions in Progress and Edit a Proposal sections in this document.
3. **Note**: If you recall and amend your proposal submission, remember to submit it to WRC again before the *Submission Close Date* and time displayed on the *My Submissions in Progress* page by following the steps in the Submit a Proposal to WRC section in this document.

Accepted Proposals Page

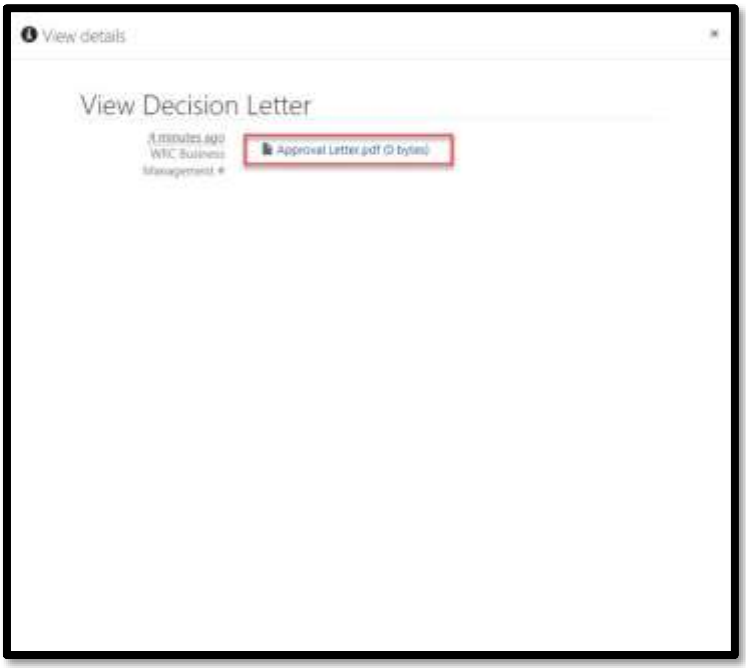
1. To view the *Accepted Proposals* page, click on the **Proposals** option in the Navigation Menu and then click on **Accepted Proposals**.



2. The *Accepted Proposals* page displays a list of proposal submissions that have been accepted for funding (with or without amendments) by the WRC.
3. The proposal will appear on this list after the WRC has sent the decision letter and will be removed from this list when either the proposal goes into the contracting process to become a WRC project, or when the WRC makes the proposal available for amendments before the contracting process.
4. To view the Decision Letter, click on the arrow to the far right of the proposal record and select the **View Decision Letter** option. This will open the *View Decision Letter* window.



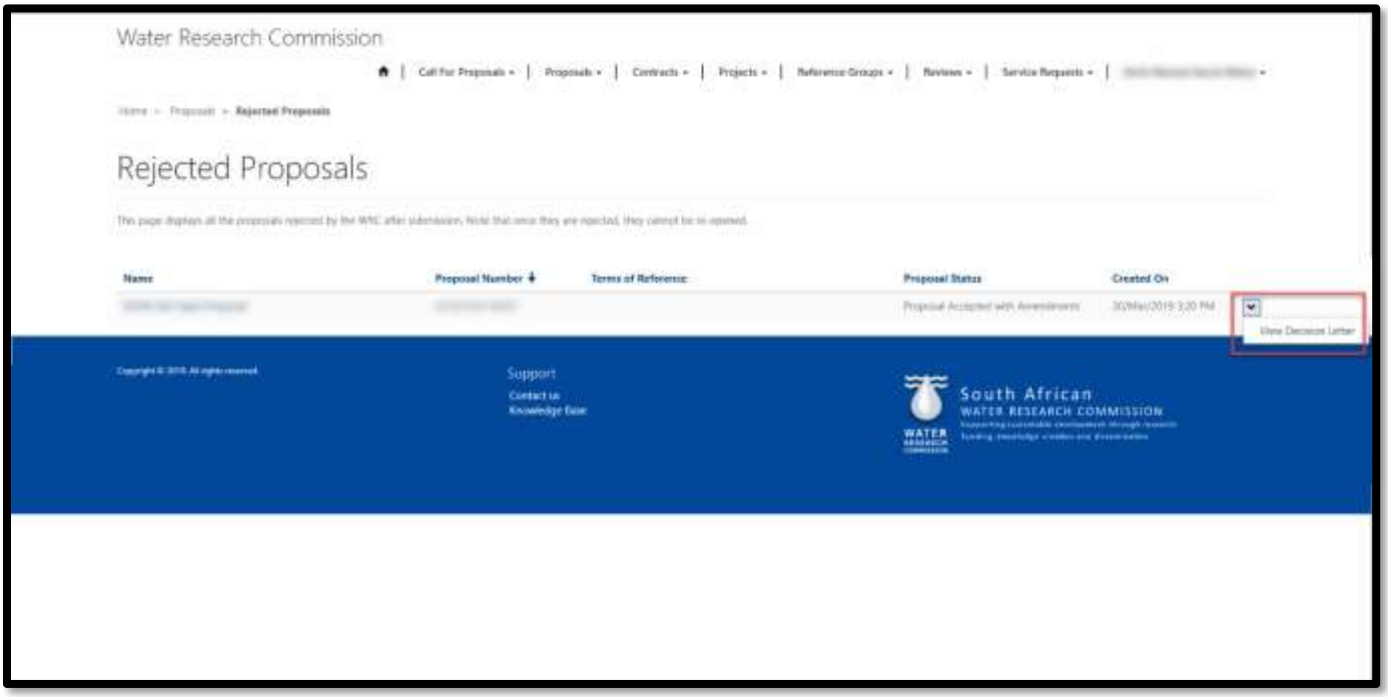
5. In the *View Decision Letter* window, you can view or download the attached *Approval Letter* document by clicking on the document name link.



Rejected Proposals Page

1. To view the *Rejected Proposals* page, click on the **Proposals** option in the Navigation Menu and then click on **Rejected Proposals**.

2. The *Rejected Proposals* page displays a list of proposal submissions that have not been accepted for funding by the WRC. The proposal will appear on this list after the WRC has sent the decision letter.
3. To view the Decision Letter, click on the arrow to the far right of the proposal record and select the **View Decision Letter** option. This will open the *View Decision Letter* window.

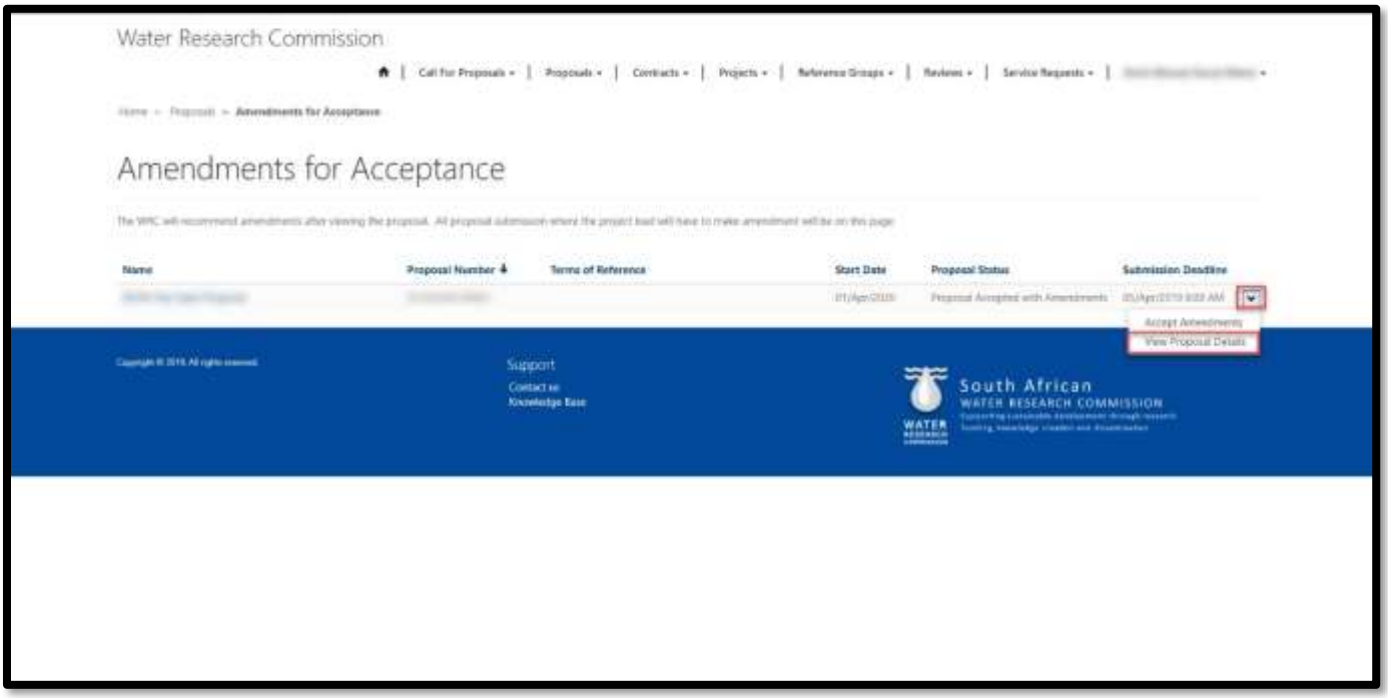


4. In the *View Decision Letter* window, you can view or download the attached *Rejection Letter* document by clicking on the document name link.

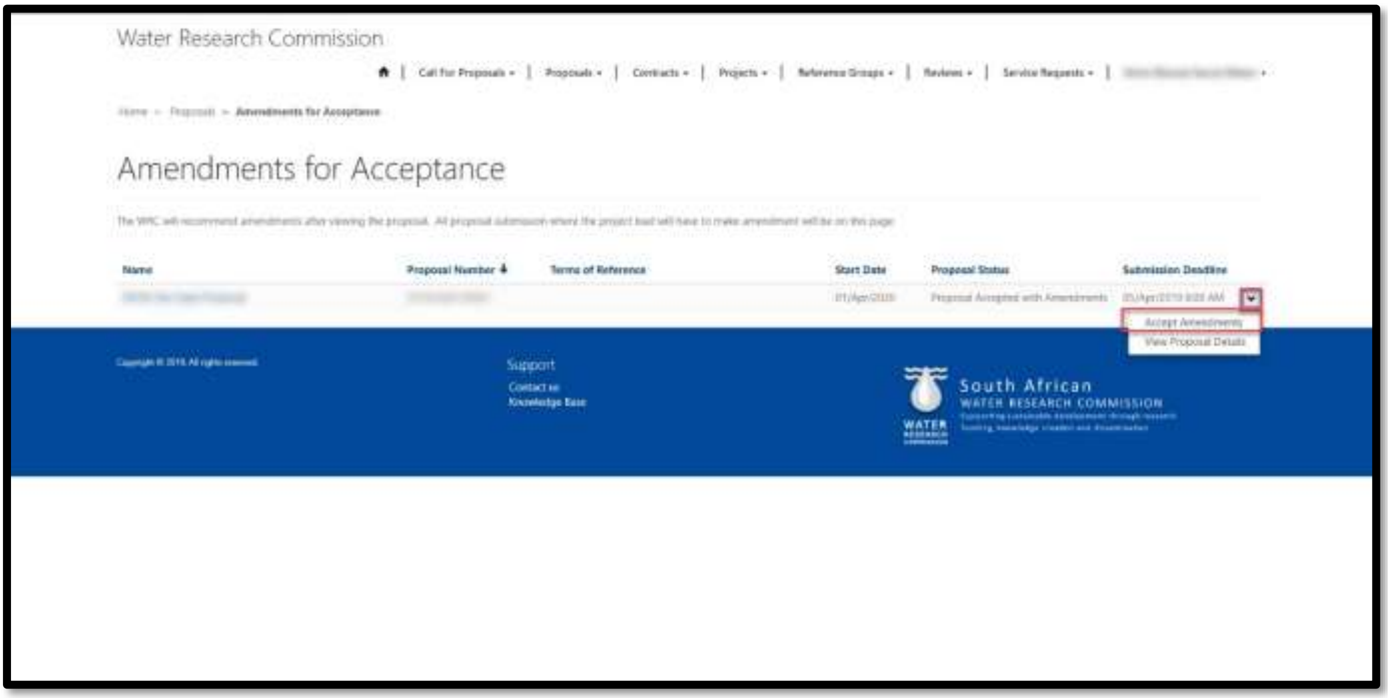
Amendments for Acceptance Page

1. To view the *Amendments for Acceptance* page, click on the **Proposals** option in the Navigation Menu and then click on **Amendments for Acceptance**.

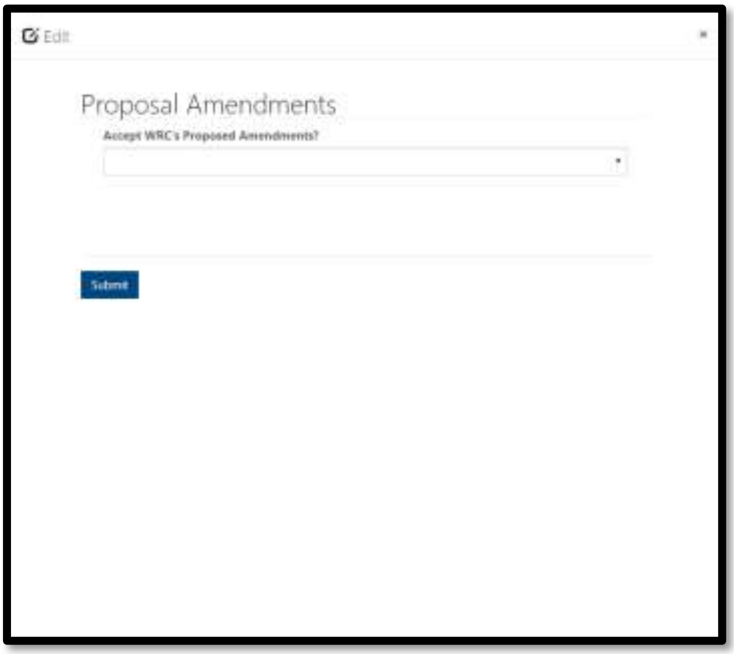
2. The *Amendments for Acceptance* page displays a list of proposals that have been accepted for funding by the WRC but require you to accept the amendments to the proposal as requested by the WRC and detailed in the Approval Letter. Once you have accepted the WRC's requested amendments, you will be able to edit the proposal record.
3. To view the details of the proposal, click on the arrow on the far right of the proposal record and select the **View Proposal Details** option. This will re-direct you to the *Proposal Details* page.



4. To accept the WRC's requested amendments to the proposal, click on the arrow to the far right of the proposal record and select the **Accept Amendments** option. This will open the *Accept Proposal Amendments* window.



5. In the *Accept Proposal Amendments* window, you can select your response and submit it to the WRC by clicking on the **Submit** button at the bottom of the window.

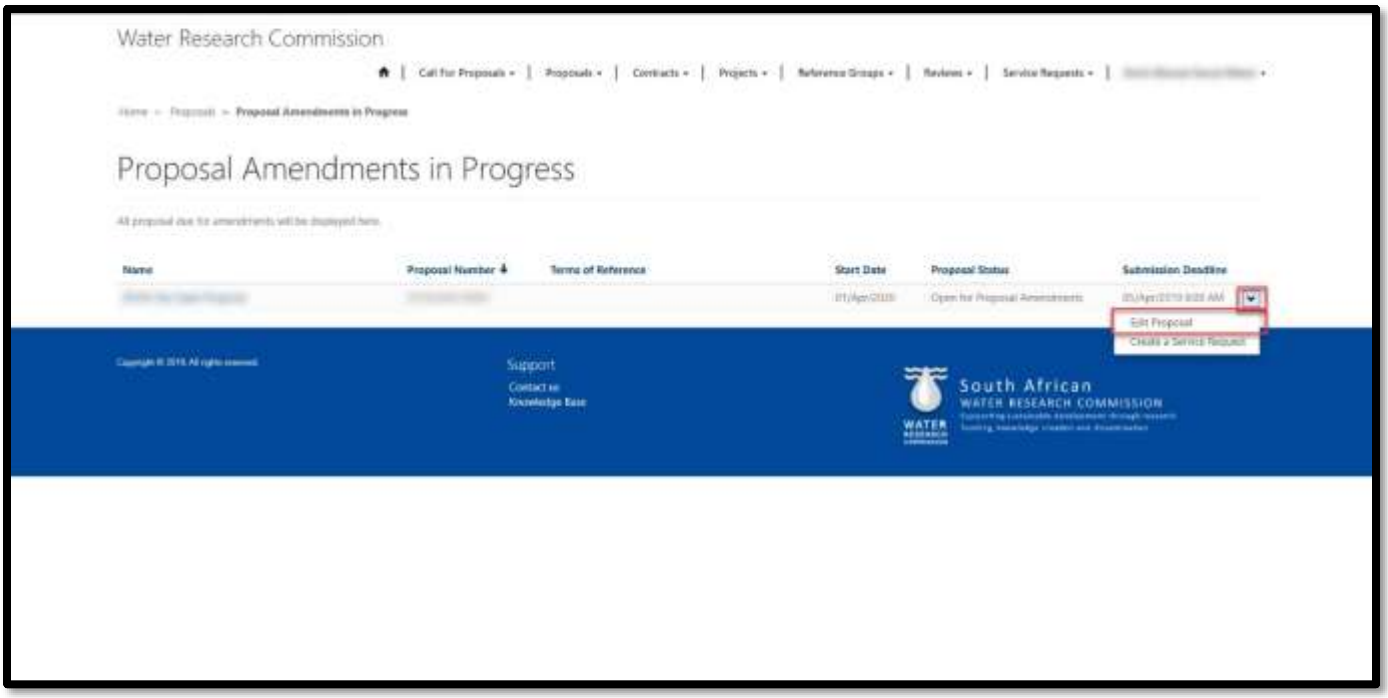


6. If you choose to accept the WRC's requested proposal amendments, you can start editing the proposal by navigating to the [Proposal Amendments page](#) as detailed in the following steps.

Proposal Amendments in Progress Page

1. To view the *Proposal Amendments in Progress* page, click on the **Proposals** option in the Navigation Menu and then click on **Proposal Amendments**.

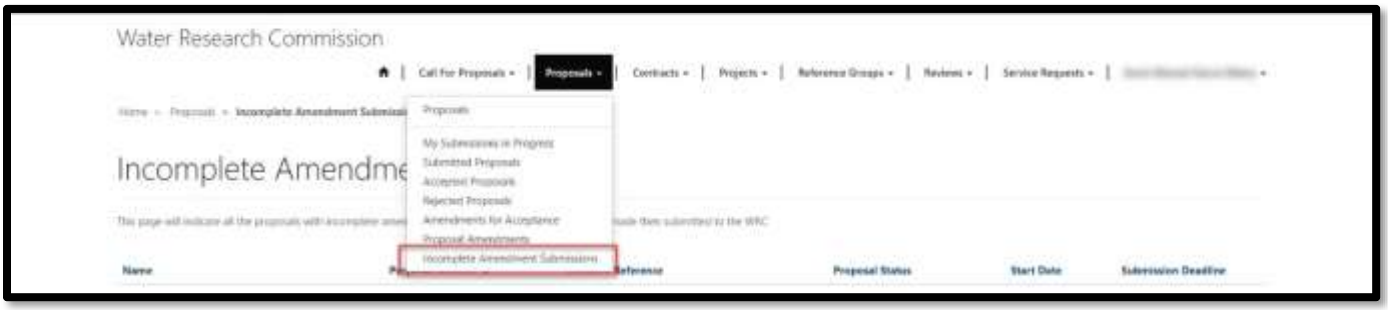
2. The *Proposal Amendments in Progress* page displays a list of proposals that have been accepted for funding by the WRC with requested amendments, and you have accepted the requested amendments.
3. The proposals records listed in on this page are available to be edited up until the *Submission Deadline* date and time displayed for each proposal.
4. To edit the details of the proposal, click on the arrow on the far right of the proposal record and select the **Edit Proposal** option. You will be re-directed to the *Edit Proposal* page.



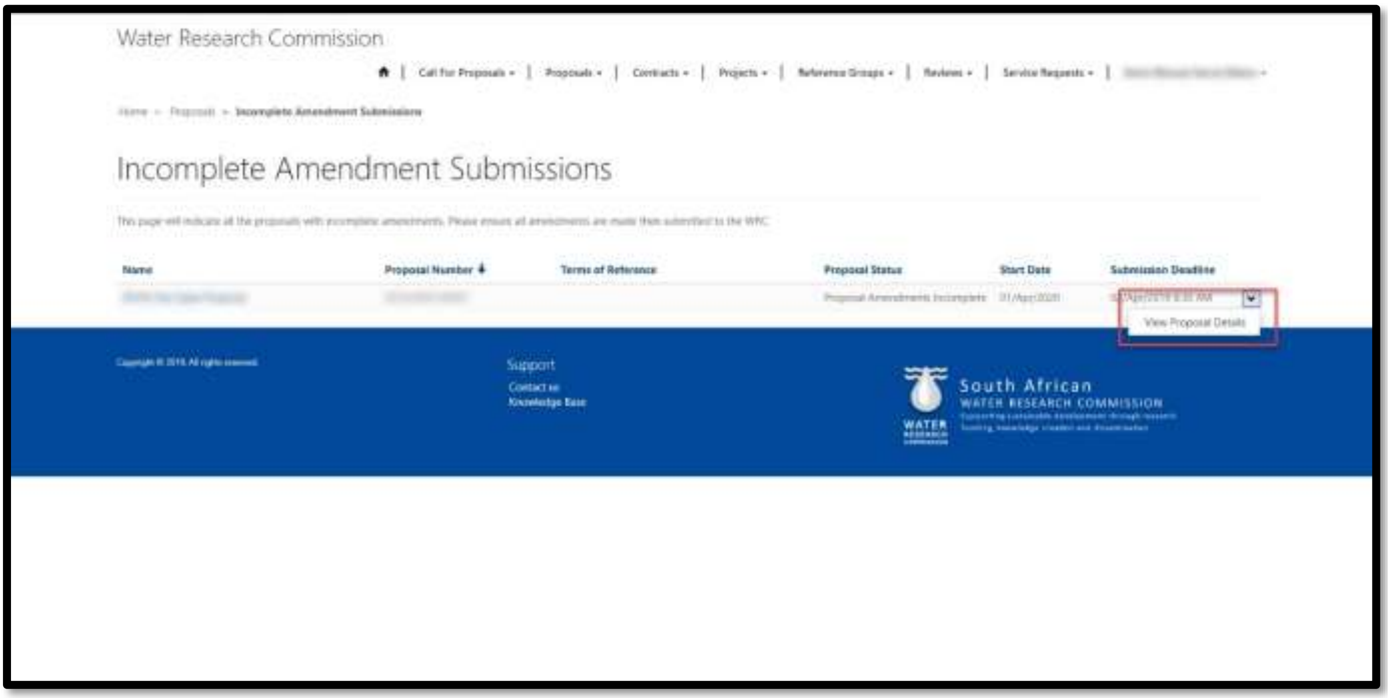
5. To edit the details of the proposal, you can follow the steps from **step #2** in the Edit Proposal page section of this document.
6. To submit the amended proposal to the WRC, you can follow the steps in the Submit a Proposal to WRC and Submitted Proposals page sections of this document, with the exception that you must submit it before the date and time in the *Submission Deadline* column for the proposal as detailed on the *Proposal Amendments in Progress* page.
7. **Note**: If you fail to submit your proposal amendments to the WRC before the Submission Deadline, your proposal record will be considered incomplete, will be removed from this page, and will appear on the Incomplete Amendment Submissions Page as detailed in the following steps.

Incomplete Amendment Submissions Page

1. To view the *Incomplete Amendment Submissions* page, click on the **Proposals** option in the Navigation Menu and then click on **Incomplete Amendment Submissions**.



2. The *Incomplete Amendment Submission* page displays a list of proposals that that were open for proposal amendments but were not submitted to the WRC before the date and time in the *Submission Deadline* column for the proposal on the *Proposal Amendments in Progress* page.
3. You can view the details of the proposal by click on the arrow on the far right of the proposal record and selecting the **View Proposal Details** option. You will be re-directed to the *Proposal Details* page.



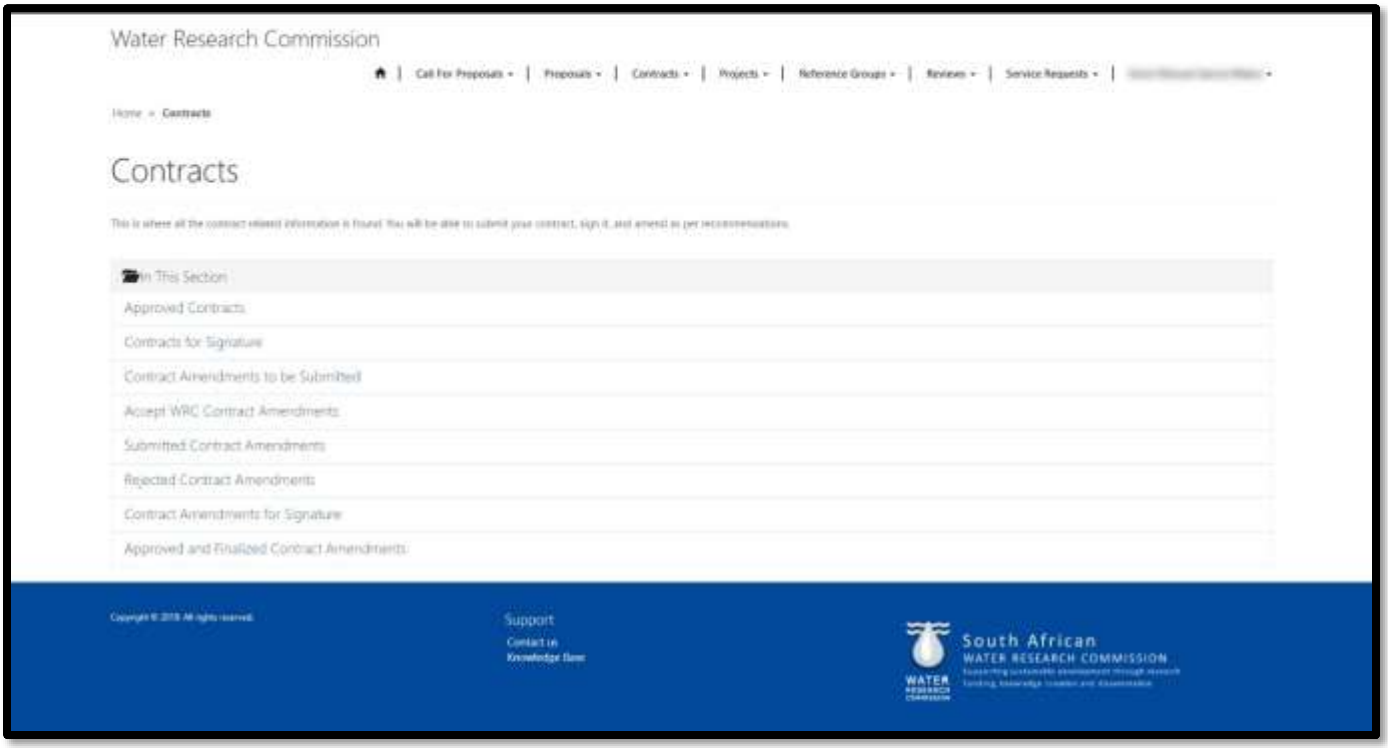
Contracts

This section details the pages and actions found in the **Contracts** section in the Navigation Menu of the BMS Portal.

<u>Contracts Page</u>

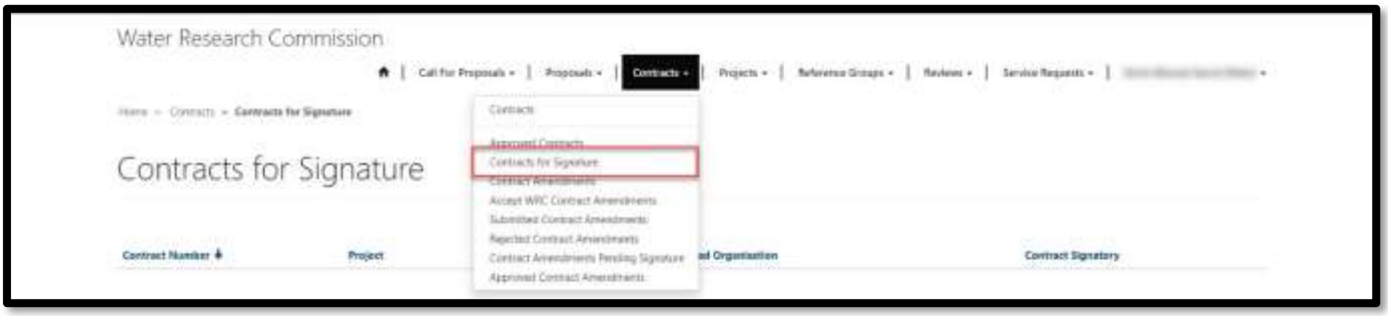
1. To view the *Contracts* page, click on the **Contracts** option in the Navigation Menu and then click on **Contracts**.

2. The *Contracts* page contains links to the related pages that display information regarding contracts and contract amendments you have with the WRC as the *Project Leader*. To view the related pages, you can click on the links under the **In This Section** section at the bottom of the form.

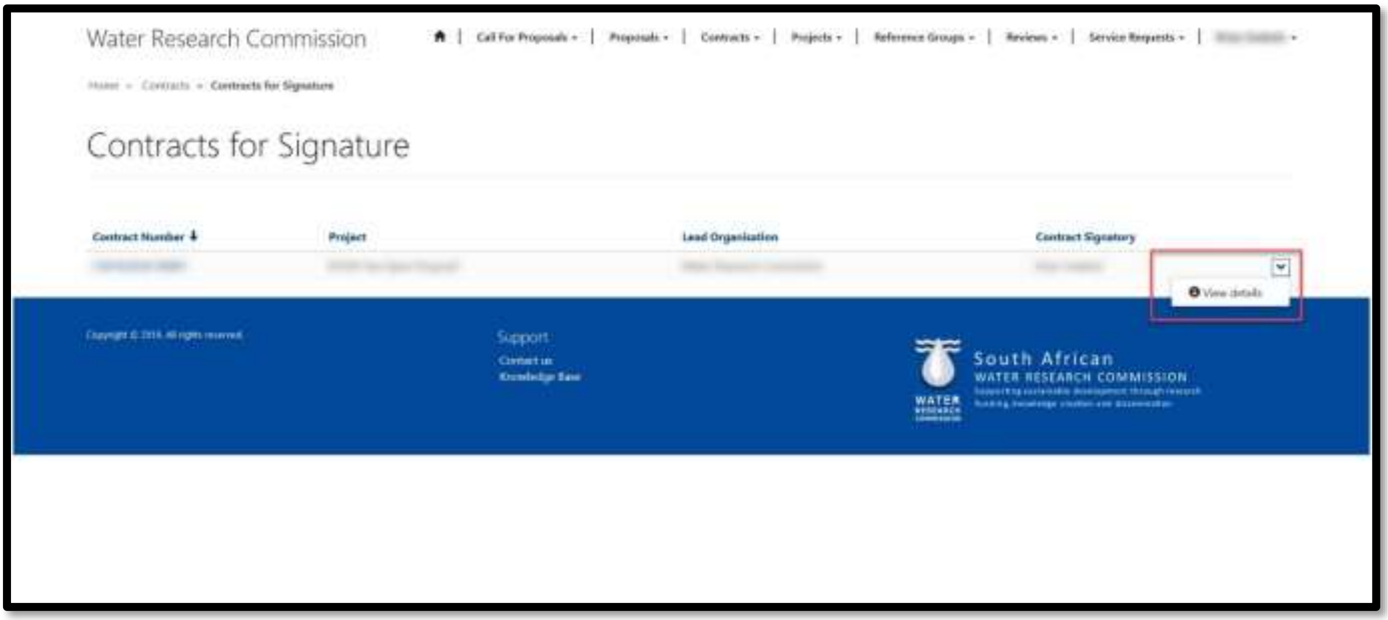


Contracts for Signature Page

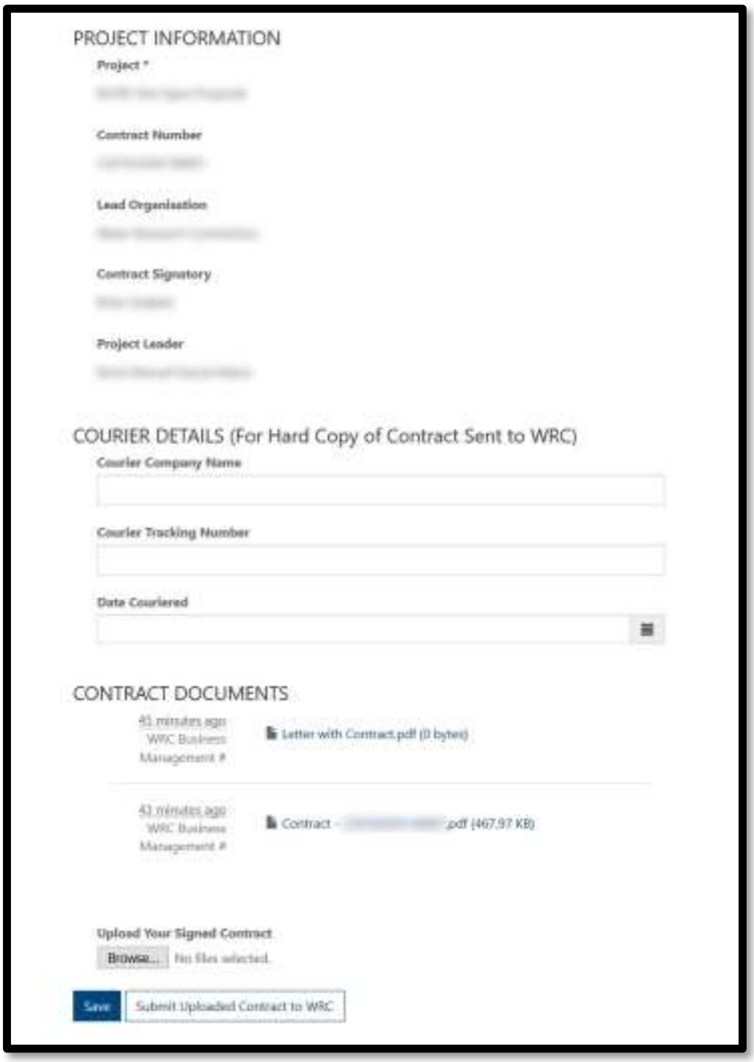
1. To view the *Contracts for Signature* page, click on the **Contracts** option in the Navigation Menu and then click on **Contracts for Signature**.



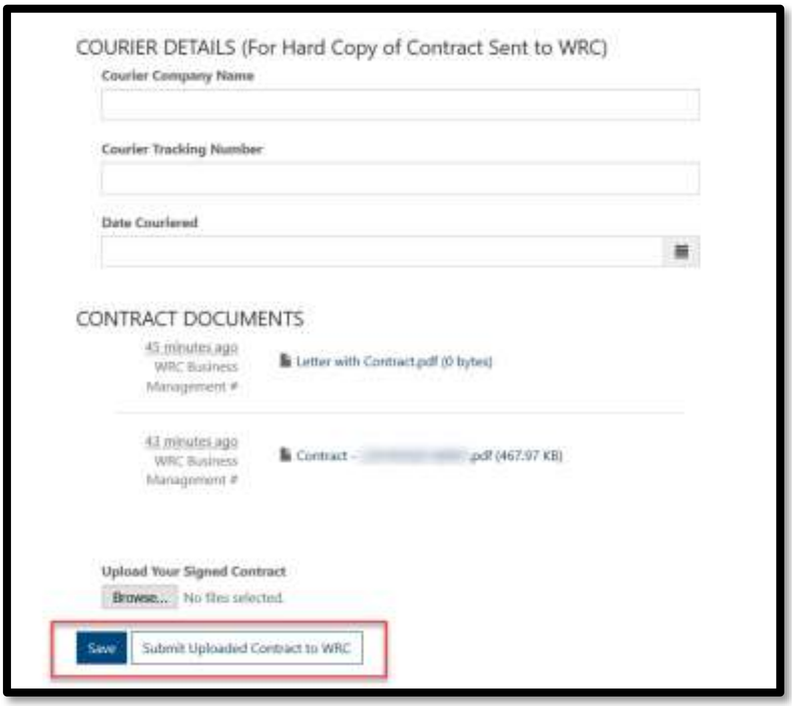
2. The *Contracts for Signature* page displays a list of contracts for new projects that have been prepared by the WRC and require your signature as the *Contract Signatory* that was captured as part of the proposal submission.
3. **Note**: Only the user that is allocated as the *Contract Signatory* as part of the proposal submission will be able to view the contract records displayed on this page. The Proposer or the Project Leader allocated to this submission will not see the contract listed on this page.
4. To view the details of the contract and download a copy on the contract document, click on the arrow on the far right of the contract record and select the **View details** option. This will open the *Contract Details* window.



5. In the *Contract Details* window, you can view the project information as well as view and download the *Letter with Contract* and *Contract* documents.

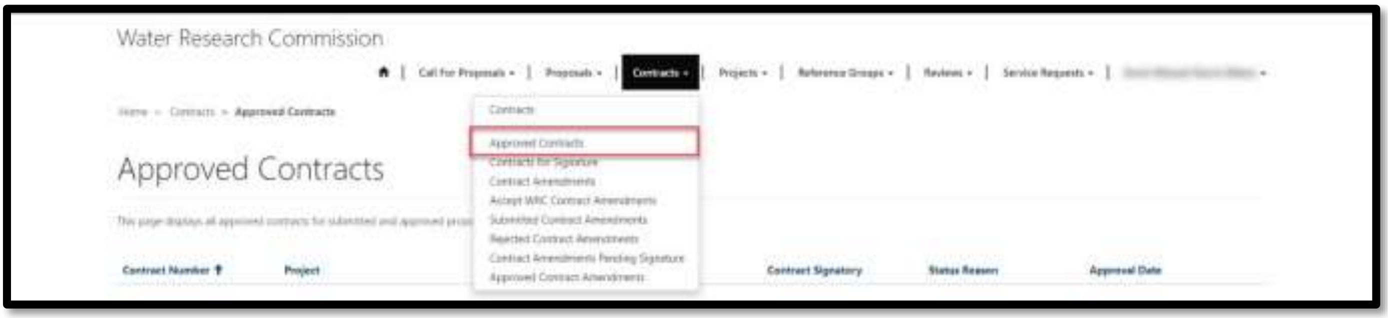


6. It is required for you as the *Contract Signatory* for the project to download a copy of the *Contract* document, sign and initial it, upload a file with the scanned copy of the document to this contract record, and submit it to the WRC.
7. You are also required to send a signed and initialed hard copy of the *Contract* document to the WRC via courier. This hard copy will be couriered by the WRC to the physical address of the *Lead Organisation* of the project.
8. Once you have the details of the hard copy that is being couriered back to the WRC, you can enter them in the *Courier Details* section of this form before you submit the uploaded scanned copy of the document.
9. You can submit the uploaded scanned copy of the *Contract* document along with the courier details of the hard copy by clicking on the **Submit Uploaded Contract to WRC** button at the bottom of the window.
10. **Note**: Please be sure to save any changes made to this contract record by clicking the **Save** button at the bottom of the window before you submit the uploaded contract document to the WRC.

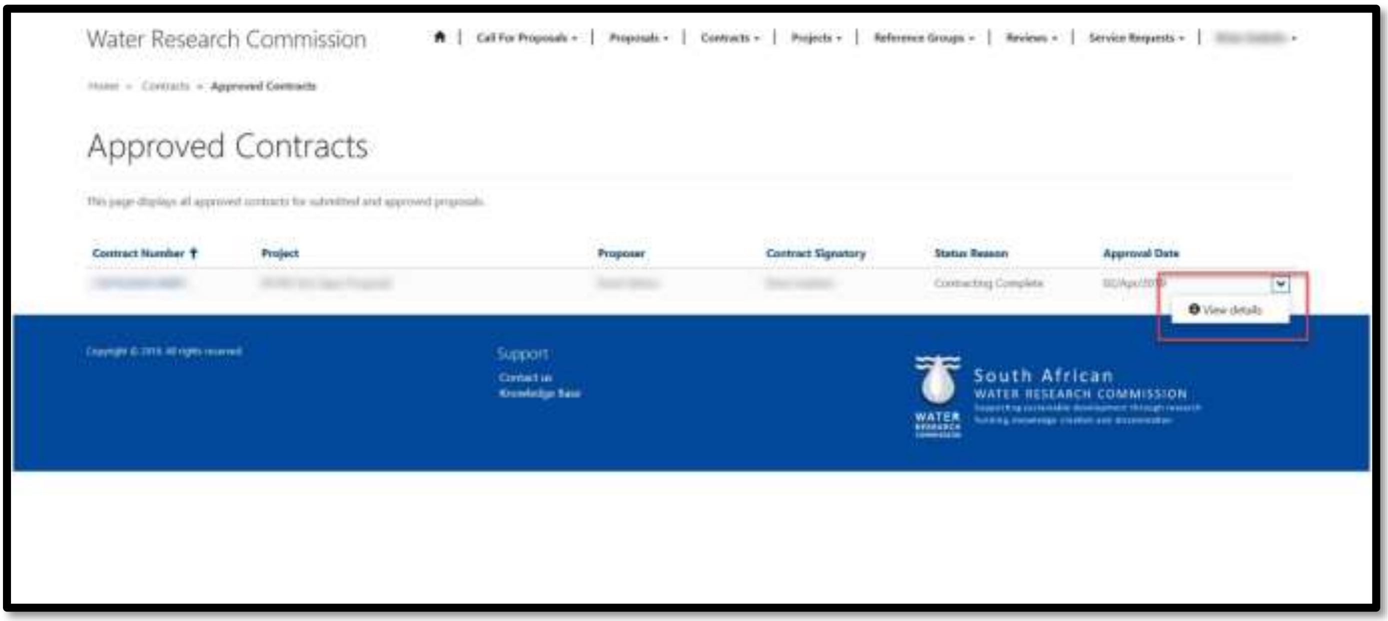


Approved Contracts

1. To view the *Approved Contracts* page, click on the **Contracts** option in the Navigation Menu and then click on **Approved Contracts**.

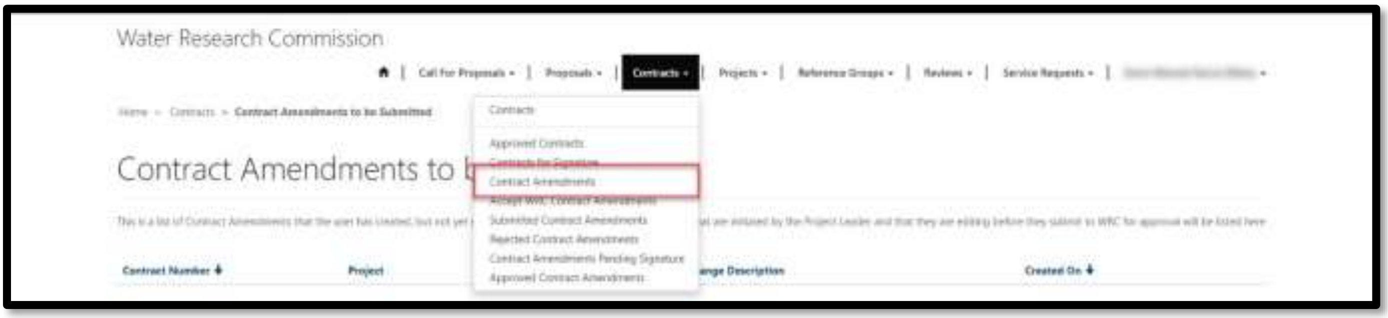


2. The *Approved Contracts* page displays a list of contracts for projects that have been approved and finalized by the WRC and you are designated as the *Contract Signatory* for the new project.
3. To view the details of the contract, as well as the original and uploaded signed copies of the *Contract* document, click on the arrow on the far right of the contract record and select the **View details** option. The *Contract Details* window will open.



Contract Amendments to be Submitted Page

1. To view the *Contract Amendments to be Submitted* page, click on the **Contracts** option in the Navigation Menu and then click on **Contract Amendments**.

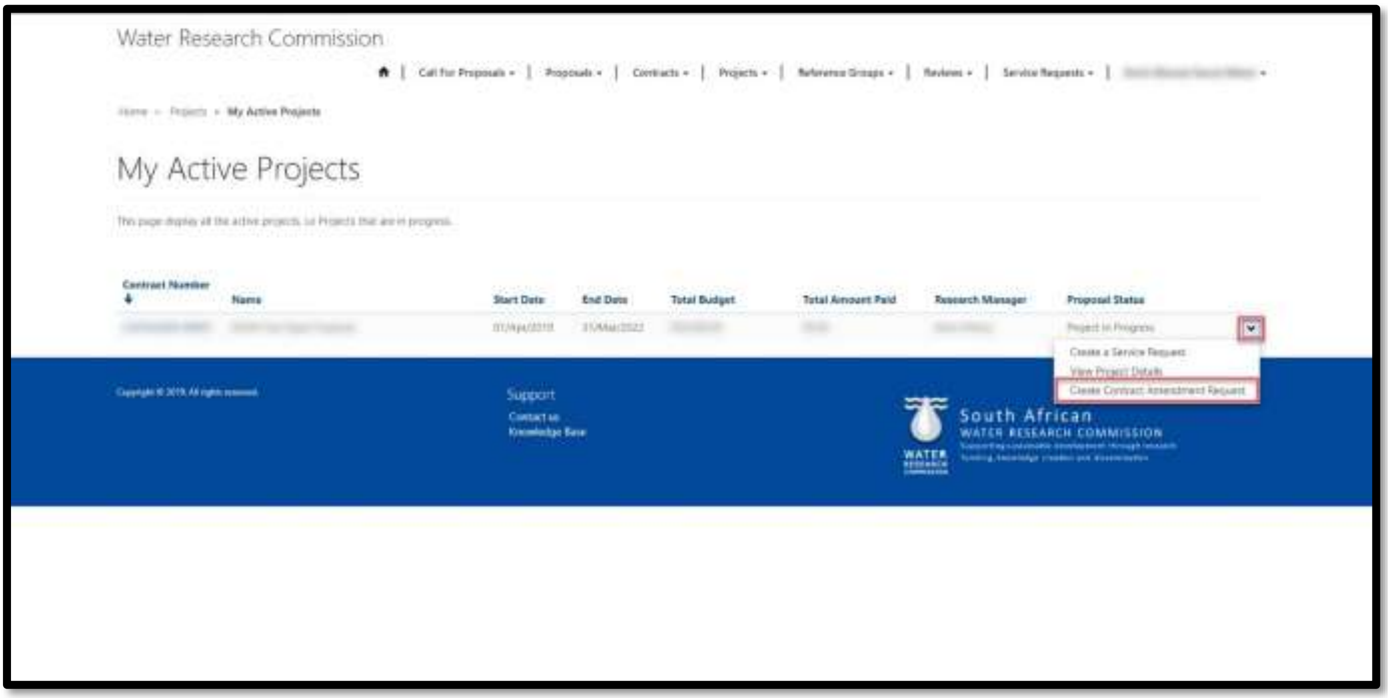


2. The *Contract Amendments to be Submitted* page displays a list of contract amendment requests that have been created by you as the *Project Leader* that has been designated for the active project.

Create a Contract Amendment Request

1. To create a contract amendment request, click on the **Projects** option in the Navigation Menu and then click on **My Active Projects**.

2. The *My Active Projects* page displays a list of projects that are currently active, meaning that the *Start Date* has already passed, the project has commenced, and for which you are designated as the *Project Leader*.
3. To create a contract amendment request against the active project, click on the arrow to the right of the project record and select the **Create Contract Amendment Request** option. This will open the *Create Contract Amendment Request* window.

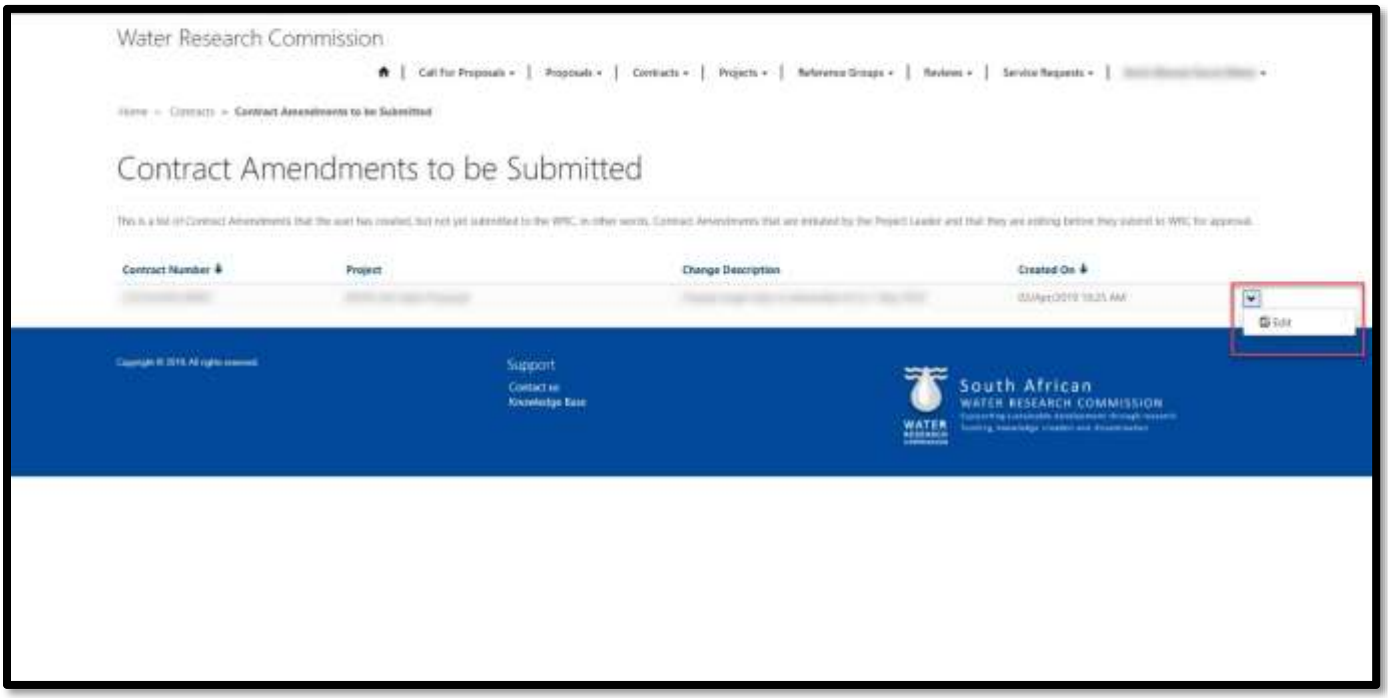


4. In the *Create Contract Amendment Request* window, you can add the required information as indicated by the * asterisk next to the mandatory fields and save the contract amendment request record by clicking on the **Create** button at the bottom of the window (see screenshot on the next page).

5. After the contract amendment request is created, you can view and continue to edit the amendment request by following the steps in the [Contract Amendments to be Submitted page](#) section in this document.

Edit and Submit a Contract Amendment Request

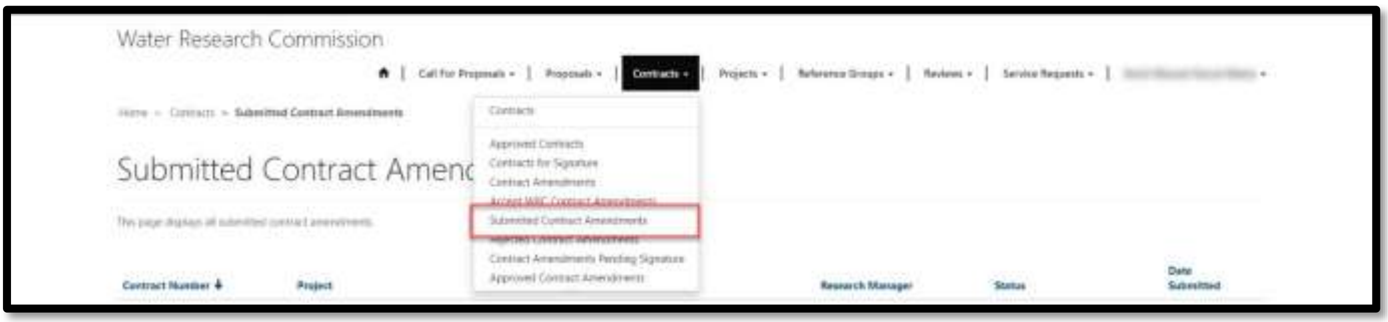
1. To edit the contract amendment request, from the *Contract Amendments to be Submitted* page, click on the arrow on the far right of the contract amendment request record and select the **Edit** option. This will open the *Edit Contract Amendment Request* window.



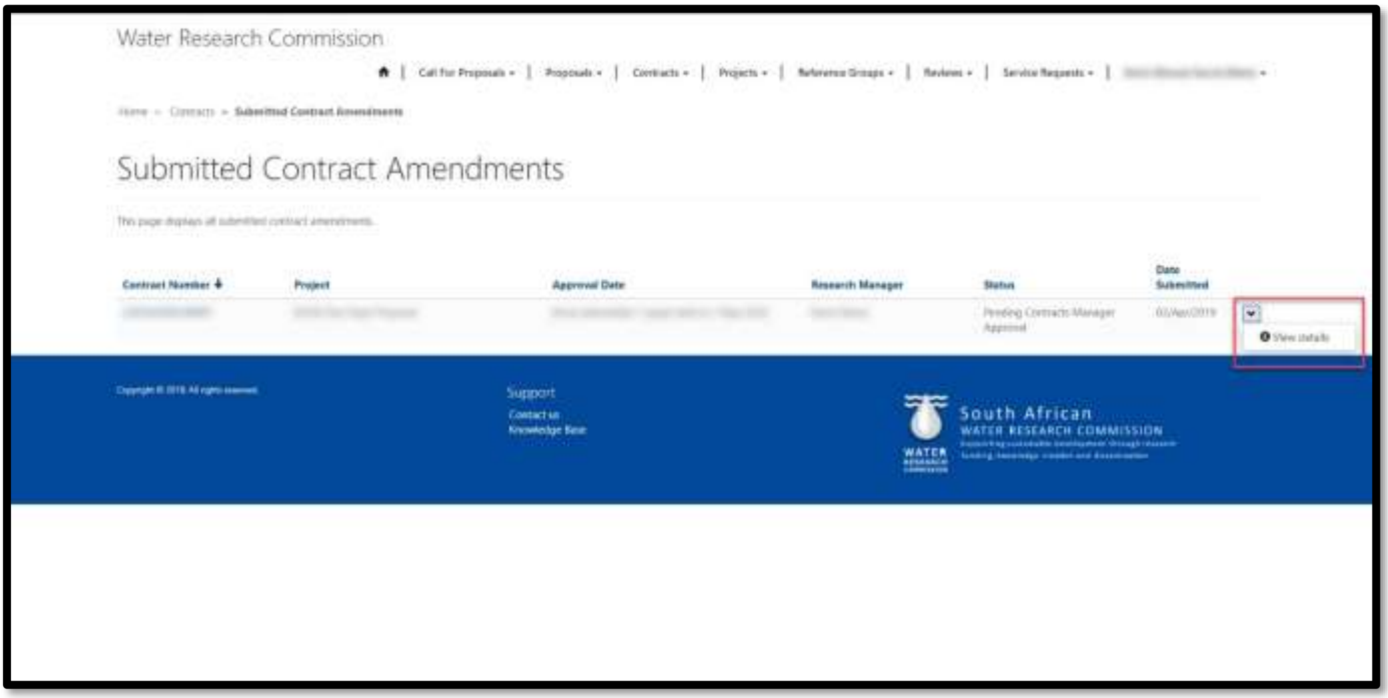
2. From the *Edit Contract Amendment Request* window can continue to edit the contract amendment request and save your changes by clicking on the **Save** button at the bottom of the window.
3. **Note**: Remember to save any changes you make to the contract amendment request record, including any documents that have been uploaded, before submitting the request to the WRC for approval.
4. To submit the contract amendment request to the WRC for approval, be sure to save any changes, then open the *Edit Contract Amendment Request* window again and click on the **Submit to WRC** button at the bottom of the window. You will be re-directed to the *Submitted Contract Amendments* page and the request can no longer be edited.

Submitted Contract Amendments Page

1. To view the *Submitted Contract Amendments* page, click on the **Contracts** option in the Navigation Menu and then click on **Submitted Contract Amendments**.



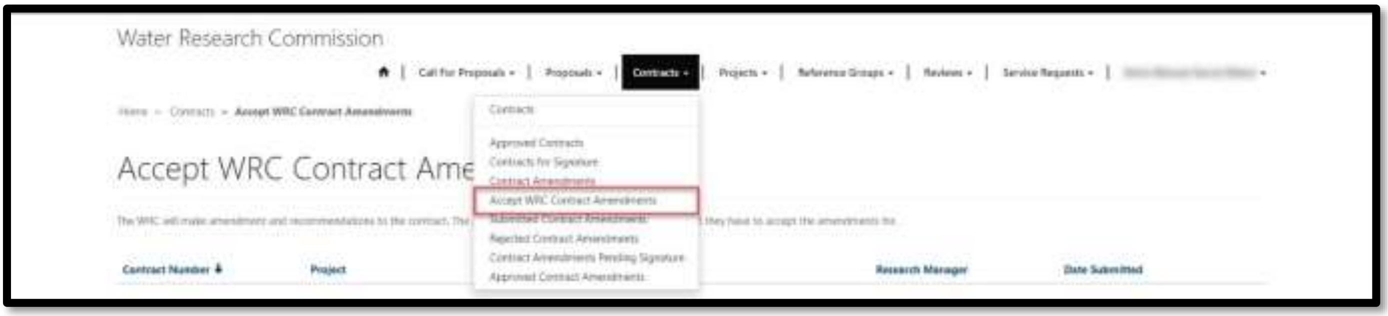
2. The *Submitted Contract Amendments* page displays a list of contract amendment request records that are pending approval by the WRC that you as the *Project Leader* of the active project have submitted to the WRC, or that the WRC has submitted to you and you have accepted.
3. To view the details of the submitted contract amendment request, click on the arrow on the far right of the contract amendment request record and select the **View details** option. This will open the *Contract Amendment Request Details* window where you can view the details of the request.



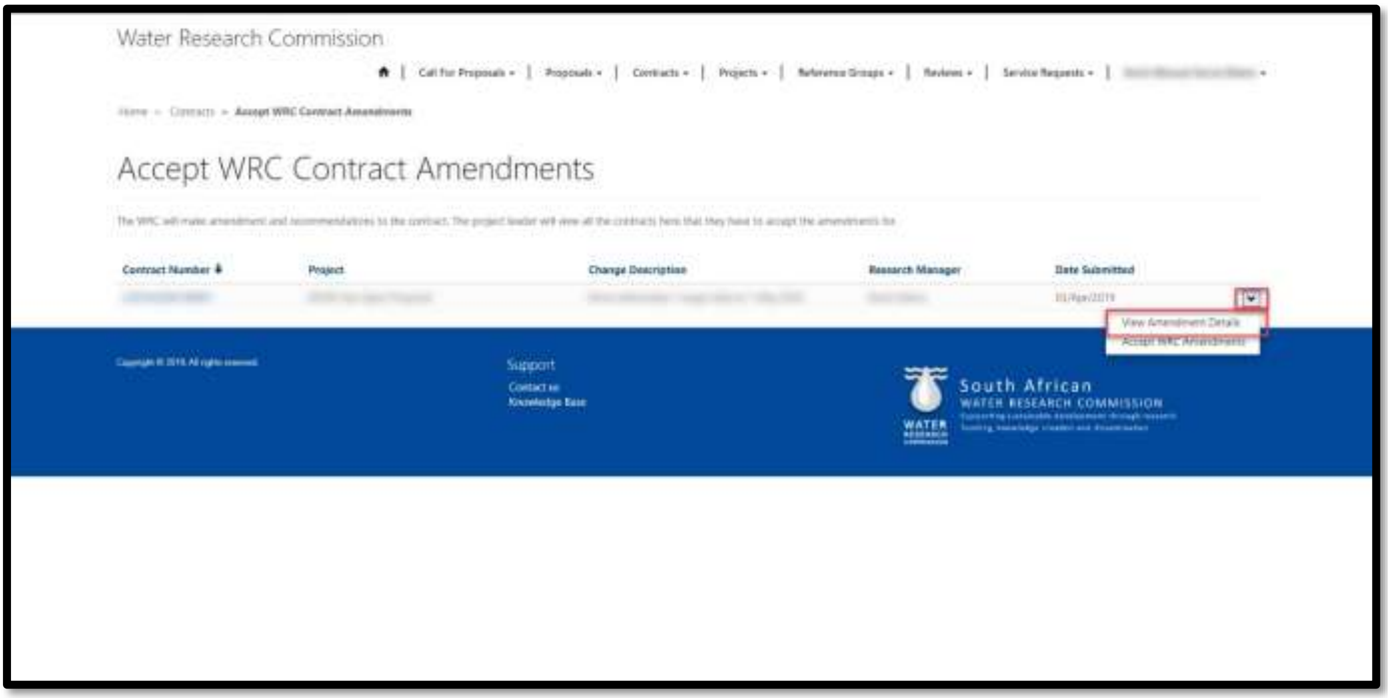
4. You can also return to this page to view the status of the contract amendment request which is shown in the *Status* column.

Accept WRC Contract Amendments Page

1. To view the *Accept WRC Contract Amendments* page, click on the **Contracts** option in the Navigation Menu and then click on **Accept WRC Contract Amendments**.

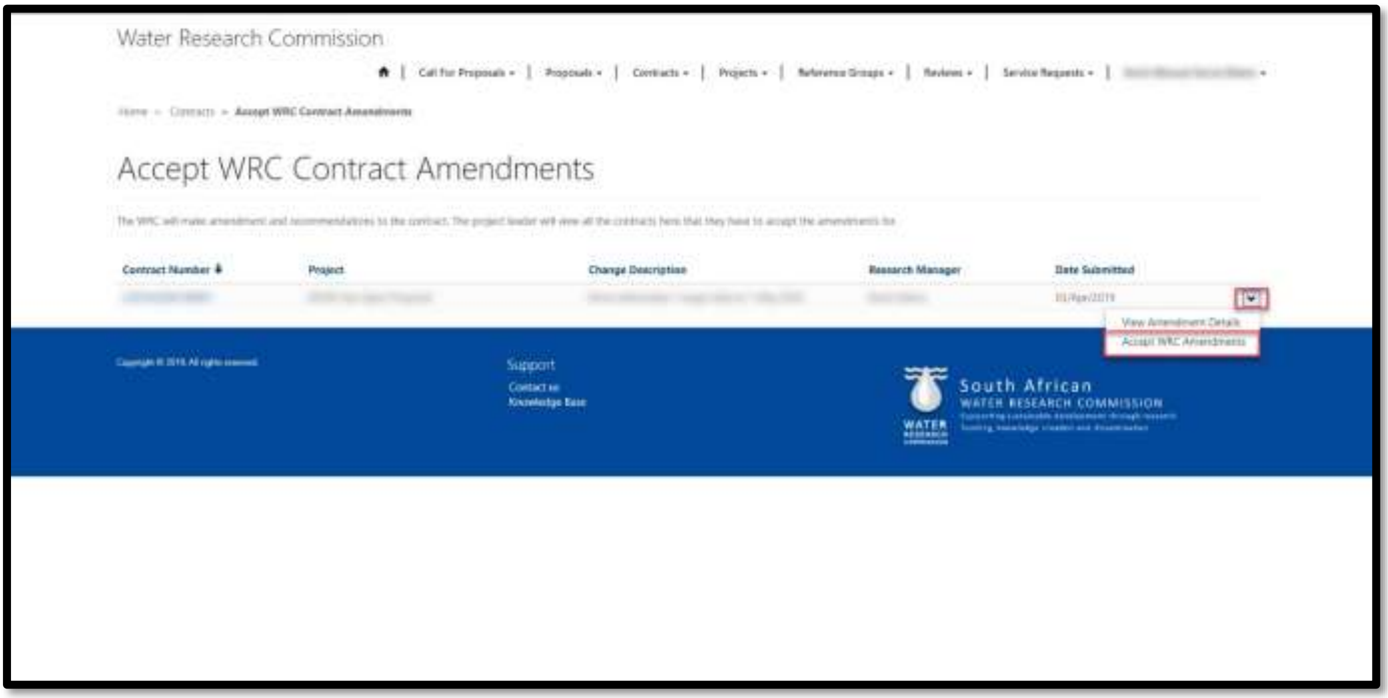


2. The *Accept WRC Contract Amendments* page displays a list of contract amendment requests that have been created by the WRC Research Manager that is overseeing the project and require your acceptance as the designated Project Leader for the project, before it can be approved and finalized by the WRC.
3. To view the details of the contract amendment request, click on the arrow on the far right of the contract amendment record and select the **View Amendment Details** option. This will open the *Contract Amendment Details* window.



4. In the *Contract Amendment Details* window, the details of the contract amendment request from the WRC are displayed, along with any attached documents for your attention (see screenshot on the next page).

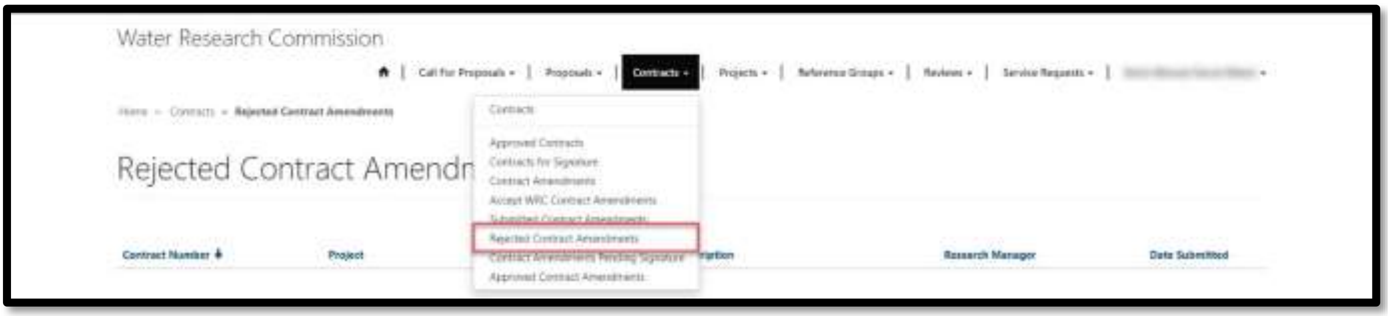
5. To accept the contract amendment requested by the WRC, close the *Contract Amendment Details* window, and from the *Accept WRC Contract Amendments* page, click on the arrow on the far right of the contract amendment record and select the **Accept WRC Amendments** option. The *Contract Amendments Accept/Reject* window will open.



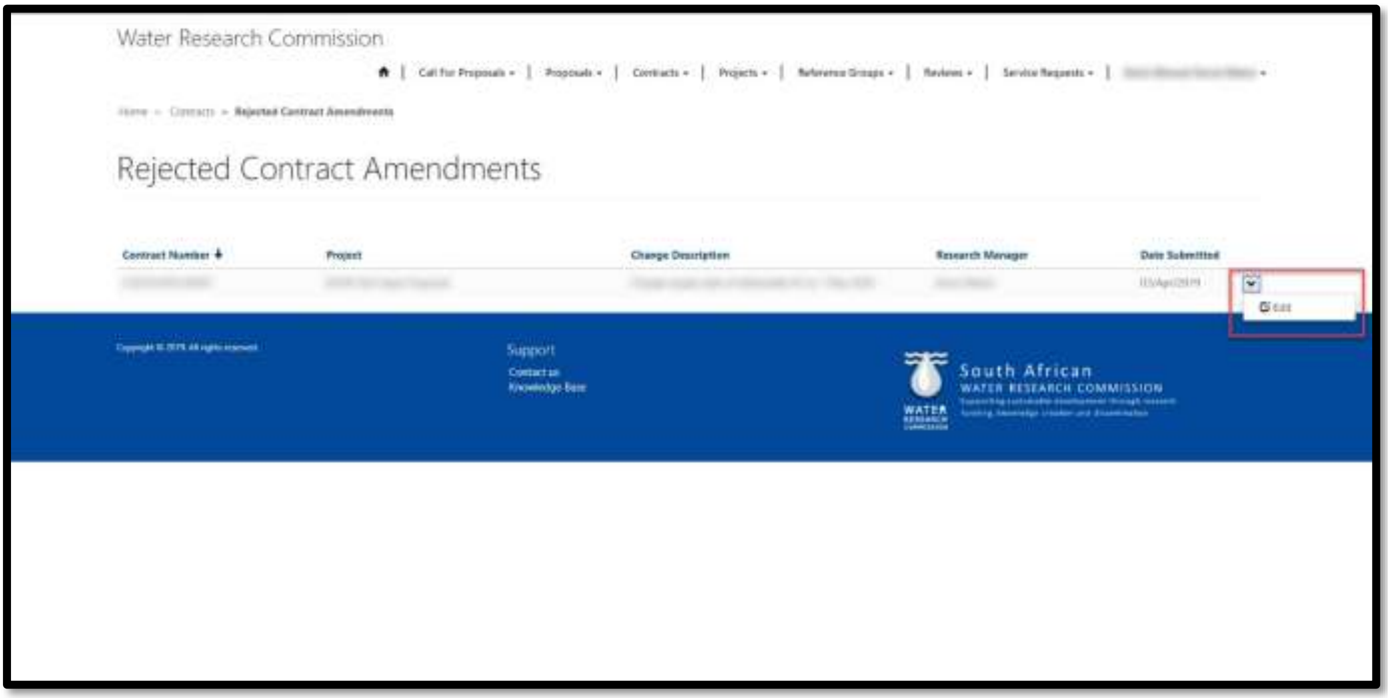
6. In the *Contract Amendments Accept/Reject* window, select your response and submit it to the WRC by clicking on the **Submit Response to WRC** button. You will be re-directed to the *Submitted Contract Amendments* page and you can follow the steps in the Submitted Contract Amendments page section of this document.

Rejected Contract Amendments Page

1. To view the *Rejected Contract Amendments* page, click on the **Contracts** option in the Navigation Menu and then click on **Rejected Contract Amendments**.



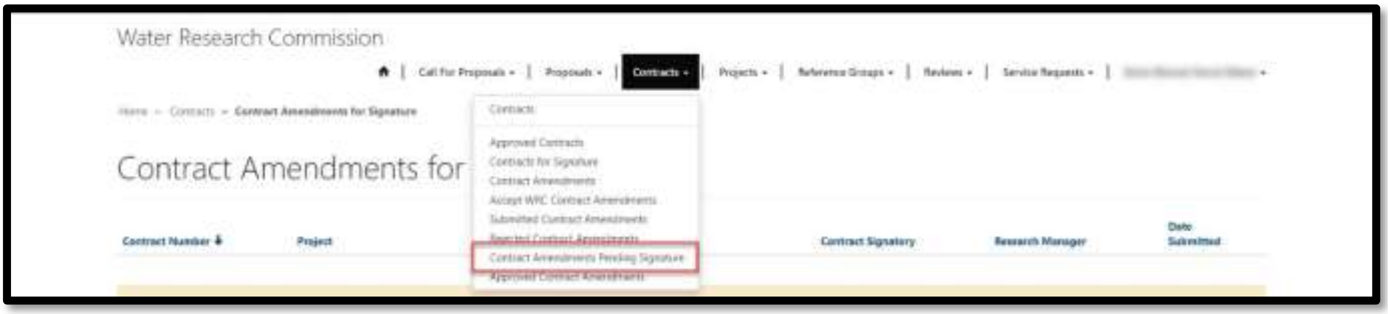
2. The Rejected Contract Amendments page displays a list of submitted contract amendment requests that you as the *Project Leader* for the active project have submitted but were rejected by the WRC.
3. The rejected contract amendment request will only be displayed on this page while it is in rejected status and has not yet been re-submitted to the WRC for approval.
4. To edit the details of the contract amendment request, click on the arrow on the far right of the contract amendment request record and select the **Edit** option. This will open the *Edit Contract Amendment Request* window.



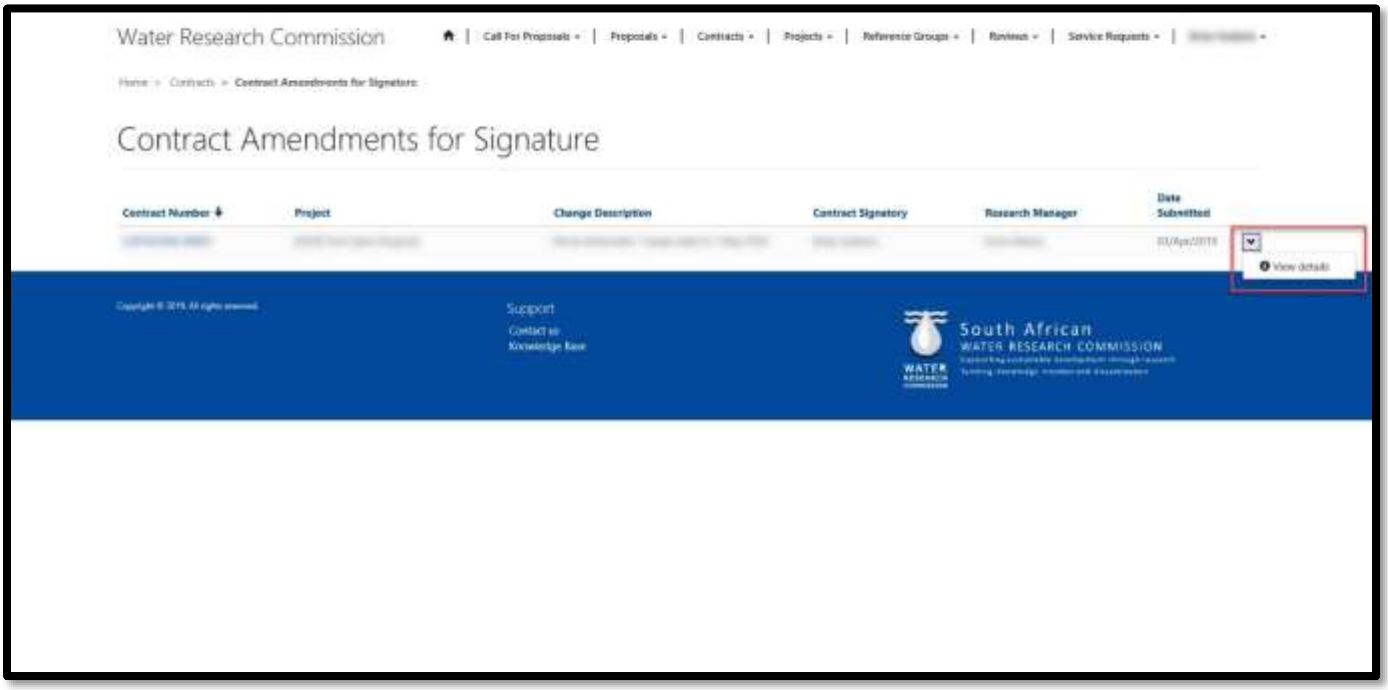
5. You can edit the details of the contract amendment request, upload supporting documents, and re-submit the contract amendment request to the WRC in the same manner as detailed in the [Edit and Submit a Contract Amendment Request] section of this document.

Contract Amendments for Signature Page

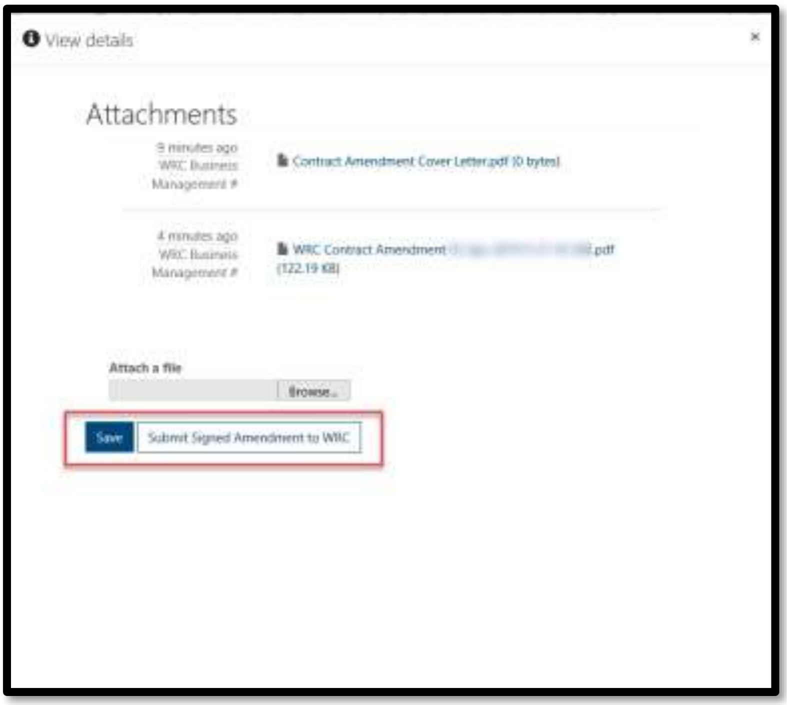
1. To view the *Contract Amendments for Signature* page, click on the **Contracts** option in the Navigation Menu and then click on **Contract Amendments Pending Signature**.



2. The *Contract Amendments for Signature* page displays a list of contract amendment request records that have been approved by the WRC and require your signature as the *Contract Signatory* designated for the project.
3. **Note**: Only the user that is allocated as the *Contract Signatory* as part of the proposal submission will be able to view the contract amendment records displayed on this page. The Project Leader allocated to this project will not see the contract amendment request listed on this page.
4. To view the details of the contract amendment request, click on the arrow on the far right of the contract amendment request record and select the **View details** option. This will open the *Attachments* window.

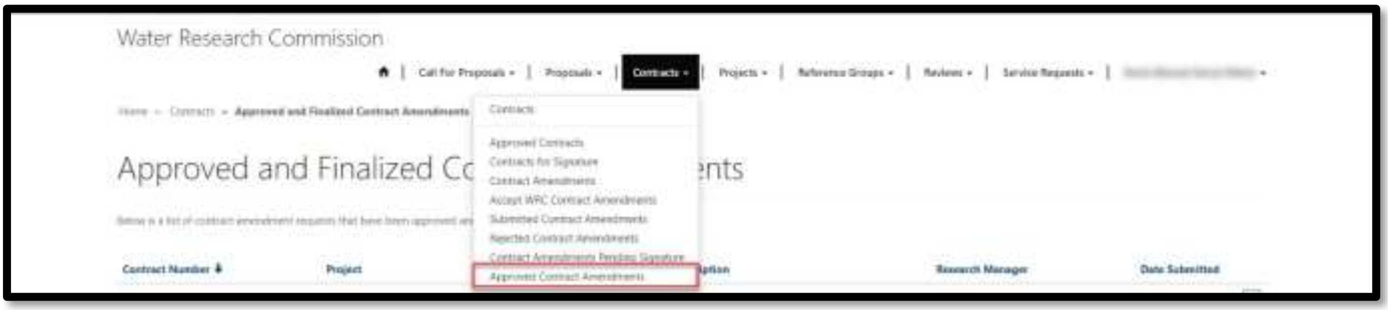


5. In the *Attachments* window, you can view and download the *Contract Amendment Cover Letter* and *Contract Amendment* documents.
6. It is required for you as the *Contract Signatory* for the project to download a copy of the *Contract Amendment* document, sign and initial it, upload a file with the scanned copy of the document to this contract amendment record and submit it to the WRC.
7. You are also required to send a signed and initialed hard copy of the *Contract Amendment* document to the WRC via courier. This hard copy will be couriered by the WRC to the physical address of the *Lead Organisation* of the project.
8. You can submit the uploaded scanned copy of the *Contract Amendment* document by clicking on the **Submit Signed Amendment to WRC** button at the bottom of the window.
9. **Note**: Please be sure to save any changes made to this contract amendment record by clicking the **Save** button at the bottom of the window before you submit the uploaded contract amendment document to the WRC.

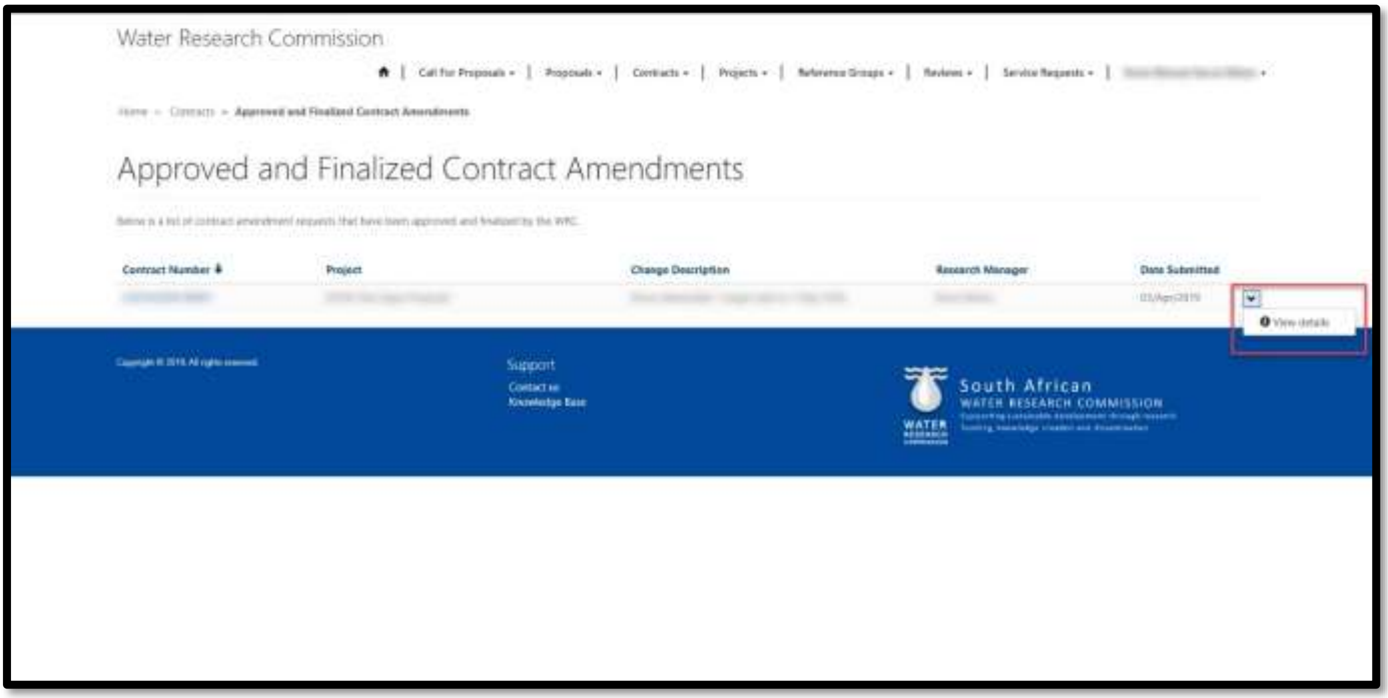


Approved and Finalized Contract Amendments Page

1. To view the *Approved and Finalized Contract Amendments* page, click on the **Contracts** option in the Navigation Menu and then click on **Approved Contract Amendments**.



2. The *Approved and Finalized Contract Amendments* page displays a list of contract amendment requests that have been approved and finalized by the WRC where you are the Project Leader for the project for which the amendment was approved.
3. To view the details of the contract amendment request, click on the arrow on the far right of the contract amendment request record and select the **View details** option. This will open the *Contract Amendment Request Details* window (see screenshot on the next page).

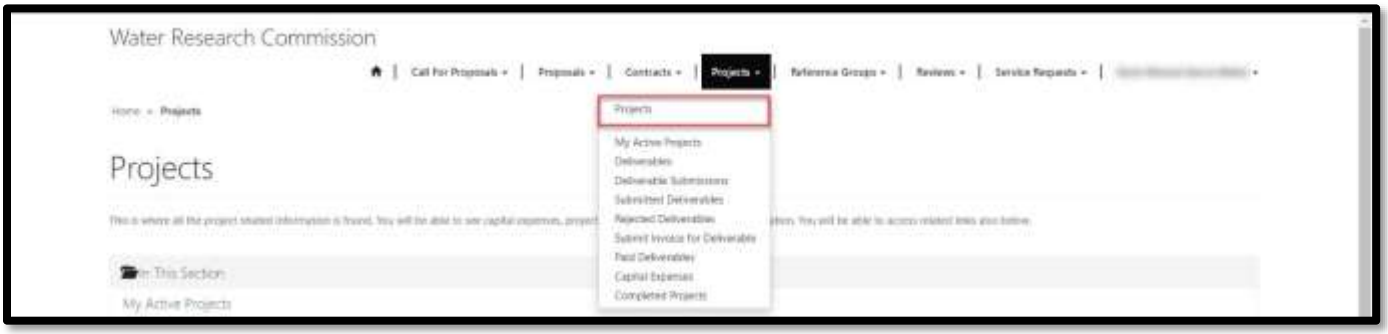

Water Research Commission
Call for Proposals | Proposals | Contracts | Projects | Reference Groups | Reviews | Service Requests
Approved and Finalized Contract Amendments
Contract Number
Project
Change Description
Research Manager
Date Submitted
View details
Support
Contact us
Knowledge Base
South African
WATER RESEARCH COMMISSION

Projects

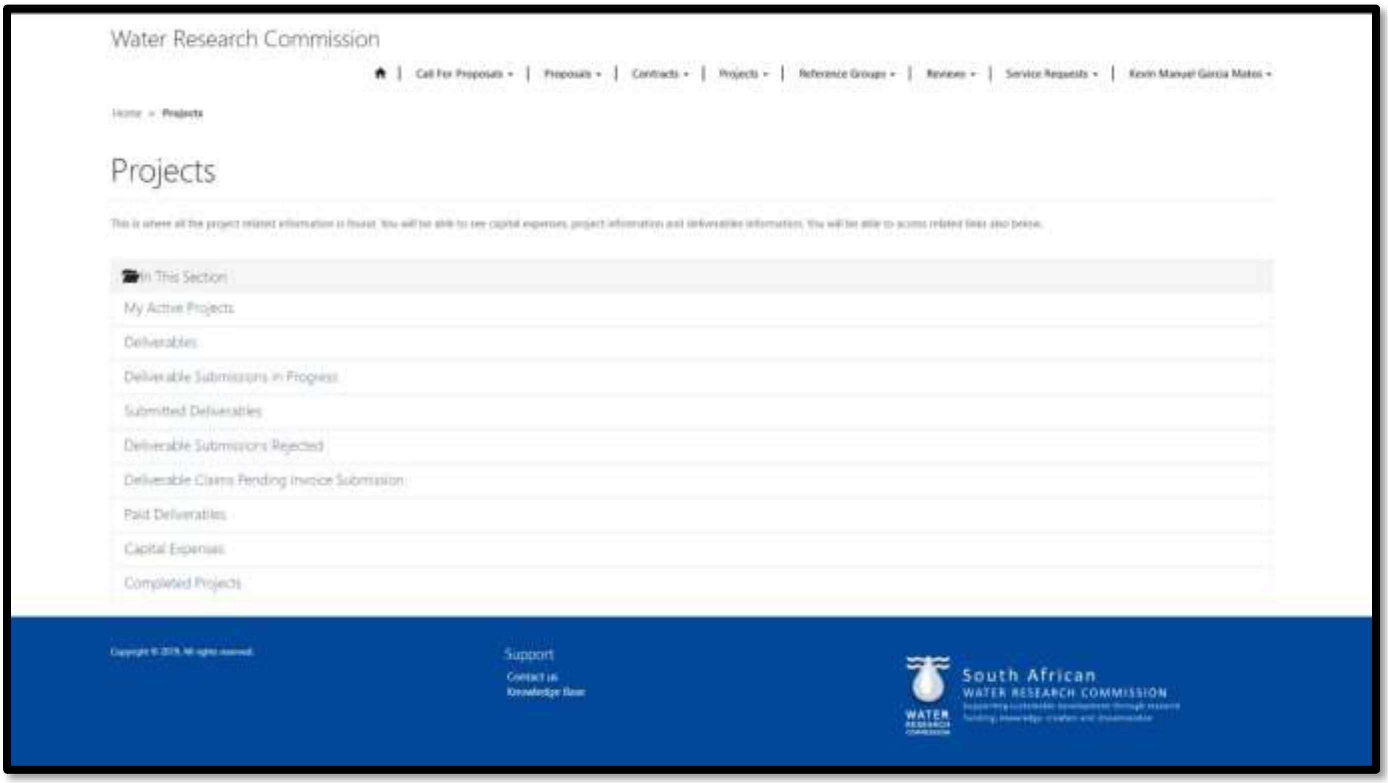
This section details the pages and actions found in the **Projects** section in the Navigation Menu of the BMS Portal.

Projects Page

1. To view the *Projects* page, click on the **Projects** option in the Navigation Menu and then click on **Projects**.



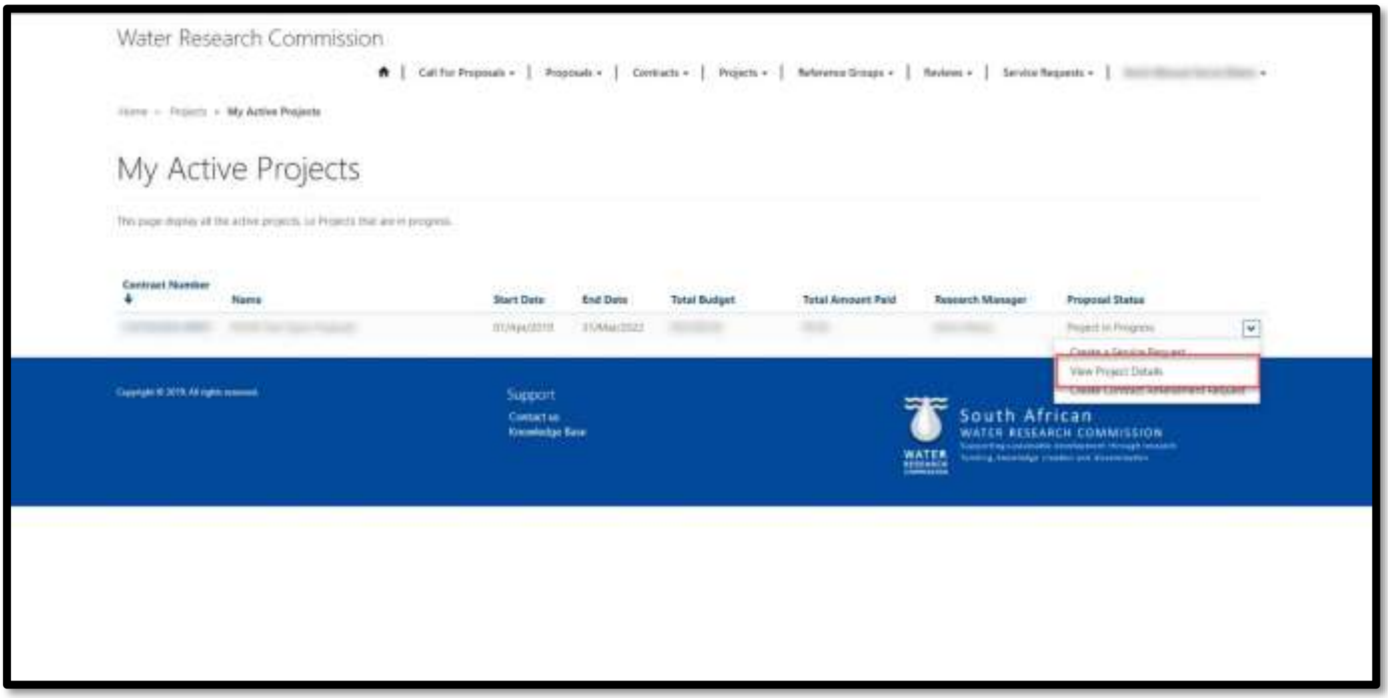
2. The *Projects* page contains links to the related pages that display information regarding projects, deliverables, and capital expenses where you are the *Project Leader* of the active project. To view the related pages, you can click on the links under the **In This Section** section at the bottom of the form.



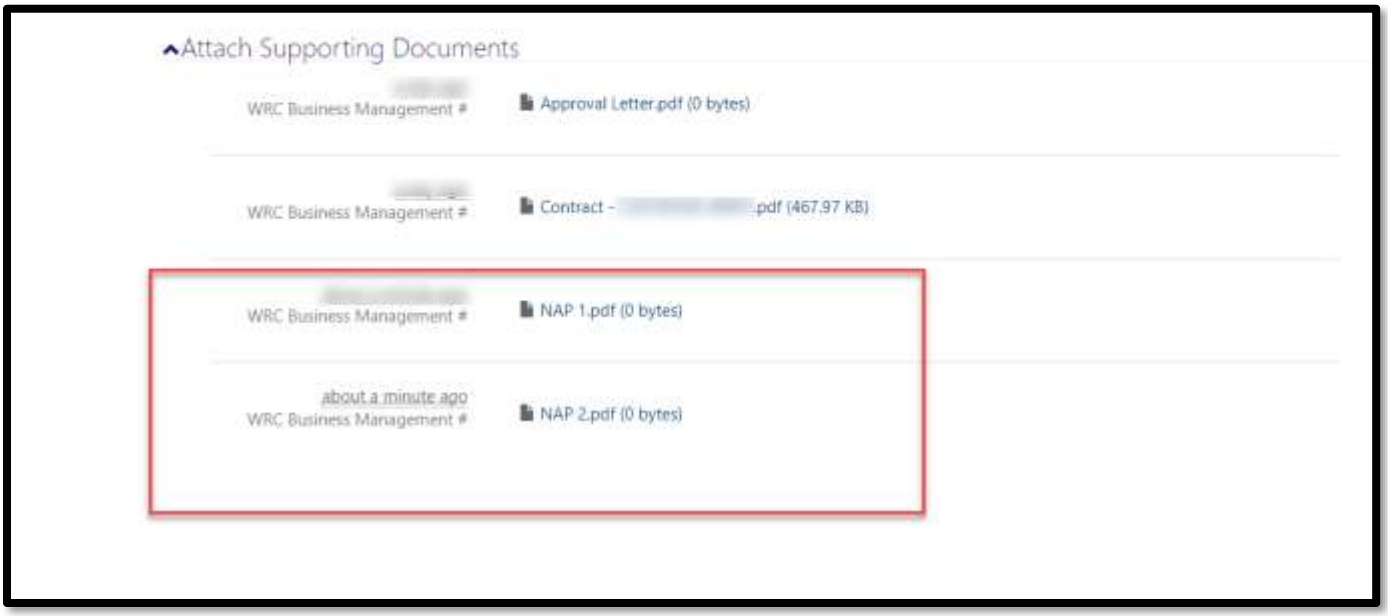
My Active Projects Page

1. To view the *My Active Projects* page, click on the **Projects** option in the Navigation Menu and then click on **My Active Projects**.

2. The *My Active Projects* page displays a list of projects where you are the *Project Leader* and are in the status of *Project in Progress*. Projects will only appear on this date on or after the date in the *Start Date* column on this page.
3. To view the details of the project, click on the arrow on the far right of the project record and select the **View Project Details** option. This will re-direct you to the *Project Details* page.

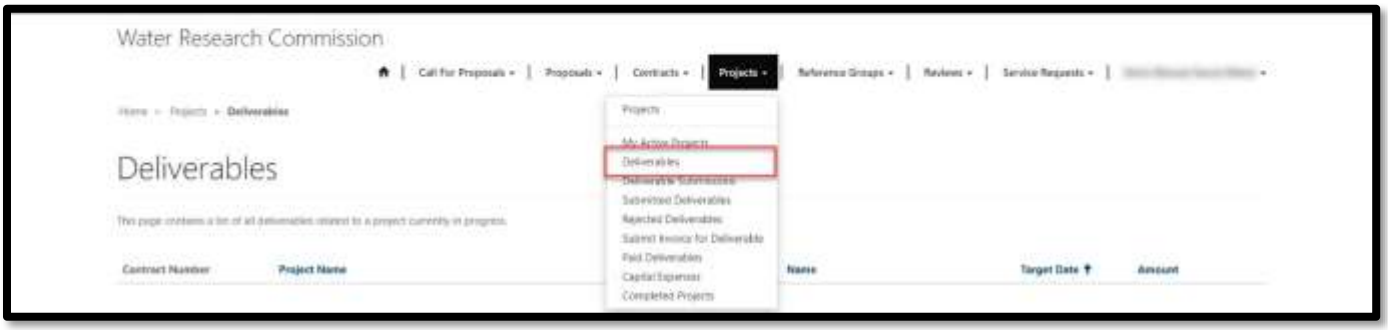


4. You can also create a *Service Request* or a *Contract Amendment Request* from the active projects listed on this page. To follow these processes, view the steps to follow in the [Create a Service Request]() and [Create a Contract Amendment Request]() sections of this document.
5. **Note**: Documentation that is made available near the end of a project by the WRC to you as the *Project Leader* (i.e. *New Audit Procedure (NAP)* letters, etc.) can be viewed or downloaded on the *Project Details* page detailed in **step #3** above and then expanding the *Attach Supporting Documents* tab on the form.

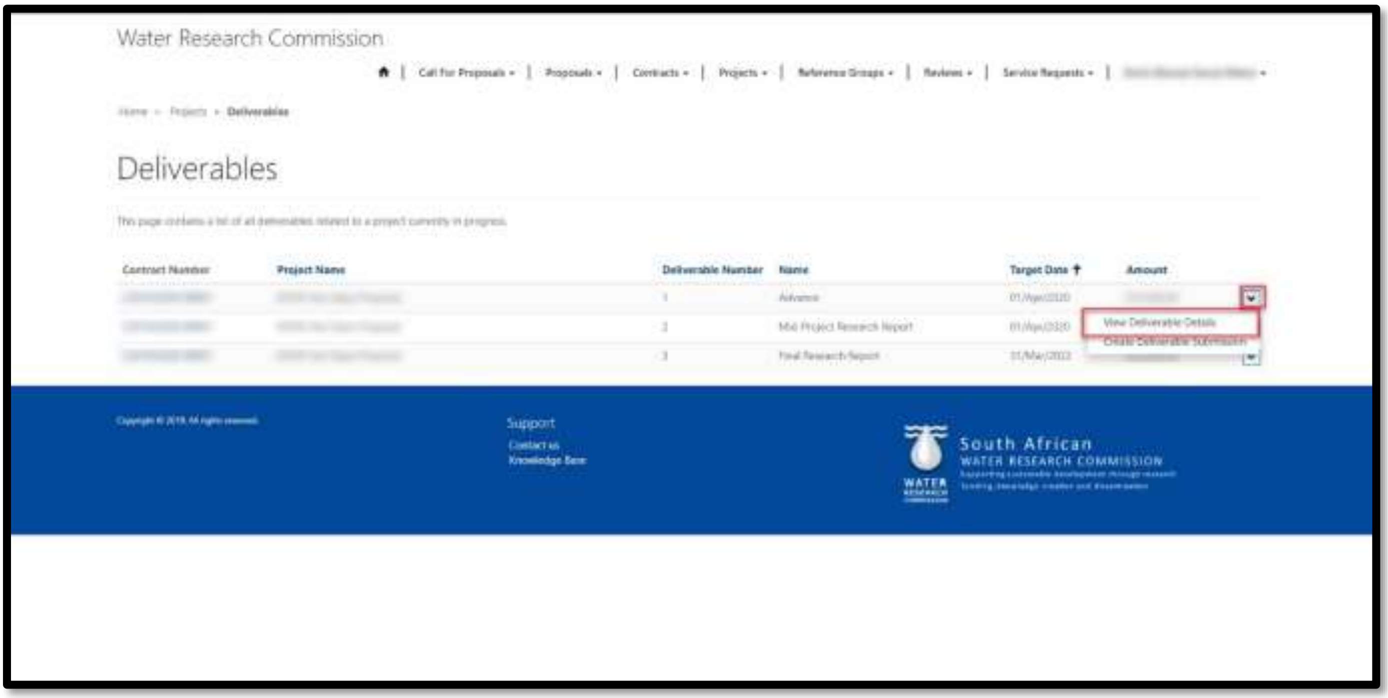


Deliverables Page

1. To view the *Deliverables* page, click on the **Projects** option in the Navigation Menu and then click on **Deliverables**.

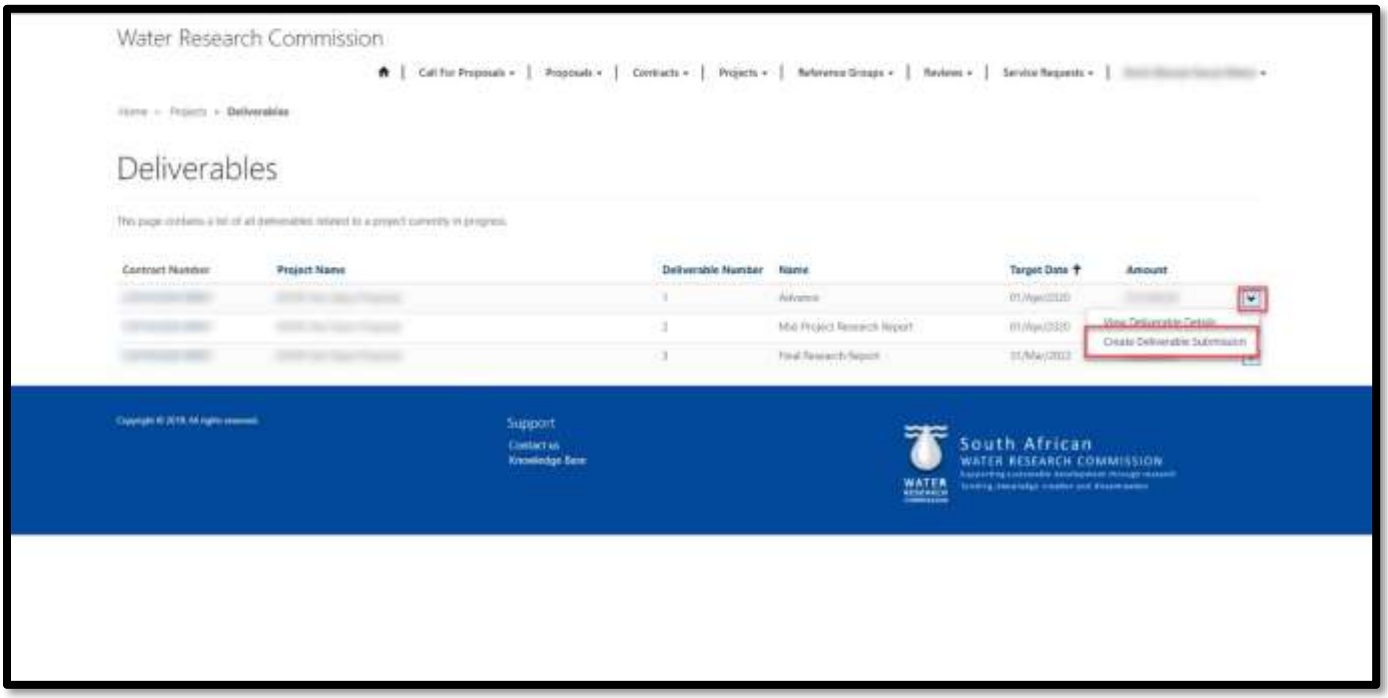


2. The *Deliverables* page displays a list of project deliverables where you are the *Project Leader* for the project, the project is in the status of *Project in Progress*, and the deliverable has not yet been submitted to the WRC for approval and payment.
3. To view the details of the deliverable, click on the arrow on the far right of the deliverable record and select the **View Deliverable Details** option. This will open the *Deliverable Details* window.



Create a Deliverable Submission

1. To create a deliverable submission, from the *Deliverables* page click on the arrow on the far right of the deliverable record and select the **Create Deliverable Submission** option. This will open the *Deliverable Submission Information* window.



2. In the *Deliverable Submission Information* window, you can complete the necessary information and upload any required documentation if you have it at this time, or you can edit the deliverable submission later after it is created.

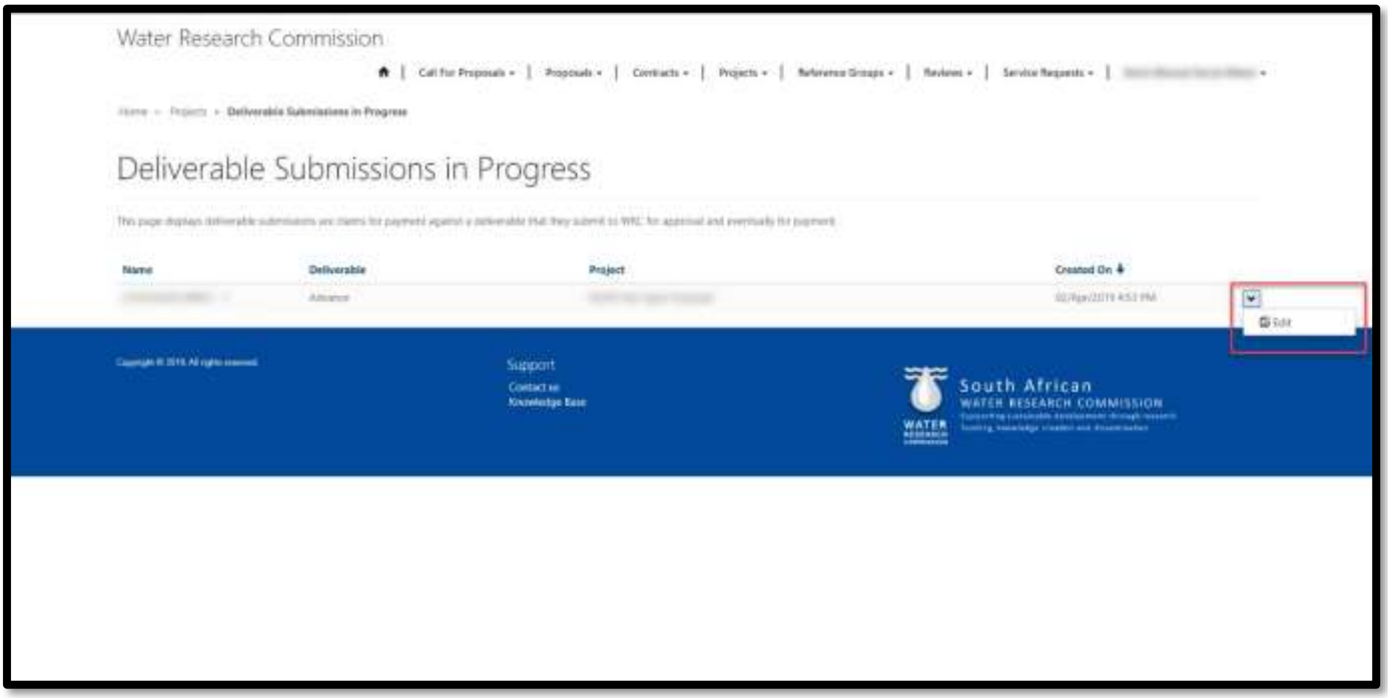
3. **Note**: You are only required to complete the *Executive Summary* field if the deliverable you are submitting is the final deliverable of the project and the retention amount is being claimed.
4. To create the deliverable submission, click on the **Create** button at the bottom of the window. The *Deliverable Claim Created* window will appear.

5. To edit and submit your deliverable submission, close the Deliverable Claim Created window, navigate to the *Deliverable Submissions* page and follow the steps in the [Deliverable Submissions in Progress](#) page section detailed below.
6. **Note**: Once a deliverable has been submitted to the WRC for approval, it will no longer appear on the [Deliverables Page](#).

Deliverable Submissions in Progress Page

1. To view the *Deliverable Submissions in Progress* page, click on the **Projects** option in the Navigation Menu and then click on **Deliverable Submissions**.

2. The *Deliverable Submissions in Progress* page displays a list of deliverable submission record that you as the *Project Leader* for the active project have created but have not yet been submitted to the WRC for approval.
3. To edit or submit the deliverable submission, click on the arrow on the far right of the deliverable submission record and select the **Edit** option. This will open the *Edit Deliverable Submission* window.



<u>Submit a Deliverable Submission to WRC</u>

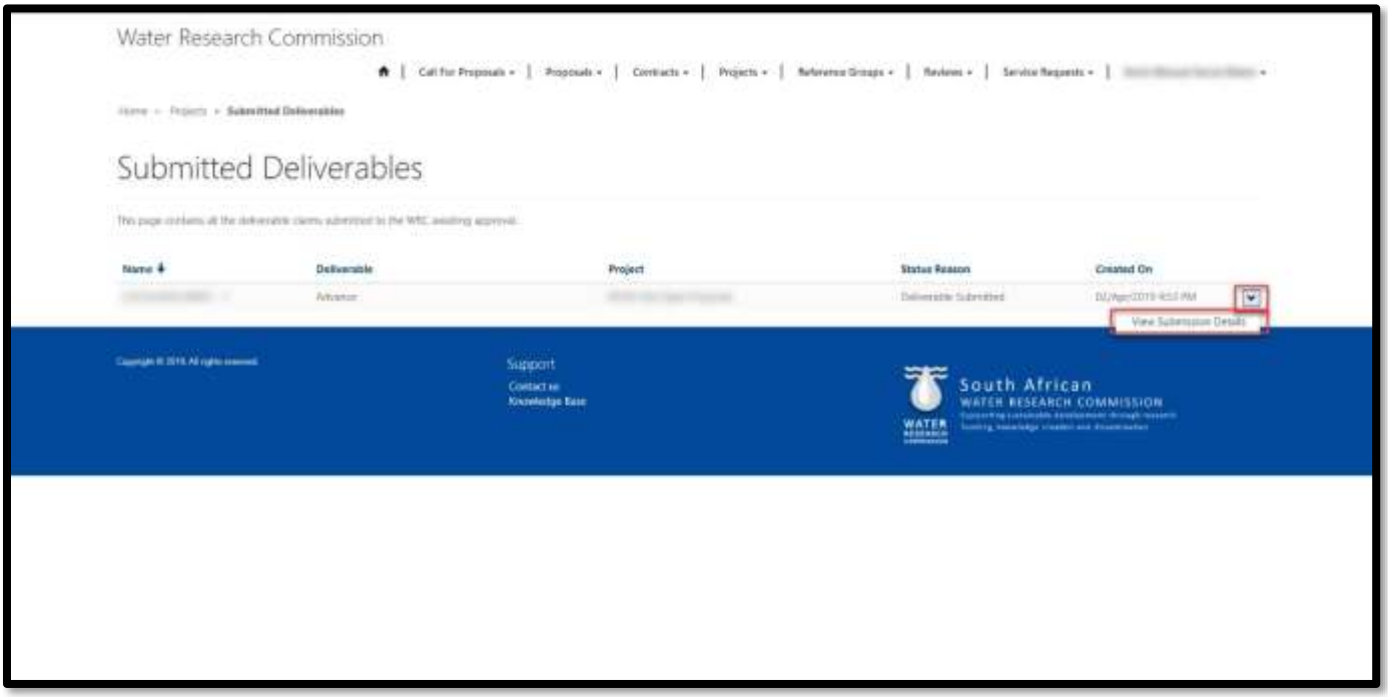
1. To submit your deliverable submission to the WRC, from the *Edit Deliverable Submission* window and save any changes, which will close the window.
2. Re-open the *Edit Deliverable Submission* window as detailed in **step #3** in the [Deliverable Submissions in Progress Page] section of this document, and click on the **Submit to WRC** button (see screenshot on the next page). This will re-direct you to the *Submitted Deliverables* page.

3. **Note**: Please remember to save any changes you have made to the deliverable submission record, including the uploading of any documents, before you submit the deliverable submission to the WRC for approval.

Submitted Deliverables Page

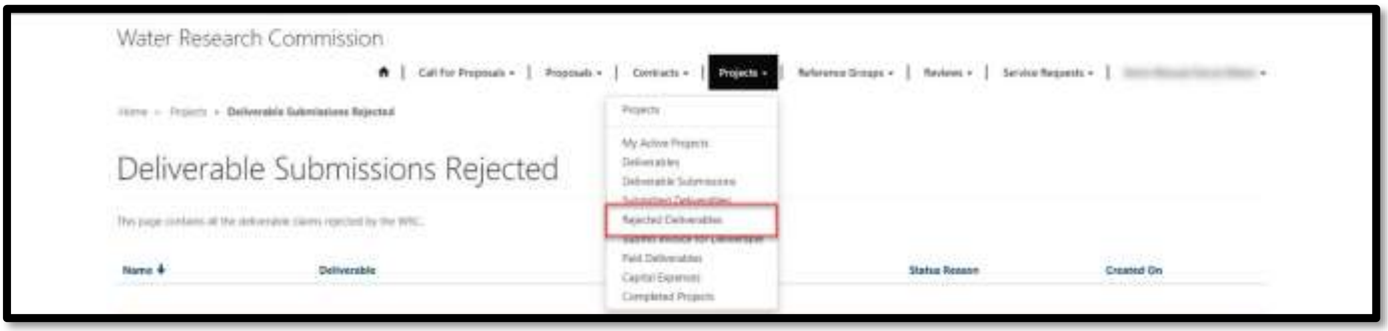
1. To view the *Submitted Deliverables* page, click on the **Projects** option in the Navigation Menu and then click on **Submitted Deliverables**.

2. The *Submitted Deliverables* page displays a list of deliverable submission records that you as the *Project Leader* of the active project have submitted to the WRC for approval.
3. You can view the progress of your submission by referring to the *Status Reason* column for the deliverable submission displayed on this page.
4. To view the details of the deliverable submission, click on the arrow on the far right of the deliverable submission record and select the **View Submission Details** option. This will open the *Deliverable Submission* details window.



Deliverable Submissions Rejected Page

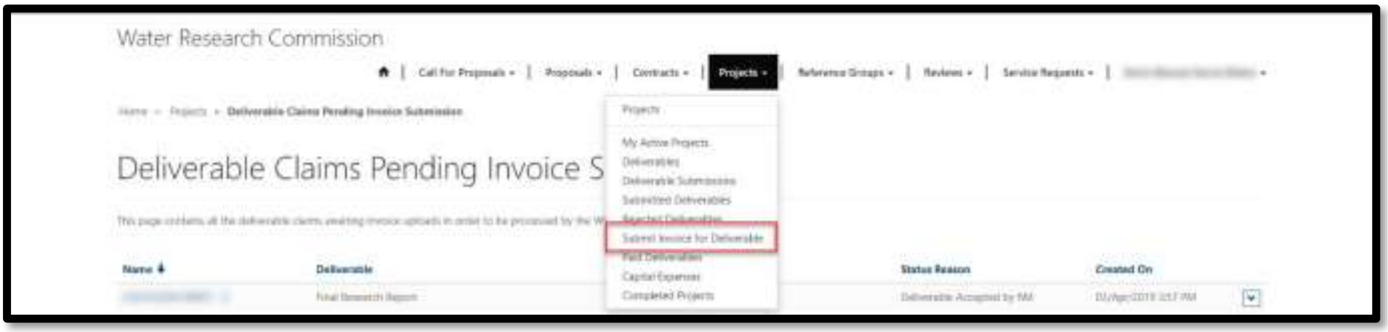
1. To view the *Deliverable Submissions Rejected* page, click on the **Projects** option in the Navigation Menu and then click on **Rejected Deliverables**.



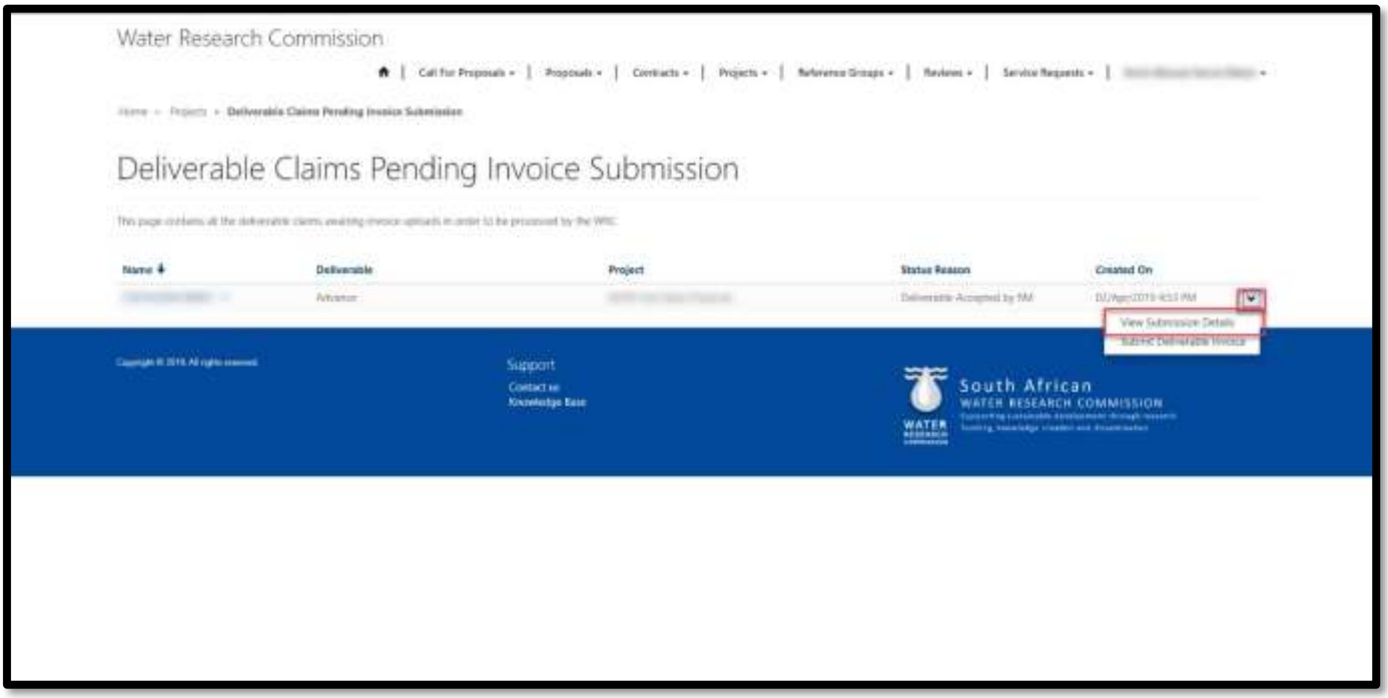
2. The Deliverable Submissions Rejected page displays a list of deliverables submissions that were submitted to the WRC for approval but were rejected.
3. To edit the deliverable submission, click on the arrow on the far right of the deliverable submission record and select the **Edit** option. This will open the *Edit Deliverable Submission* window.
4. To re-submit the deliverable submission to the WRC for approval, you can follow the steps as detailed in the <u>Submit a Deliverable Submission to WRC</u> section of this document.

Deliverable Claims Pending Invoice Submission Page

1. To view the *Deliverable Claims Pending Invoice Submission* page, click on the **Projects** option in the Navigation Menu and then click on **Submit Invoice for Deliverable**.

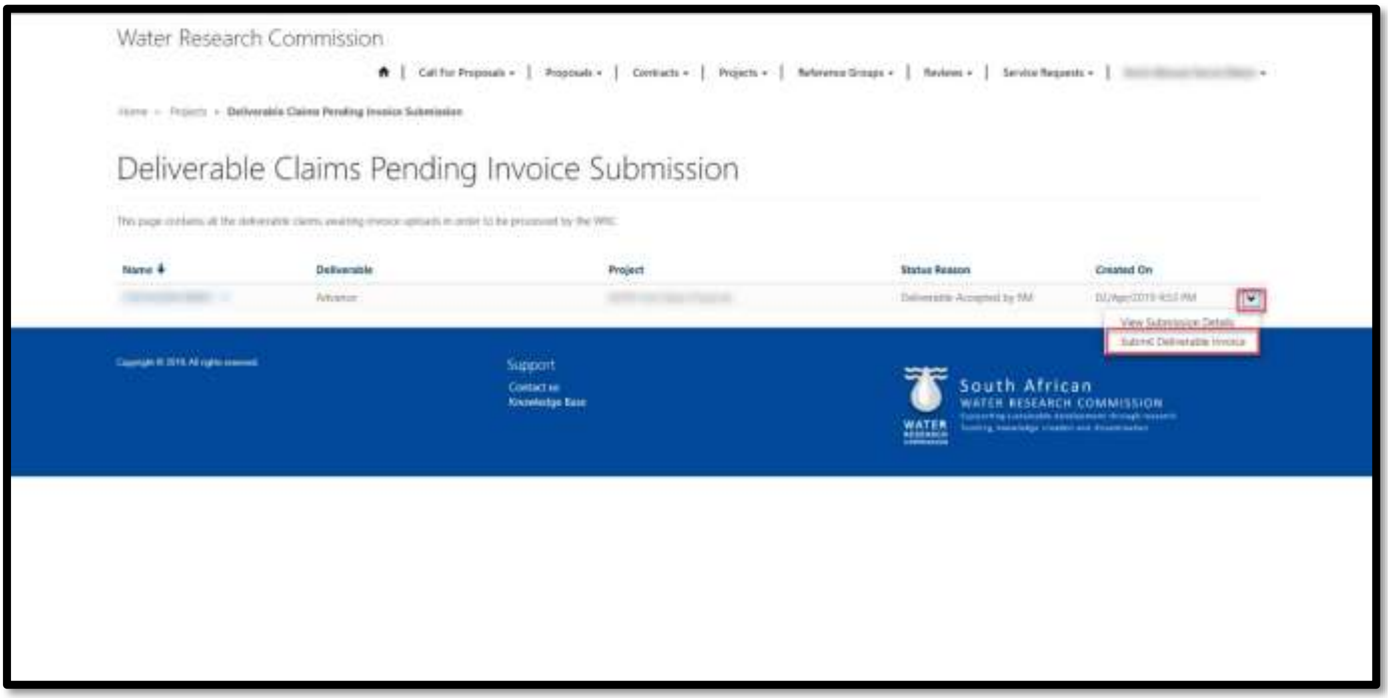


2. The *Deliverable Claims Pending Invoice Submission* page displays a list of deliverable submissions that were approved by the WRC and now require you as the *Project Leader* to submit the invoice for the deliverable payment to the WRC for approval.
3. You can view the details of the deliverable submission by clicking on the arrow on the far right of the deliverable submission record and selecting the **View Submission Details** option. This will open the *Deliverable Submission Details* window.



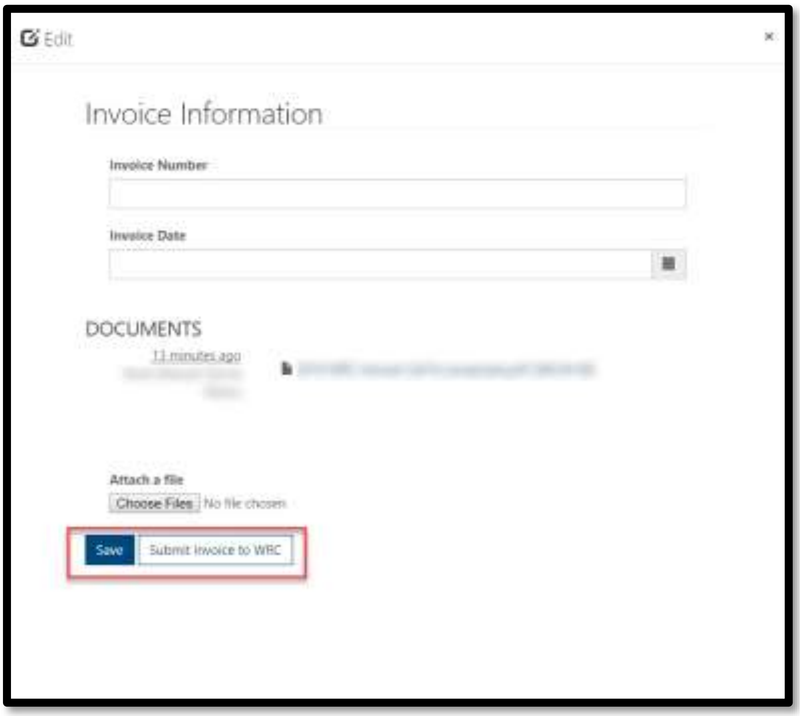
Submit Deliverable Invoice to WRC

1. To submit the invoice for the deliverable to the WRC for approval, click on the arrow on the far right of the deliverable submission record and select the **Submit Deliverable Invoice** option. This will open the *Invoice Information* window.



2. In the *Invoice Information* window, enter the invoice number and date, upload invoice document, and save your changes, which will close the window.

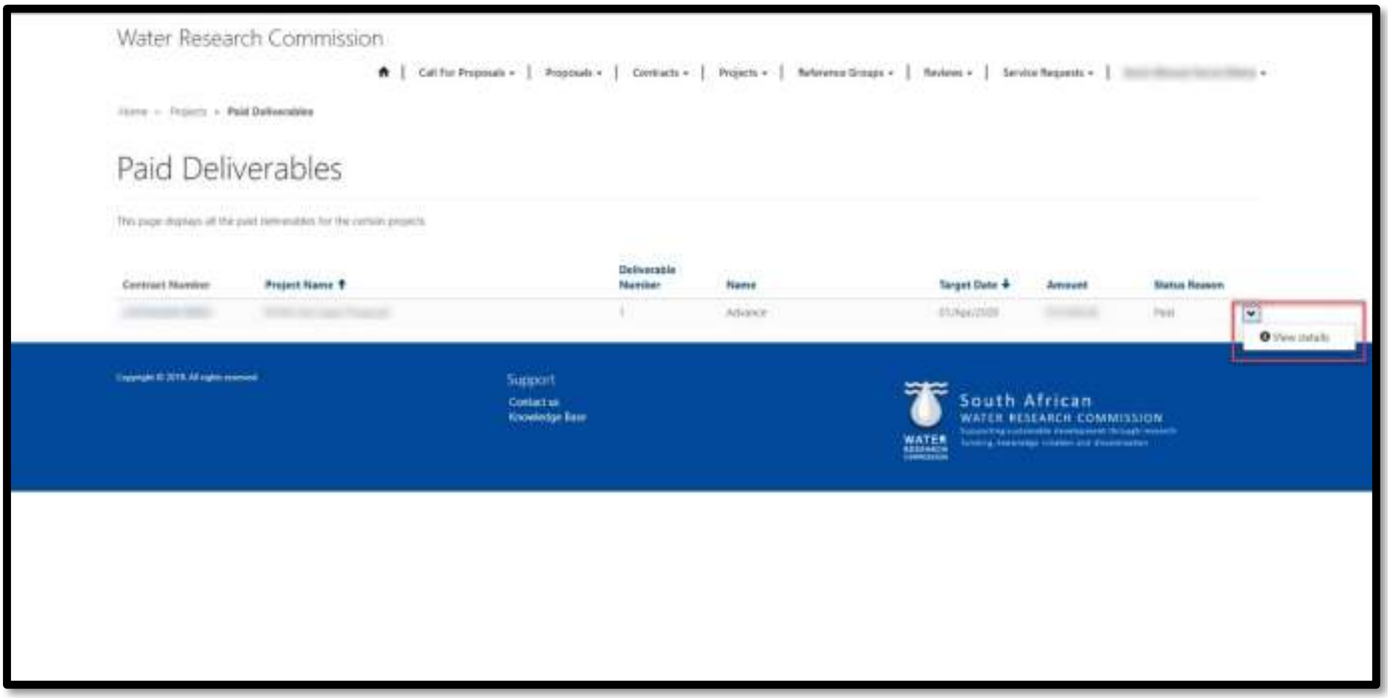
3. Re-open the *Invoice Information* window and click on the **Submit Invoice to WRC** button. This will re-direct you to the *Submitted Deliverables* page where you can continue to track the progress of your submission.



Paid Deliverables Page

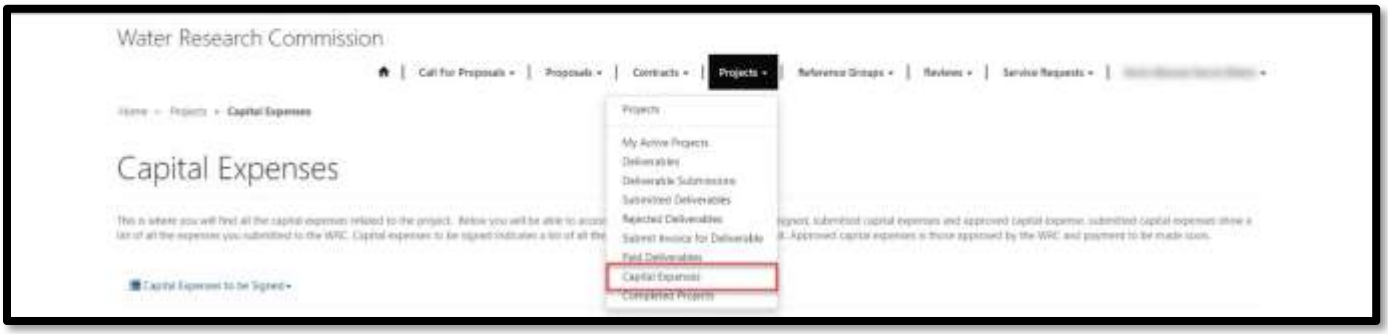
1. To view the *Paid Deliverables* page, click on the **Projects** option in the Navigation Menu and then click on **Paid Deliverables**.

2. The *Paid Deliverables* page displays a list of deliverables that have been approved by the WRC for payment and you are the *Project Leader* of the active project.
3. To view the details of the deliverable, click on the arrow on the far right of the deliverable record and select the **View details** option. This will open the *Deliverable Details* window.

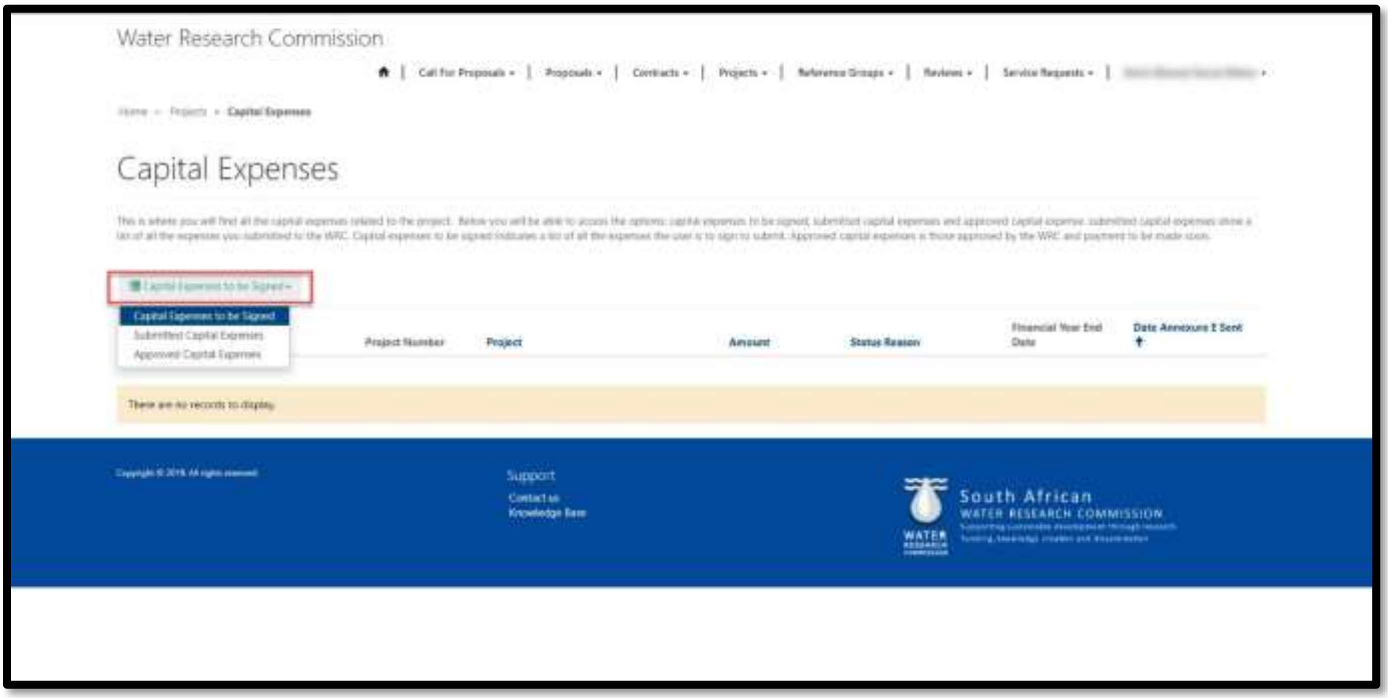


Capital Expenses Page

1. To view the *Capital Expenses* page, click on the **Projects** option in the Navigation Menu and then click on **Capital Expenses**.

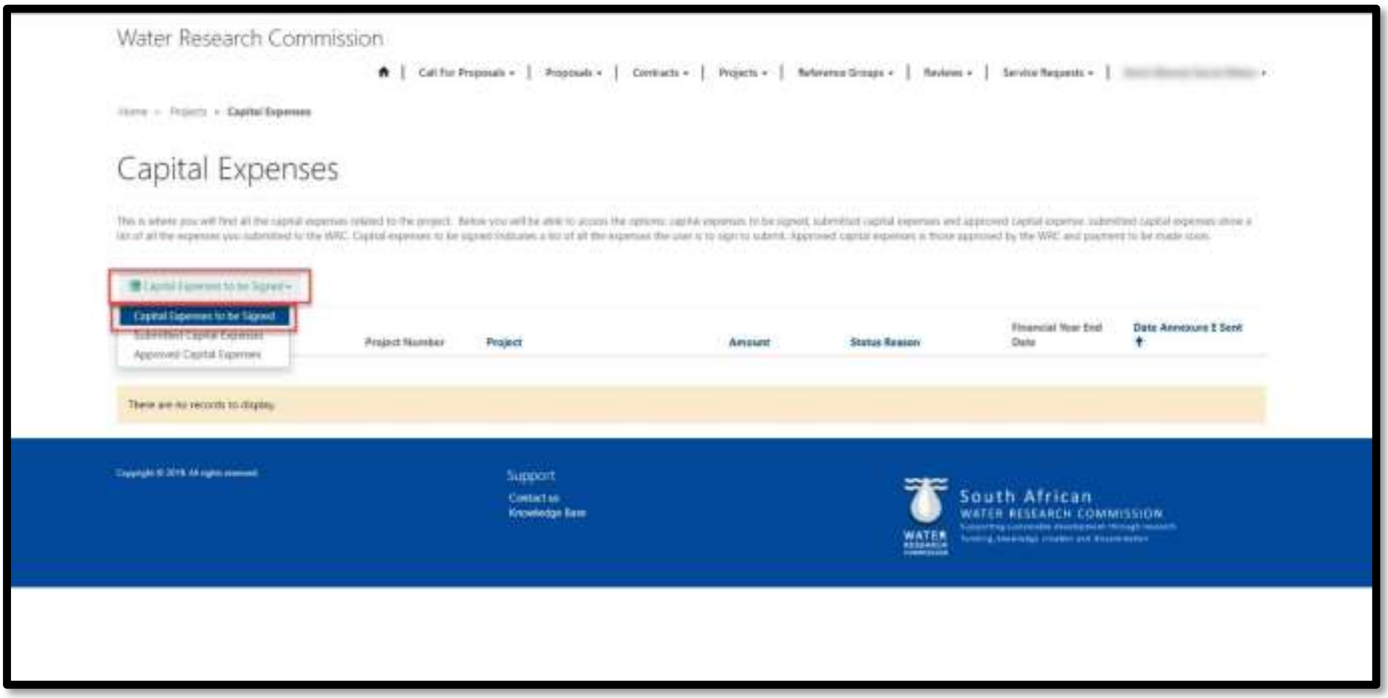


2. The *Capital Expenses* page displays three different views of capital expense records that are part of any active project for which you are the *Project Leader*:
   a. Capital Expenses to be Signed
   b. Submitted Capital Expenses
   c. Approved Capital Expenses
3. To select a view, click on the view list heading as shown below and then select a view from the list.

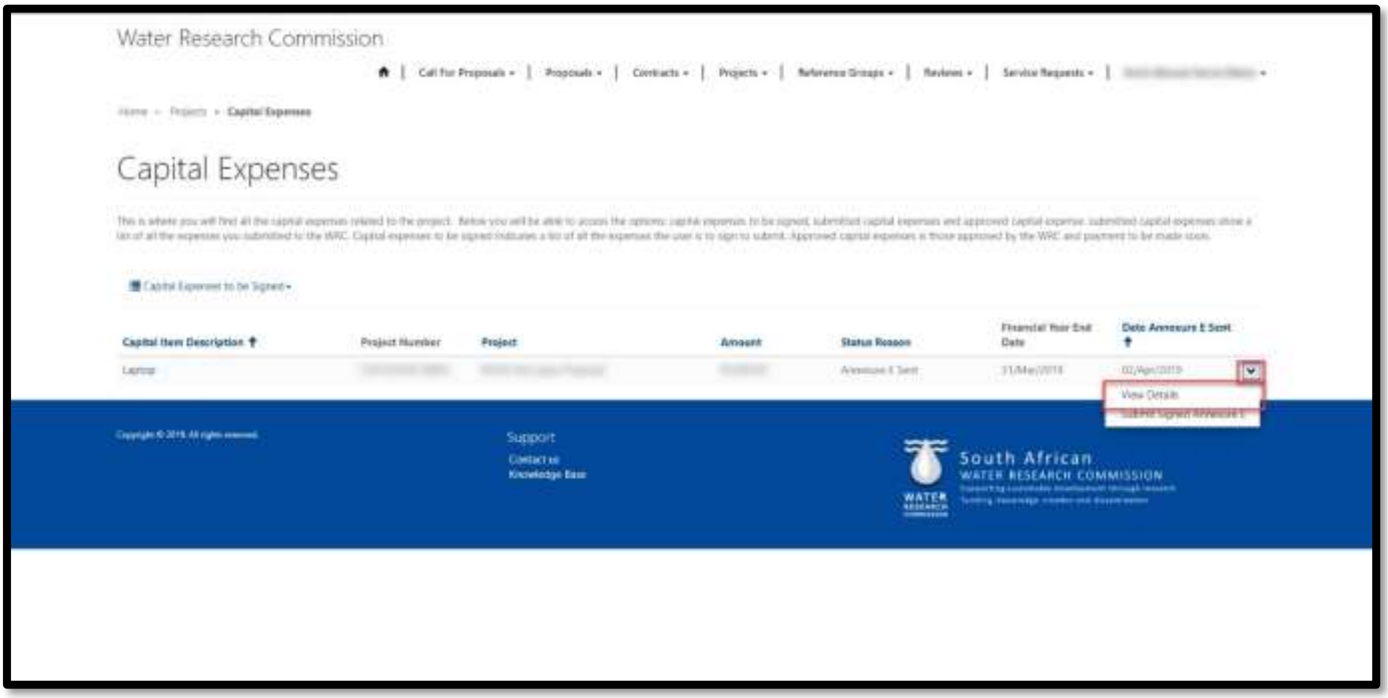


Capital Expenses to be Signed View

1. To view the *Capital Expenses to be Signed* view, on the *Capital Expenses* page, click on the view list heading and select the **Capital Expenses to be Signed** option.



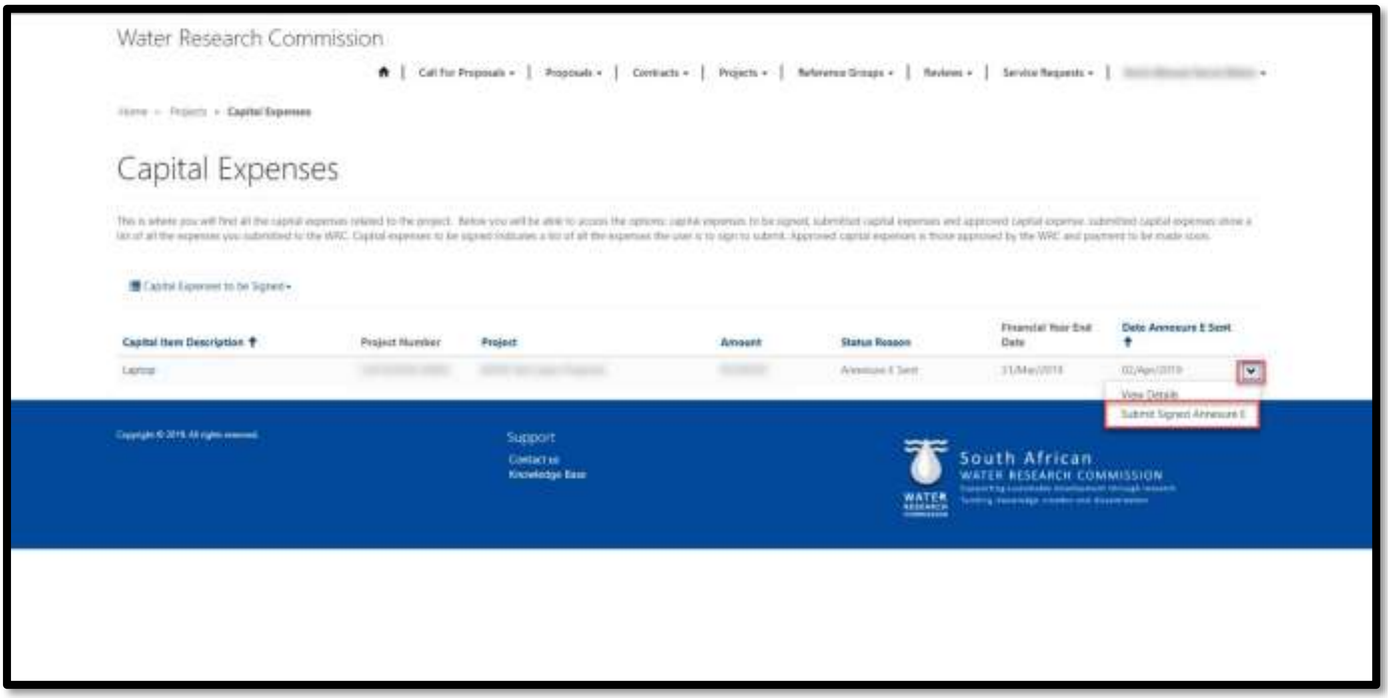
2. The *Capital Expenses to be Signed* view displays a list of capital expense records for active projects where you are the *Project Leader*, and the *Annexure E* document for the capital expense has been made available to you to be signed and submitted to the WRC.
3. To view the details of the capital expense, click on the arrow on the far right of the capital expense record and select the **View Details** option. This will open the *Capital Expense Details* window.



4. In the *Capital Expense Details* window, you can view the details of the capital expense, and view or download the attached *Annexure E* document.

5. It is required for the *Contract Signatory* for the project to sign and initial the copy of the *Annexure E* document, then you as the *Project Leader* to upload the file with the scanned copy of the document to this capital expense record, and then submit it to the WRC.
6. You are also required to send a signed and initialed hard copy of the *Contract Amendment* document to the WRC via courier.
7. You can upload and submit scanned copy of the *Annexure* document by going back to the *Capital Expenses to be Signed* view as detailed in **steps #1 and #2** above, clicking arrow on the far right of the

capital expense record, and selecting the **Submit Signed Annexure E** option. This will open the *Submit Annexure E* window.

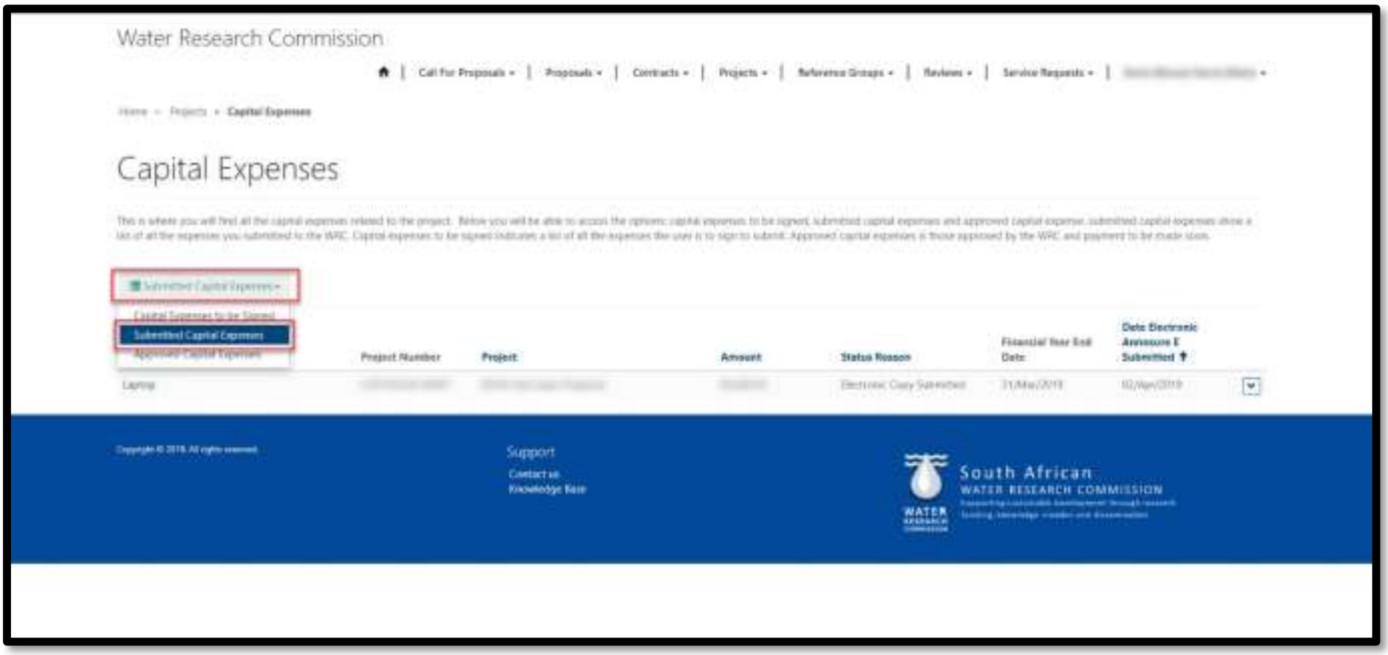


8. In the *Submit Annexure E* window, you can upload the document, save your changes, which will close the window.
9. Re-open this window and submit the *Annexure E* the document to the WRC by clicking on the **Submit Signed Annexure E to WRC** button at the bottom of the window.

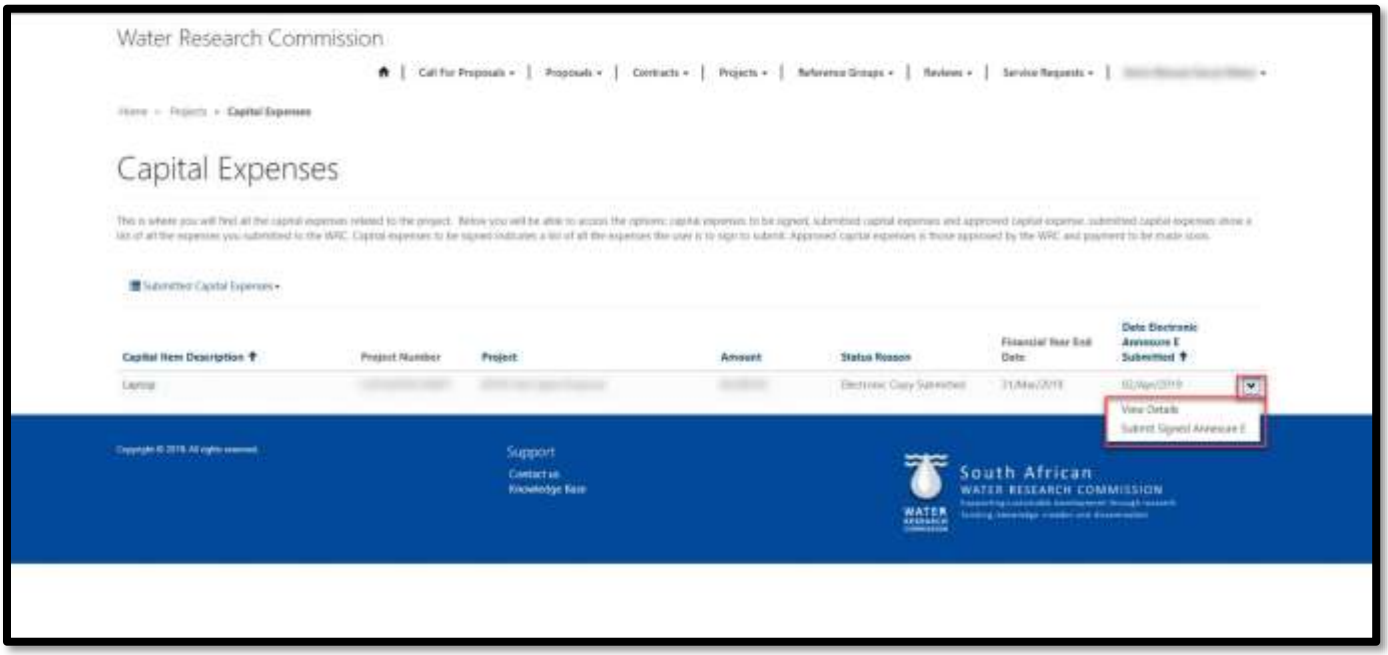
10. **Note**: Please be sure to save any changes made to this contract amendment record by clicking the **Save** button at the bottom of the window before you submit the uploaded *Annexure E* document to the WRC.

Submitted Capital Expenses View

1. To view the *Submitted Capital Expenses* view, on the *Capital Expenses* page, click on the view list heading and select the **Submitted Capital Expenses** option.

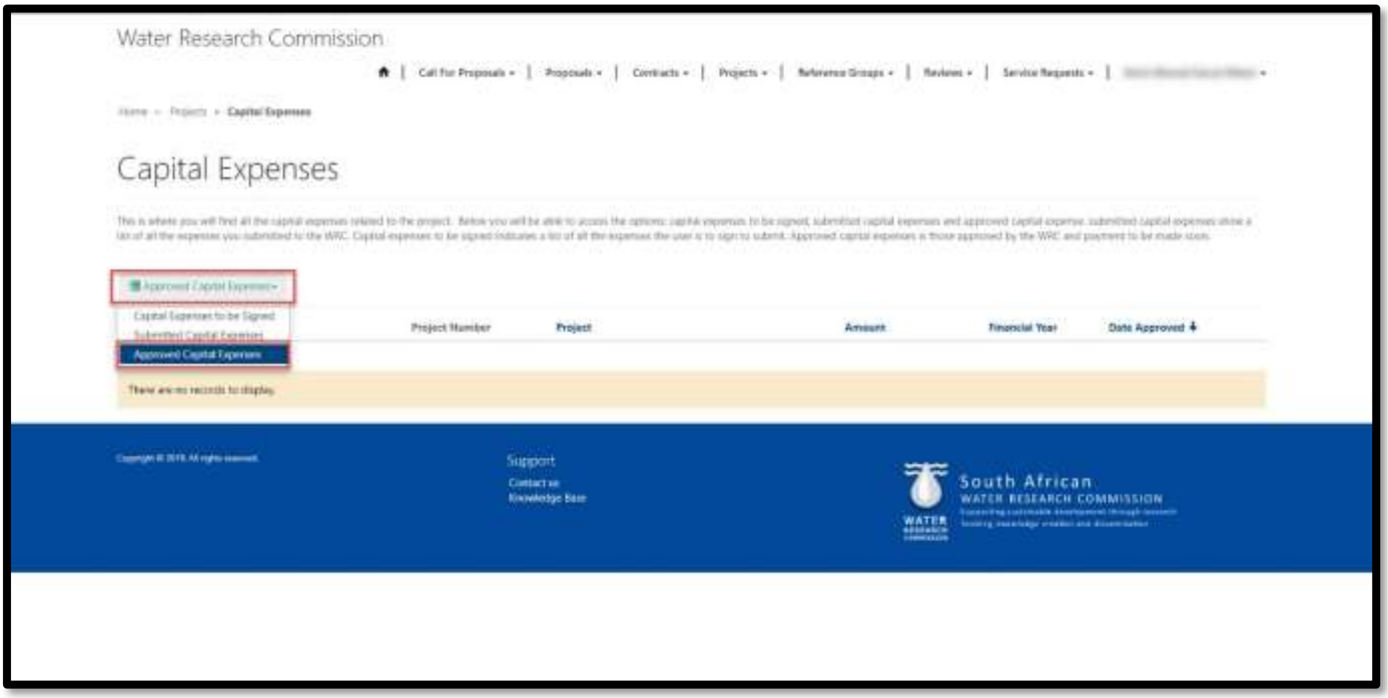


2. The *Submitted Capital Expenses* view displays a list of capital expense records for active projects where the *Annexure E* document has been submitted to the WRC for approval.
3. You can track the status of the submitted capital expense by checking the *Status Reason* column for each capital expense record in the list.
4. You can view the details of the capital expense by clicking on the arrow on the far right of the capital expense record and selectin the **View Details** option.
5. If the WRC rejects the electronic copy of the *Annexure E* document that was submitted, you can re-submit *Annexure E* document by clicking on the arrow on the far right of the capital expense record, selecting the **Submit Signed Annexure E** option and following the step #7 to step #10 as detailed in the [Capital Expenses to be Signed View](#) section above.

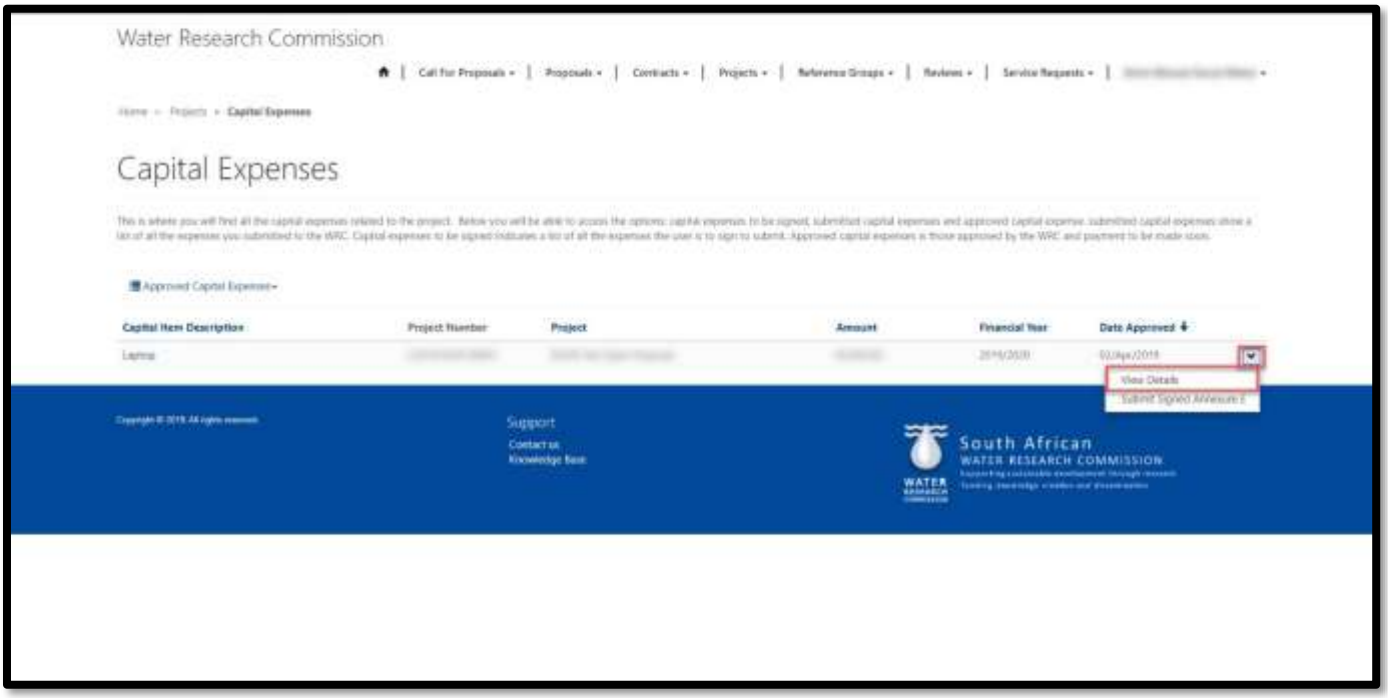


Approved Capital Expenses View

1. To view the *Submitted Capital Expenses* view, on the *Capital Expenses* page, click on the view list heading and select the **Submitted Capital Expenses** option.

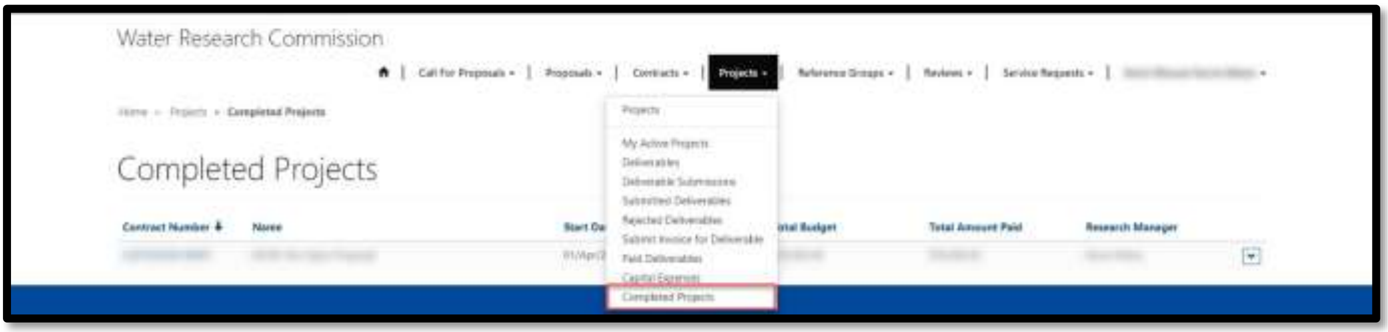


2. The *Approved Capital Expenses* view displays a list of capital expense records where the electronic and hard copes *Annexure E* document submitted by you, the *Project Leader* of the project, have been approved and finalized by the WRC.
3. To view the details of the capital expense, click on the arrow of the far right of the capital expense record and select the **View Details** option. This will open the *Capital Expense Details* window.

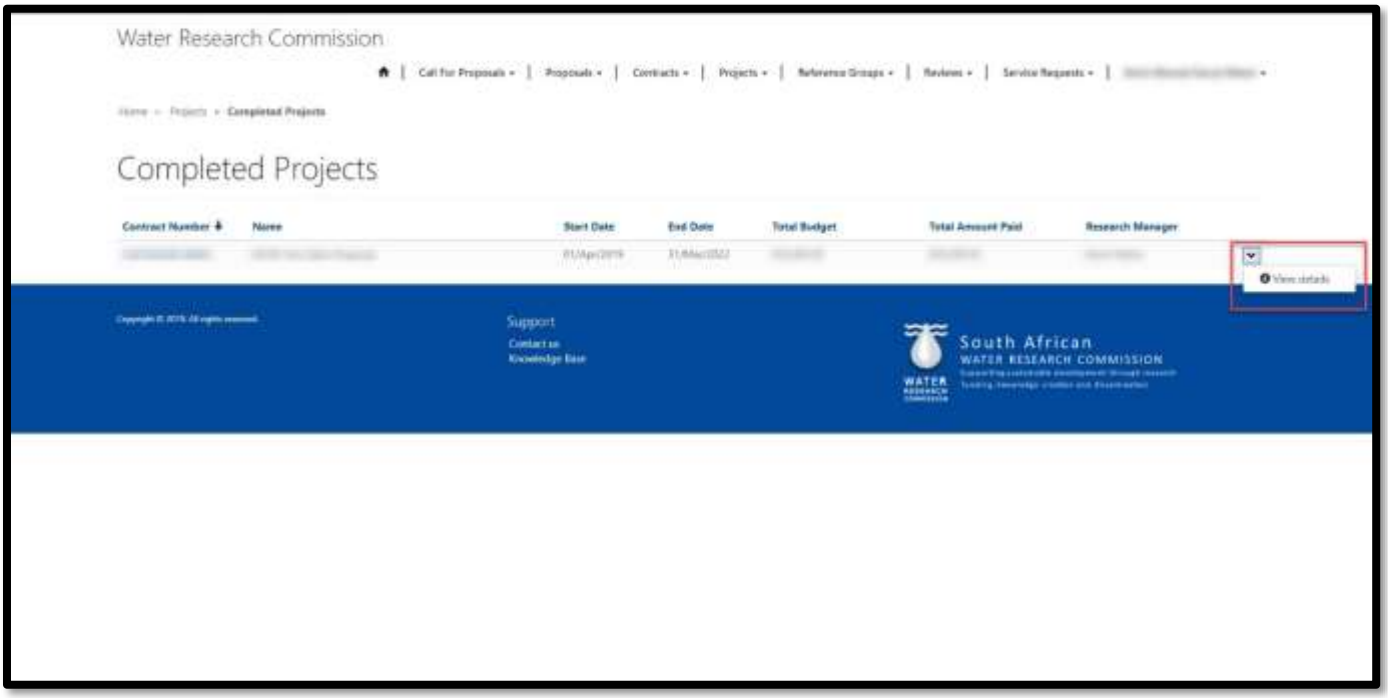


Completed Projects Page

1. To view the *Completed Projects* page, click on the **Projects** option in the Navigation Menu and then click on **Completed Projects**.



2. The *Completed Projects* page displays a list of projects that have been finalized by closed by the WRC.
3. To view the details of the completed project, click on the arrow on the far right of the project record and select the **View details** option (see screenshot on the next page). This will re-direct you to the *Project Details* page.


Water Research Commission
Call for Proposals
Proposals
Contracts
Projects
Reference Groups
Reviews
Service Requests
Completed Projects
Contract Number
Name
Start Date
End Date
Total Budget
Total Amount Paid
Research Manager
View details
Support
Contact us
Knowledge Base
South African
WATER RESEARCH COMMISSION

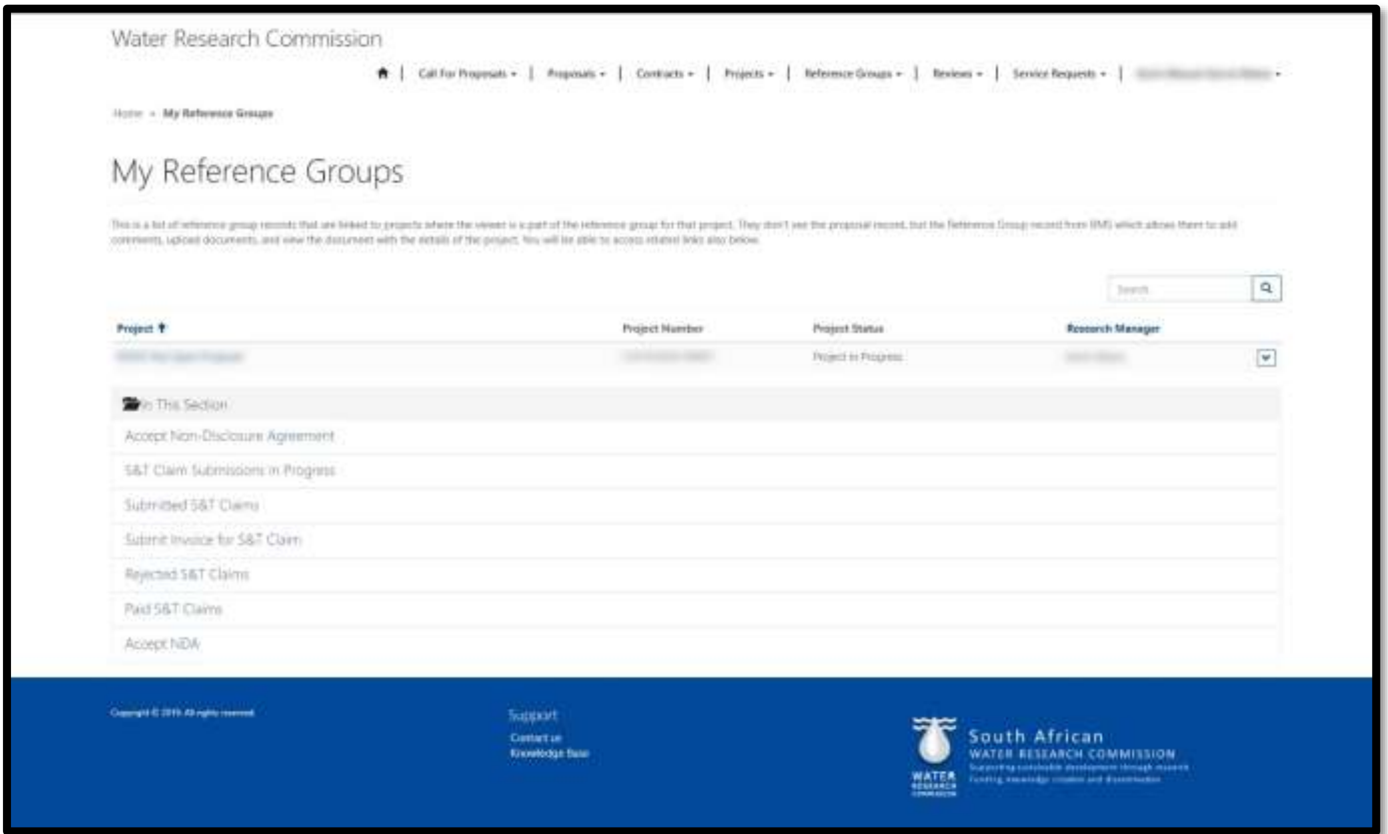
Reference Groups

This section details the pages and actions found in the **Reference Groups** section in the Navigation Menu of the BMS Portal.

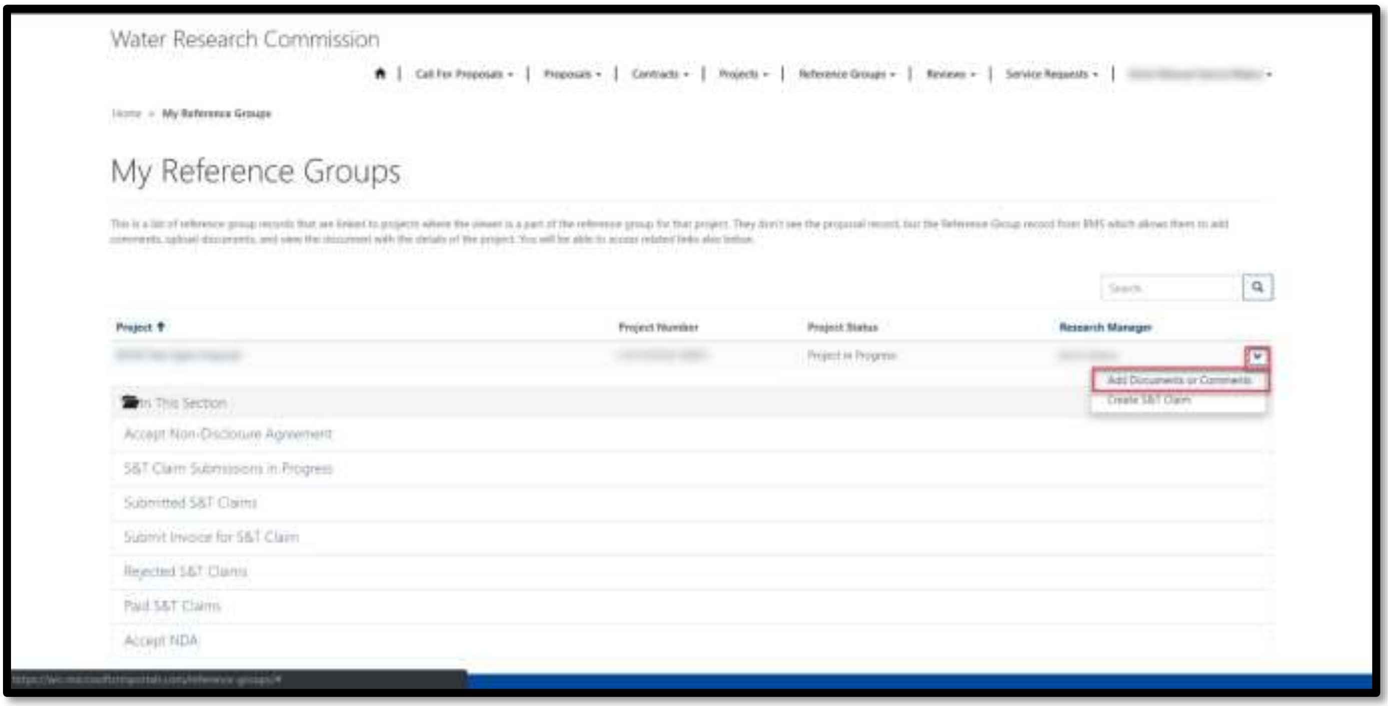
My Reference Groups Page

1. To view the *My Reference Groups* page, click on the **Reference Groups** option in the Navigation Menu and then click on **Reference Groups**.

2. The *My Reference Groups* page displays a list of reference group records for WRC funded projects where you have accepted the WRC's invitation to be a member of the reference group for the project.
3. The *My Reference Groups* page also contains links to the related pages that display information regarding reference groups to which you have been invited to be a part of by the WRC. To view the related pages, you can click on the links under the **In This Section** section at the bottom of the form.



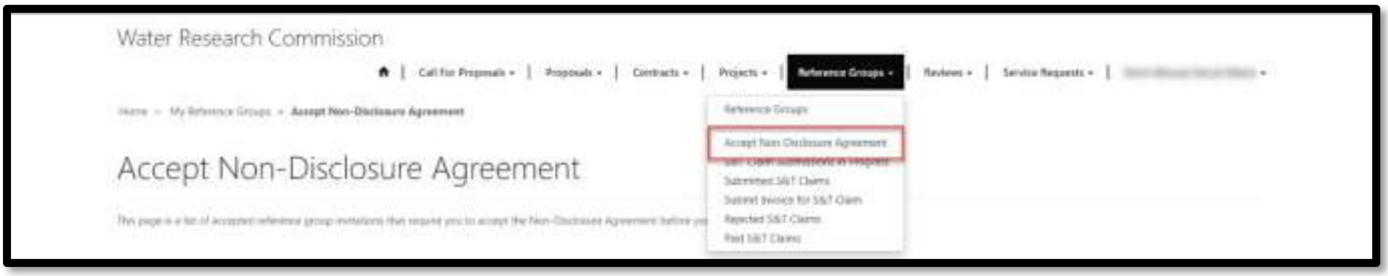
4. To upload any documents or add any comments as requested by the WRC *Research Manager* for the project, click on the arrow on the far right of the reference group record and select the **Add Documents or Comments** option. This will open the *Reference Group Project Details* window.



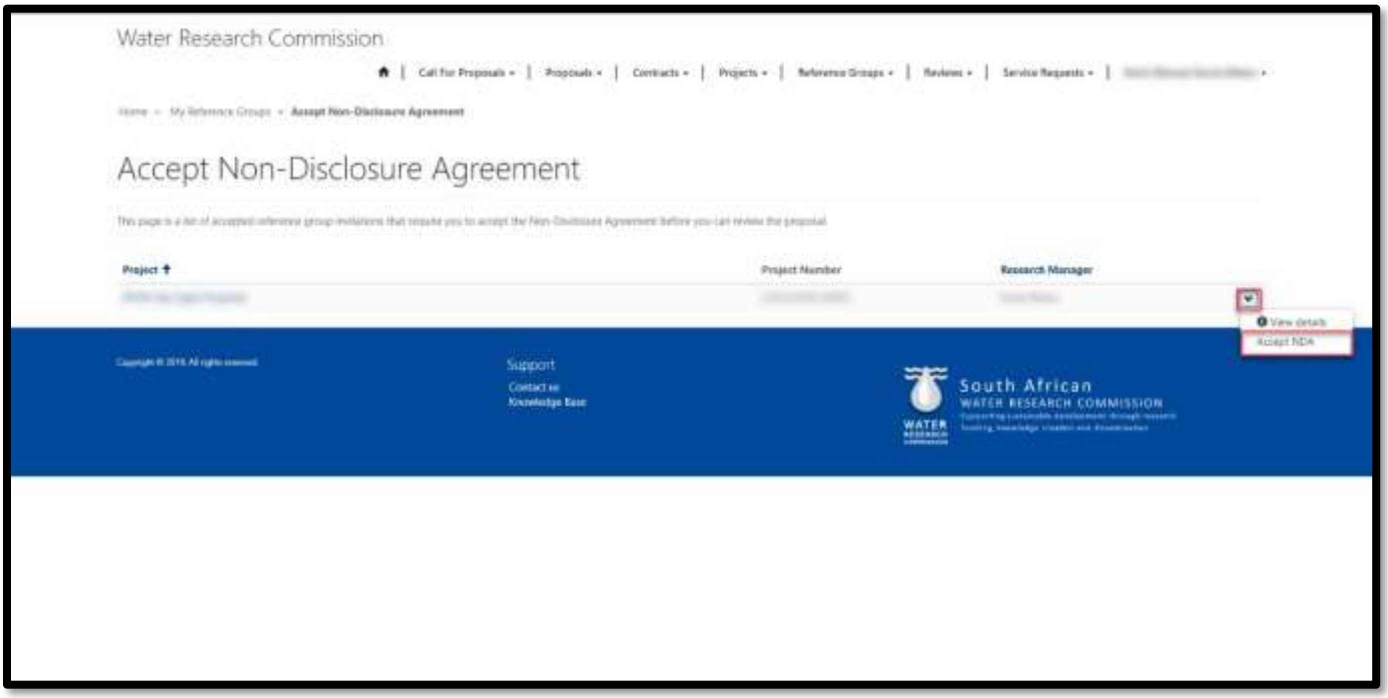
5. In the *Reference Group Project Details* window, you can view and download the attached *Proposal Submission for RG Member* document, which contains the full details of the project.
6. In this window, you can also add any comments or attach any documents and save your changes by clicking on the **Save** button at the bottom of the window. The WRC *Research Manager* for the project will be able to view the comments and uploaded documents.

Accept Non-Disclosure Agreement Page

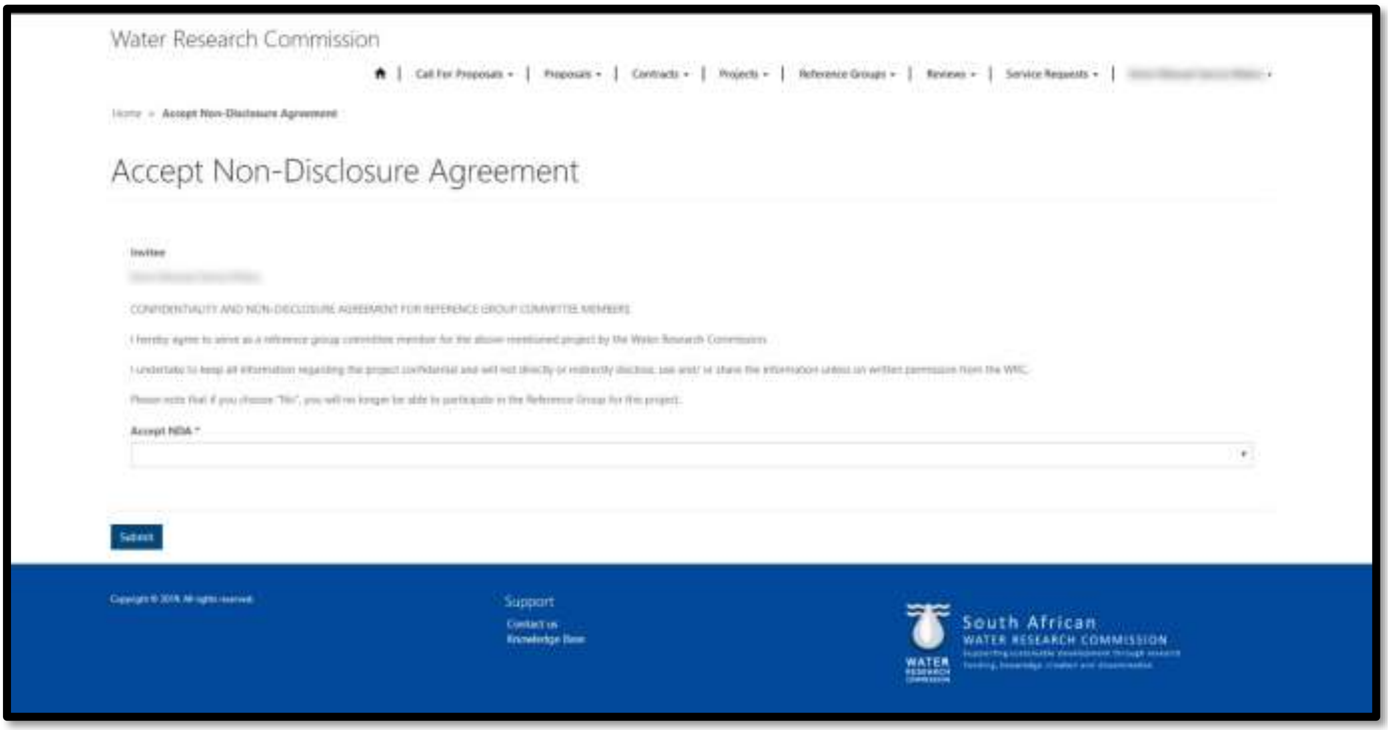
1. To view the *Accept Non-Disclosure Agreement* page, click on the **Reference Groups** option in the Navigation Menu and then click on **Accept Non-Disclosure Agreement**.



2. The *Accept Non-Disclosure Agreement* page displays a list of non-disclosure agreement records that need to be accepted by you, having been invited by the WRC to participate in the reference group.
3. If you accepted the email invitation from the WRC to participate in the reference group, you will need to accept the non-disclosure agreement before you can be a member of the reference group and view the project information.
4. **Note**: The non-disclosure agreement is only displayed on this page if you chose the *Accept Invitation* option in the email invitation received from the WRC. If you chose the *Reject Invitation* option in the email invitation, you do not need reject the non-disclosure agreement.
5. To view more information, click on the arrow to the far right of the non-disclosure agreement record and select the **View details** option. This will open the *Reference Group Details* window.
6. To accept the non-disclosure agreement, click on the arrow to the far right of the non-disclosure agreement record and select the **Accept NDA** option. This will re-direct you to the *Accept Non-Disclosure Agreement Form* page.



7. On the *Accept Non-Disclosure Agreement Form* page, you can read the agreement, select your choice between yes or no in the *Accept NDA* field, and submit your response to the WRC by clicking on the **Submit** button at the bottom of the page. This will re-direct you to the *My Reference Group* page.

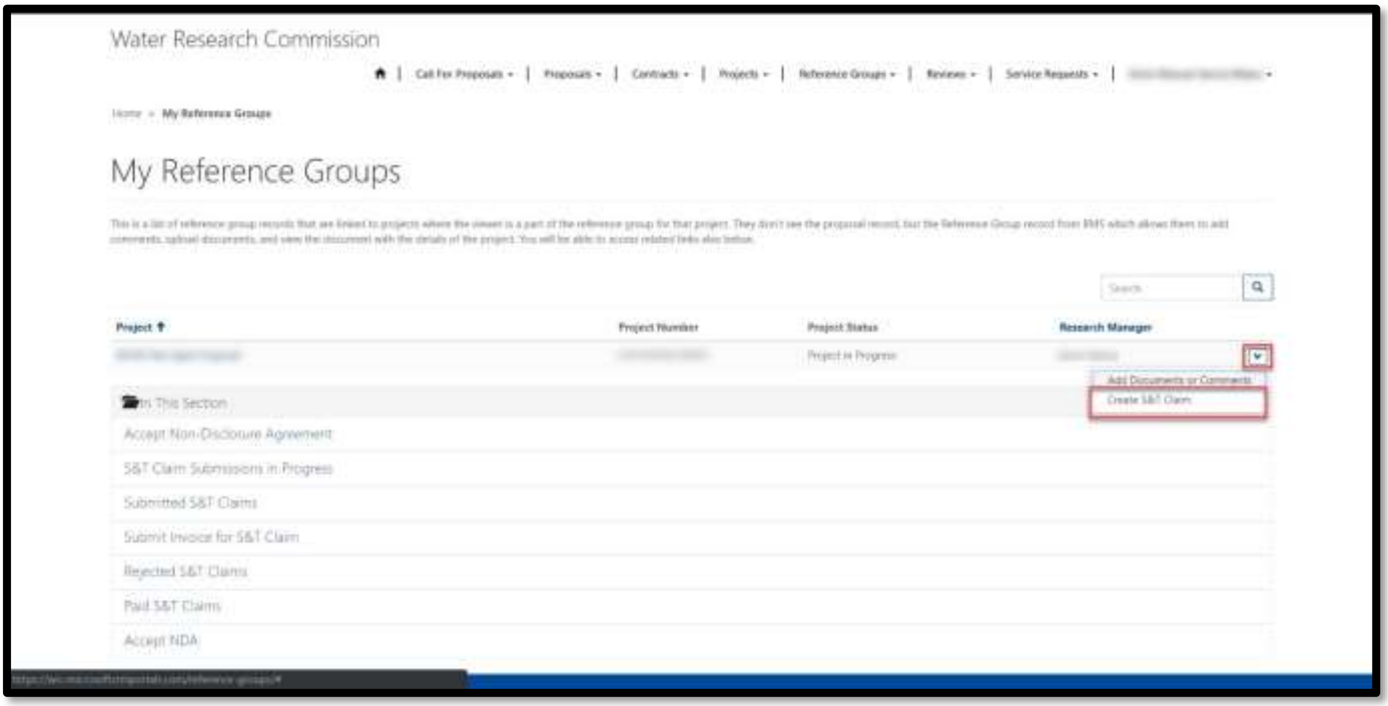


8. **Note**: If you chose to accept the non-disclosure agreement, you will be able to view the details of the project by following the steps in the [My Reference Groups]() page section of this document. If you chose not to accept the non-disclosure agreement, you will no longer be able to participate in the reference group for this project and it will not be displayed on the *My Reference Groups* page.

Create a Subsistence and Travel (S&T) Claim

1. To create an S&T claim for reimbursement of subsistence and travel expenses related to your attendance of a WRC reference group meeting, navigate to the *My Reference Groups* page.

2. From the *My Reference Groups* page, click the arrow on the far right of the project for which you attended the meeting, and select the **Create S&T Claim** option. This will re-direct you to the *Create S&T Claim* page.



3. On the *Create S&T Claim* page, you will need to enter at least the mandatory fields as indicated by the ***** asterisk symbol before you can create the S&T claim record.
4. Once you finish capturing the mandatory fields, create the S&T claim record by clicking on the **Save** button at the bottom of the page (see screenshot on the next page).

Water Researcr Commission

Create S&T Claim

Claim Information

SANK DETAILS

Subsistence AOowance

Transport

AIRFARE

CARRENTAL

PRNATE CAR

Accommodation

Meals

BREAKFAST

IUNCH

DINNER

Other Expenses

Documents

Support

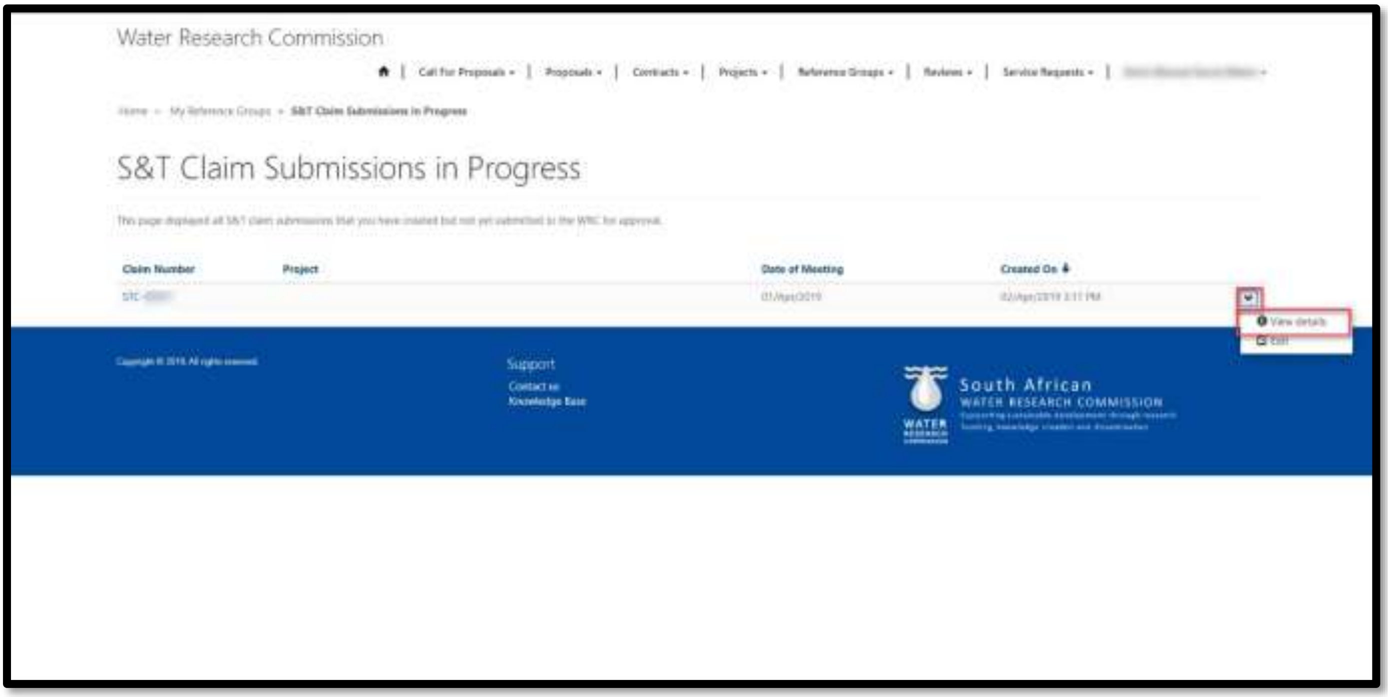
South African
WATER RESEARCH COMMISSION

5. You will be re-directed to the S&T Claim Submissions in Progress page where you can continue to edit your S&T claim record and add related *Accommodation* and *Other* expenses.
6. **Note**: You will only be able to add individual *Accommodation* and *Other Expense* records to the S&T claim after it has been created.

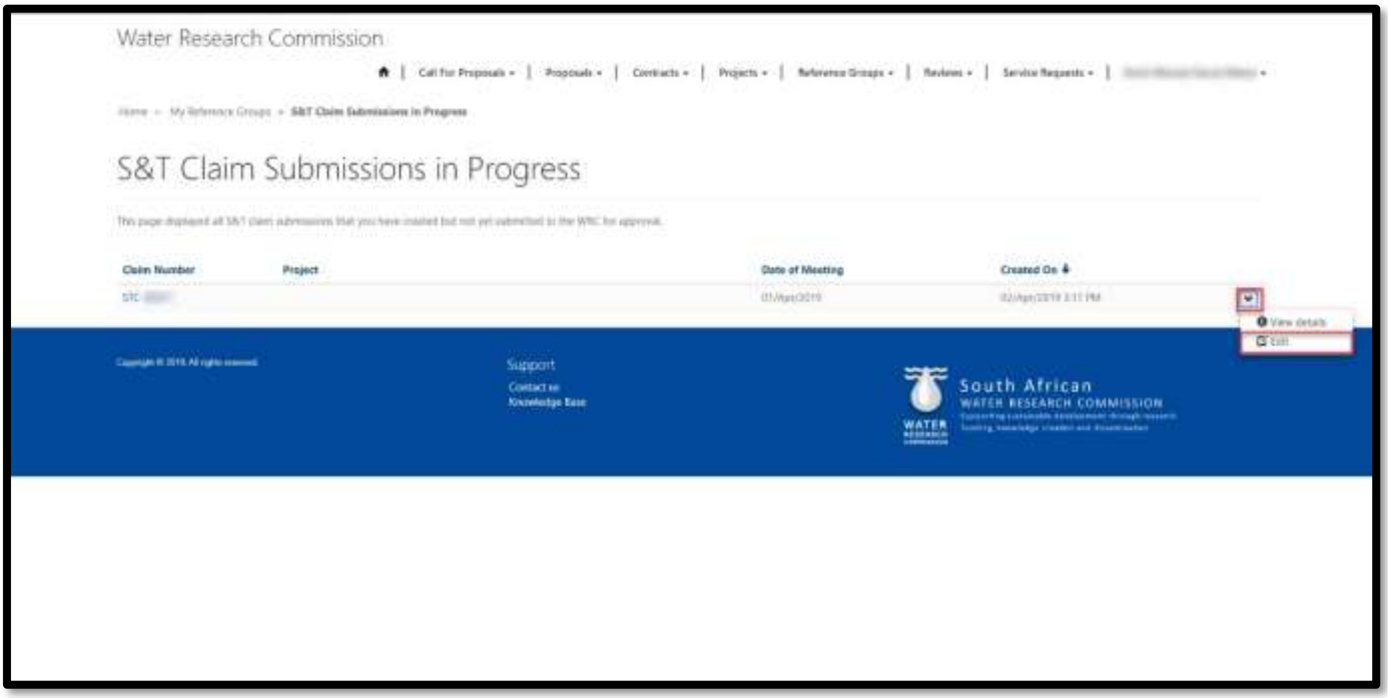
S&T Claim Submissions in Progress Page

1. To view the *S&T Claim Submissions in Progress* page, click on the **Reference Groups** option in the Navigation Menu and then click on **S&T Claim Submissions in Progress**.

2. The *S&T Claim Submissions in Progress* page displays a list of S&T claims that you as the *Reference Group Member* for the active project have created and are editing but have not yet been submitted to the WRC for approval.
3. To view a read-only page with the details of the S&T claim that you have captured so far, click on the arrow on the far right of the S&T claim record and select the **View details** option. This will re-direct you to the *S&T Claim Details* page.



4. To edit the S&T claim, click on the arrow on the far right of the S&T claim record and select the **Edit** option. This will re-direct you to the *Edit S&T Claim* page.



5. On the *Edit S&T Claim* page, you can edit the claim information, upload documents, and add related *Accommodation* and *Other* expenses using the buttons on the form. Be sure to <u>save</u> your changes often using the **Save** button at the bottom of the form (see screenshot on the next page).

Water Research Commission

Edit S&T Claim

BANK DETAILS

Subsistence Allowance

Transport

AIRFARE

CAR RENTAL

PRIVATE CAR

Accommodation

Meals

BREAKFAST

LUNCH

DINNER

Other Expenses

+W

Documents

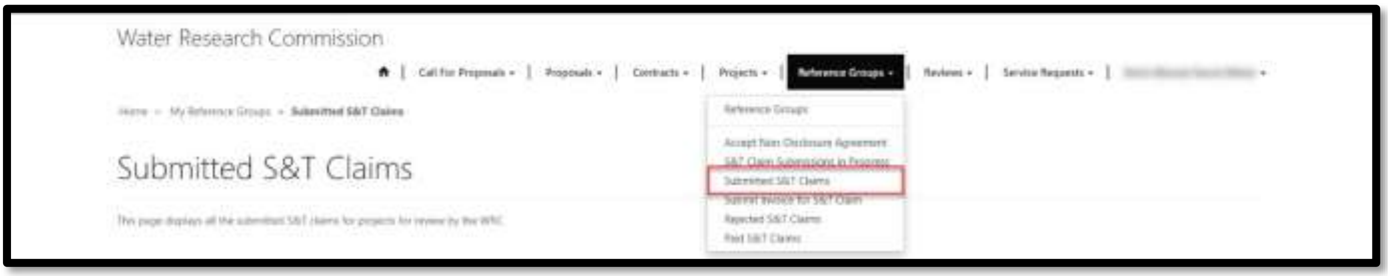
Submit an S&T Claim to WRC

1. When you are ready to submit your completed S&T claim to the WRC for approval, open the *Edit S&T Claim* page as detailed in **step #4 and step #5** in the [S&T Claim Submissions in Progress]() section above, and click on the **Submit to WRC** button at the bottom of the page. You will be re-directed to the *Submitted S&T Claims* page.

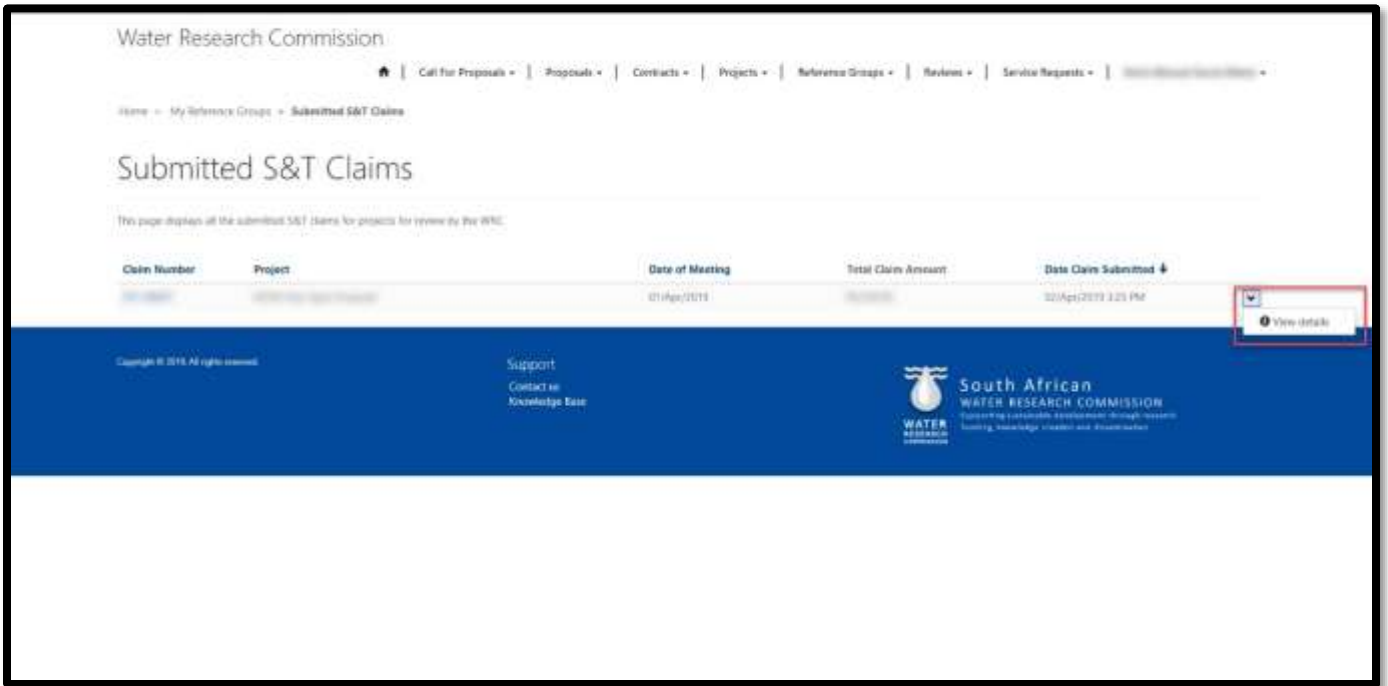
2. **Note**: Once the S&T claim is submitted to the WRC, you will not be able to edit the details of the claim as it will no longer appear in the list of S&T claims on the *S&T Claim Submissions in Progress* page.

Submitted S&T Claims Page

1. To view the *Submitted S&T Claims* page, click on the **Reference Groups** option in the Navigation Menu and then click on **Submitted S&T Claims**.



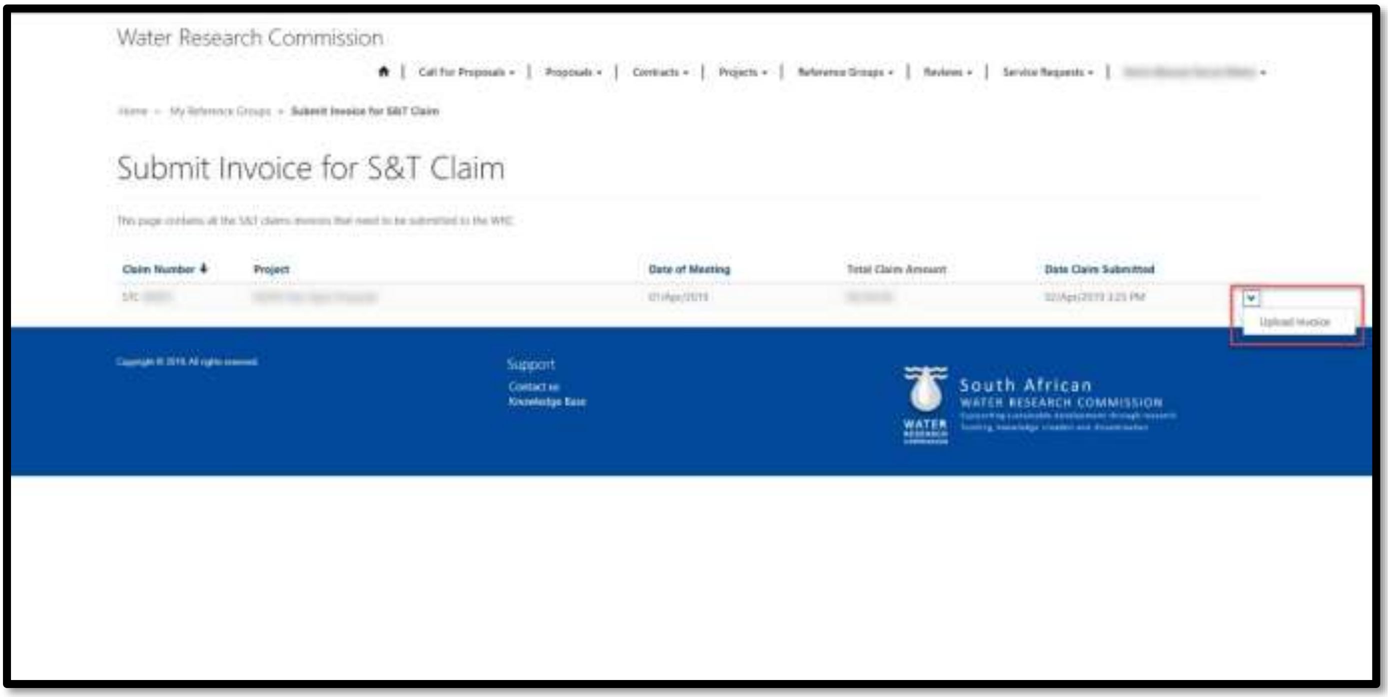
2. The Submitted S&T Claims page displays a list of S&T claim records that you as a Reference Group Member for the project have submitted to the WRC and are pending approval.
3. To view the details of the submitted S&T claim, click on the arrow on the far right of the S&T claim record and select the **View details** option. This will re-direct you to the *S&T Claim Details* page.



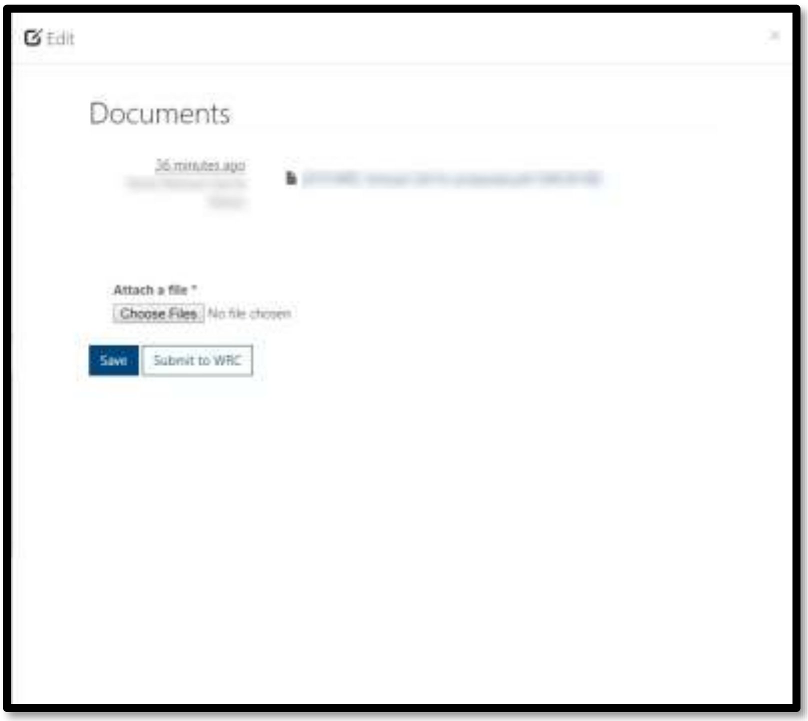
Submit Invoice for S&T Claim Page

1. To view the *Submit Invoice for S&T Claim* page, click on the **Reference Groups** option in the Navigation Menu and then click on **Submit Invoice for S&T Claim**.

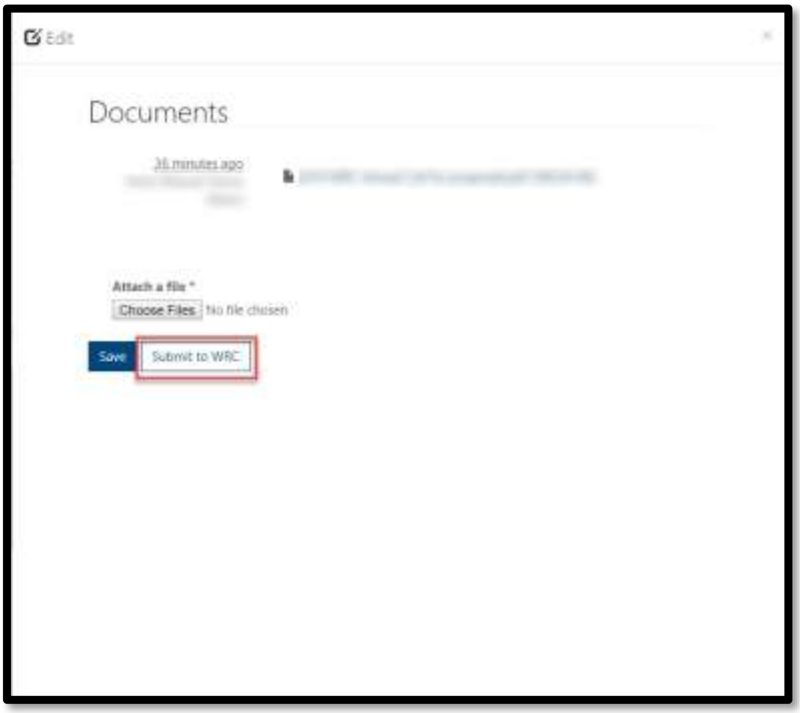
2. The *Submit Invoice for S&T Claim* page displays a list of S&T claim records where the WRC has requested that you submit an invoice for the S&T claim.
3. To upload and submit the invoice for the S&T claim, click on the arrow on the far right of the S&T claim record and select the **Upload Invoice** option. This will open the *Upload S&T Claim Invoice* window.



4. In the *Upload S&T Claim Invoice* window, you can upload the invoice document to the S&T claim by choosing under the *Attach a file* field. It is mandatory to attach a file before you can click the **Save** button at the bottom of the window.
5. **Note**: Please remember to save the uploaded invoice first by using the **Save** button at the bottom of the window before you submit it to the WRC for approval. Saving the attachment will close the *Upload S&T Claim Invoice* window.



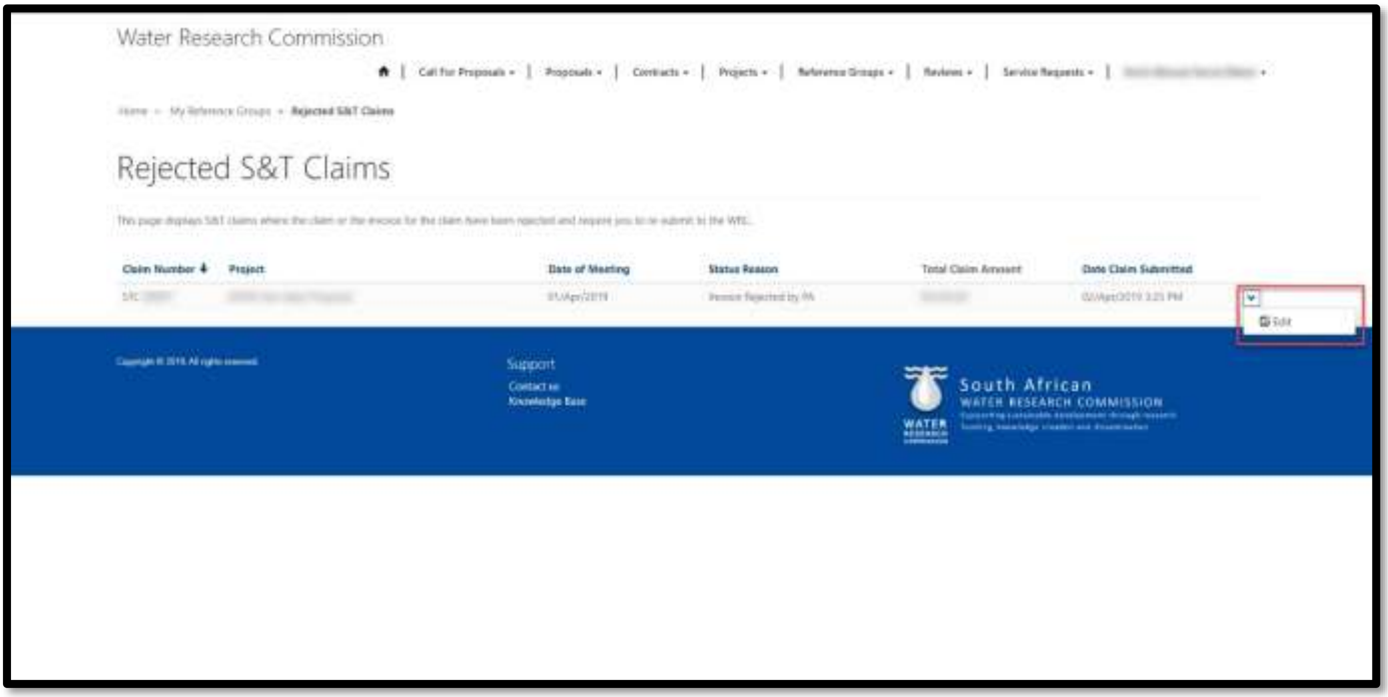
6. To submit the uploaded invoice to the WRC for approval, re-open the *Submit S&T Claim Invoice* window and click the **Submit to WRC** button. This will re-direct you to the Submitted S&T Claims page.



Rejected S&T Claims Page

1. To view the *Rejected S&T Claims* page, click on the **Reference Groups** option in the Navigation Menu and then click on **Rejected S&T Claims**.

2. The *Rejected S&T Claims* page displays a list of S&T claims that you submitted to the WRC for approval but were rejected.
3. You can edit the rejected S&T Claim by clicking on the arrow on the far right of the S&T claim record and selecting the **Edit** option. You will be re-directed to the *Edit S&T Claim* page.



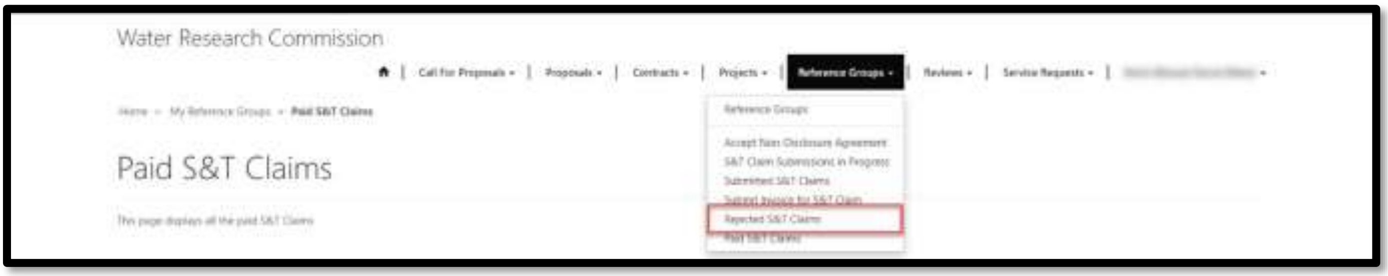
4. You can edit the S&T claim as detailed in **step #4 to step #5** in the [S&T Claim Submissions in Progress Page] section of this document. Remember to save any changes made to the S&T claim before re-submitting it to the WRC for approval.

3. To submit the rejected S&T claim back to the WRC for approval, open the *Edit S&T Claim* page as detailed in the previous step, and click on the **Submit to WRC** button at the bottom of the page. You will be re-directed to the *Submitted S&T Claims* page.

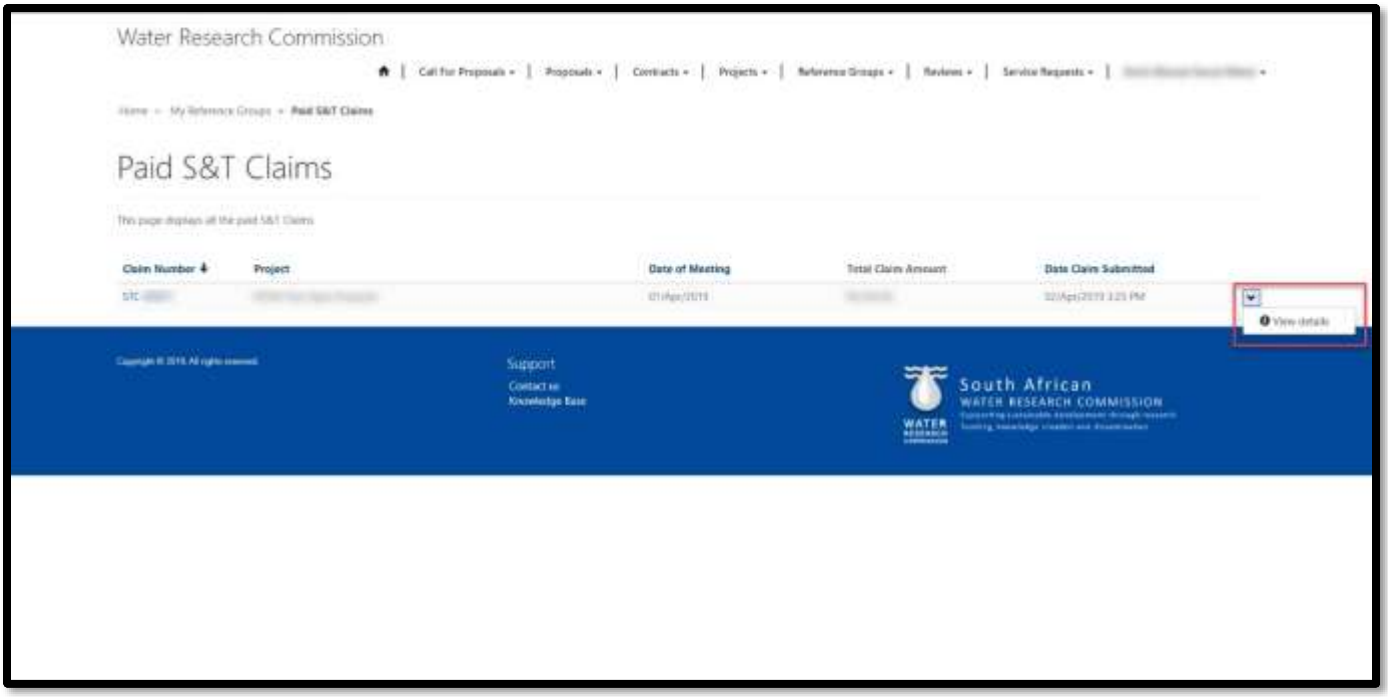
4. **Note**: Once the S&T claim is submitted to the WRC, you will not be able to edit the details of the claim as it will no longer appear in the list of rejected S&T claims on the *Rejected S&T Claims* page.

Paid S&T Claims

1. To view the *Paid S&T Claims* page, click on the **Reference Groups** option in the Navigation Menu and then click on **Paid S&T Claims**.



2. The *Paid S&T Claims* page displays a list of your submitted S&T claims that the WRC has approved for payment.
3. To view the details of the approved S&T claim, click on the arrow on the far right of the S&T claim record and select the **View details** option. This will re-direct you to the *S&T Claim Details* page.



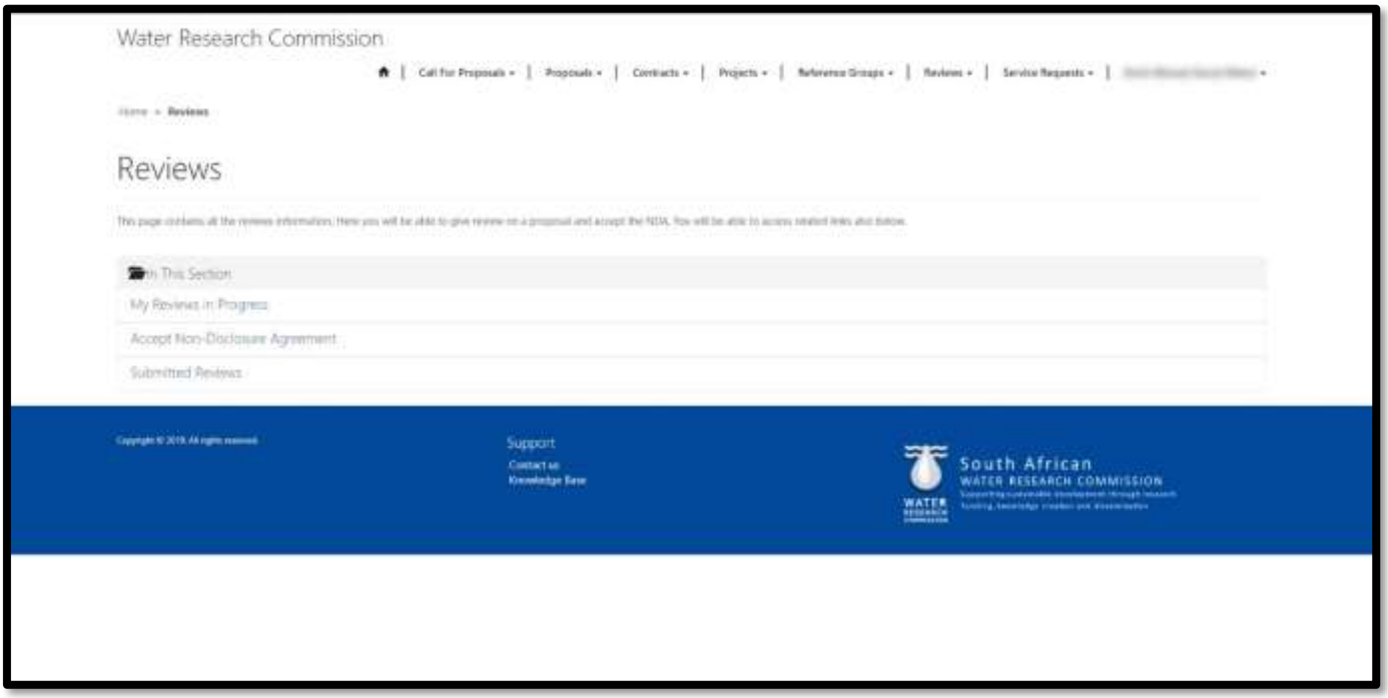
Reviews

This section details the pages and actions found in the **Reviews** section in the Navigation Menu of the BMS Portal.

Reviews Page

1. To view the *Reviews* page, click on the **Reviews** option in the Navigation Menu and then click on **Reviews**.

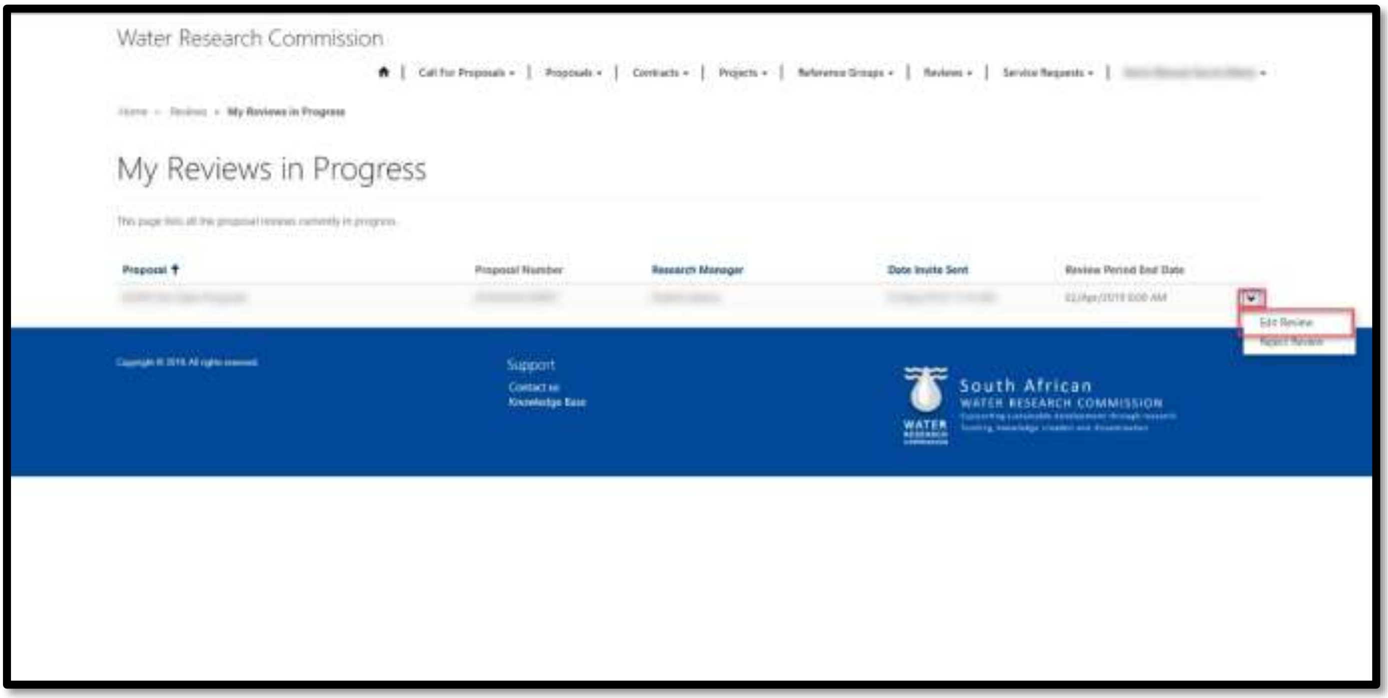
2. The *Reviews* page contains links to the related pages that display information regarding reviews that the you have been invited to complete as a *Reviewer* for proposals that the WRC is considering to fund. To view the related pages, you can click on the links under the **In This Section** section at the bottom of the form.



My Reviews in Progress Page

1. To view the *My Reviews in Progress* page, click on the **Reviews** option in the Navigation Menu and then click on **My Reviews in Progress**.

2. The *My Reviews in Progress* page displays a list of review records for proposals submitted to the WRC where you have accepted the WRC's invitation to review the proposal.
3. To start capturing your review of the proposal, click on the arrow on the far right of the review record and select the **Edit Review** option. You will be re-directed to the *Edit Review* page.



4. On the *Edit Review* page, you can add your scores, comments, and view or download the attached *Proposal Submission for Reviewer* document at the bottom of the page, which contains the full details of the proposal (see screenshot on the next page).

Water Research Commission

Edit Review

Review

RELEVANCE

SCIENTIFIC,ITECHPI.ICAL SOUNDNESS AND CREOISILITY

INNOJATION

KNO'NLEOGE APPUCATION/COMMERCIALISATION

KNO'NLEDGE DISSEMINATION

VALUE FOR MONEY

Support

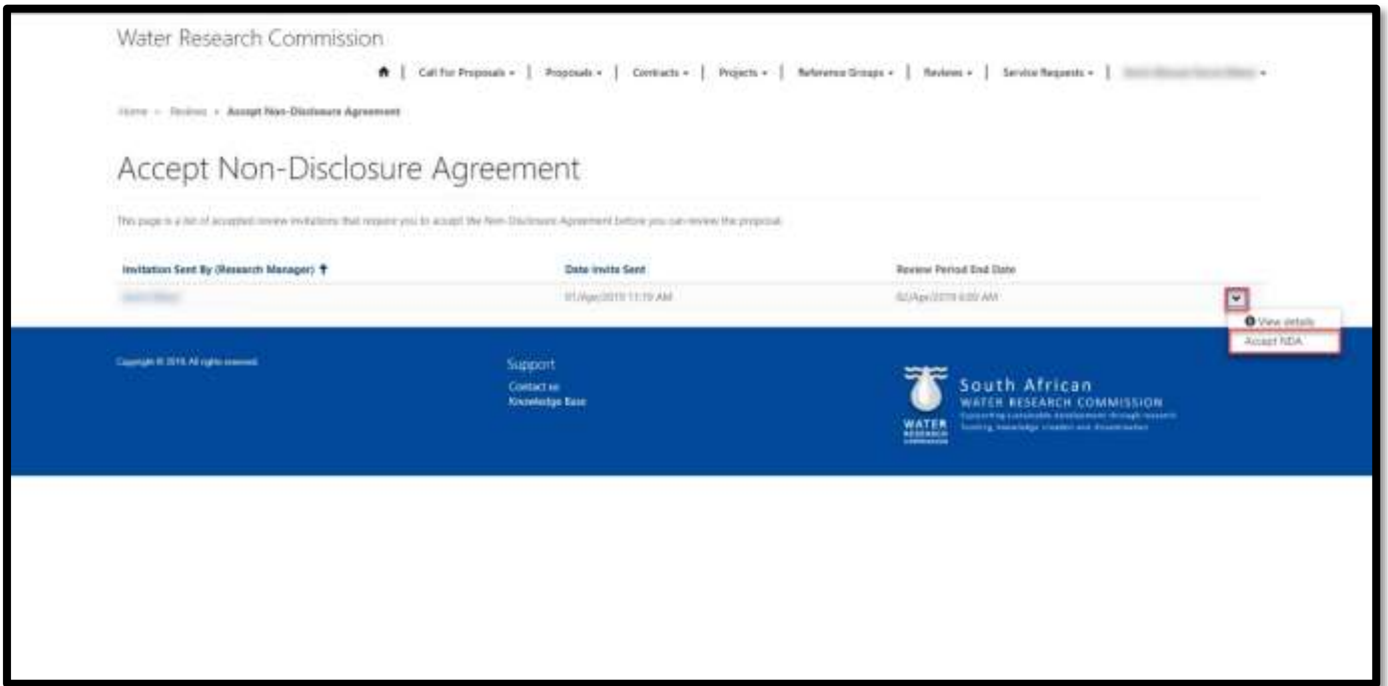
South African
WATER RESEARCH COMMISSION

5. **Note**: Please remember to <u>save</u> your changes by clicking on the **Save** button at the bottom of the window. This will re-direct you back to the *My Reviews in Progress* page. You can follow the **steps #3 and #4** above to come back and edit the review at any time.

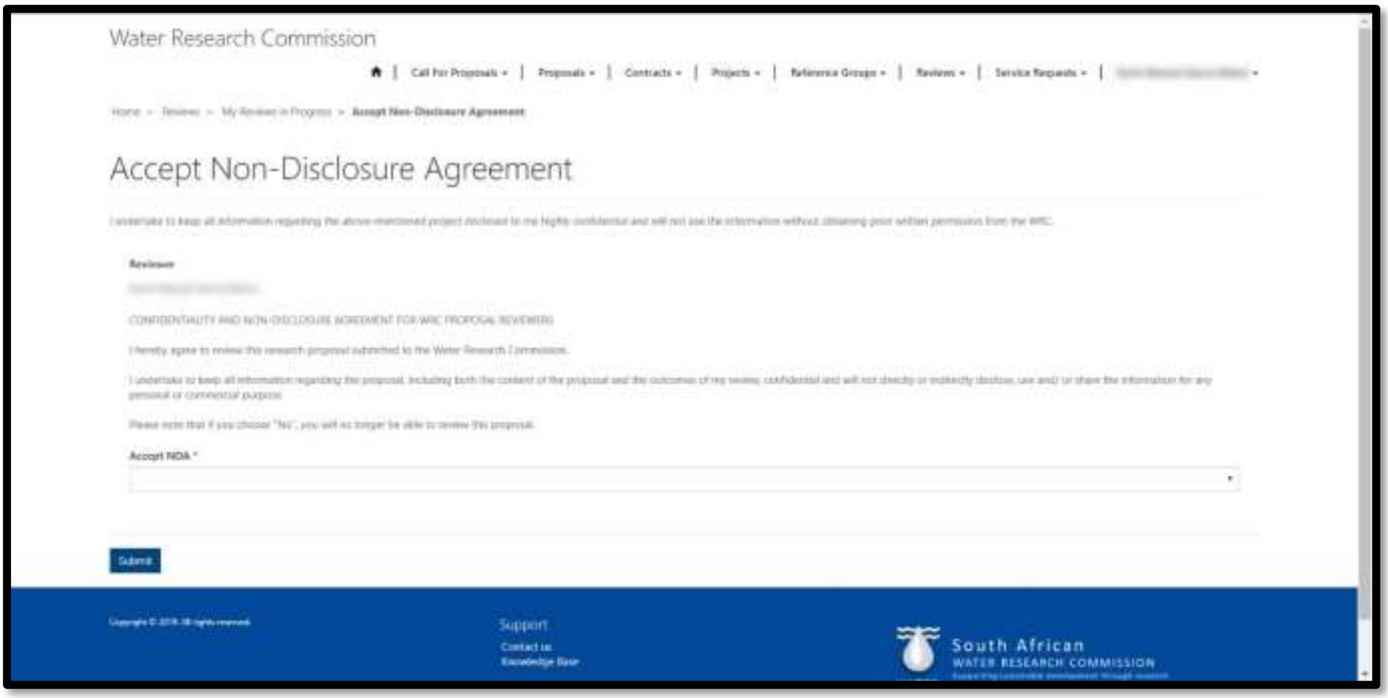
<u>Accept Non-Disclosure Agreement Page</u>

1. To view the *Accept Non-Disclosure Agreement* page, click on the **Reviews** option in the Navigation Menu and then click on **Accept Non-Disclosure Agreement**.

2. The *Accept Non-Disclosure Agreement* page displays a list of non-disclosure agreement records that need to be accepted by you, having been invited by the WRC to review the proposal.
3. If you accepted the email invitation from the WRC to review the proposal, you will need to accept the non-disclosure agreement before you can view the proposal information and review the proposal.
4. **Note**: The non-disclosure agreement is only displayed on this page if you chose the *Accept Invitation* option in the email invitation received from the WRC. If you chose the *Reject Invitation* option in the email invitation, the invitation is considered as rejected and you are not required to accept or reject the non-disclosure agreement.
5. To view more information, click on the arrow to the far right of the non-disclosure agreement record and select the **View details** option. This will open the Review *Details* window.
6. To accept the non-disclosure agreement, click on the arrow to the far right of the non-disclosure agreement record and select the **Accept NDA** option. This will re-direct you to the *Accept Non-Disclosure Agreement Form* page.



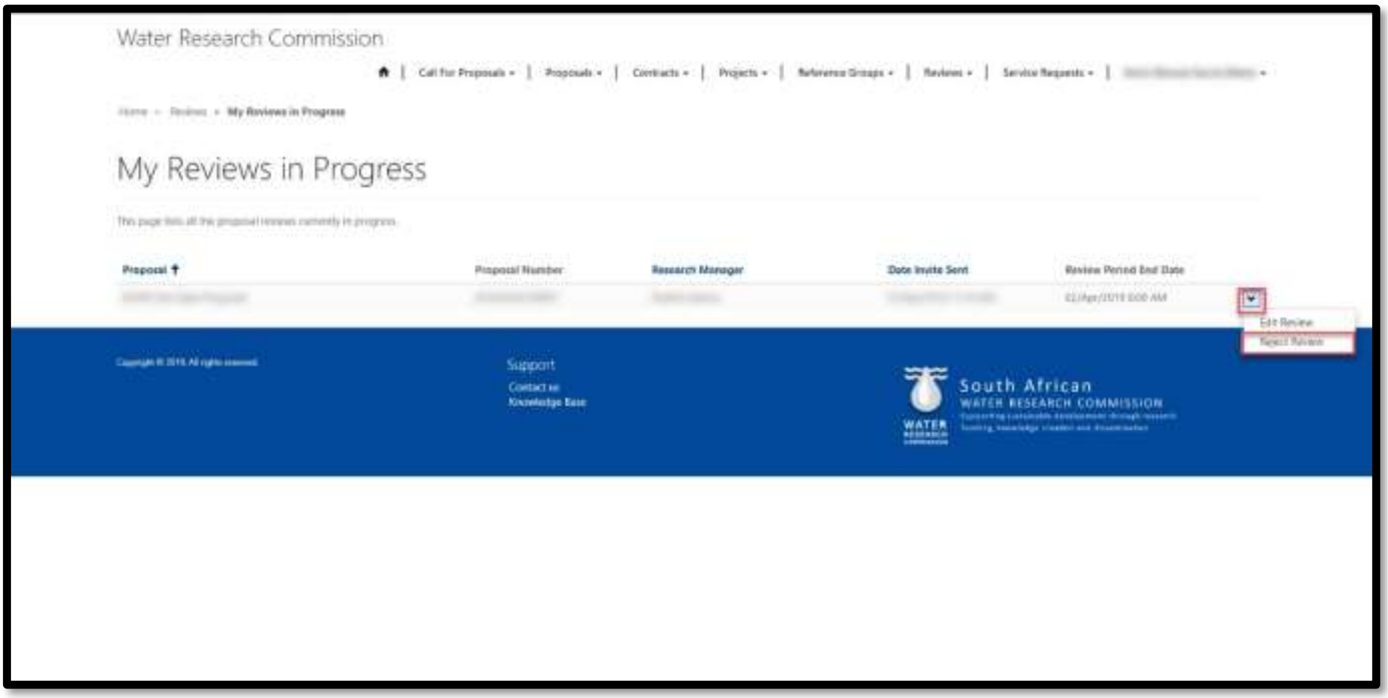
7. On the *Accept Non-Disclosure Agreement Form* page, you can read the agreement, select your choice between yes or no in the *Accept NDA* field, and submit your response to the WRC by clicking on the **Submit** button at the bottom of the page. This will re-direct you to the *My Reviews in Progress* page.



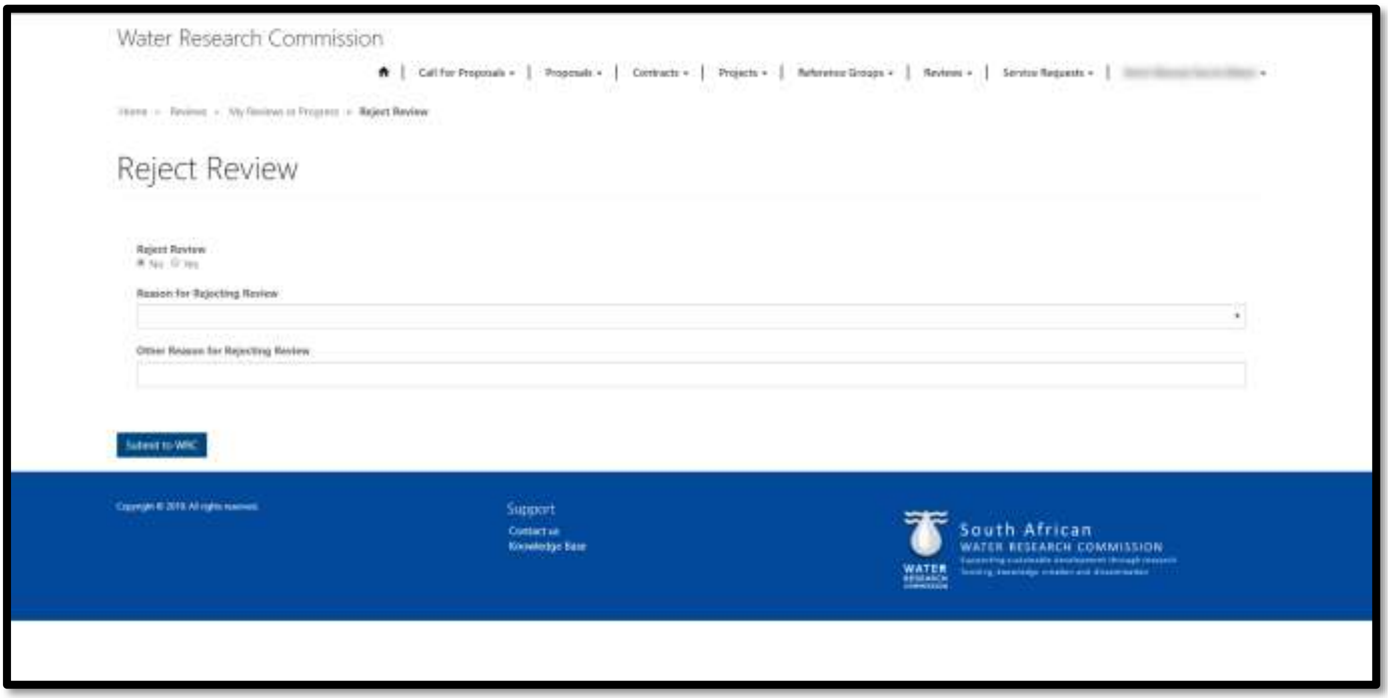
8. **Note**: If you chose to accept the non-disclosure agreement, you will be able to view the details of the proposal by following the steps in the [My Reviews in Progress Page] section of this document. If you chose not to accept the non-disclosure agreement, you will no longer be able to review the proposal and it will not be displayed on the *My Reviews in Progress* page.

Reject a Review

1. If you had previously accepted both the email invitation and the non-disclosure agreement to review a proposal for the WRC, but you are now no longer able to complete the review, you need to notify the WRC by rejecting the review request.
2. To reject the review, navigate to the *My Reviews in Progress* page, click on the arrow on the far right of the review you need to reject, and select the **Reject Review** option. You will be re-directed to the *Reject Review* page.



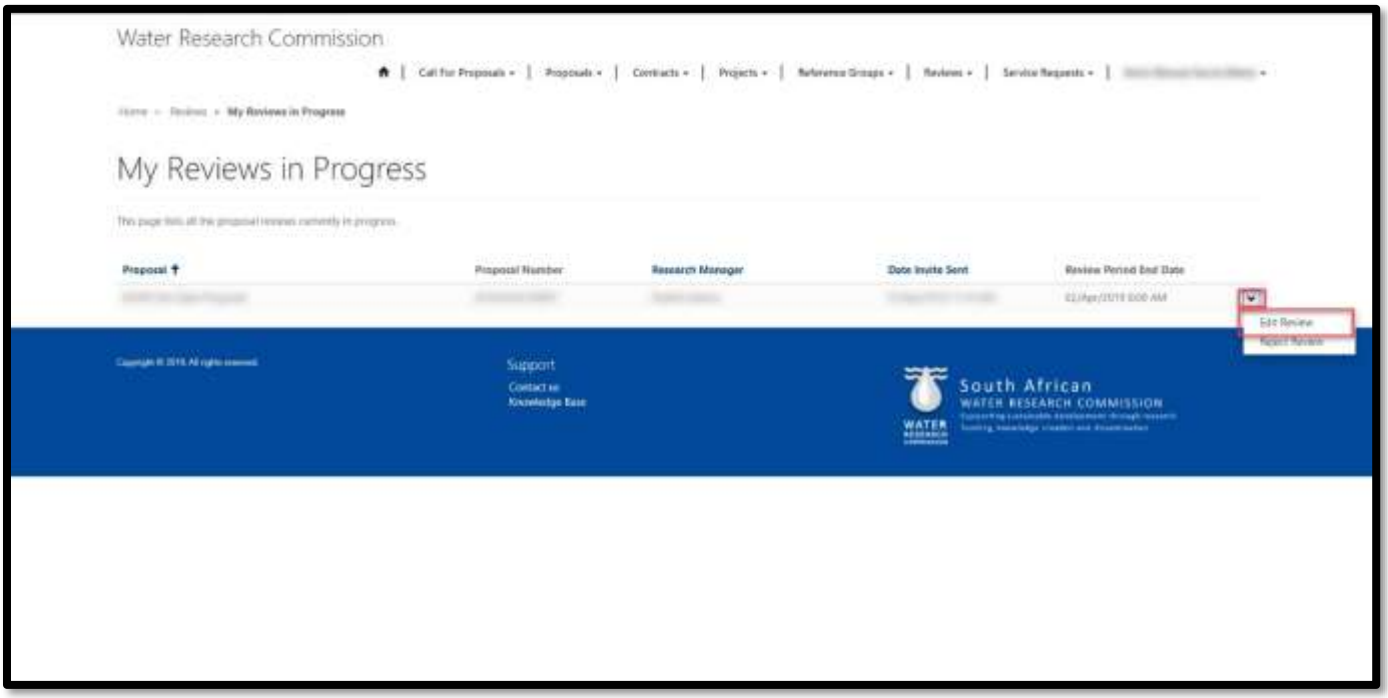
3. On the *Reject Review* page, select *Yes* under the *Reject Review* field, and select a reason from the *Reason for Rejecting Review* field. If you select the *Other* option, please enter why in the *Other Reason for Rejecting Review* field.
4. To submit the review rejection to the WRC Research Manager, click on the **Submit to WRC button** at the bottom of the page.



5. **Note**: Please enter the details before submitting the review rejection to the WRC, as you will only be able to submit the rejection once. After the review rejection is submitted, you will not be able to edit the review and it will no longer appear on the *My Reviews in Progress* page.

Submit a Review to the WRC

1. To submit your completed review to the WRC, from the *My Reviews in Progress* page, click on the arrow on the far right of the review record and select the **Edit Review** option.

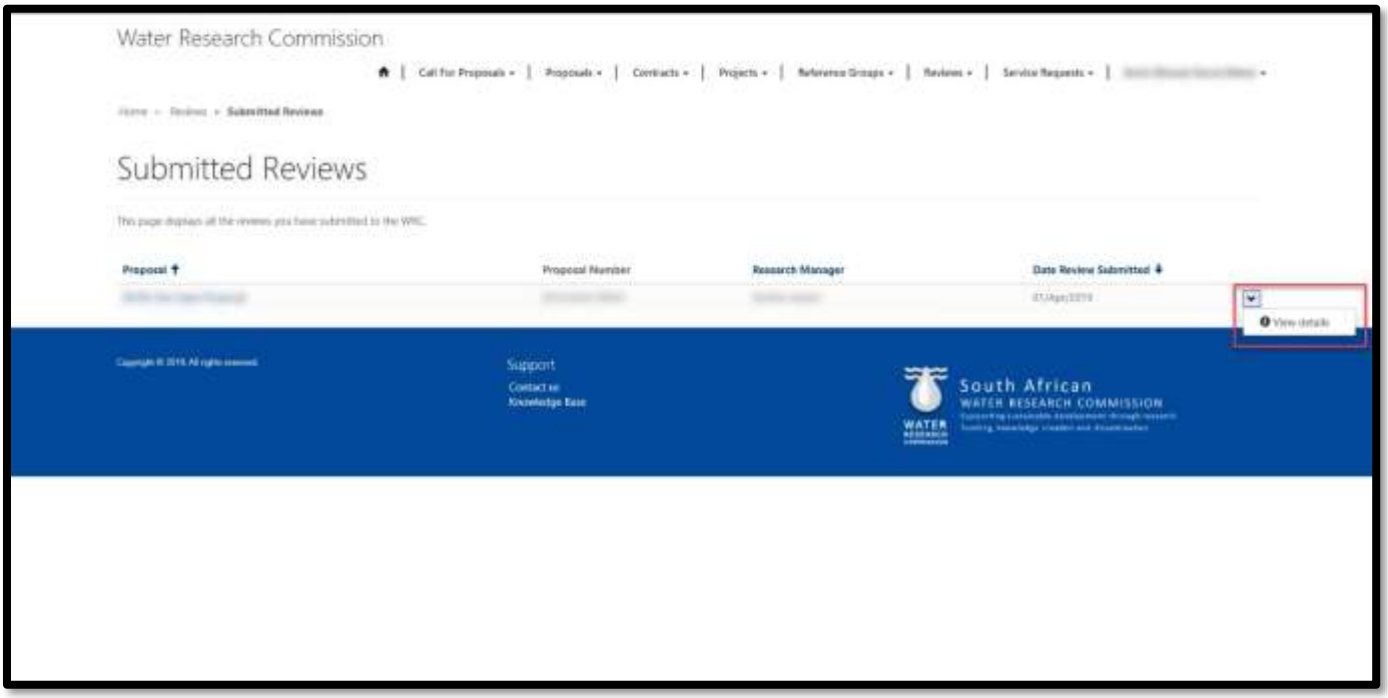


2. On the *Edit Review* page, click on the **Submit to WRC** button at the bottom of the page. You will be re-directed to the *Reviews* page and the review record will no longer appear in the *My Reviews in Progress* page but rather on the *Submitted Reviews* page.

Submitted Reviews Page

1. To view the *Submitted Reviews* page, click on the **Reviews** option in the Navigation Menu and then click on **Submitted Reviews**.

2. The *Submitted Reviews* page displays a list of proposal reviews that you have completed and submitted to the WRC.
3. To view the details of the proposal review, click on the arrow on the far right of the review record and select the **View details** option. This will re-direct to the *Review Details* page.


Water Research Commission
Call for Proposals
Proposals
Contracts
Projects
Reference Groups
Reviews
Service Requests
Submitted Reviews
Proposal
Proposal Number
Research Manager
Date Review Submitted
View details
Support
Contact us
Knowledge Base
South African
WATER RESEARCH COMMISSION

Logging Service Requests for WRC Business Systems Support

How to log a Service Request

Service Requests can be created on the BMS Portal by following the steps in the Service Requests section below.

Alternatively, if you cannot access the BMS Portal, you can email us at bms-support@wrc.org.za. Service Requests submitted to the support email address must have the following format:

1. **Subject** – a brief description of the problem
2. **Email body** – Use plain text to type a description to further explain the issue
3. **Attachment** - You can also attach screenshots to the email

Priority of Service Requests

Service Requests will be prioritized according to the nature of the request:

Priority	Response Time
C – Critical	1 – 4 hours
H – High	4 – 8 hours
M – Medium	1 – 2 working days
L – Low	3 working days

The severity, priority and resolution of the calls will be decided by the business systems team and communicated to the business. Priority calls will be classified as such:

1. **Critical**: Unavailability or significant impairment of business-critical systems. Customer's business has halted.
2. **High**: System Impaired. Customer's business has moderate loss, but business can reasonably continue in this situation.
3. **Medium**: Minor Impairment. No significant impact to customer's business.
4. **Low**: General guidance request. No impact to customer's business.

Our support team will remain in-contact with the end-user logging a support request. Should any indicated SLA be unachievable - we will always update the user prior to the SLA being breached.

Operational Times

Weekdays: Monday to Friday from 8:00am to 4:00pm

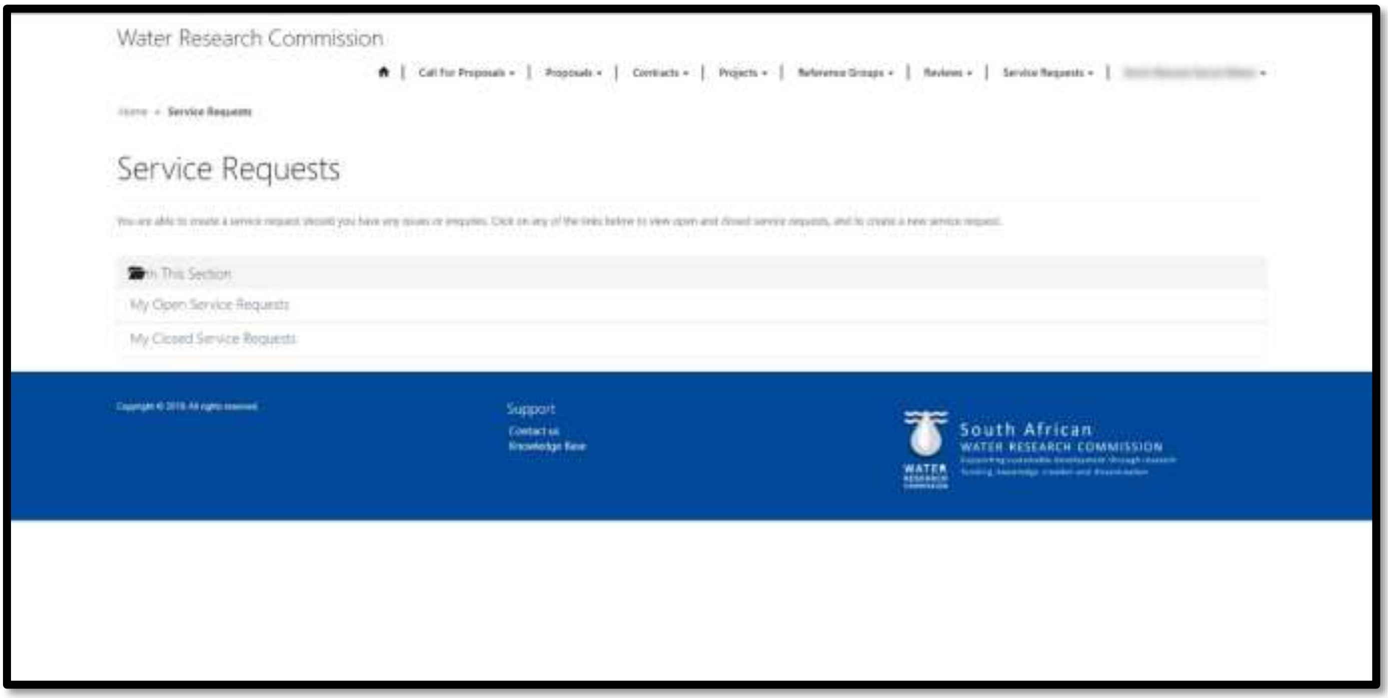
Service Requests

This section details the pages and actions found in the **Service Requests** section in the Navigation Menu of the BMS Portal.

Service Requests Page

1. To view the *Service Requests* page, click on the **Service Requests** option in the Navigation Menu and then click on **Service Requests**.

2. The *Service Requests* page contains links to the related pages that display information regarding service requests that are currently open, service requests that have been closed, and where you can create a new service request. To view the related pages, you can click on the links under the **In This Section** section at the bottom of the form.



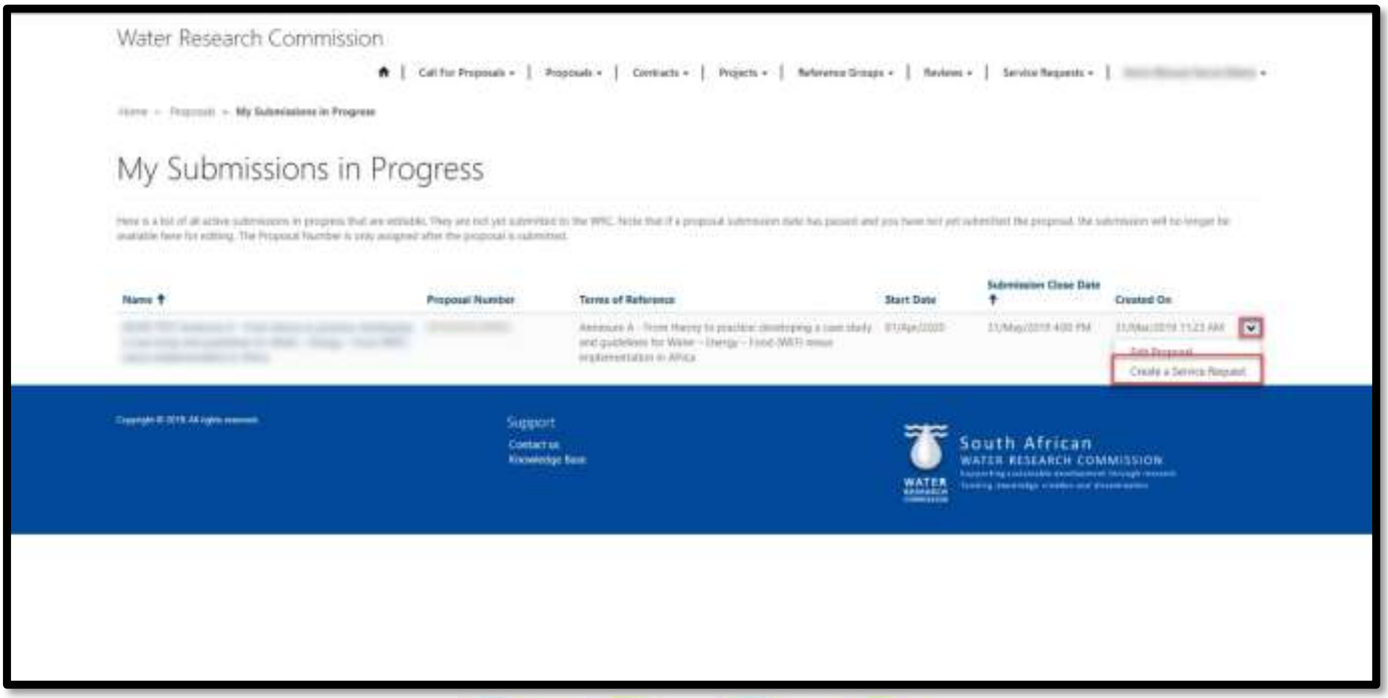
Create a Service Request

1. In the BMS Portal, there are different ways to create a service request depending on the nature of the request:
    a. Create a Service Request from a Proposal Submission in Progress
    b. Create a Service Request from a Proposal Amendments Submission in Progress
    c. Create a Service Request from an Active Project
    d. Create a Service Request from the Open & Closed Service Requests Pages

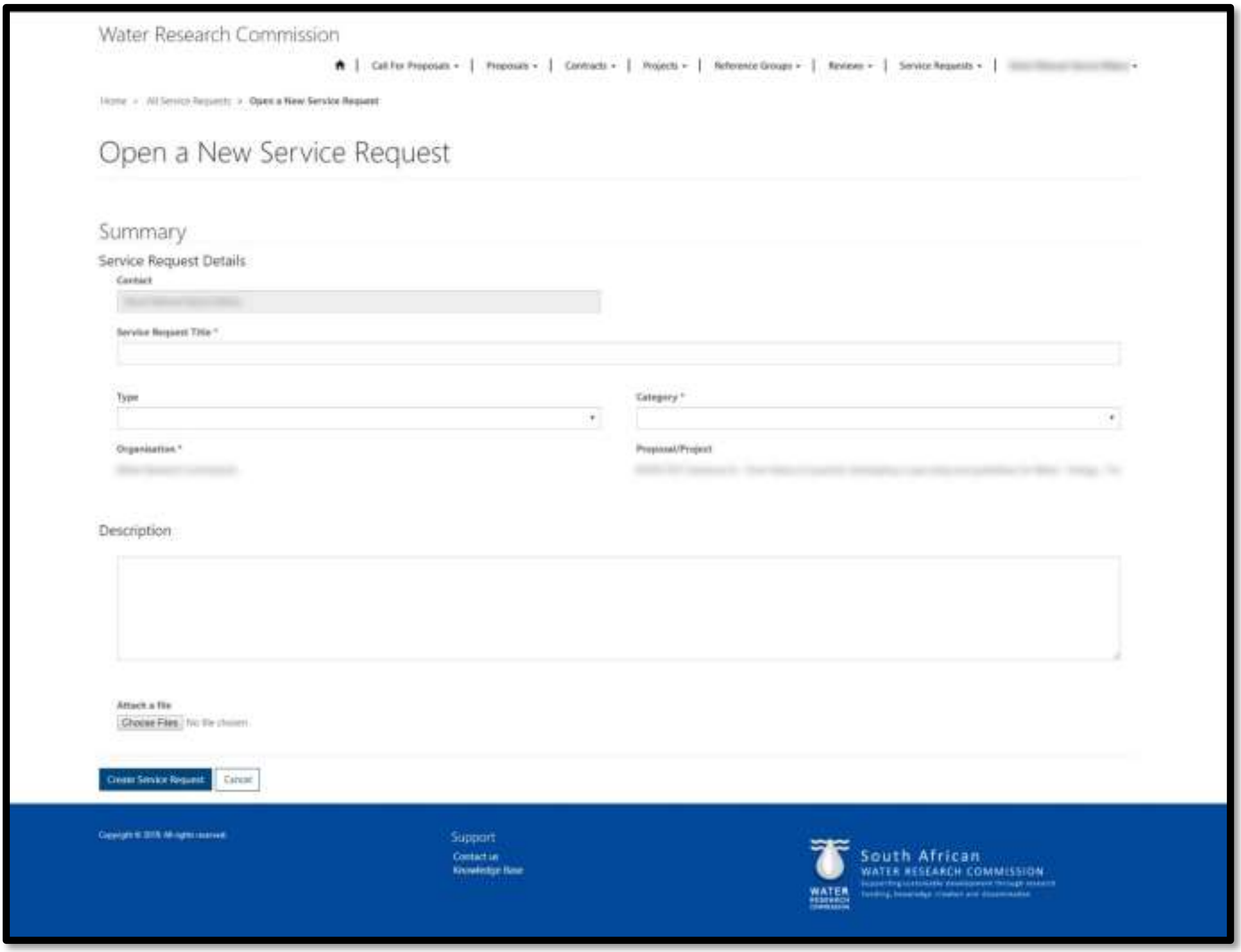
Create a Service Request from a Proposal Submission in Progress

1. Creating a service request from a proposal submission will link the request to the submission and make it easier for the WRC Business Systems Support Team to assist you if the service request is related to the submission.
2. To create a service request from a proposal submission that you currently have in progress, click on **Proposals** in the Navigation Menu, then select **My Submissions in Progress**. You will be re-directed to the *My Submissions in Progress* page.

3. From the *My Submissions in Progress* page, click on the arrow on the far right of the proposal submission that you wish to open the service request for, and select the **Create a Service Request** option. You will be re-directed to the *Open a New Service Request* page.



4. On the *Open a New Service Request,* you will see that the proposal is already linked to the service request as the name of the proposal is in the *Proposal/Project* field.
5. Complete all the details of the service request, including the mandatory fields indicated by the * asterisk, upload any files or screenshots that will assist the WRC Business Systems Support Team (if applicable), and create the service request by clicking the **Create Service Request** button at the bottom of the page.

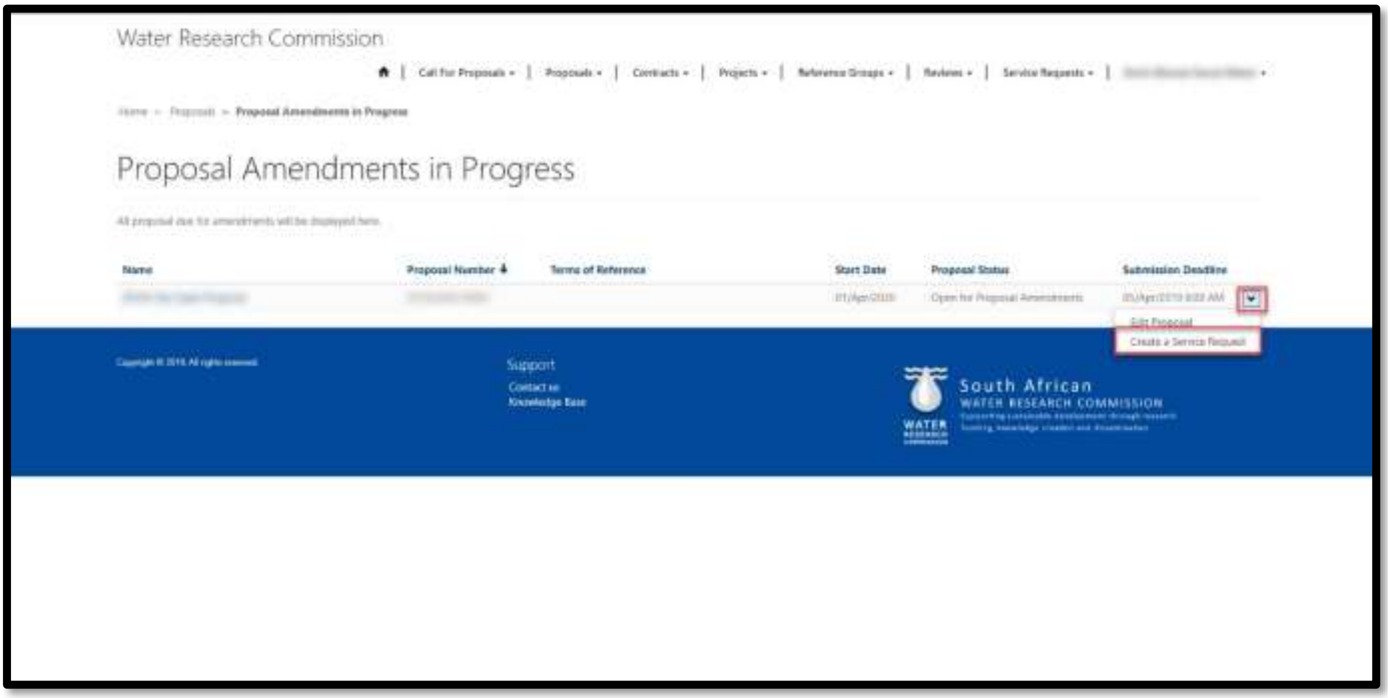


6. You will be re-directed to the *Open Service Requests* page. You can follow the steps in the [My Open Service Requests] section of this document to track the progress of your service request.

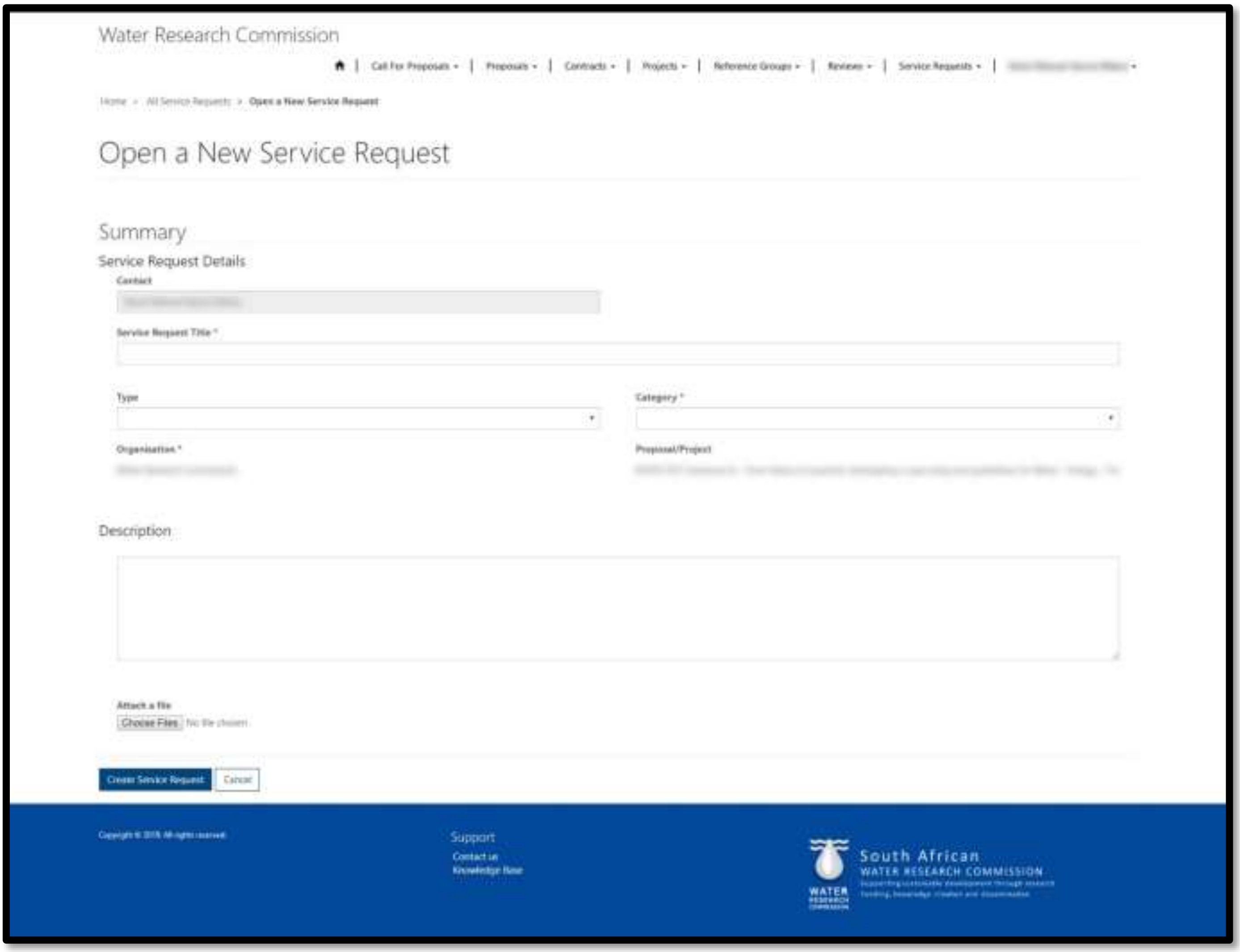
Create a Service Request from a Proposal Amendments Submission in Progress

1. Creating a service request from a proposal amendments submission will link the request to the submission and make it easier for the WRC Business Systems Support Team to assist you if the service request is related to the submission.
2. To create a service request from a proposal amendments submission that you currently have in progress, click on **Proposals** in the Navigation Menu, then select **Proposal Amendments**. You will be re-directed to the *Proposal Amendments in Progress* page.

3. From the *Proposal Amendments in Progress* page, click on the arrow on the far right of the proposal record that you wish to open the service request for, and select the **Create a Service Request** option. You will be re-directed to the *Open a New Service Request* page.



4. On the *Open a New Service Request,* you will see that the proposal is already linked to the service request as the name of the proposal is in the *Proposal/Project* field.
5. Complete all the details of the service request, including the mandatory fields indicated by the * asterisk, upload any files or screenshots that will assist the WRC Business Systems Support Team (if applicable), and create the service request by clicking the **Create Service Request** button at the bottom of the page (see screenshot on the next page).

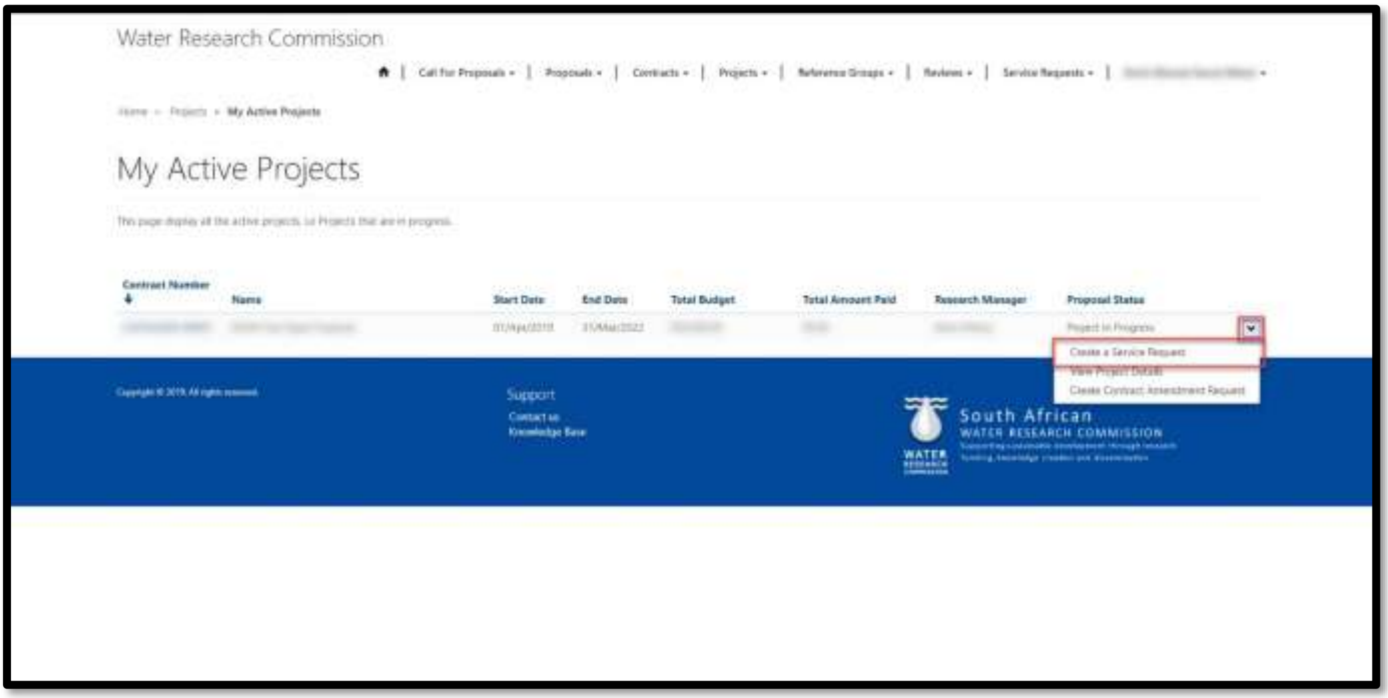


6. You will be re-directed to the *Open Service Requests* page. You can follow the steps in the [My Open Service Requests] section of this document to track the progress of your service request.

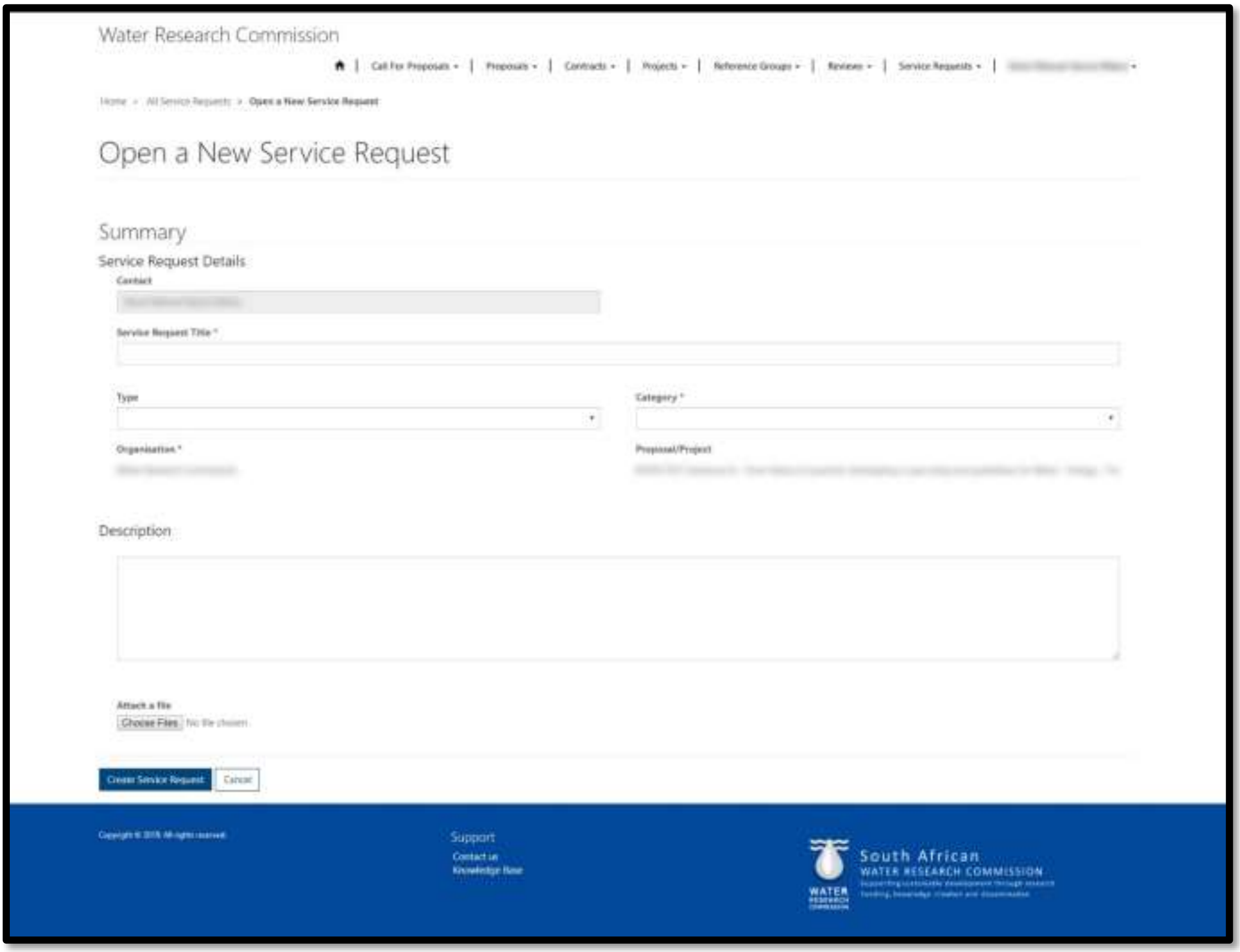
Create a Service Request from an Active Project

1. Creating a service request from an active project will link the request to the project and make it easier for the WRC Business Systems Support Team to assist you if the service request is related to the project.
2. To create a service request from an active project that is currently in progress, click on **Projects** in the Navigation Menu, then select **My Active Projects**. You will be re-directed to the *My Active Projects* page.

3. From the *My Active Projects* page, click on the arrow on the far right of the project record that you wish to open the service request for, and select the **Create a Service Request** option. You will be re-directed to the *Open a New Service Request* page.



4. On the *Open a New Service Request,* you will see that the project is already linked to the service request as the name of the project is in the *Proposal/Project* field.
5. Complete all the details of the service request, including the mandatory fields indicated by the * asterisk, upload any files or screenshots that will assist the WRC Business Systems Support Team (if applicable), and create the service request by clicking the **Create Service Request** button at the bottom of the page (see screenshot on the next page).



6. You will be re-directed to the *Open Service Requests* page. You can follow the steps in the My Open Service Requests section of this document to track the progress of your service request.

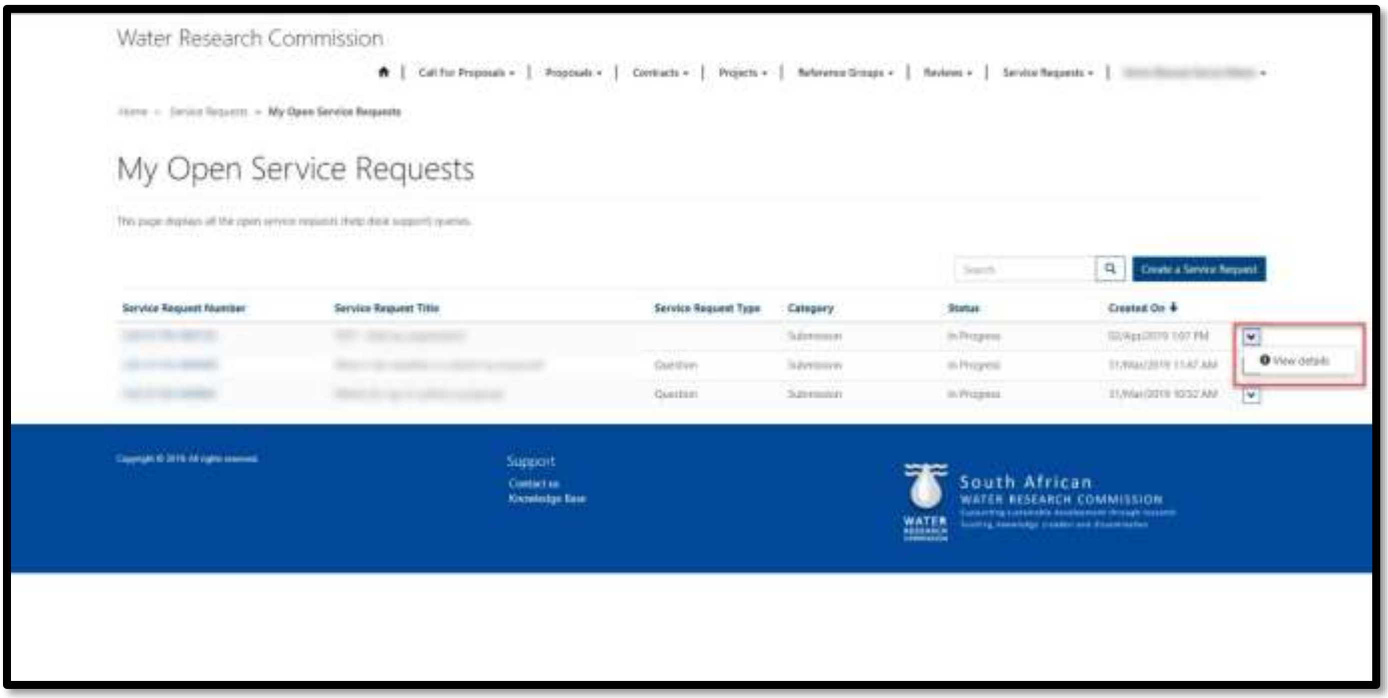
Create a Service Request from the Open & Closed Service Requests Pages

1. If you wish to create a service request that is not related to a proposal submission, proposal amendments submission, or an active project, you can create the service request by clicking on the **Create Service Request** button that is found on both the My Open Service Requests page and My Closed Service Requests page as detailed in the respective sections below.

My Open Service Requests Page

1. To view the *My Open Service Requests* page, click on the **Service Requests** option in the Navigation Menu and then click on **Open Service Requests**.

2. The *My Open Service Requests* page displays a list of service requests that you have opened and that are still in progress.
3. You can track the status of your service request by checking the *Status* column for each service request in listed on the page.
4. You can also create a new service request by clicking on the **Create a Service Request** button on the right side of the page above the list.
5. To view the details of the service request, click on the arrow on the right of the service request record and select the **View details** option. You will be re-directed to the *Service Request Details* page.

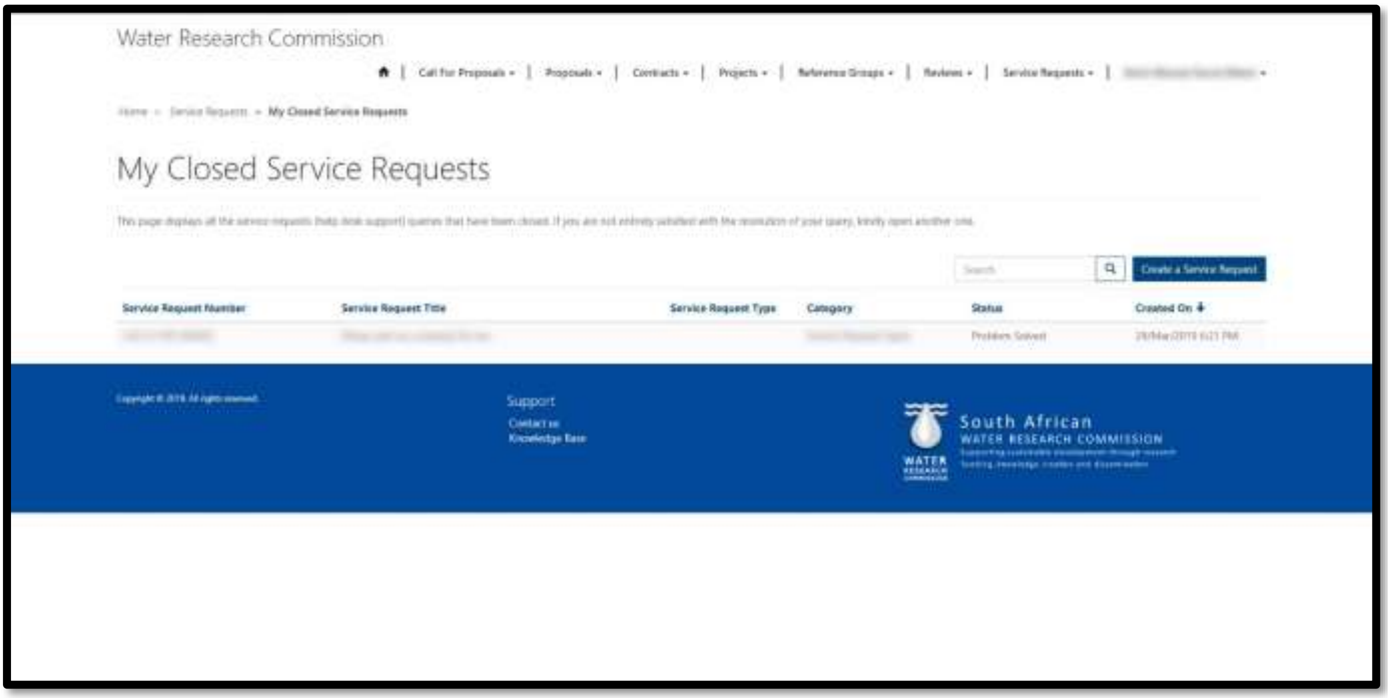


6. **Note**: A service request cannot be edited after it is created. If further information is needed, the BMS Support Team will be in contact via email or phone. Once the WRC Business Systems Support Team is satisfied that the request can be closed, they will close the request and it will appear on the *My Closed Service Requests* page.

My Closed Service Requests Page

1. To view the *My Closed Service Requests* page, click on the **Service Requests** option in the Navigation Menu and then click on **Closed Service Requests**.

1. The *My Closed Service Requests* page displays a list of service requests that have been closed by the BMS Support Team.
2. You can also create a new service request by clicking on the **Create a Service Request** button on the right side of the page above the list.



Conclusion

The BMS Portal is designed to simplify and streamline your engagements with the WRC.

We welcome any feedback or suggestions you have that will help improve your experience. Please send your comments or suggestions to us via email to bms-support@wrc.org.za.