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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](mailto:bms-support@wrc.org.za).

## Glossary of Terms

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

Term	Description
<b>Navigation Menu</b>	The menu bar at the top all pages that allows you to navigate to the different sections of the BMS Portal.
<b>Proposer</b>	The BMS Portal user is that is currently logged in when creating a proposal submission.
<b>Record</b>	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.
<b>Related Record</b>	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.
<b>WRC</b>	Water Research Commission



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# 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.

The screenshot shows the top navigation bar with the Water Research Commission logo and a 'Sign in / Register' link highlighted with a red box. Below the navigation bar is a large banner with the text 'WATER RESEARCH COMMISSION BUSINESS MANAGEMENT SYSTEM'. The main content area features a 'About Us' section with the following text: '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 are required to register as BMS users. If you are new to the WRC Business Management System (BMS) and you intend to submit a research, development and innovation proposal to the WRC or perform any WRC RDI project Management activity, you are required to register your details as a new user using your email address as your username. To login in or to register, click on "Sign in/Register" link on the top right-hand corner of this page and follow the prompts.' The footer contains copyright information, support links, and the South African Water Research Commission logo.

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

The screenshot shows the 'Register for a new local account' page. The top navigation bar includes the Water Research Commission logo and a 'Sign in' link. Below the navigation bar, there are three tabs: 'Sign in', 'Register' (highlighted with a red box), and 'Redeem invitation'. The main content area contains the following text: 'To register on the portal, please make use of your email address you previously used on the FMS portal. For new users, please register with any email address that you want to receive communication on regarding proposal submissions. For any support queries, please log a call on [bms-support@wrc.org.za](mailto:bms-support@wrc.org.za)'. Below this text is a form with four input fields: '\* Email', '\* Username', '\* Password', and '\* Confirm password'. A 'Register' button is located below the form. The footer contains copyright information, support links, and the South African Water Research Commission logo.

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 address 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

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

The screenshot shows the homepage of the Water Research Commission Business Management System. At the top left, it says "Water Research Commission". On the right, there is a "Sign in / Register" link highlighted with a red box. The main header features the WRC logo and the text "WATER RESEARCH COMMISSION BUSINESS MANAGEMENT SYSTEM". Below this is a section titled "About Us" with a background image of water splashing. The text describes the BMS and provides instructions for new users. At the bottom, there is a footer with copyright information, support links, and the South African Water Research Commission logo.

- 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.

The screenshot shows the sign-in page of the Water Research Commission Business Management System. At the top left, it says "Water Research Commission". On the right, there is a "Sign in" link. Below this, there are three tabs: "Sign in", "Register", and "Redeem invitation". The "Sign in" tab is selected. The page is titled "Sign in with a local account". There are two input fields: "\* Username" and "\* Password". Below the password field, there is a "Remember me?" checkbox and a "Sign in" button highlighted with a red box. To the right of the "Sign in" button is a "Forgot your password?" link. At the bottom, there is a footer with copyright information, support links, and the South African Water Research Commission logo.

# 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.

The screenshot shows the 'Forgot your password?' page. At the top left is the 'Water Research Commission' logo and at the top right are 'Sign in / Register' links. The main heading is 'Forgot your password?'. Below it is a text input field labeled '\* Email' with the placeholder text 'Enter your email address to request a password reset.' and a blue 'Send' button. The footer contains copyright information, a 'Support' link, and the South African Water Research Commission logo with its tagline: 'Supporting sustainable development through research funding, knowledge creation and dissemination'.

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.

The screenshot shows the 'Reset password' page. At the top left is the 'Water Research Commission' logo and at the top right are 'Sign in / Register' links. The main heading is 'Reset password'. Below it are two text input fields: 'New password' and 'Confirm new password', both with masked characters (dots). A blue 'Reset' button is positioned below the second field. The footer contains copyright information, a 'Support' link, and the South African Water Research Commission logo with its tagline: 'Supporting sustainable development through research funding, knowledge creation and dissemination'.



## 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



Home > Profile

## Profile



Profile

- Security
  - Change Password
  - Change Email

Please provide some information about yourself.

The **First Name** and **Last Name** you provide will be displayed alongside any comments, forum posts, or ideas you make on the site.

The **Email Address** and **Phone** number are required but will not be displayed on the site.

**Your email requires confirmation.** [Confirm Email](#)

<b>Title</b>	<b>E-mail *</b>
Mr.	
<b>First Name *</b>	<b>Last Name *</b>
<b>Job Title</b>	<b>Mobile Phone *</b>
<b>Web Site</b>	<b>Business Phone</b>

**Organisation Name**

Should your organization not appear in search field above, please send an email to [bms-support@wrc.org.za](mailto:bms-support@wrc.org.za) with the name of the Organization as the subject and please also include the following details:

- Physical Address
- Postal Address
- Business Phone Number
- Fax Number (if applicable)

**Qualifications** [Add Qualification](#)

Name ↑	Contact

**Areas of Expertise** [Add Area of Expertise](#)

Name	Years' Experience ↑

**Areas of Interest** [Add Area of Interest](#)

Name ↑

Organisation	Organisation Name ↑	Main Phone	Province	Country	Website
--------------	---------------------	------------	----------	---------	---------

There are no records to display.

**Blue Directory**

A web-based 'Who's Who' in the water and sanitation research space that will be profiling professionals who have done an incredible work within the water research community while also providing details of their work in order to benefit South Africa and the international community. Should you wish to be added to this Database kindly select "Yes" below.

No  Yes

[Save & Update](#)



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.

Organisation				
Organisation Name ↑	Main Phone	Province	Country	Website
[Redacted]	[Redacted]	Gauteng	South Africa	

[View Organisation Details](#)

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).



## Organisation Details

### ORGANISATION INFORMATION

Organisation Name *	Account Number
Primary Contact	Website
Phone *	Fax *
Alternate Email 1	Alternate Email 2
Parent Account	Business Partner Group
<input type="checkbox"/> SMME	Stakeholder Type
<input type="checkbox"/> HDI	Stakeholder Category
Currency	Stakeholder Sub-Category
South African Rand	

### ADDRESSES

Physical Address	Postal Address
------------------	----------------

### SUPPORTING DOCUMENTS INFORMATION

Income Tax Number	VAT Number
Tax Clearance Certificate Expiry Date	B-BBEE Certificate Expiry Date
Company Registration Number	Company Registration Certificate Expiry Date

### DOCUMENTS

There are no notes to display.

[Upload a Document](#)



# BMS Portal Navigation Menu

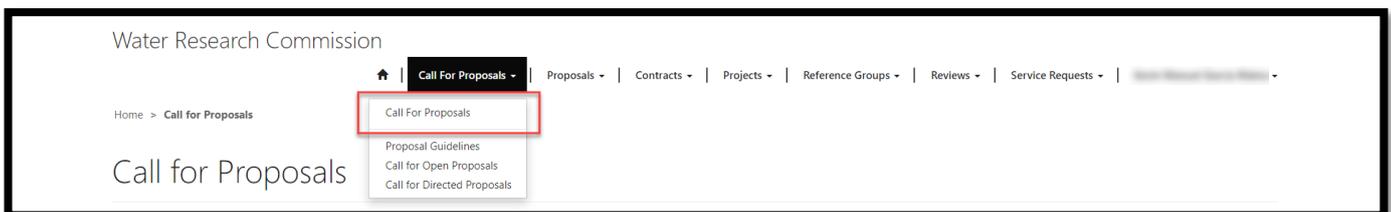
## Call For Proposals

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

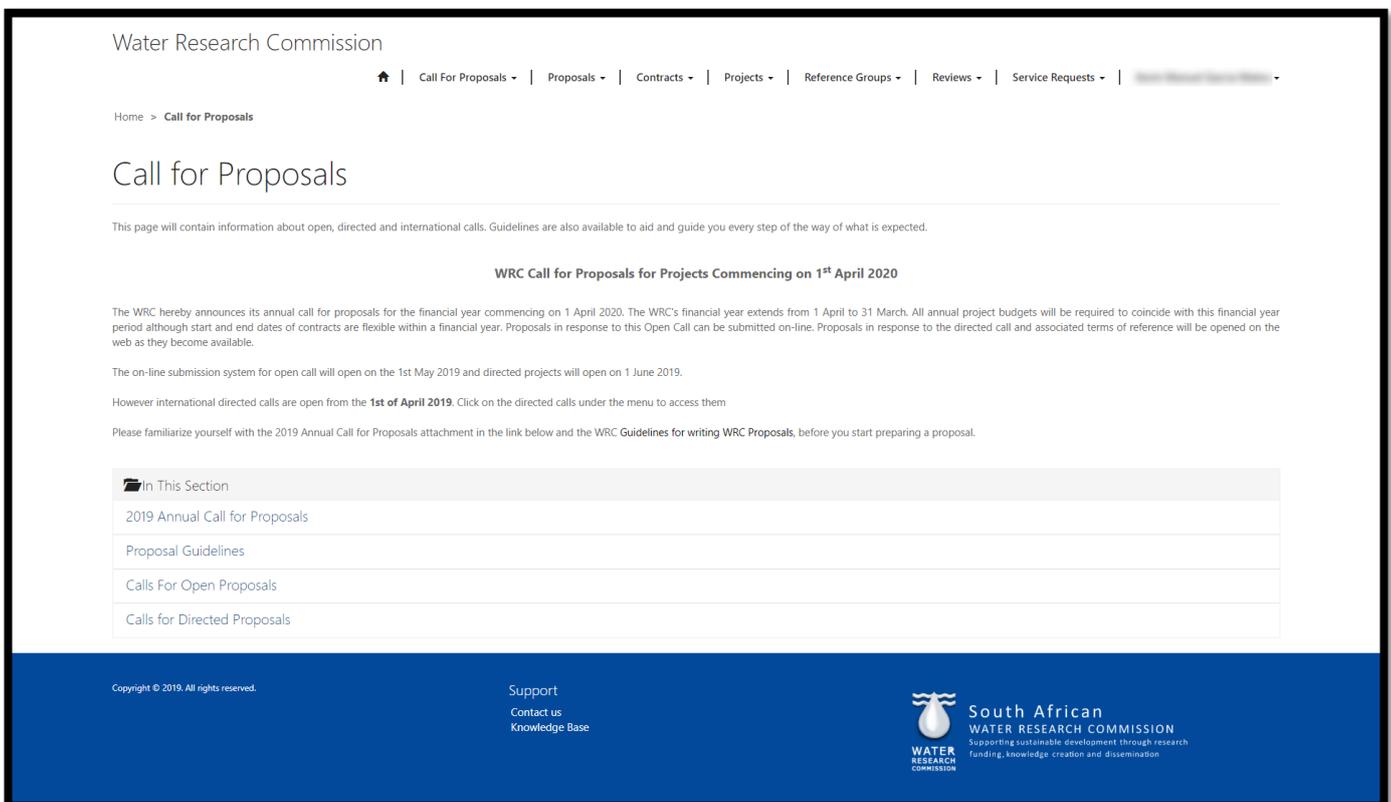


## Call for Proposals Page

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.

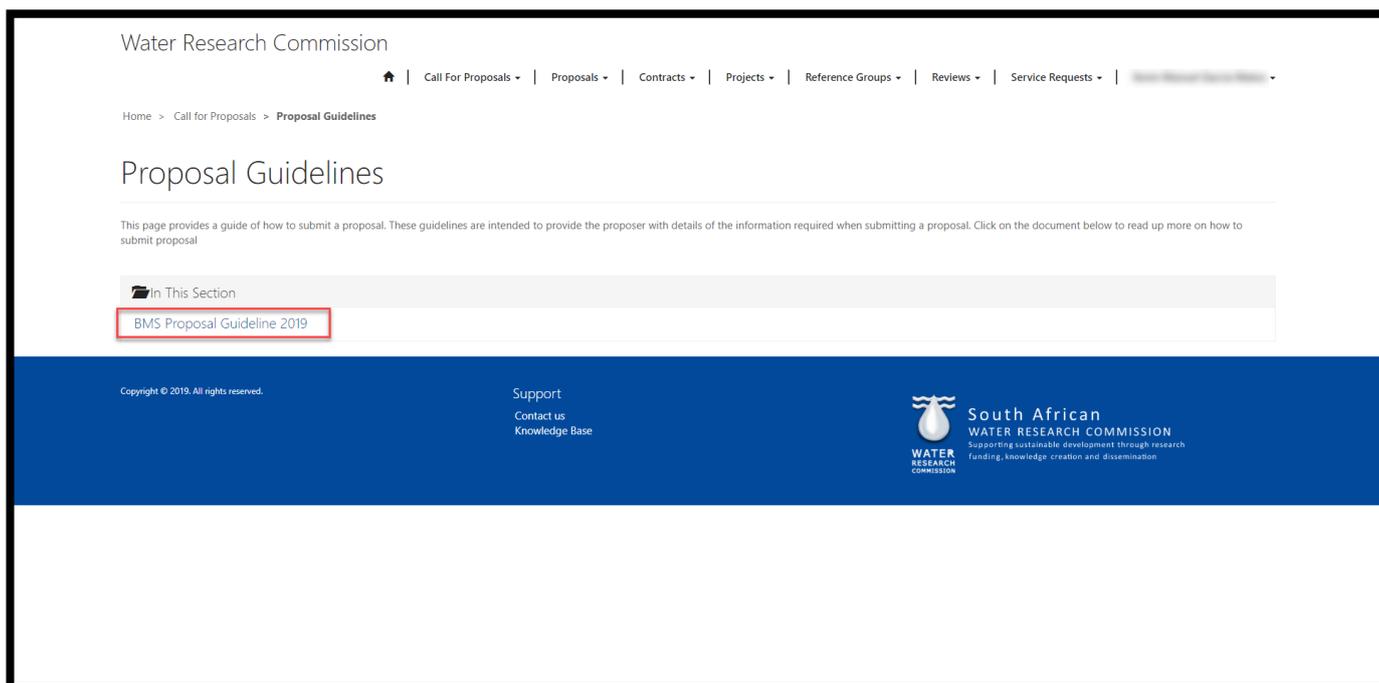


## Proposal Guidelines Page

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 Open Proposals Page

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



2. The *Call for Open Proposals* page will list any WRC open calls for proposals that are currently open for submissions.

## Submit a Proposal for an Open Call

1. To create a proposal submission for an open call for proposals, from the *Call for Open Proposals* page, click on the arrow on the far right of the record and select the **Submit a Proposal** option.

Water Research Commission

Home > Call for Proposals > Calls For Open Proposals

### Calls For Open Proposals

Only open calls will be displayed on this page. Open calls also applicable for the certain open period. Should you wish to read up on upcoming calls, visit our website. Click on the down arrow to start to submit a proposal.

Please NOTE: Calls will only start being open from the 1st of May 2019

Name	Submission Deadline ↑
	30/Mar/2019 5:30 PM

Submit a Proposal

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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.

Water Research Commission

Home > Proposals > My Submissions in Pro... > Capture Proposal Details

### Capture Proposal Details

#### General Information

Full Title \*

Financial Year \*  
Enter the financial year of the WRC in which this proposal is being submitted

Strategic Area \*

Start Date \*

End Date \*

New Proposer  First Time Project Leader

Have you submitted this proposal previously?

Previous Proposal Number

Financial Year

Create Proposal

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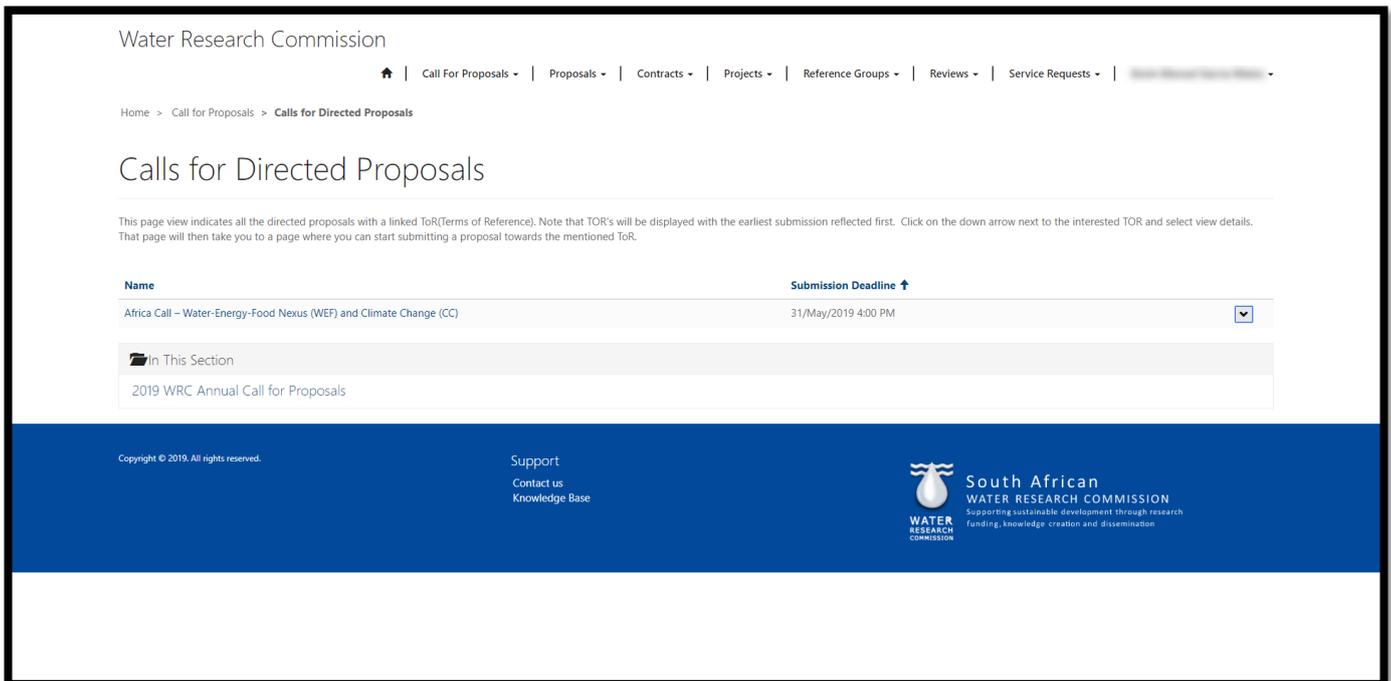
- Once the proposal record has been created, you will be redirected to the *My Submissions in Progress* page. Please follow the steps in the [My Submissions in Progress](#) section in this document to edit and complete the proposal.

## **Call for Directed Proposals Page**

- 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**.



- 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.



- 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.

Water Research Commission

Home > Call for Proposals > Calls for Directed Proposals

## Calls for Directed Proposals

This page view indicates all the directed proposals with a linked ToR(Terms of Reference). Note that TOR's will be displayed with the earliest submission reflected first. Click on the down arrow next to the interested TOR and select view details. That page will then take you to a page where you can start submitting a proposal towards the mentioned ToR.

Name	Submission Deadline
Africa Call – Water-Energy-Food Nexus (WEF) and Climate Change (CC)	31/May/2019 4:00 PM

in This Section

2019 WRC Annual Call for Proposals

View details

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funding, knowledge creation and dissemination

- The *Call for Proposal Details* page will display any *ToR (Terms of Reference)* records that are linked to this directed call for proposals.
- To view the details of the ToR, click on the arrow on the far right of the record and select the **View Details** option.

Water Research Commission

Home > Calls for Proposal Details

## Calls for Proposal Details

Please select the drop down arrow and select view to view the details of the TOR. Once in the view TOR screen, select view and scroll down to the bottom to download and view the TOR details

SUBMISSION DATES

Submission Start Date	Submission Deadline
01/Apr/2019 8:00 AM	31/May/2019 4:00 PM

Terms of Reference

TOR ID	Title	Project Start Date	Project End Date	Budget
	Annexure A - From theory to practice: developing a case study and guidelines for Water – Energy – Food (WEF) nexus implementation in Africa			R2,000,000.00
	Annexure B - Climate Change and Water Security: Developmental Perspectives for Water-Linked Sectors in a Future Climate for Africa (Bi-National Assessment)			R2,000,000.00

Submit a Proposal  
View Details

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- 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.

Water Research Commission

Home > Calls for Proposal Details

### Calls for Proposal Details

Please select the drop down arrow and select view to view the details of the TOR. Once in the view TOR screen, select view and scroll down to the bottom to download and view the TOR details

**SUBMISSION DATES**

<b>Submission Start Date</b> 01/Apr/2019 8:00 AM	<b>Submission Deadline</b> 31/May/2019 4:00 PM
---	---

**Terms of Reference**

TOR ID ↓	Title ↑	Project Start Date	Project End Date	Budget	
	Annexure A - From theory to practice: developing a case study and guidelines for Water – Energy – Food (WEF) nexus implementation in Africa			R2,000,000.00	▼
	Annexure B - Climate Change and Water Security: Developmental Perspectives for Water-Linked Sectors in a Future Climate for Africa (Bi-National Assessment)			R2,000,000.00	▼ Submit a Proposal View Details

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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).

Water Research Commission

[Home](#) | [Call For Proposals](#) | [Proposals](#) | [Contracts](#) | [Projects](#) | [Reference Groups](#) | [Reviews](#) | [Service Requests](#) | [Water Research Commission](#)

Home > Proposals > My Submissions in Pro... > Capture Proposal Details

## Capture Proposal Details

### General Information

**Full Title \***

**Financial Year \***  
Enter the financial year of the WRC in which this proposal is being submitted

**Strategic Area \***  
Enter the Strategic Area as prescribed in the Terms of Reference

**Start Date \***

**End Date \***

New Proposer
  First Time Project Leader

Have you submitted this proposal previously?

**Previous Proposal Number**

**Financial Year**

[Create Proposal](#)

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funding, knowledge creation and dissemination

- 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.



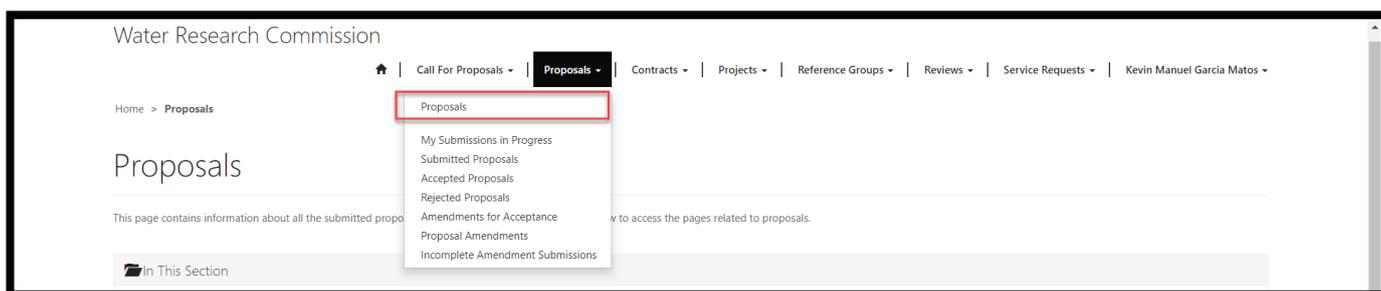
## Proposals

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

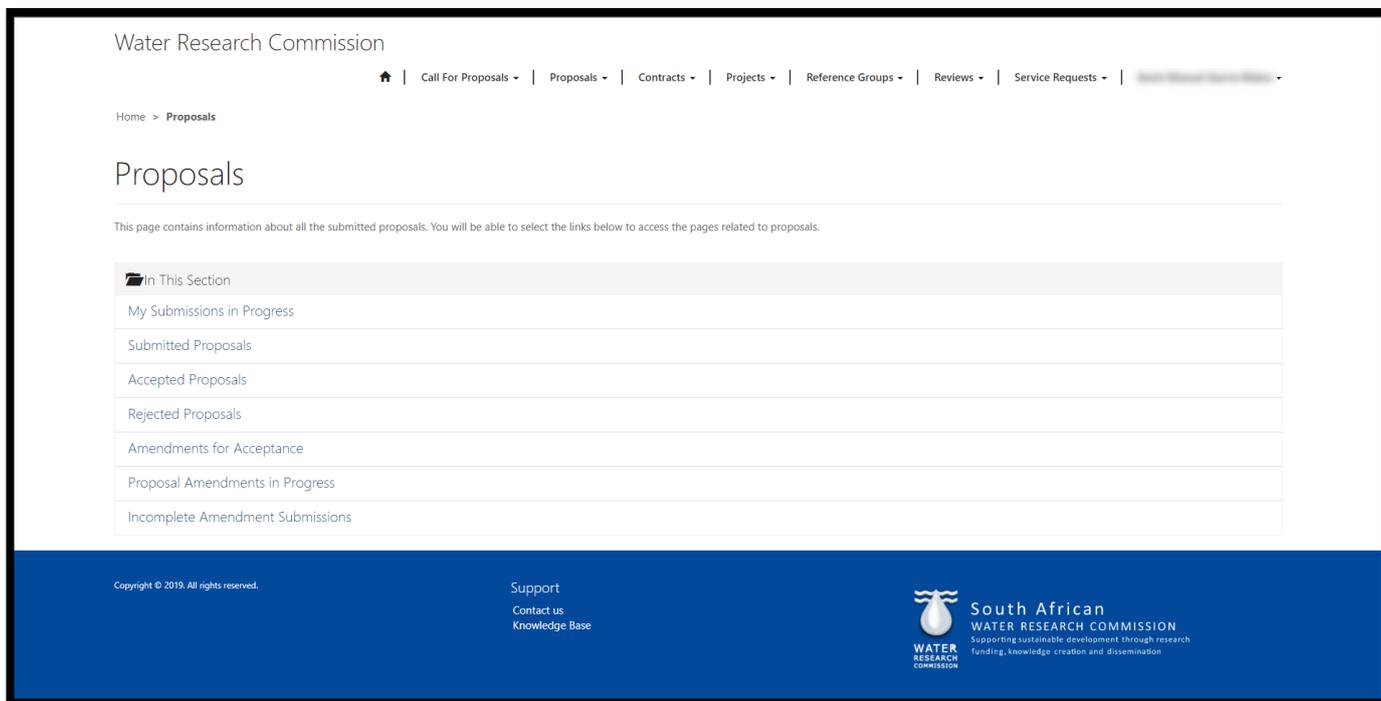


### Proposals Page

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

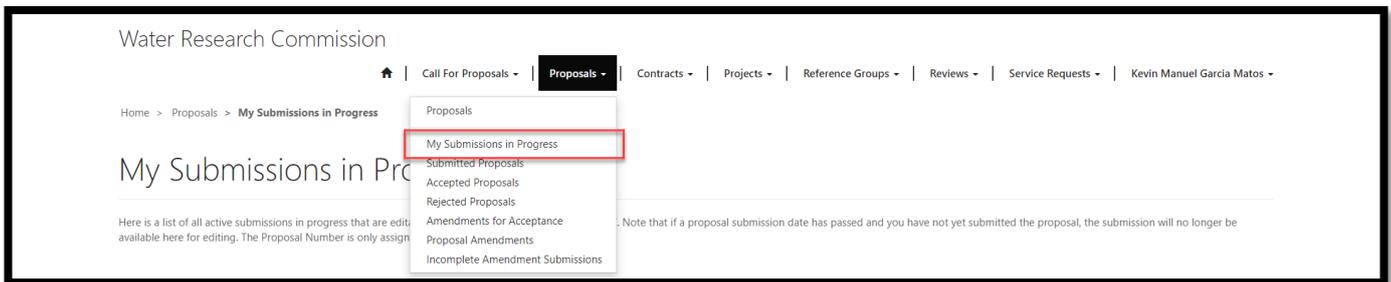


2. The *Proposals* page contains links to the related pages that display information regarding proposals you have submitted to the WRC as the *Proposer*. To view the related pages, you can click on the links under the **In This Section** section at the bottom of the form.



## My Submissions in Progress Page

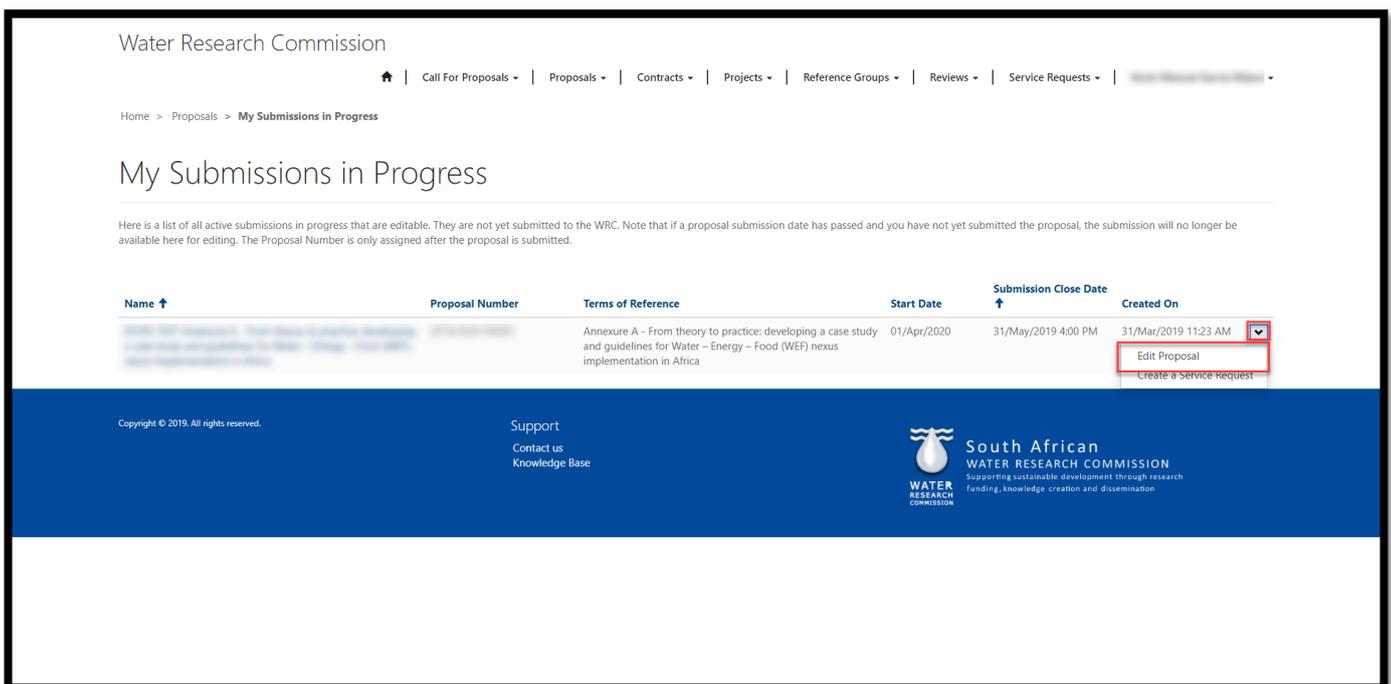
1. To view the *My Submissions in Progress* page, click on the **Proposals** option in the Navigation Menu and then click on **My Submissions in Progress**.



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.



## EDIT PROPOSAL

To edit the information in a tab, click on the arrow to expand it. To view updates to the amounts in the Budget Summary tab, save your changes and expand the tab again. Always remember to save your changes before you leave this page.

- ▼ 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

- 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.



To edit the information in a tab, click on the arrow to expand it. To view updates to the amounts in the Budget Summary tab, save your changes and expand the tab again. **Always remember to save your changes before you leave this page.**

- General Information
- Administrative Staff
- Research Information
- Lead Organisation**

Organisation Name

Contribution

PHYSICAL ADDRESS

Address Line 1

Address Line 2

Address Line 3

City

Postal Code

POSTAL ADDRESS

Postal Address is the same as the Physical Address?  
 No  Yes

Address Line 1

Address Line 2

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.

To edit the information in a tab, click on the arrow to expand it. To view updates to the amounts in the Budget Summary tab, save your changes and expand the tab again. **Always remember to save your changes before you leave this page.**

- General Information
- Administrative Staff
- Research Information
- Lead Organisation
- Collaborating Organisations
- Researchers**

[Add Researcher](#)

Name ↑	Organisation Name	Project Role	Created On
		Project Leader	31/Mar/2019 12:38 PM

- Abstract
- Rationale
- Aims
- Methodology
- Deliverables
- Products
- Innovation
- Background Intellectual Property

View Researcher Details  
 Edit Researcher  
 Delete Researcher

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: Please remember to save your changes often!**



## Submit a Proposal to WRC

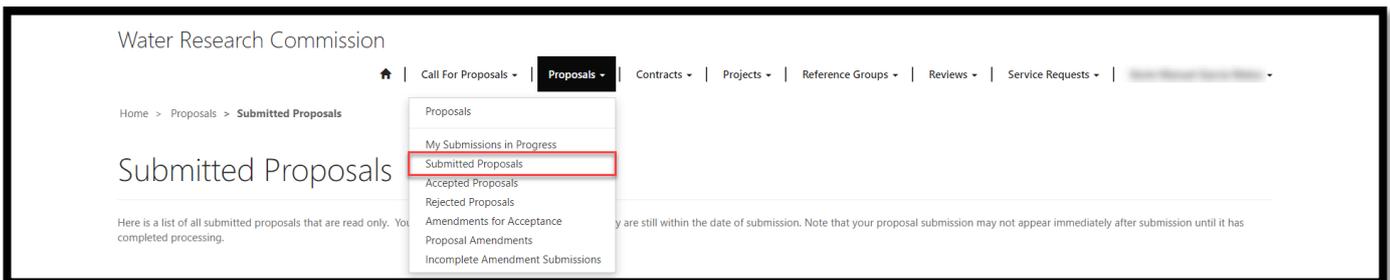
1. When your proposal is completed, you can save any final changes and submit the proposal to the WRC by clicking on the **Submit to WRC** button at the bottom of the *Edit Proposal* page. You will be re-directed to the *Submitted Proposals* page.



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.



Water Research Commission

[Home](#) | [Call For Proposals](#) | [Proposals](#) | [Contracts](#) | [Projects](#) | [Reference Groups](#) | [Reviews](#) | [Service Requests](#) | [User Profile](#)

Home > Proposals > Submitted Proposals

## Submitted Proposals

Here is a list of all submitted proposals that are read only. You can start the process of editing them if they are still within the date of submission. Note that your proposal submission may not appear immediately after submission until it has completed processing.

Name	Proposal Number ↓	Terms of Reference	Submission Deadline	Proposal Status	Created On
<a href="#">[Redacted]</a>	<a href="#">[Redacted]</a>	<a href="#">[Redacted]</a>	30/Mar/2019 5:30 PM	Review in Progress	30/Mar/2019 3:20 PM

[View details](#)

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- 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).



## PROPOSAL DETAILS

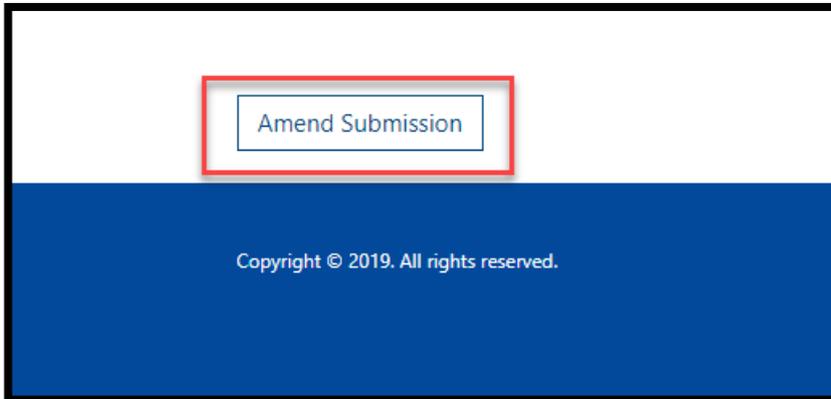
- ▼ General Information
- ▼ Administrative Staff
- ▼ Research Information
- ▼ Lead Organisation
- ▼ Collaborating Organisations
- ▼ Researchers
- ▼ Abstract
- ▼ Rationale
- ▼ Aims
- ▼ Methodology
- ▼ Deliverables
- ▼ Products
- ▼ Innovation
- ▼ Background Intellectual Property
- ▼ Human Resource Costs
- ▼ 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](#)



## Amend a Proposal Submission

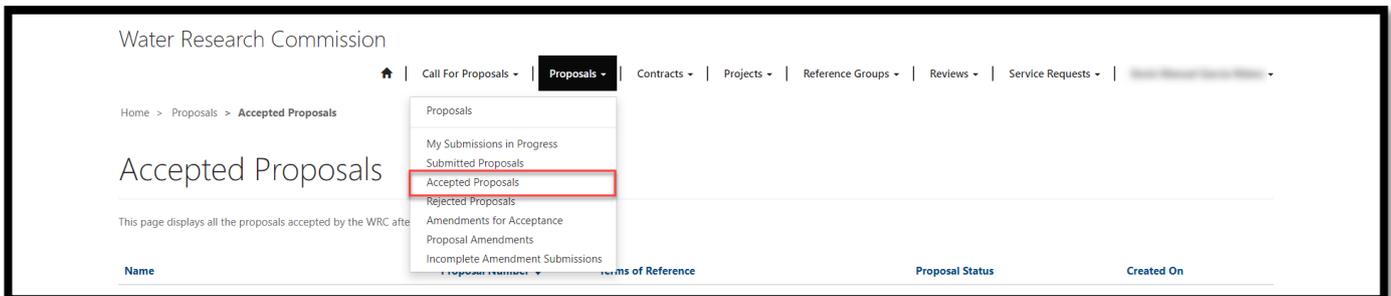
1. If you have submitted your proposal to the WRC, and the current date and time is *before* the Submission Close Date and time displayed on the *Submitted Proposals* page, you can recall and amend your proposal submission by clicking on the **Amend Submission** button at the bottom of the *Proposal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

Water Research Commission

Home > Proposals > Accepted Proposals

## Accepted Proposals

This page displays all the proposals accepted by the WRC after submission.

Name	Proposal Number ↓	Terms of Reference	Proposal Status	Created On
[Redacted]	[Redacted]	[Redacted]	Proposal Accepted with Amendments	30/Mar/2019 3:20 PM

View Decision Letter

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

View details

### View Decision Letter

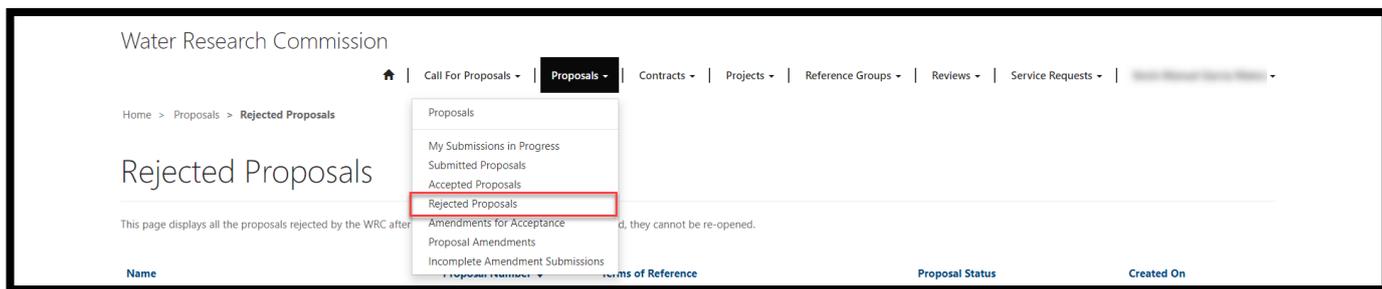
4 minutes ago  
WRC Business  
Management #

Approval Letter.pdf (0 bytes)

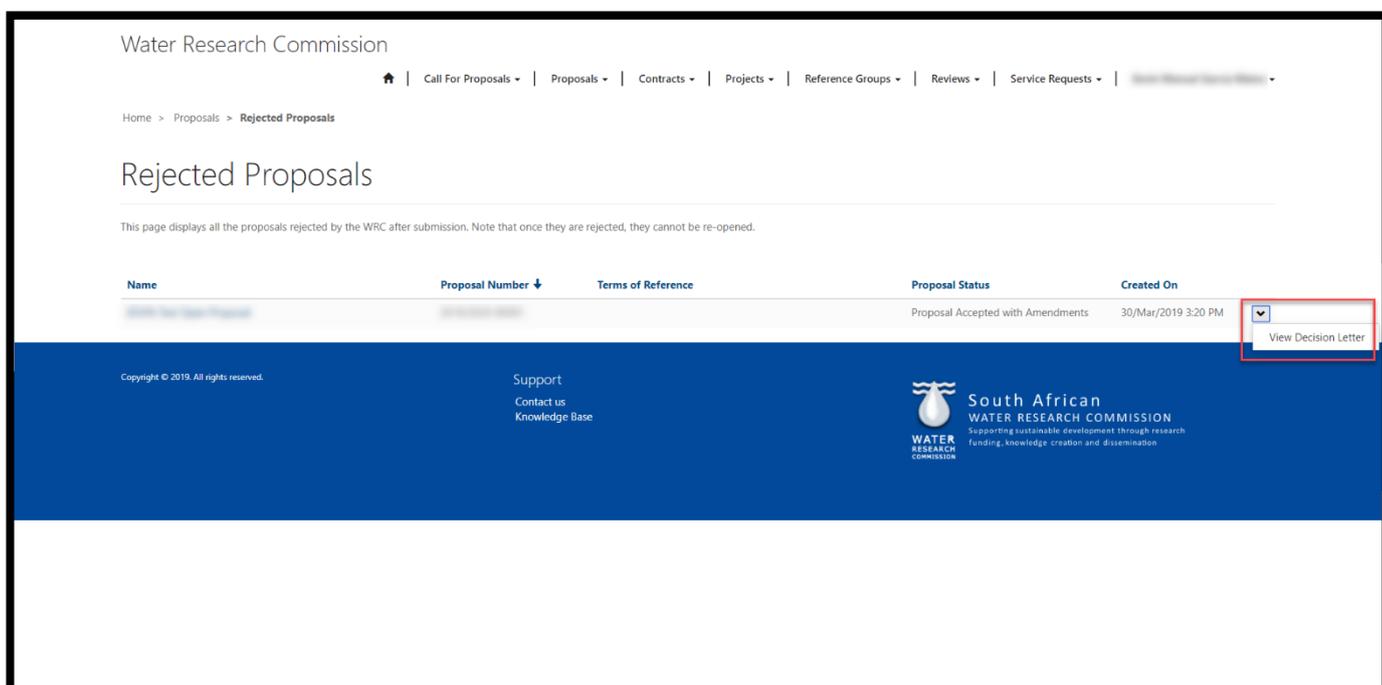


## Rejected Proposals Page

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.

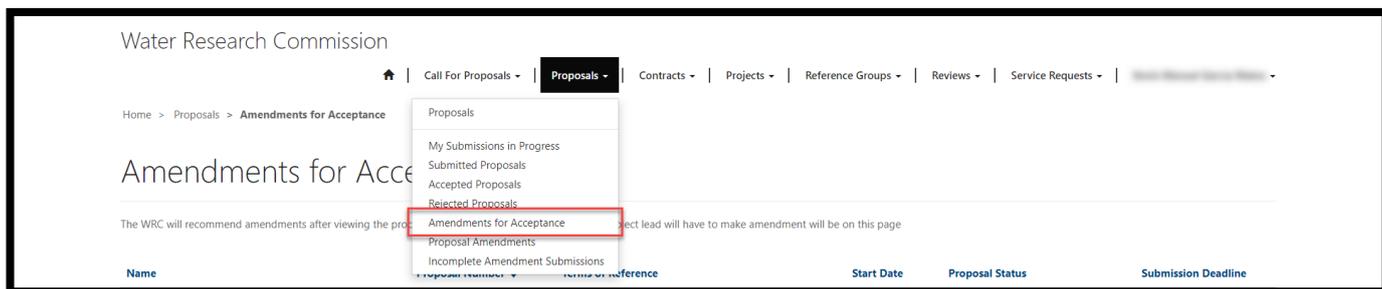


4. In the *View Decision Letter* window, you can view or download the attached *Rejection Letter* document by clicking on the document name link.

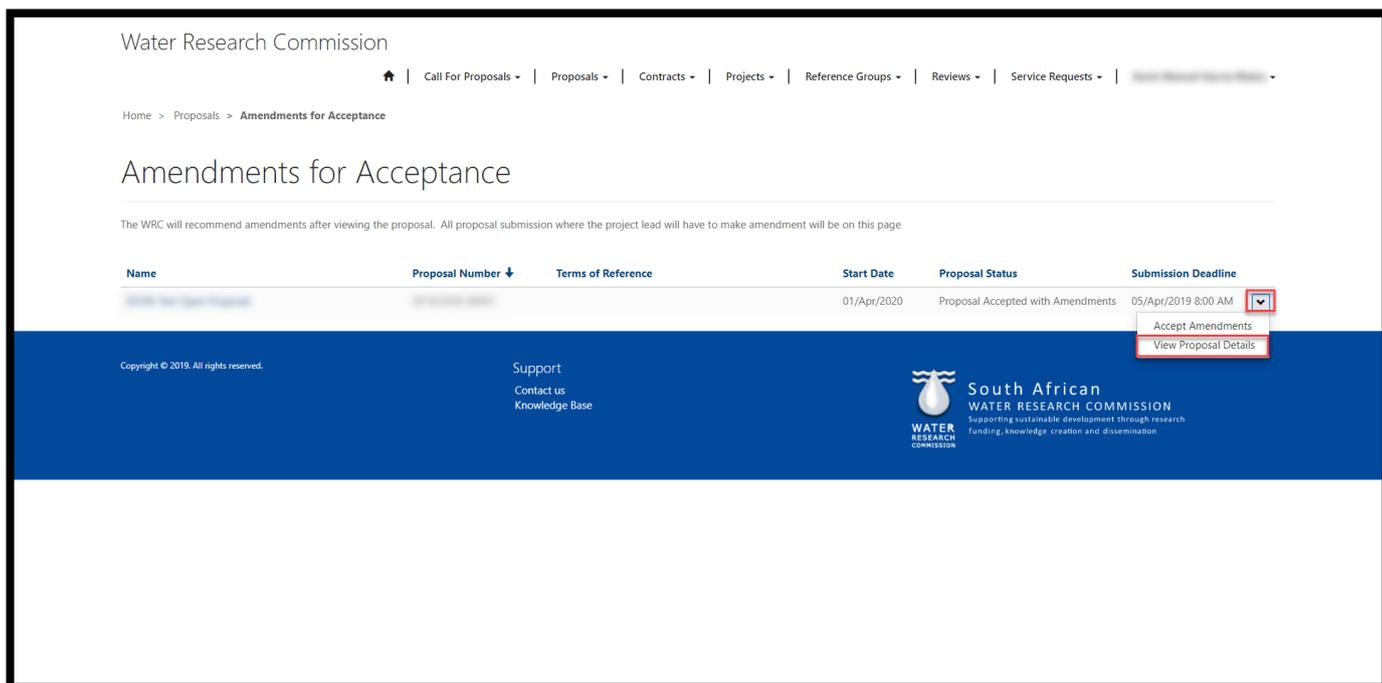


## Amendments for Acceptance Page

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.

Water Research Commission

Home > Proposals > Amendments for Acceptance

## Amendments for Acceptance

The WRC will recommend amendments after viewing the proposal. All proposal submission where the project lead will have to make amendment will be on this page

Name	Proposal Number ↓	Terms of Reference	Start Date	Proposal Status	Submission Deadline
			01/Apr/2020	Proposal Accepted with Amendments	05/Apr/2019 8:00 AM

Accept Amendments  
View Proposal Details

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- 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.

Edit

### Proposal Amendments

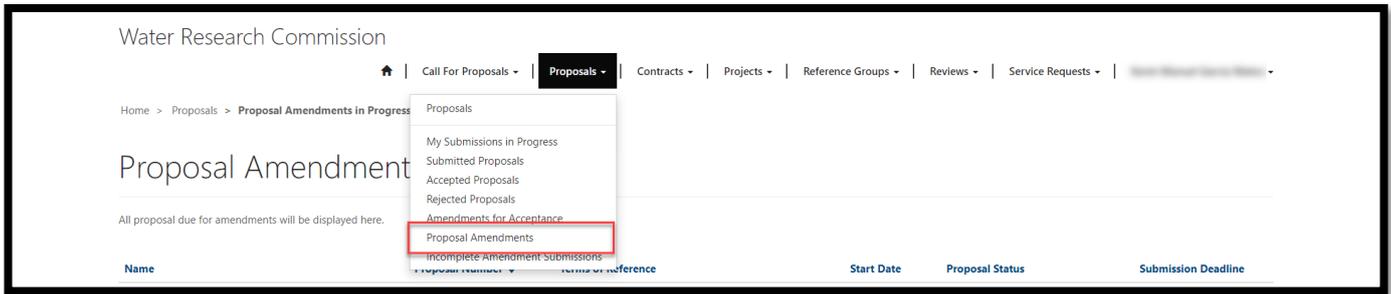
Accept WRC's Proposed Amendments?

- 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.

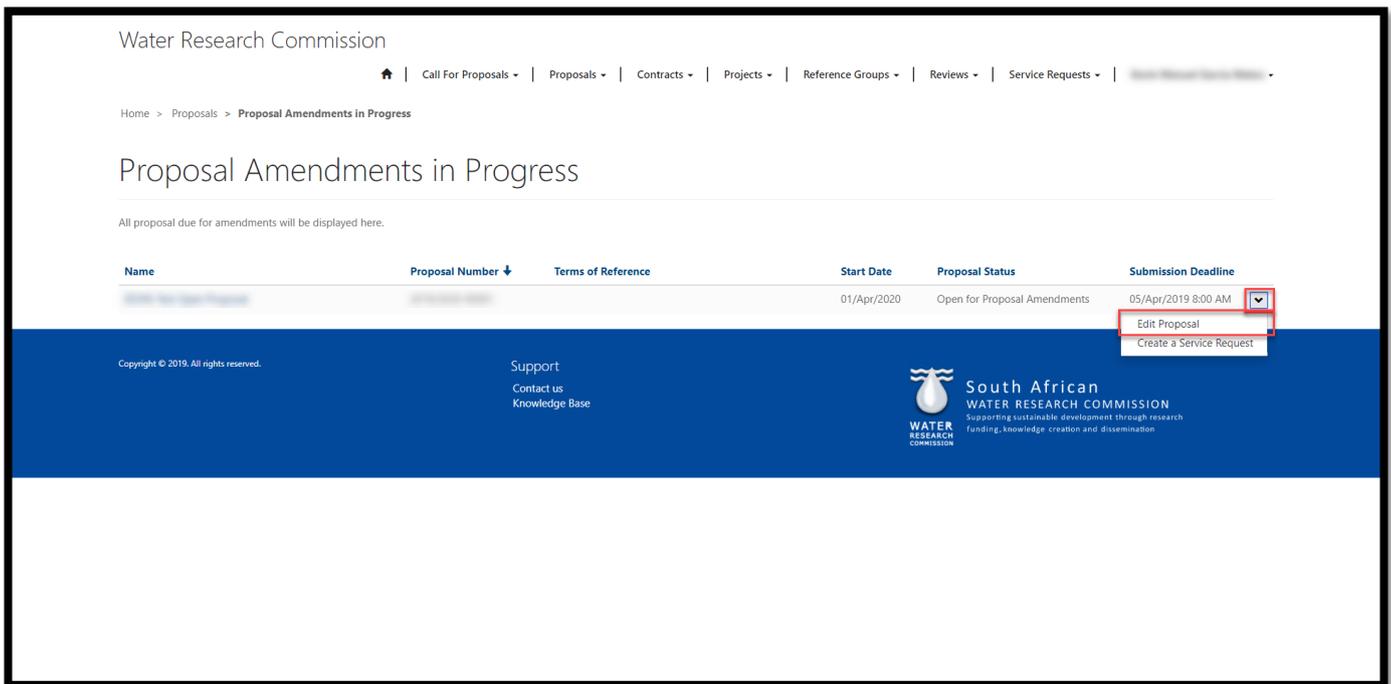


## Proposal Amendments in Progress Page

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



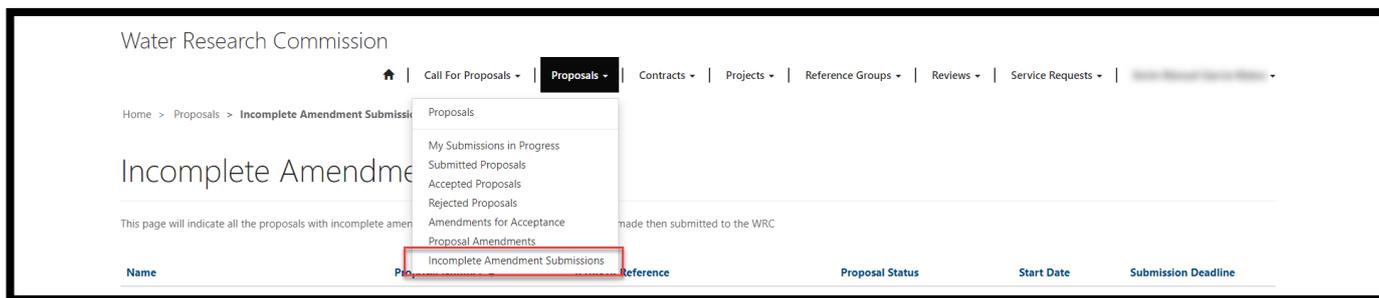
2. The *Proposal Amendments in Progress* page displays a list of proposals that have been accepted for funding by the WRC with requested amendments, and you have accepted the requested amendments.
3. The proposals records listed in on this page are available to be edited up until the *Submission Deadline* 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.



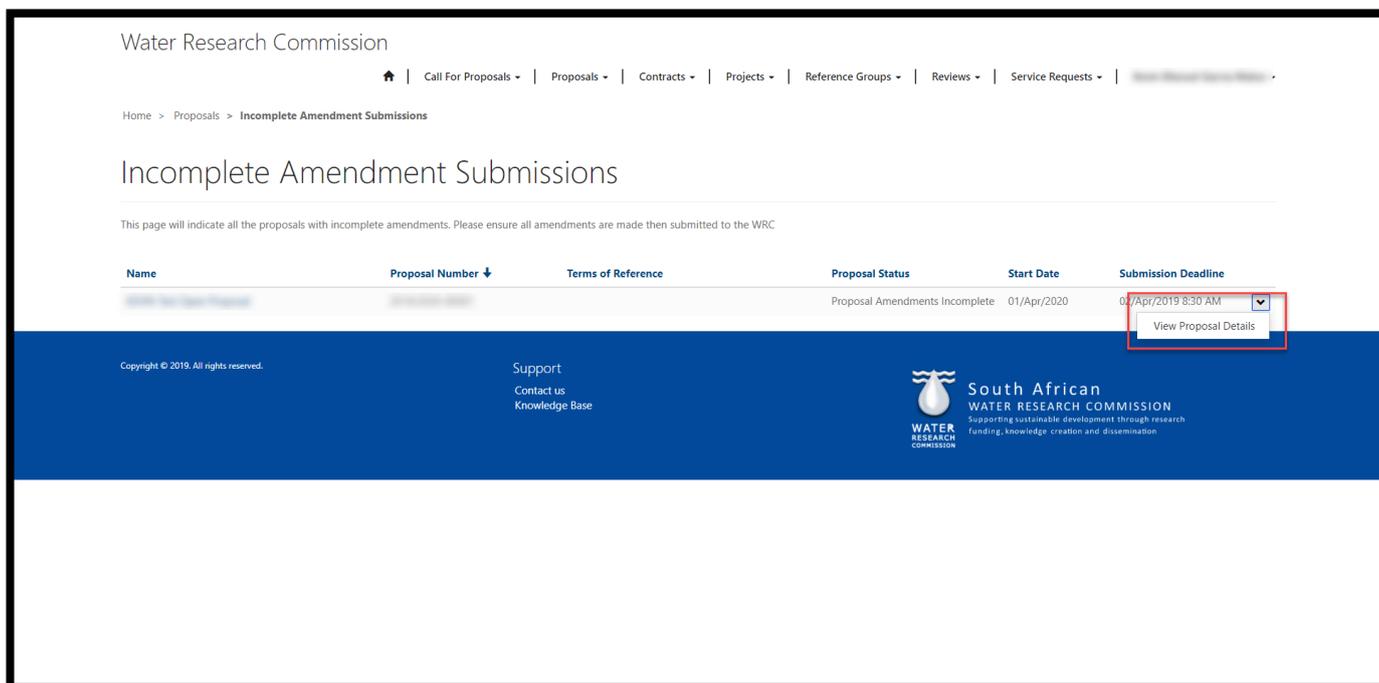
5. To edit the details of the proposal, you can follow the steps from **step #2** in the [Edit Proposal page](#) section of this document.
6. To submit the amended proposal to the WRC, you can follow the steps in the [Submit a Proposal to WRC](#) and [Submitted Proposals page](#) sections of this document, 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 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 clicking 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.



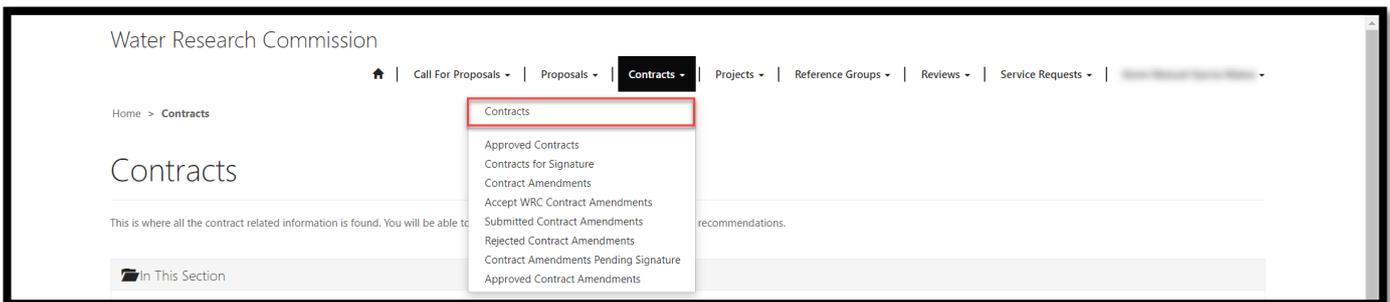
## Contracts

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

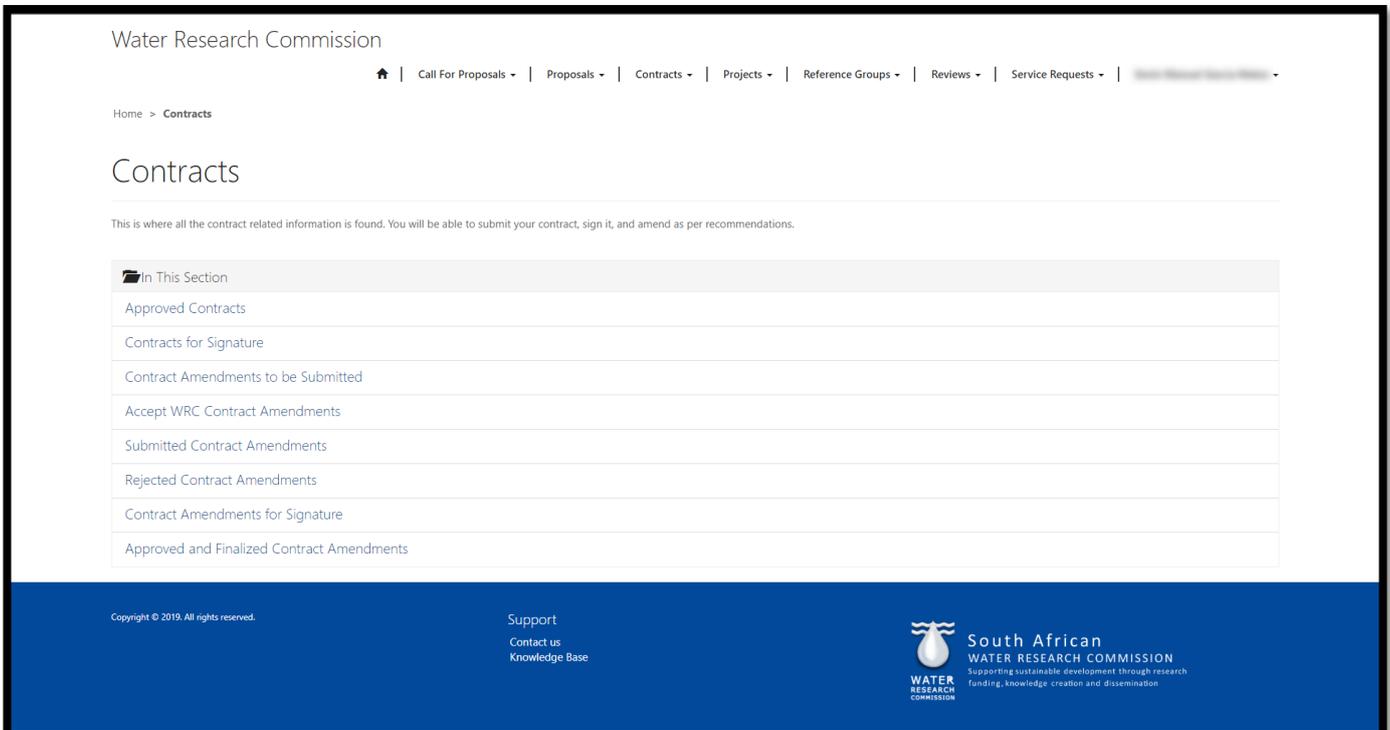


### Contracts Page

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

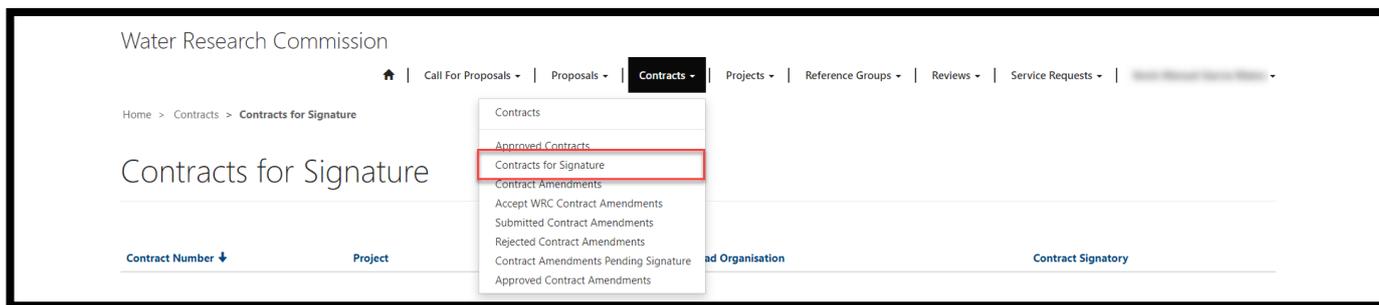


2. The *Contracts* page contains links to the related pages that display information regarding contracts and contract amendments you have with the WRC as the *Project Leader*. To view the related pages, you can click on the links under the **In This Section** section at the bottom of the form.

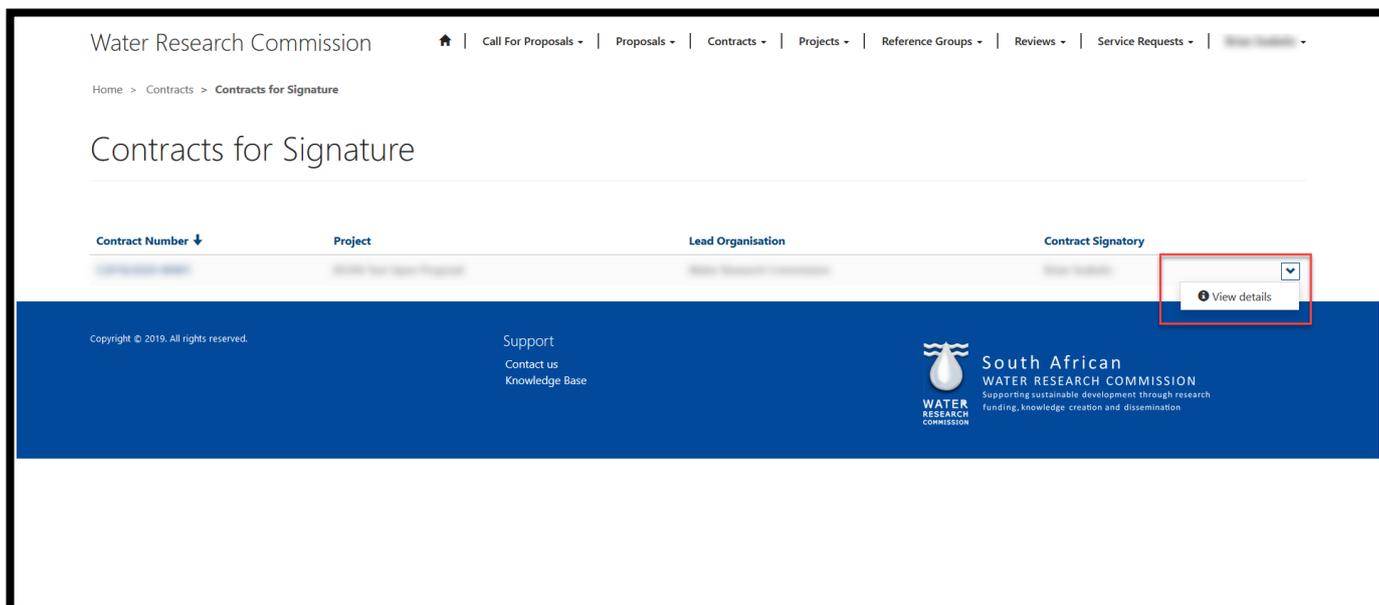


## Contracts for Signature Page

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.

### PROJECT INFORMATION

Project \*

Contract Number

Lead Organisation

Contract Signatory

Project Leader

### COURIER DETAILS (For Hard Copy of Contract Sent to WRC)

Courier Company Name

Courier Tracking Number

Date Couriered  
 

### CONTRACT DOCUMENTS

45 minutes ago  
WRC Business Management #  
 Letter with Contract.pdf (0 bytes)

---

43 minutes ago  
WRC Business Management #  
 Contract - [redacted].pdf (467.97 KB)

Upload Your Signed Contract  
 No files selected.

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.



**COURIER DETAILS (For Hard Copy of Contract Sent to WRC)**

Courier Company Name

Courier Tracking Number

Date Couriered

**CONTRACT DOCUMENTS**

45 minutes ago  
WRC Business Management #  
Letter with Contract.pdf (0 bytes)

---

43 minutes ago  
WRC Business Management #  
Contract - [redacted].pdf (467.97 KB)

Upload Your Signed Contract  
 No files selected.

## Approved Contracts

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

Water Research Commission

Home > Contracts > Approved Contracts

Approved Contracts

This page displays all approved contracts for submitted and approved proposals.

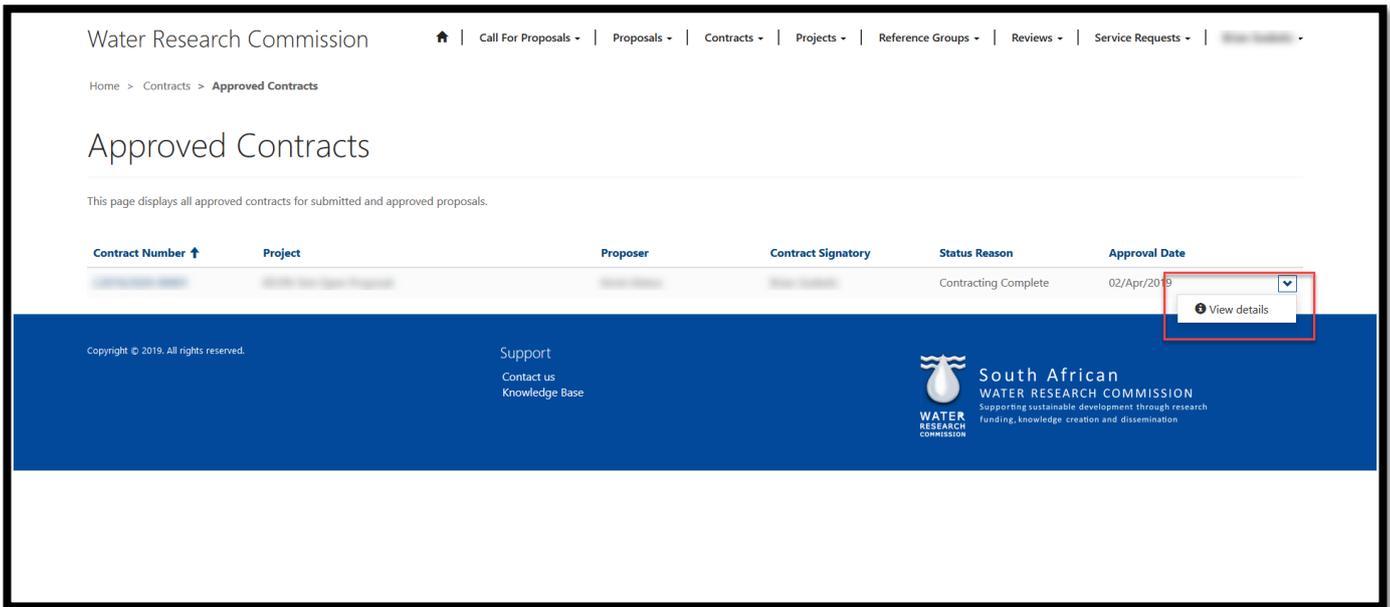
Navigation Menu: Home | Call For Proposals | Proposals | **Contracts** | Projects | Reference Groups | Reviews | Service Requests

Contracts dropdown menu:

- Contracts
- Approved Contracts**
- Contracts for Signature
- Contract Amendments
- Accept WRC Contract Amendments
- Submitted Contract Amendments
- Rejected Contract Amendments
- Contract Amendments Pending Signature
- Approved Contract Amendments

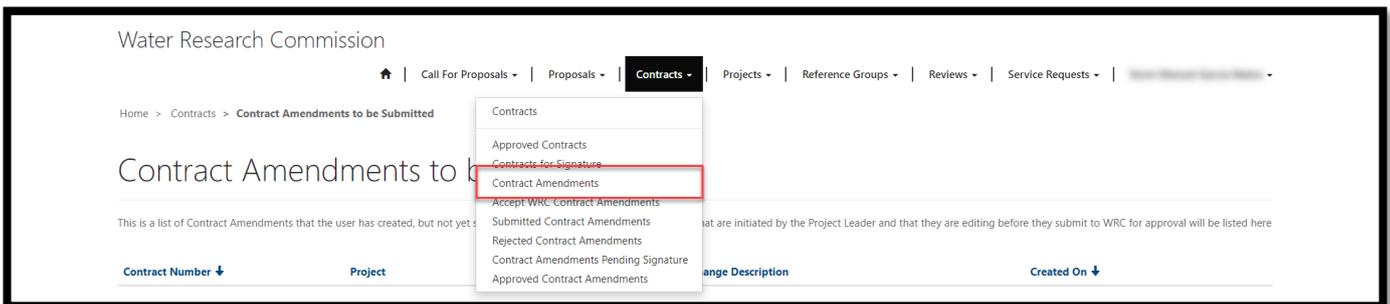
Table Headers: Contract Number ↑, Project, Contract Signatory, Status Reason, Approval Date

- 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.
- 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

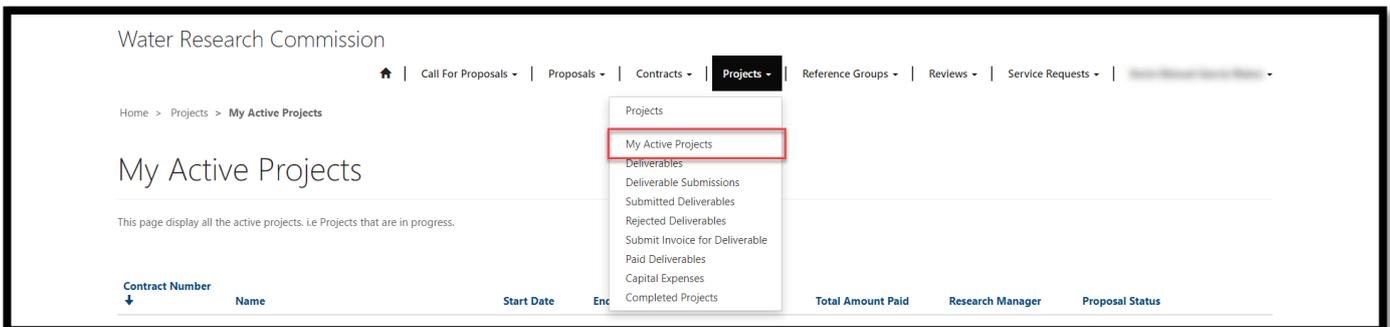
1. To view the *Contract Amendments to be Submitted* page, click on the **Contracts** option in the Navigation Menu and then click on **Contract Amendments**.



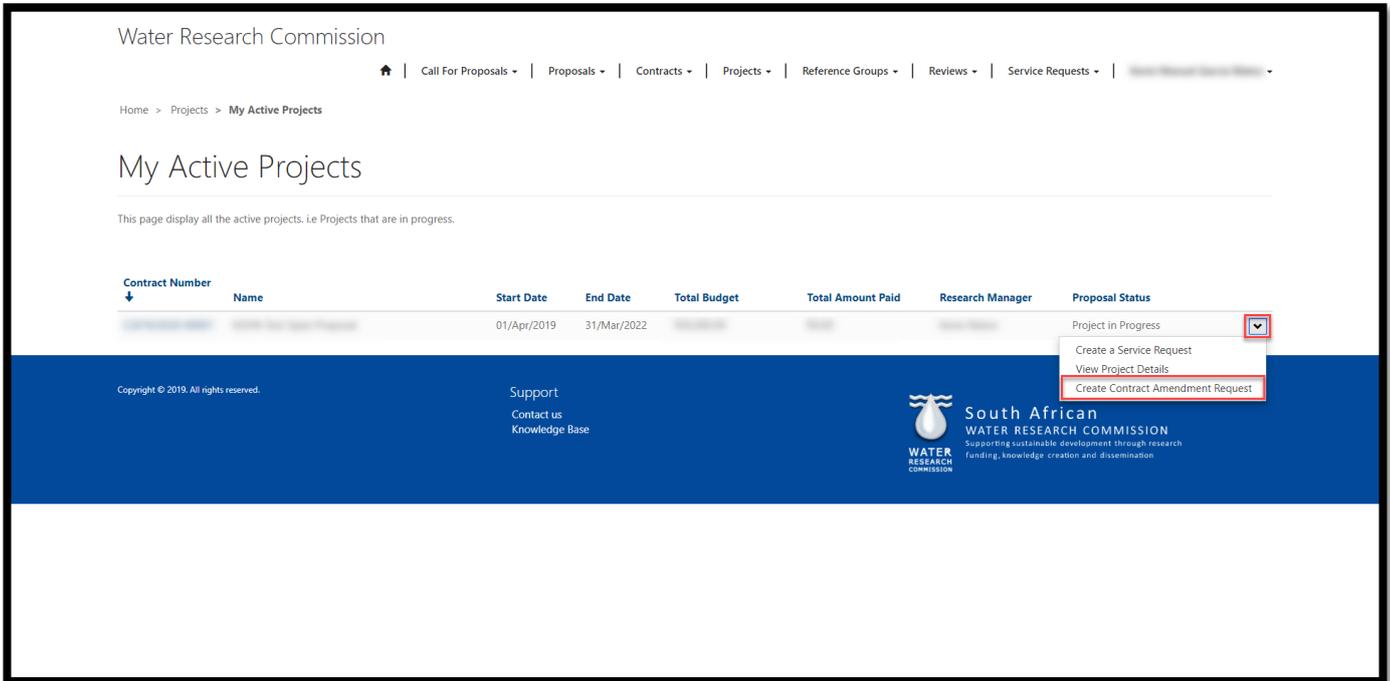
2. The *Contract Amendments to be Submitted* page displays a list of contract amendment requests that have been created by you as the *Project Leader* that has been designated for the active project.

### 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).



## General

---

### INFORMATION

**Project \***

**Change Description \***

**Motivation \***

---

### REASON FOR CHANGE

**Change to Contract End Date**  
 No  Yes

**New Contract End Date**

**Change to Deliverable/Contract Budget**  
 No  Yes

**Additional Funds Requested**

**Change to Deliverable Target Date(s)**  
 No  Yes

**Change to Deliverable Content**  
 No  Yes

**Change of Project Leader**  
 No  Yes

**New Project Leader (Researcher)**

---

### DETAILS OF CHANGE

---

### Attachments

**Attach a file**  
 No file chosen

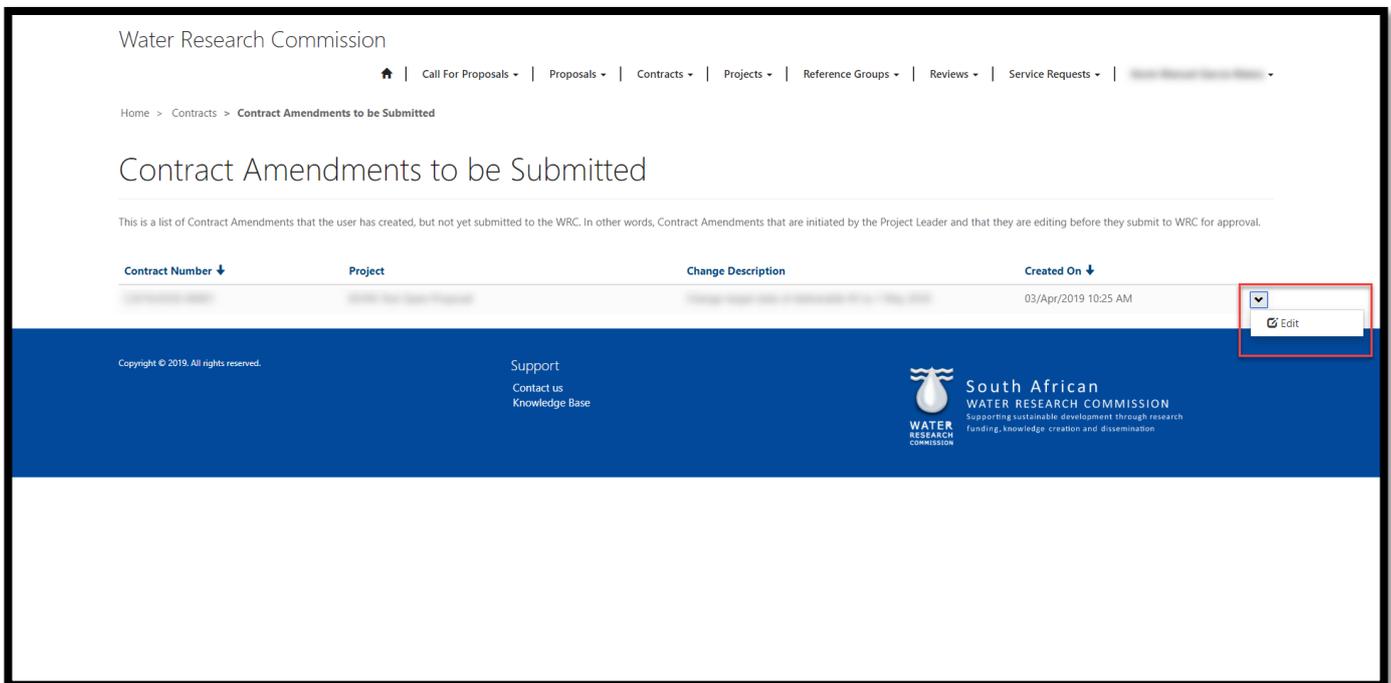
---

- 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.



Water Research Commission

Home > Contracts > Contract Amendments to be Submitted

### Contract Amendments to be Submitted

This is a list of Contract Amendments that the user has created, but not yet submitted to the WRC. In other words, Contract Amendments that are initiated by the Project Leader and that they are editing before they submit to WRC for approval.

Contract Number ↓	Project	Change Description	Created On ↓
			03/Apr/2019 10:25 AM

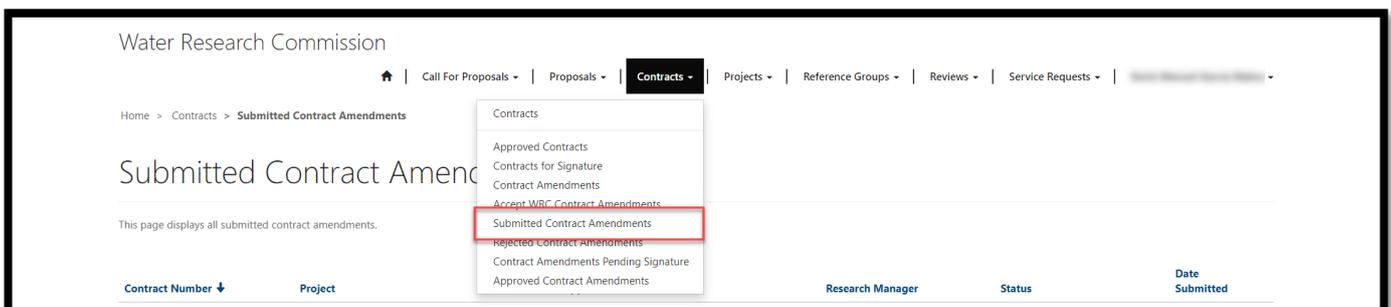
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2. From the *Edit Contract Amendment Request* window can continue to edit the contract amendment request and save your changes by clicking on the **Save** button at the bottom of the window.
3. **Note:** Remember to save any changes you make to the 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**.



Water Research Commission

Home > Contracts > Submitted Contract Amendments

### Submitted Contract Amend

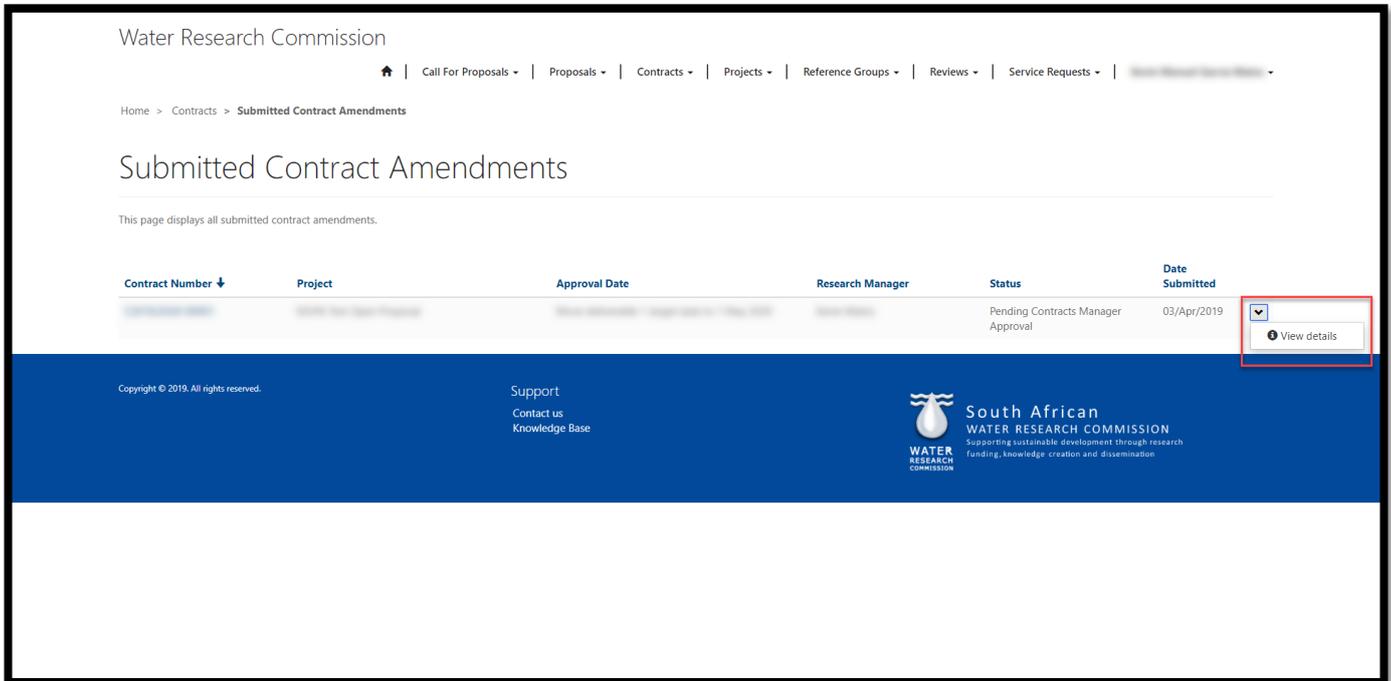
This page displays all submitted contract amendments.

Contract Number ↓	Project	Research Manager	Status	Date Submitted
-------------------	---------	------------------	--------	----------------

Contracts

- Approved Contracts
- Contracts for Signature
- Contract Amendments
- Accept WRC Contract Amendments
- Submitted Contract Amendments
- Rejected Contract Amendments
- Contract Amendments Pending Signature
- Approved Contract Amendments

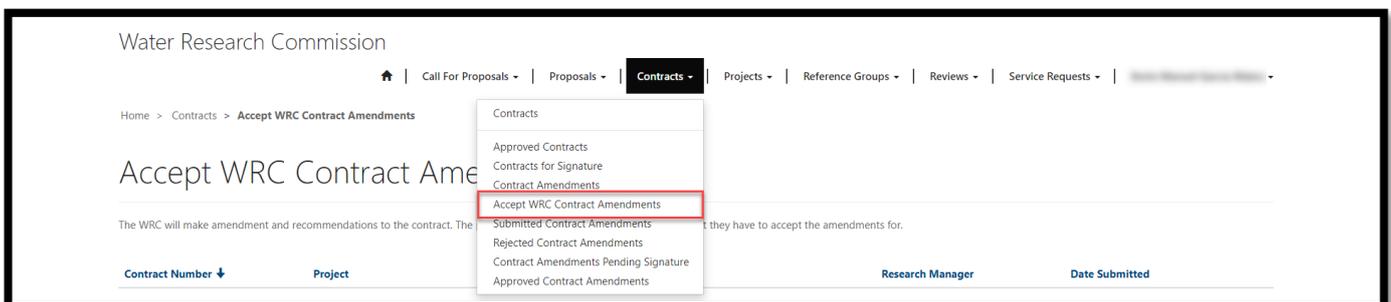
2. The *Submitted Contract Amendments* page displays a list of contract amendment request records that are pending approval by the WRC that you as the *Project Leader* of the active project have submitted to the WRC, or that the WRC has submitted to you and you have accepted.
3. To view the details of 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.

Water Research Commission

Home > Contracts > Accept WRC Contract Amendments

## Accept WRC Contract Amendments

The WRC will make amendment and recommendations to the contract. The project leader will view all the contracts here that they have to accept the amendments for.

Contract Number ↓	Project	Change Description	Research Manager	Date Submitted
				03/Apr/2019

View Amendment Details  
Accept WRC Amendments

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- 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).



## General

---

### INFORMATION

**Project \***

**Change Description \***

**Motivation \***

### REASON FOR CHANGE

<b>Change to Contract End Date</b> <input checked="" type="radio"/> No <input type="radio"/> Yes	<b>New Contract End Date</b> <input type="text"/>
<b>Change to Deliverable/Contract Budget</b> <input checked="" type="radio"/> No <input type="radio"/> Yes	<b>Additional Funds Requested</b> <input type="text"/>
<b>Change to Deliverable Target Date(s)</b> <input type="radio"/> No <input checked="" type="radio"/> Yes	
<b>Change to Deliverable Content</b> <input checked="" type="radio"/> No <input type="radio"/> Yes	
<b>Change of Project Leader</b> <input checked="" type="radio"/> No <input type="radio"/> Yes	<b>New Project Leader (Researcher)</b> <input type="text"/>

### DETAILS OF CHANGE

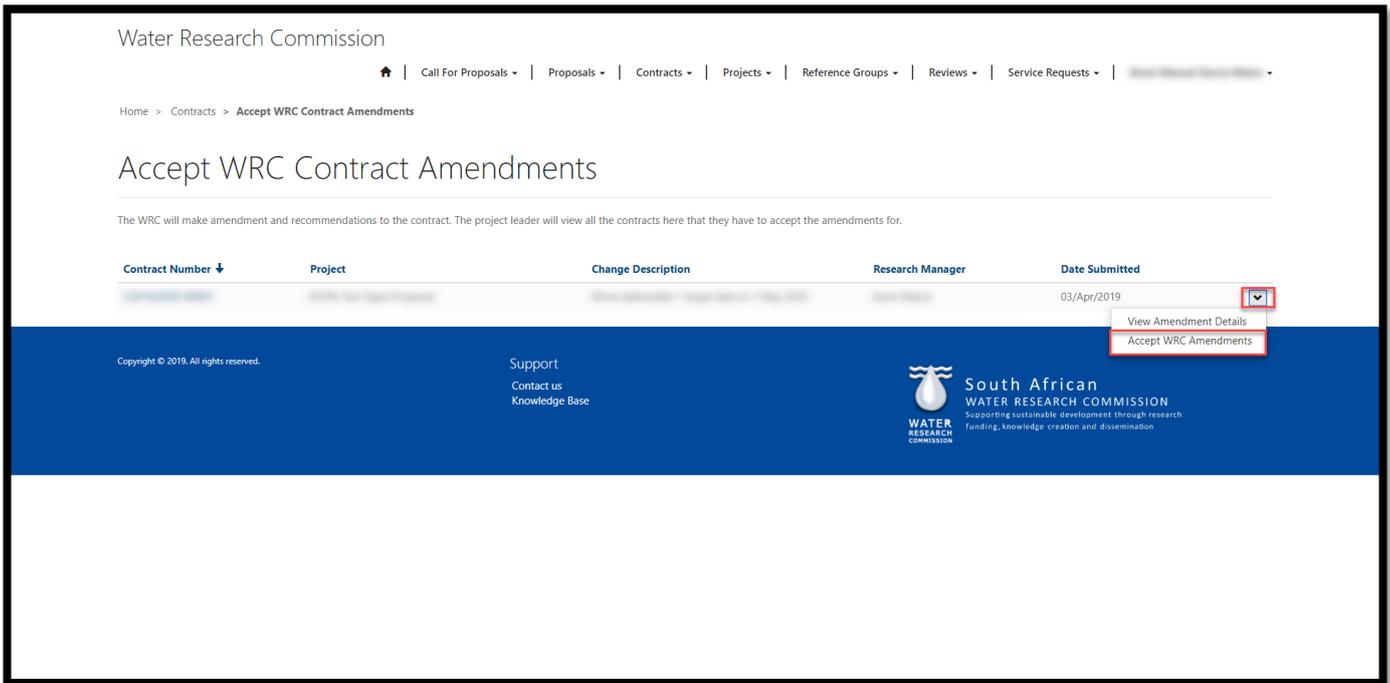
  

### Attachments

There are no notes to display.

- 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.

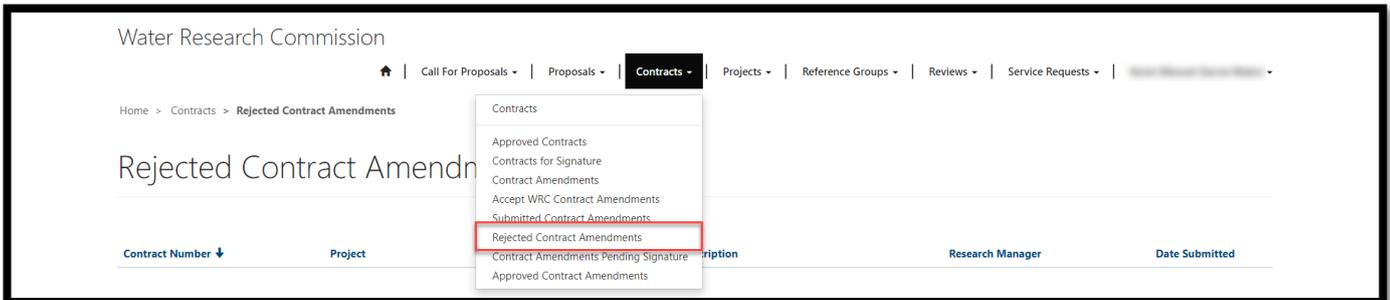




6. In the *Contract Amendments Accept/Reject* window, select your response and submit it to the WRC by clicking on the **Submit Response to WRC** button. You will be re-directed to the *Submitted Contract Amendments* page and you can follow the steps in the [Submitted Contract Amendments page](#) section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

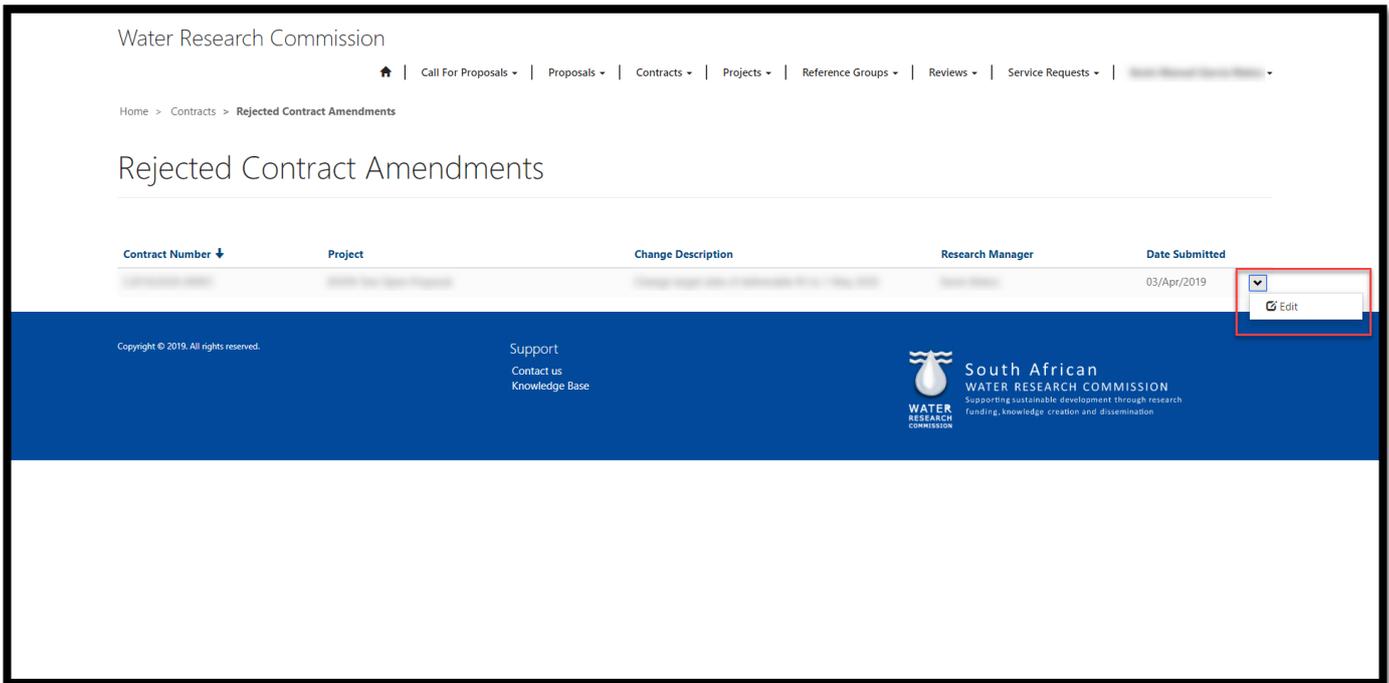
## Rejected Contract Amendments Page

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.

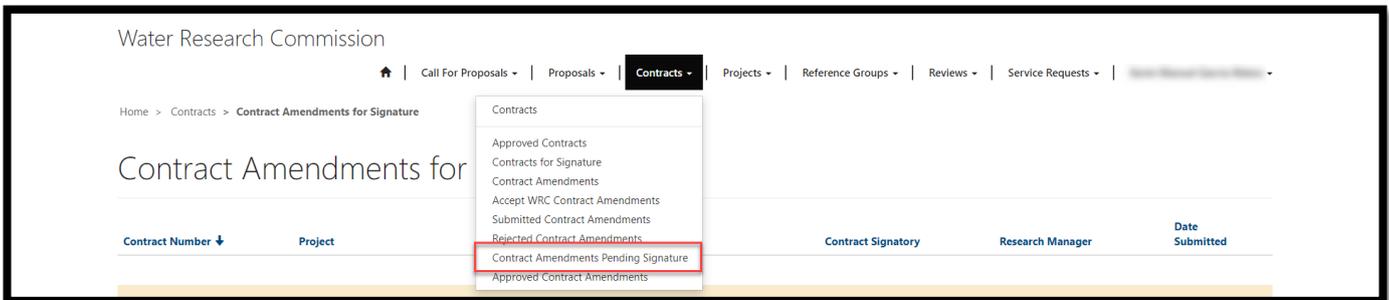




5. You can edit the details of the contract amendment request, upload supporting documents, and re-submit the contract amendment request to the WRC in the same manner as detailed in the [Edit and Submit a Contract Amendment Request](#) section of this document.

### **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.



Water Research Commission | Call For Proposals | Proposals | Contracts | Projects | Reference Groups | Reviews | Service Requests

Home > Contracts > Contract Amendments for Signature

## Contract Amendments for Signature

Contract Number ↓	Project	Change Description	Contract Signatory	Research Manager	Date Submitted
					03/Apr/2019

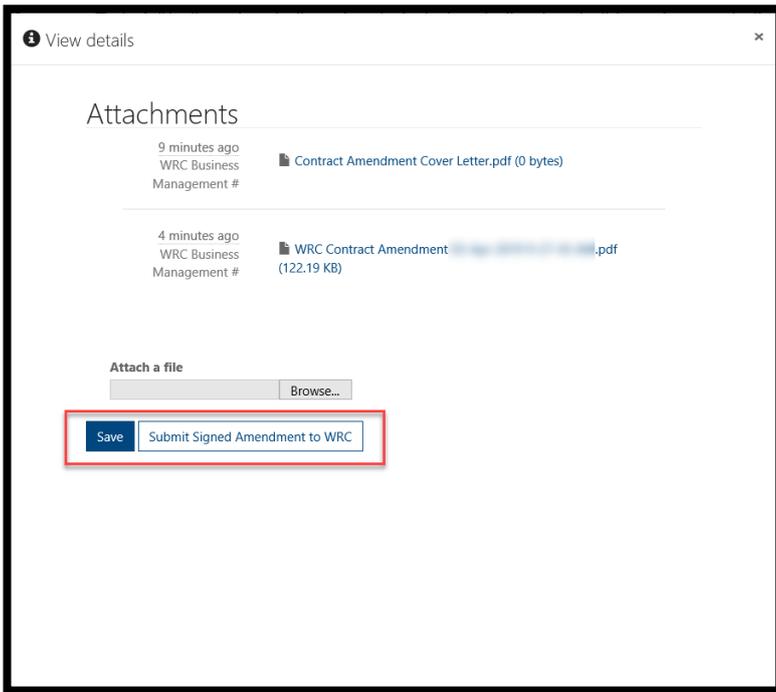
View details

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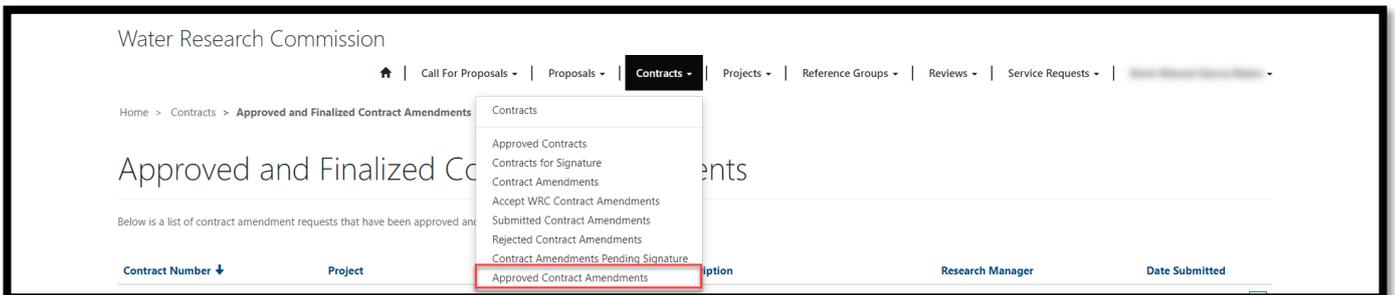
- In the *Attachments* window, you can view and download the *Contract Amendment Cover Letter* and *Contract Amendment* documents.
- It is required for you as the *Contract Signatory* for the project to download a copy of the *Contract Amendment* document, sign and initial it, upload a file with the scanned copy of the document to this contract amendment record and submit it to the WRC.
- 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.
- 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.
- 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).



## Approved and Finalized Contract Amendments

Below is a list of contract amendment requests that have been approved and finalized by the WRC.

Contract Number ↓	Project	Change Description	Research Manager	Date Submitted
				03/Apr/2019

View details

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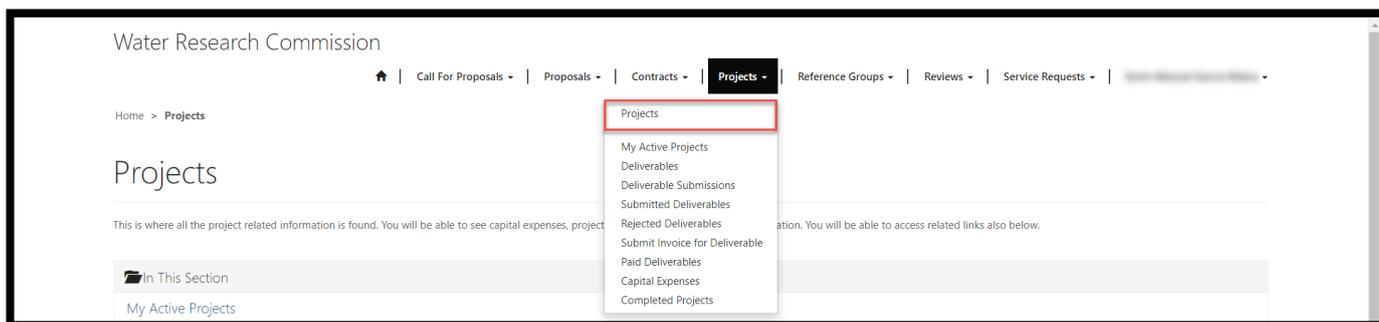
## Projects

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

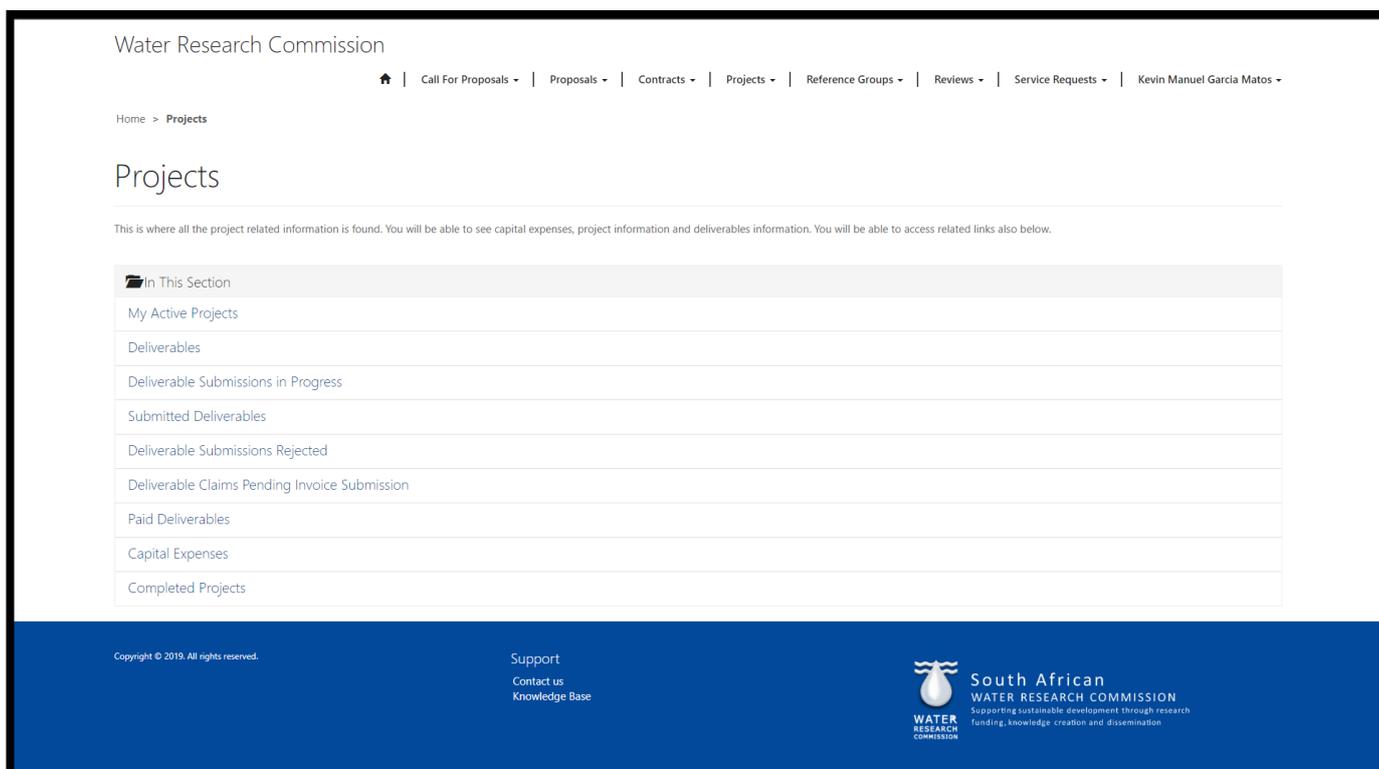


## Projects Page

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

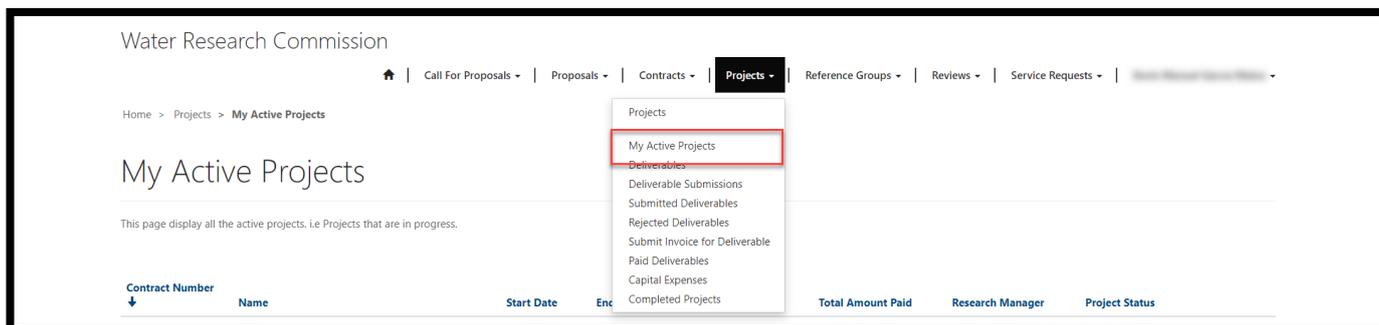


2. The *Projects* page contains links to the related pages that display information regarding projects, deliverables, and capital expenses where you are the *Project Leader* of the active project. To view the related pages, you can click on the links under the **In This Section** section at the bottom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

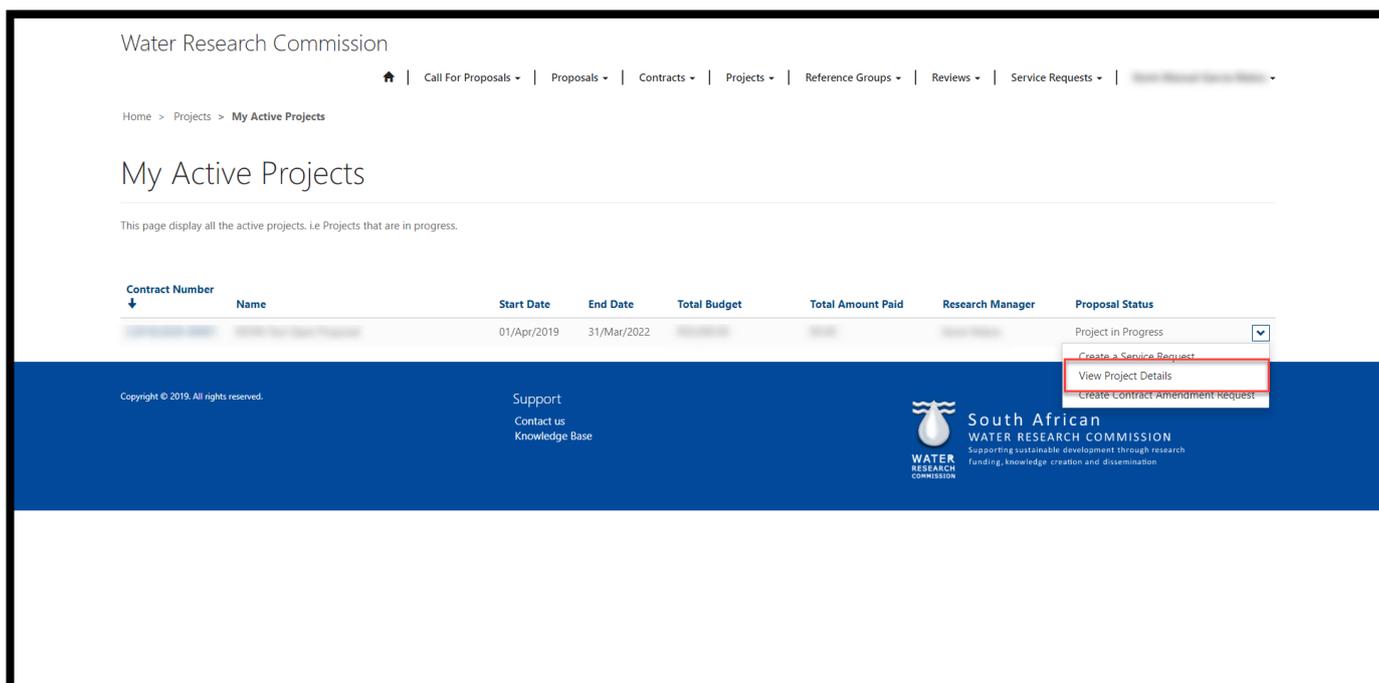


## My Active Projects Page

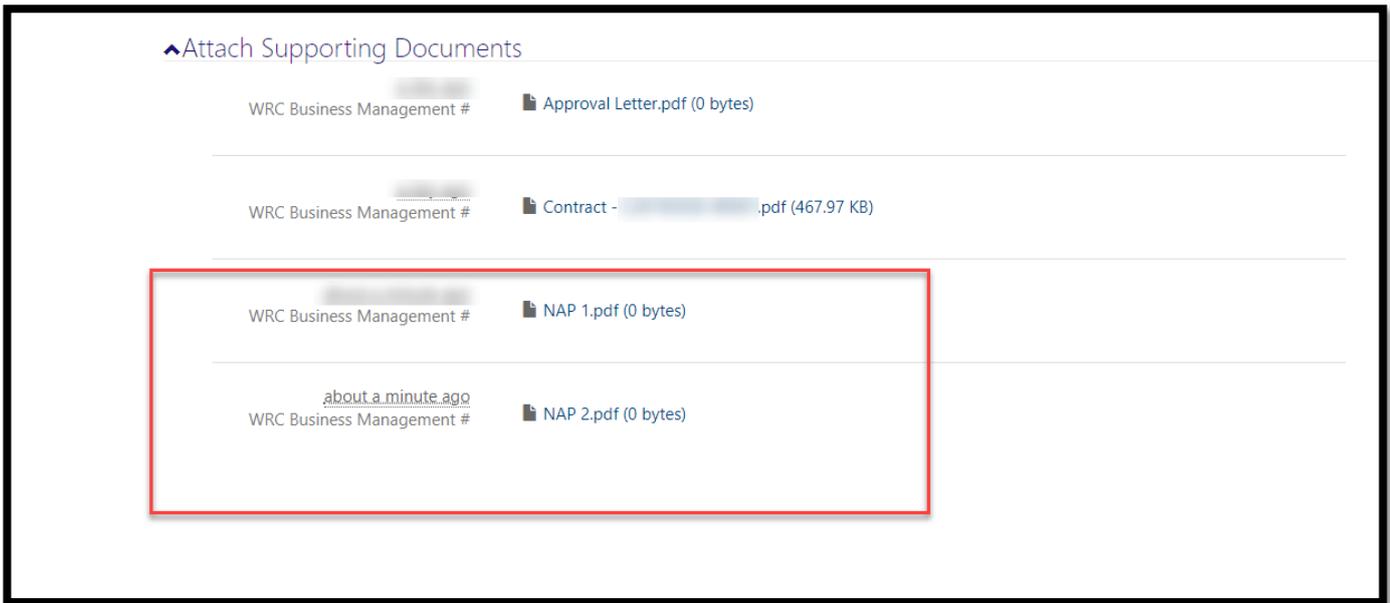
1. To view the *My Active Projects* page, click on the **Projects** option in the Navigation Menu and then click on **My Active Projects**.



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.

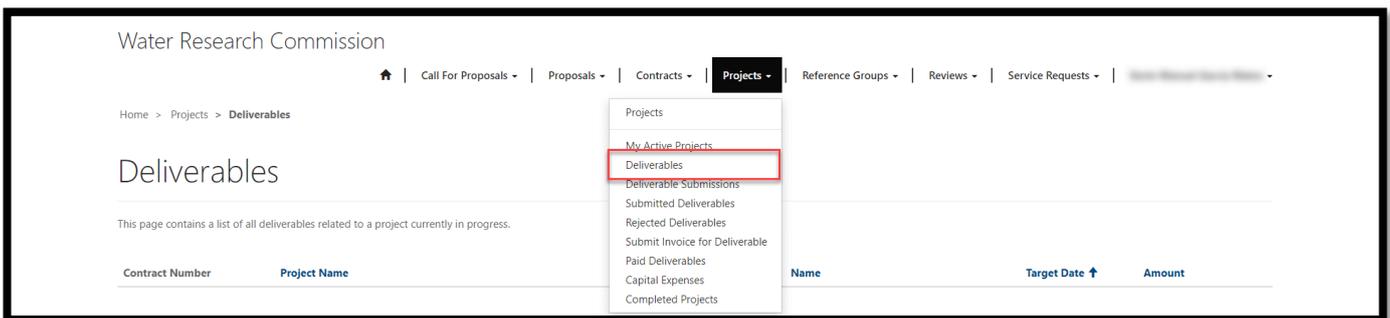


4. You can also create a *Service Request* or a *Contract Amendment Request* from the active projects listed on this page. To follow these processes, view the steps to follow in the [Create a Service Request](#) and [Create a Contract Amendment Request](#) sections of this document.
5. **Note:** Documentation 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.



Water Research Commission

Home > Projects > Deliverables

## Deliverables

This page contains a list of all deliverables related to a project currently in progress.

Contract Number	Project Name	Deliverable Number	Name	Target Date ↑	Amount
[REDACTED]	[REDACTED]	1	Advance	01/Apr/2020	[REDACTED]
[REDACTED]	[REDACTED]	2	Mid-Project Research Report	01/Apr/2020	[REDACTED]
[REDACTED]	[REDACTED]	3	Final Research Report	31/Mar/2022	[REDACTED]

View Deliverable Details  
Create Deliverable Submission

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### 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.

Water Research Commission

Home > Projects > Deliverables

## Deliverables

This page contains a list of all deliverables related to a project currently in progress.

Contract Number	Project Name	Deliverable Number	Name	Target Date ↑	Amount
[REDACTED]	[REDACTED]	1	Advance	01/Apr/2020	[REDACTED]
[REDACTED]	[REDACTED]	2	Mid-Project Research Report	01/Apr/2020	[REDACTED]
[REDACTED]	[REDACTED]	3	Final Research Report	31/Mar/2022	[REDACTED]

View Deliverable Details  
Create Deliverable Submission

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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.

Claim Information

PROJECT LEADER COMMENTS

Comments

EXECUTIVE SUMMARY

RESEARCH MANAGER COMMENTS

RM Recommendation Comments

—

DOCUMENTS

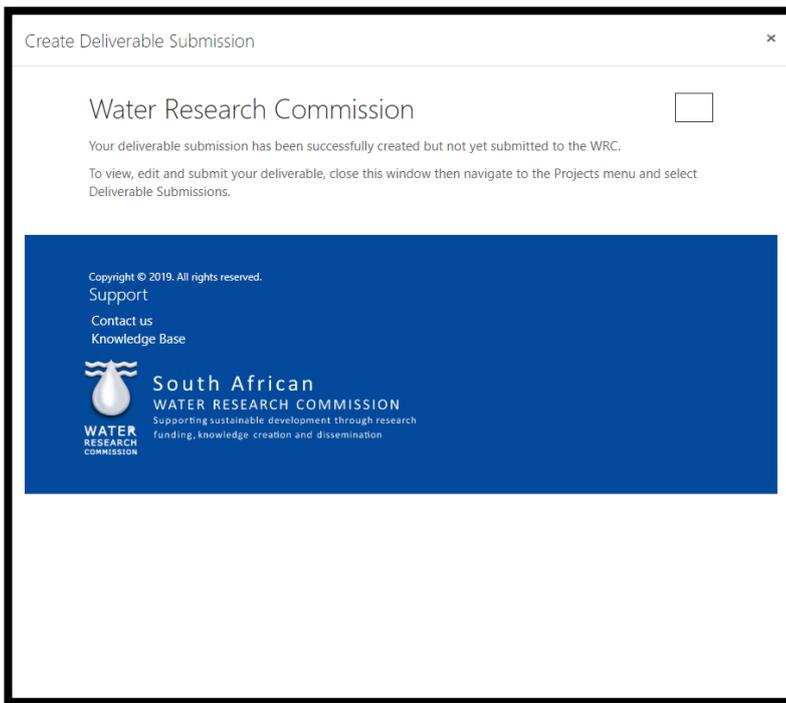
Attach a file

No file chosen

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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.

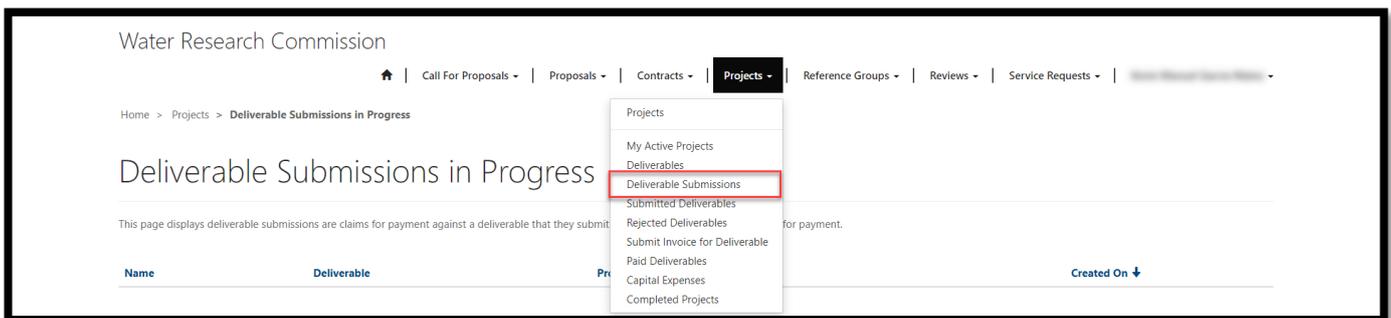




- To edit and submit your deliverable submission, close the Deliverable Claim Created window, navigate to the *Deliverable Submissions* page and follow the steps in the [Deliverable Submissions in Progress](#) page section detailed below.
- Note:** Once a deliverable has been submitted to the WRC for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

### **Deliverable Submissions in Progress Page**

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



- 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.
- 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.



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Home > Projects > Deliverable Submissions in Progress

## Deliverable Submissions in Progress

This page displays deliverable submissions are claims for payment against a deliverable that they submit to WRC for approval and eventually for payment.

Name	Deliverable	Project	Created On	
XXXXXXXXXX	Advance	XXXXXXXXXX	02/Apr/2019 4:53 PM	<input type="button" value="Edit"/>

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### **Submit a Deliverable Submission to WRC**

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.



## Claim Information

### PROJECT LEADER COMMENTS

Comments

### EXECUTIVE SUMMARY

### RESEARCH MANAGER COMMENTS

RM Recommendation Comments

—

### DOCUMENTS

Attach a file

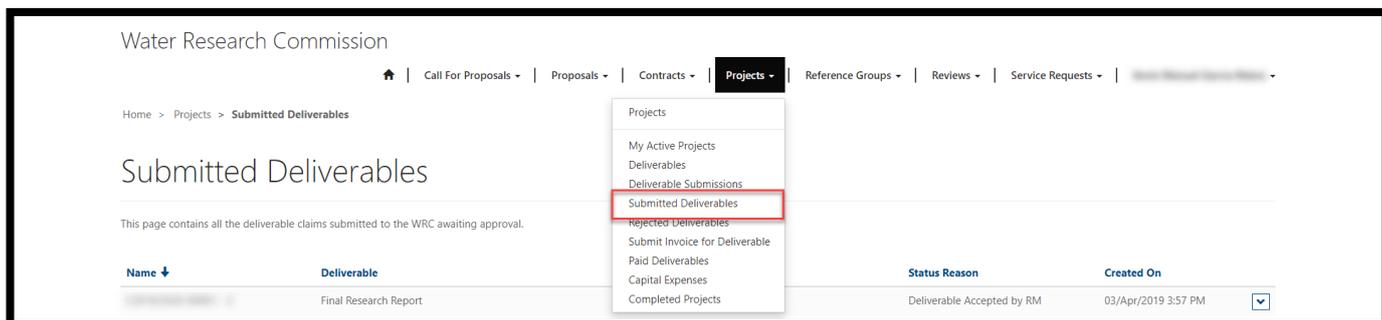
No file chosen

- 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.

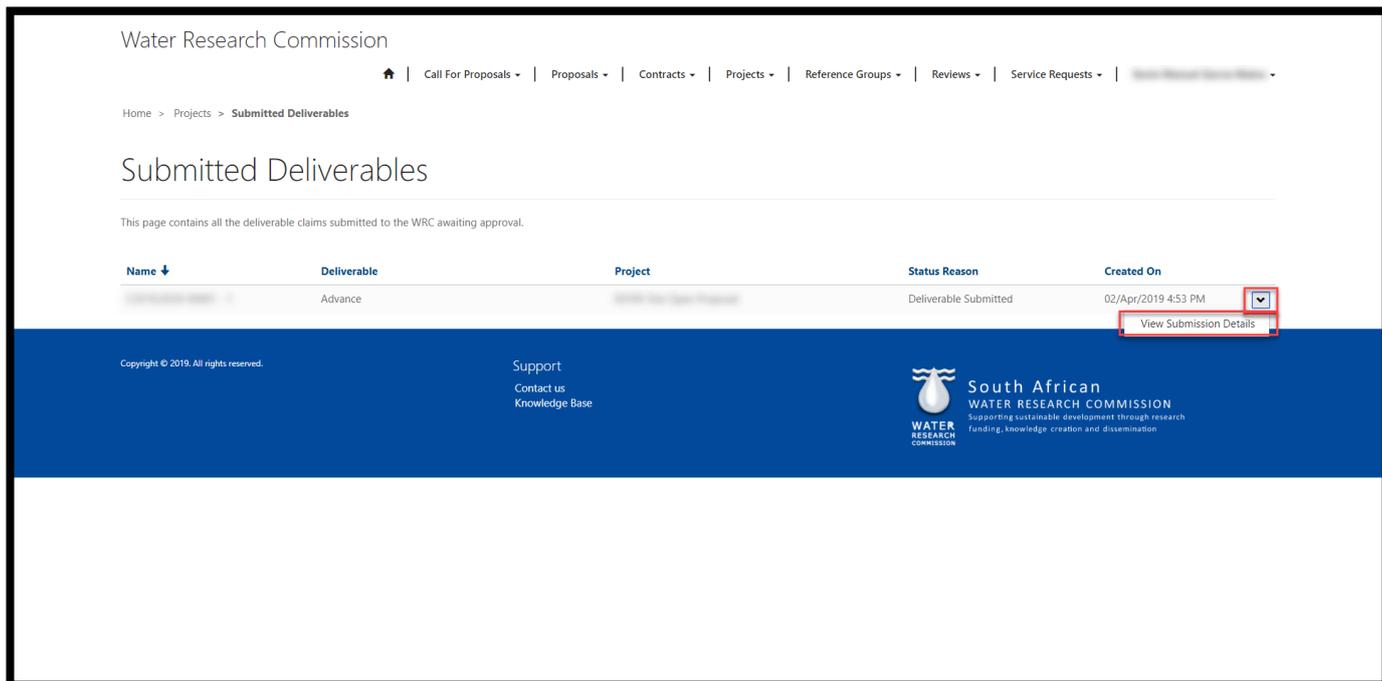


## Submitted Deliverables Page

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

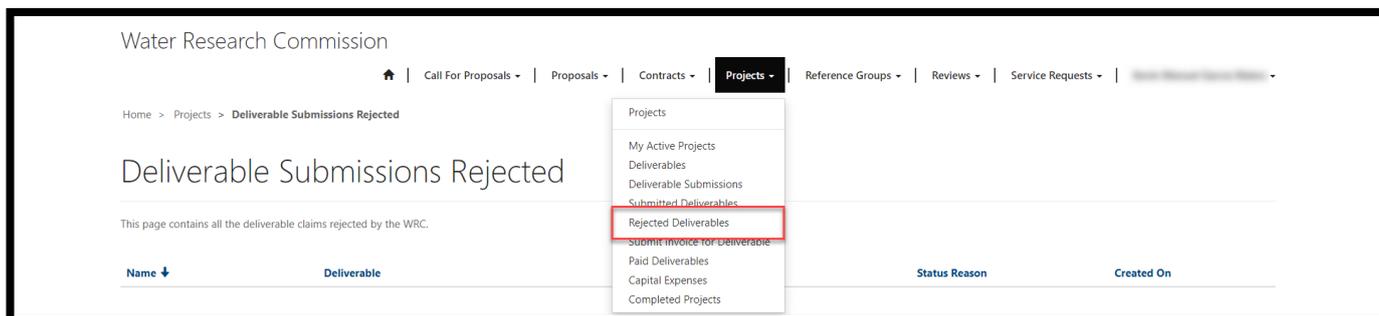


2. The *Submitted Deliverables* page displays a list of deliverable submission records that you as the *Project Leader* of the active project have submitted to the WRC for approval.
3. You can view the progress of your submission by referring to the *Status Reason* column for the deliverable submission 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

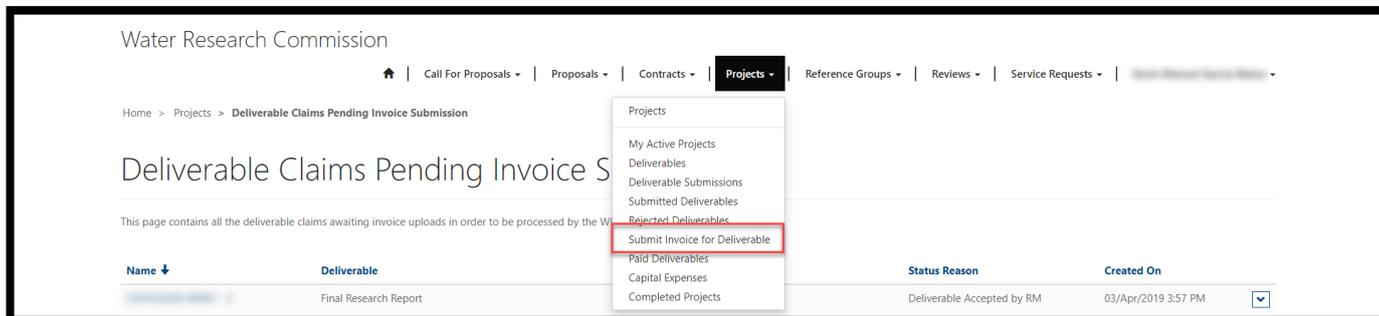
1. To view the *Deliverable Submissions Rejected* page, click on the **Projects** option in the Navigation Menu and then click on **Rejected Deliverables**.



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 [Submit a Deliverable Submission to WRC](#) 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.

Water Research Commission

Home > Projects > Deliverable Claims Pending Invoice Submission

## Deliverable Claims Pending Invoice Submission

This page contains all the deliverable claims awaiting invoice uploads in order to be processed by the WRC

Name	Deliverable	Project	Status Reason	Created On
	Advance		Deliverable Accepted by RM	02/Apr/2019 4:53 PM

View Submission Details  
Submit Deliverable Invoice

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### **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.

Water Research Commission

Home > Projects > Deliverable Claims Pending Invoice Submission

## Deliverable Claims Pending Invoice Submission

This page contains all the deliverable claims awaiting invoice uploads in order to be processed by the WRC

Name	Deliverable	Project	Status Reason	Created On
	Advance		Deliverable Accepted by RM	02/Apr/2019 4:53 PM

View Submission Details  
Submit Deliverable Invoice

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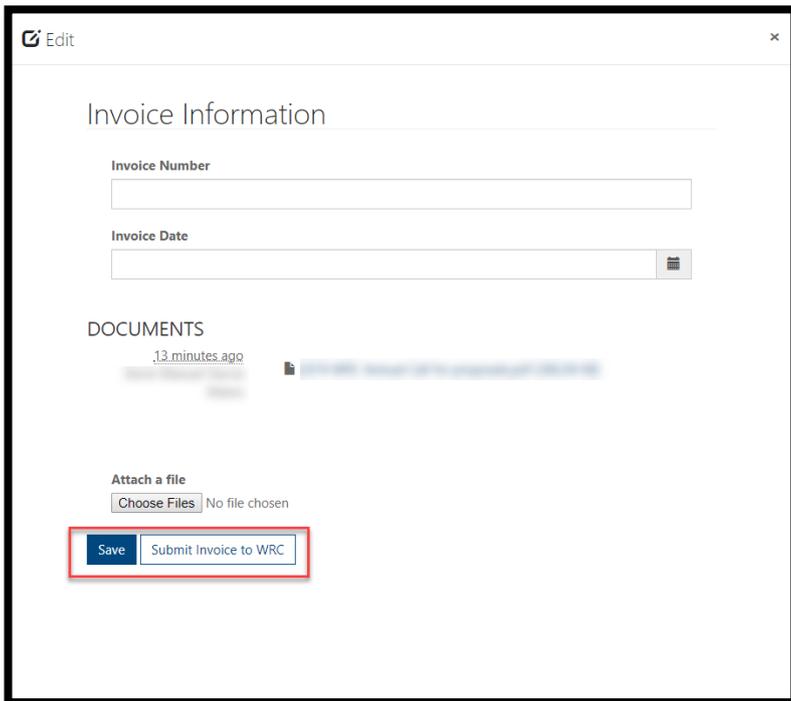
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2. In the *Invoice Information* window, enter the invoice number and date, upload invoice document, and save your changes, which will close the window.

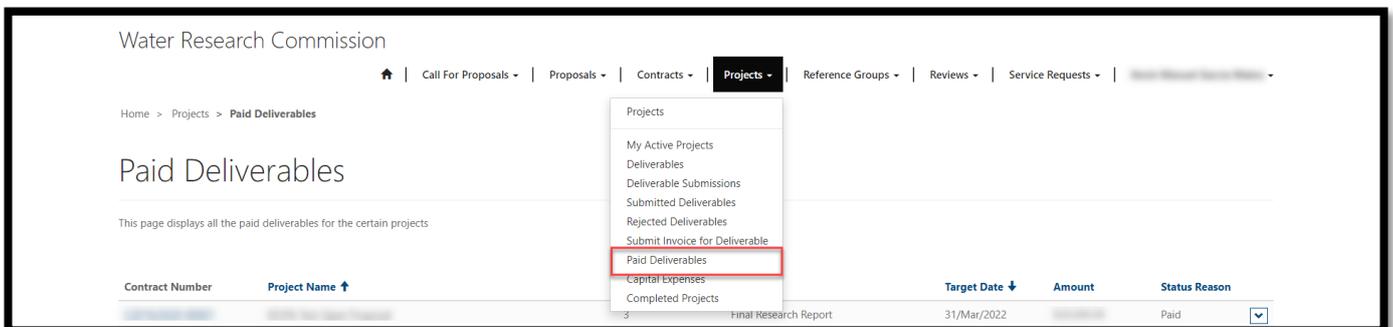


3. Re-open the *Invoice Information* window and click on the **Submit Invoice to WRC** button. This will re-direct you to the *Submitted Deliverables* page where you can continue to track the progress of your submission.



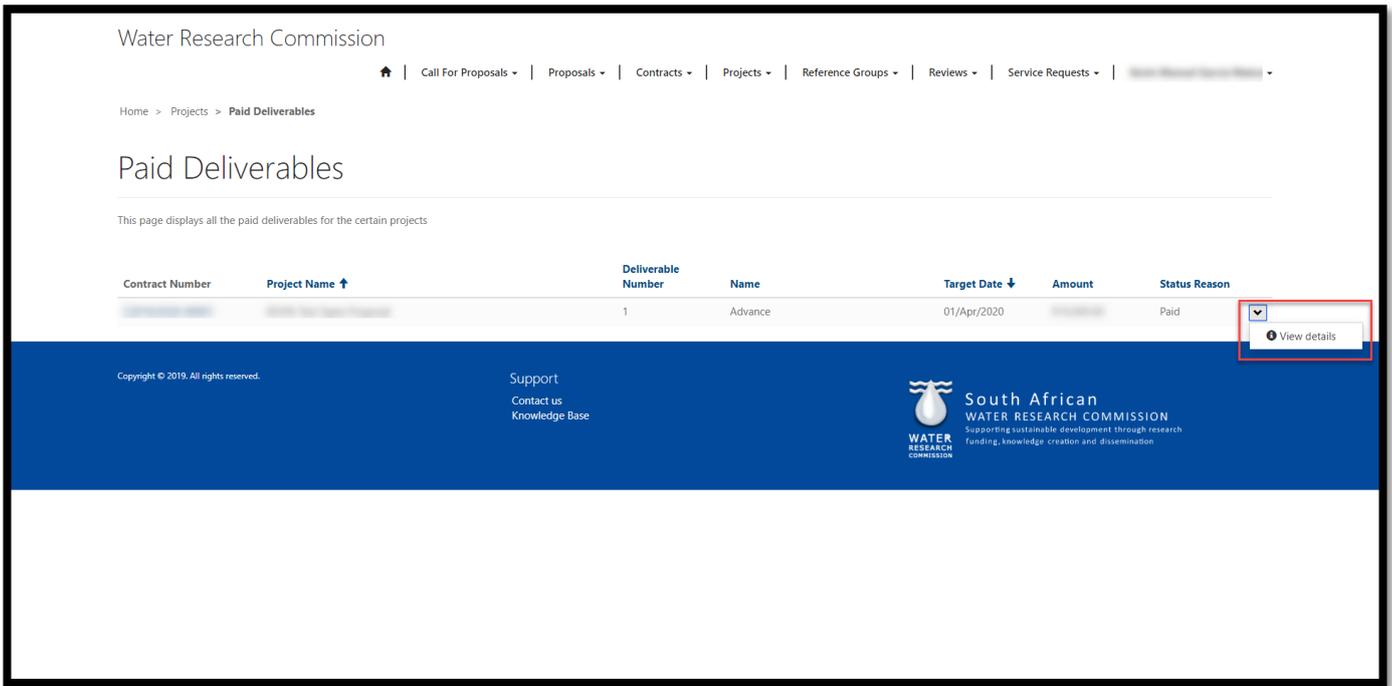
## **Paid Deliverables Page**

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



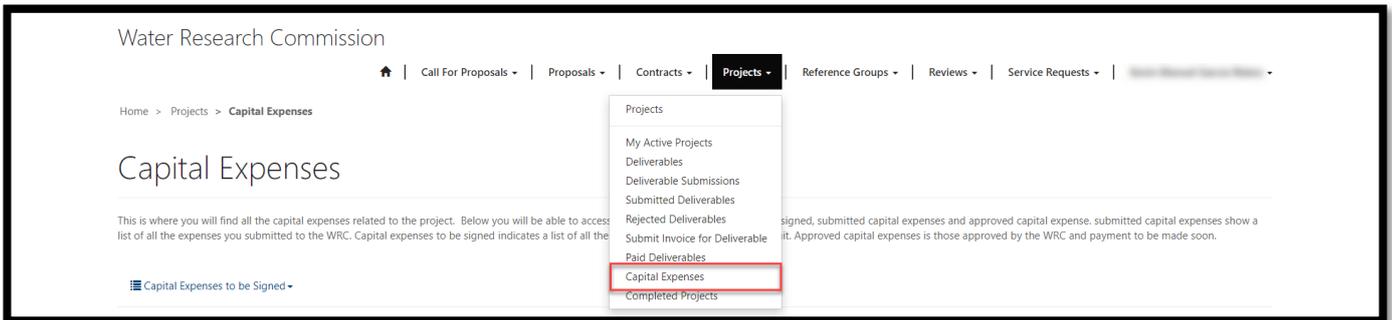
2. The *Paid Deliverables* page displays a list of deliverables that have been approved by the WRC for payment and you are the *Project Leader* of the active project.
3. To view the details of the deliverable, click on the arrow on the far right of the deliverable record and select the **View details**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



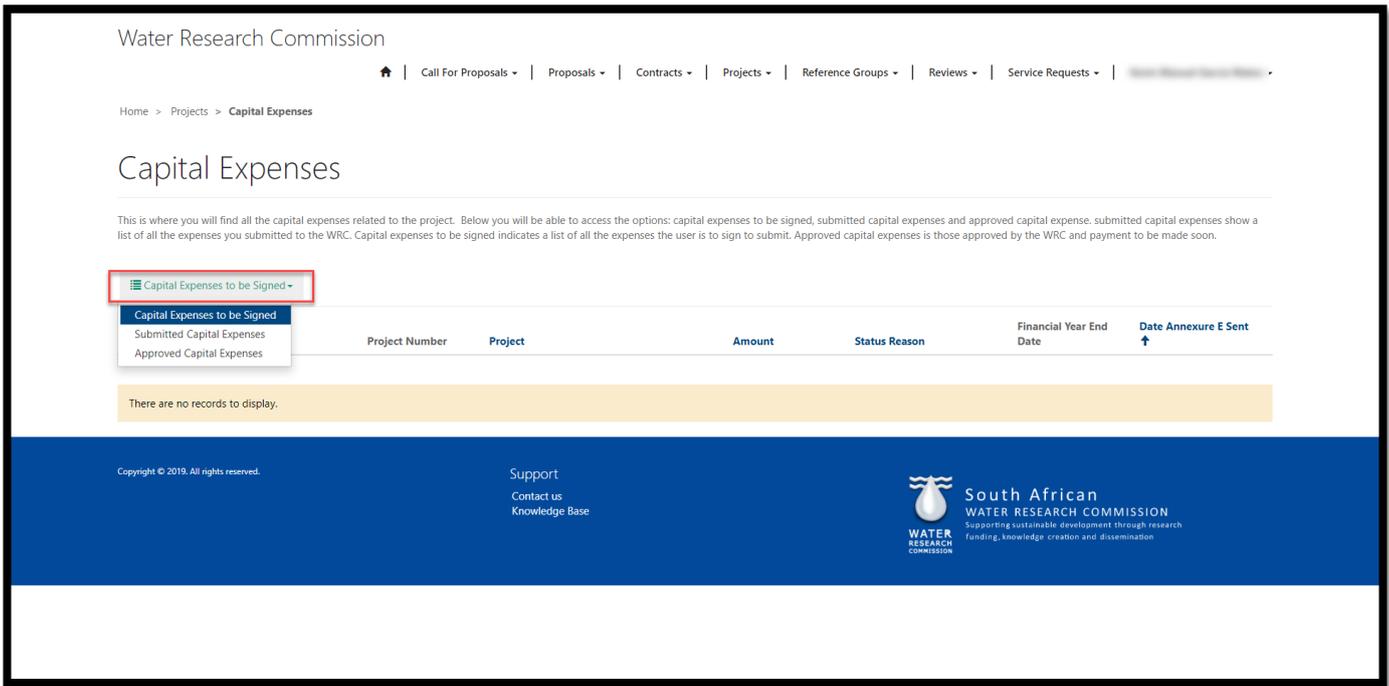


## Capital Expenses Page

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

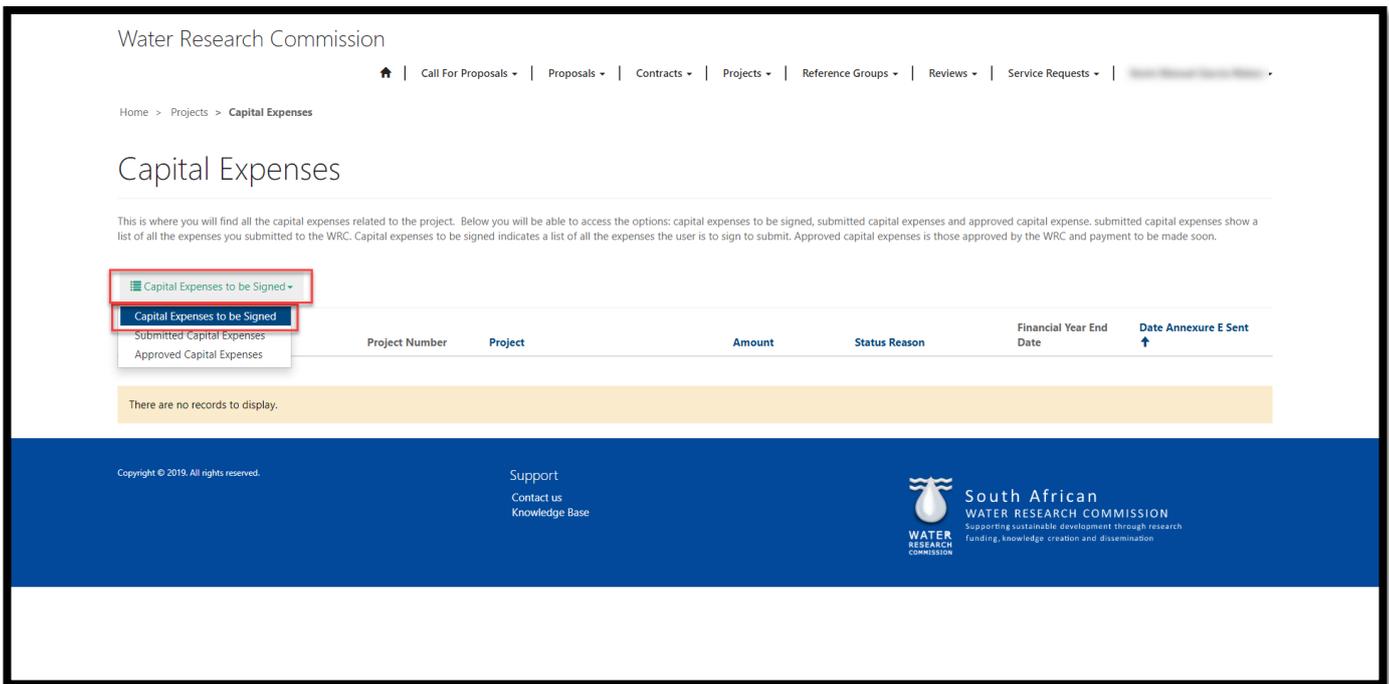


2. The *Capital Expenses* page displays three different views of capital expense records that are part of any active project for which you are the *Project Leader*:
  - a. [Capital Expenses to be Signed](#)
  - b. [Submitted Capital Expenses](#)
  - c. [Approved Capital Expenses](#)
3. To select a view,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



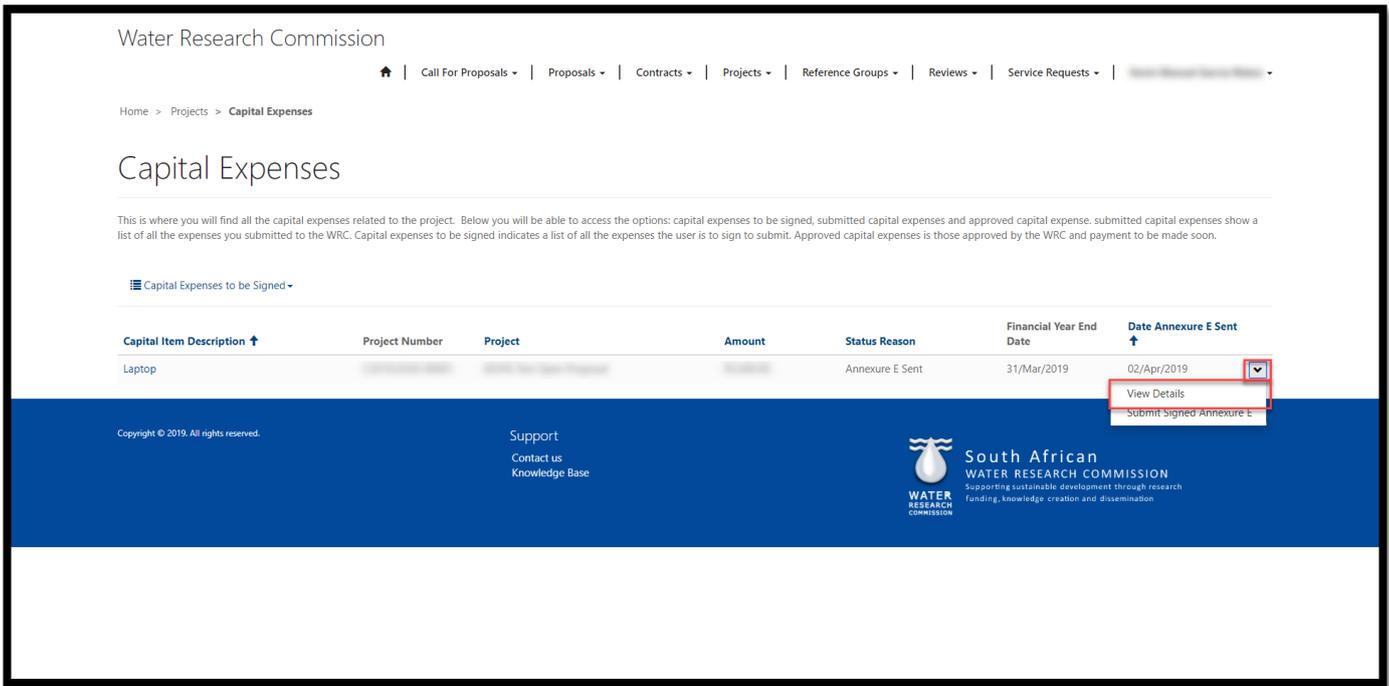
### Capital Expenses to be Signed View

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.

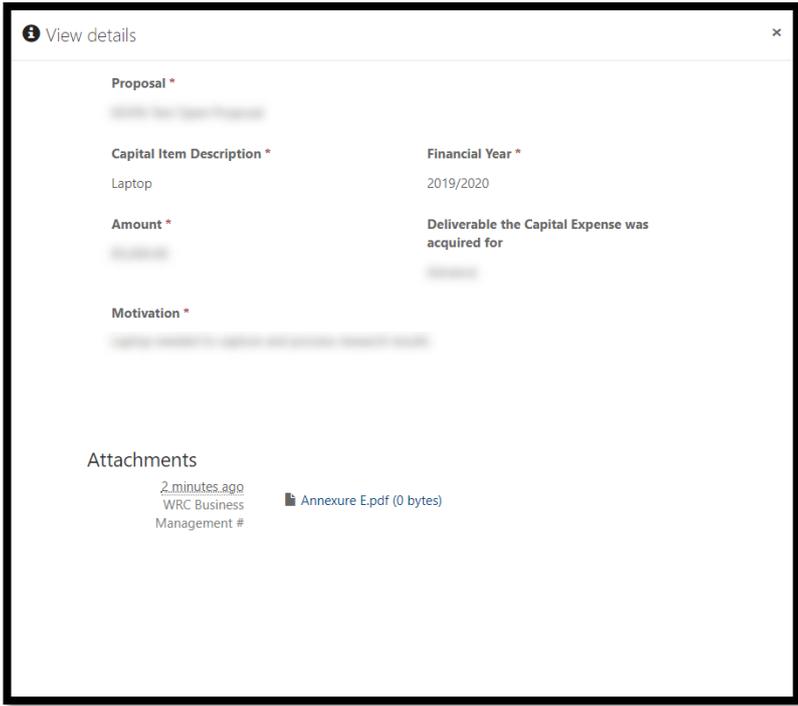


2. The *Capital Expenses to be Signed* view displays a list of capital expense records for active projects where you are the *Project Leader*, and the *Annexure E* document for the capital expense has been made available to you to be signed and submitted to the WRC.
3. To view the details of the capital 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.

Water Research Commission

Home > Projects > Capital Expenses

## Capital Expenses

This is where you will find all the capital expenses related to the project. Below you will be able to access the options: capital expenses to be signed, submitted capital expenses and approved capital expense. submitted capital expenses show a list of all the expenses you submitted to the WRC. Capital expenses to be signed indicates a list of all the expenses the user is to sign to submit. Approved capital expenses is those approved by the WRC and payment to be made soon.

Capital Expenses to be Signed ▾

Capital Item Description ↑	Project Number	Project	Amount	Status Reason	Financial Year End Date	Date Annexure E Sent ↑
Laptop				Annexure E Sent	31/Mar/2019	02/Apr/2019 ▾

View Details  
Submit Signed Annexure E

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- In the *Submit Annexure E* window, you can upload the document, save your changes, which will close the window.
- 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.

Proposal \*

Capital Item Description \* Financial Year \*

Laptop 2019/2020

Amount \* Deliverable the Capital Expense was acquired for

Motivation \*

Attachments

4 minutes ago WRC Business Management # Annexure E.pdf (0 bytes)

less than a minute ago Signed Annexure E.pdf (98.16 KB)

Attach a file

Choose File No file chosen

Save Submit Signed Annexure E to WRC

- 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

- 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.

Water Research Commission

Home > Projects > Capital Expenses

### Capital Expenses

This is where you will find all the capital expenses related to the project. Below you will be able to access the options: capital expenses to be signed, submitted capital expenses and approved capital expense. submitted capital expenses show a list of all the expenses you submitted to the WRC. Capital expenses to be signed indicates a list of all the expenses the user is to sign to submit. Approved capital expenses is those approved by the WRC and payment to be made soon.

Submitted Capital Expenses -

Capital Expenses to be Signed

Submitted Capital Expenses

Approved Capital Expenses

Project Number	Project	Amount	Status Reason	Financial Year End Date	Date Electronic Annexure E Submitted ↑
Laptop			Electronic Copy Submitted	31/Mar/2019	02/Apr/2019

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- 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.
- You can track the status of the submitted capital expense by checking the *Status Reason* column for each capital expense record in the list.
- 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.
- 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.

Water Research Commission

Home > Projects > Capital Expenses

## Capital Expenses

This is where you will find all the capital expenses related to the project. Below you will be able to access the options: capital expenses to be signed, submitted capital expenses and approved capital expense. submitted capital expenses show a list of all the expenses you submitted to the WRC. Capital expenses to be signed indicates a list of all the expenses the user is to sign to submit. Approved capital expenses is those approved by the WRC and payment to be made soon.

Submitted Capital Expenses -

Capital Item Description ↑	Project Number	Project	Amount	Status Reason	Financial Year End Date	Date Electronic Annexure E Submitted ↓
Laptop				Electronic Copy Submitted	31/Mar/2019	02/Apr/2019

View Details  
Submit Signed Annexure E

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### 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.

Water Research Commission

Home > Projects > Capital Expenses

## Capital Expenses

This is where you will find all the capital expenses related to the project. Below you will be able to access the options: capital expenses to be signed, submitted capital expenses and approved capital expense. submitted capital expenses show a list of all the expenses you submitted to the WRC. Capital expenses to be signed indicates a list of all the expenses the user is to sign to submit. Approved capital expenses is those approved by the WRC and payment to be made soon.

Approved Capital Expenses -

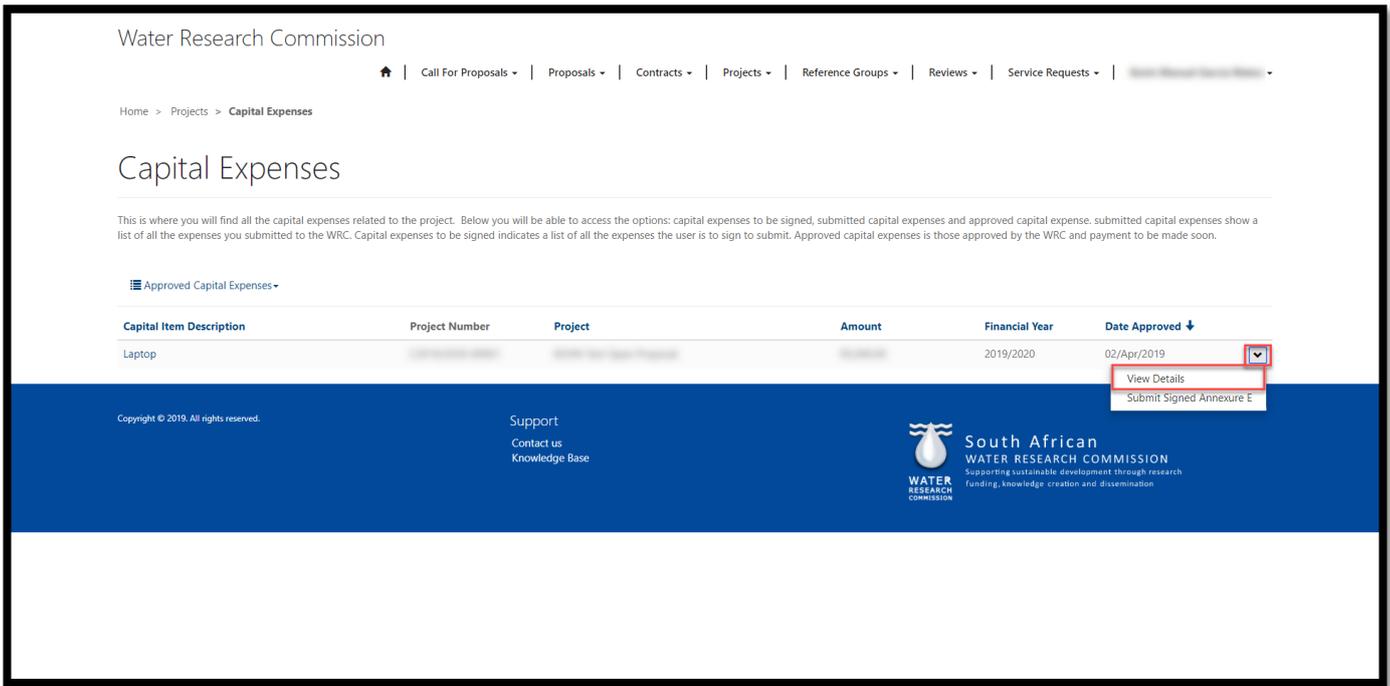
Capital Expenses to be Signed	Project Number	Project	Amount	Financial Year	Date Approved ↓
There are no records to display.					

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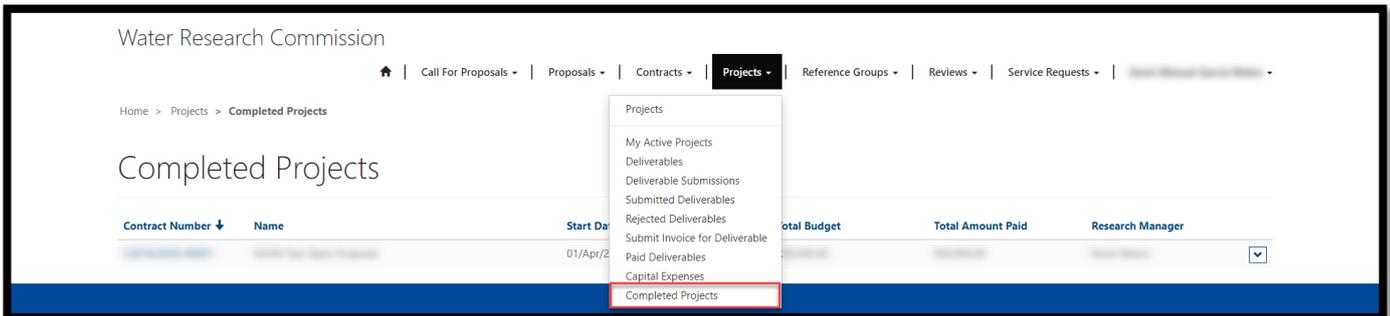
South African  
WATER RESEARCH COMMISSION  
Supporting sustainable development through research  
funding, knowledge creation and dissemination

2. The *Approved Capital Expenses* view displays a list of capital expense records where the electronic and hard copies *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**.

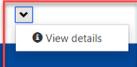


2. The *Completed Projects* page displays a list of projects that have been finalized by closed by the WRC.
3. To view the details of the completed project, click on the arrow on the far right of the project record and select the **View details** option (see screenshot on the next page). This will re-direct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



## Completed Projects

Contract Number ↓	Name	Start Date	End Date	Total Budget	Total Amount Paid	Research Manager
██████████	██████████	01/Apr/2019	31/Mar/2022	██████████	██████████	██████████



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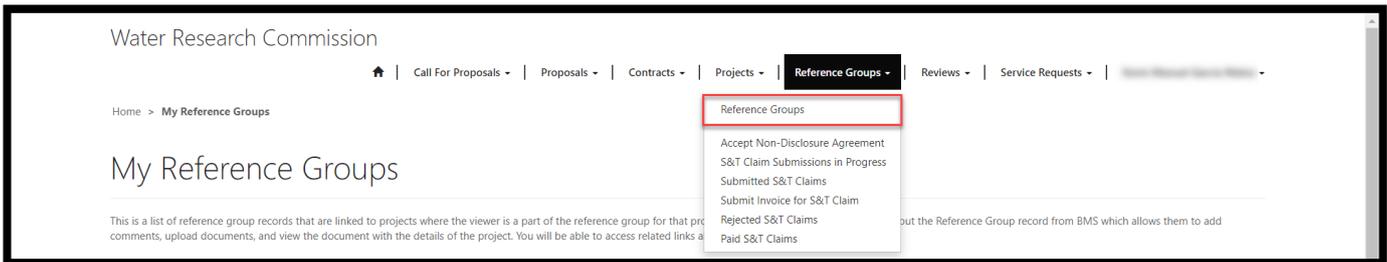
# Reference Groups

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

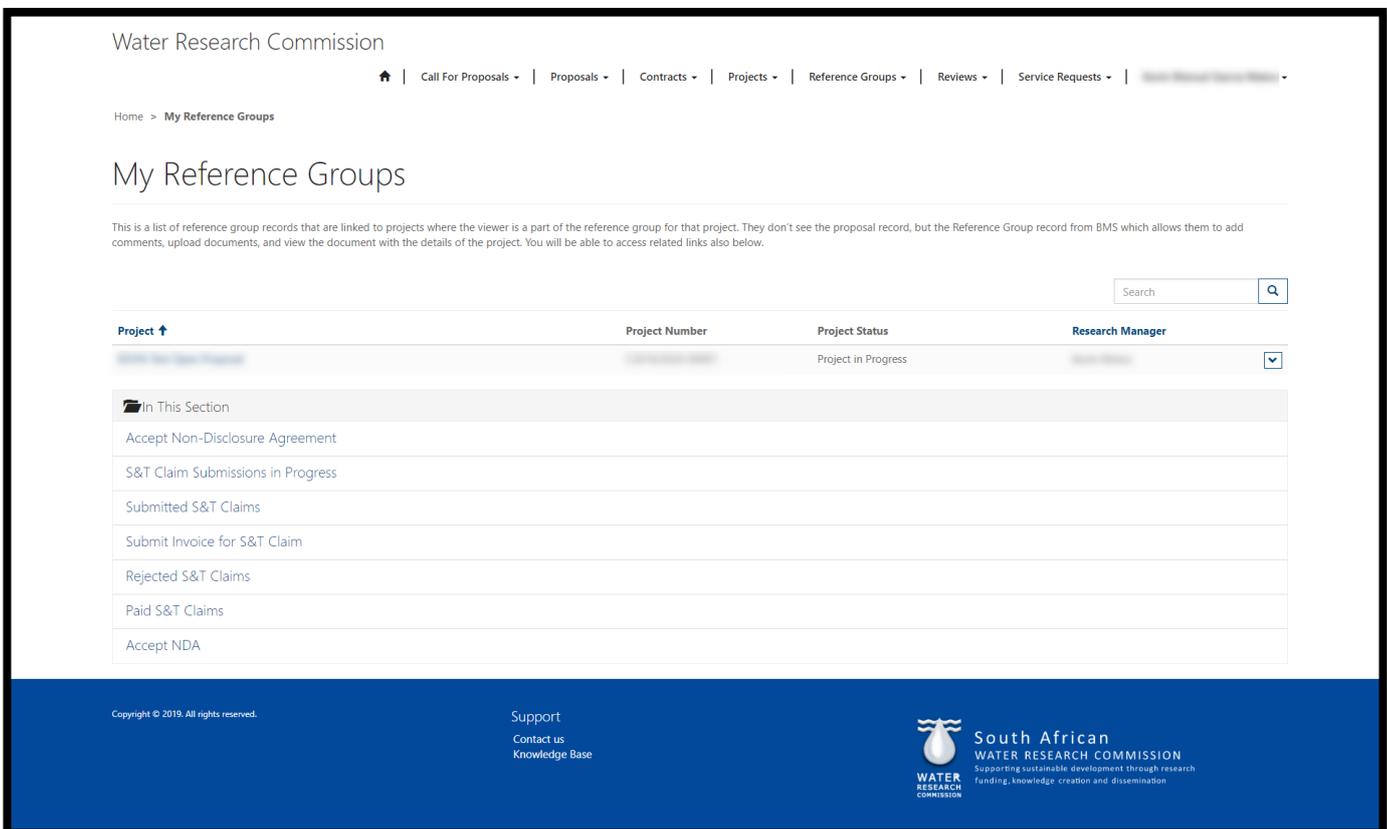


## My Reference Groups Page

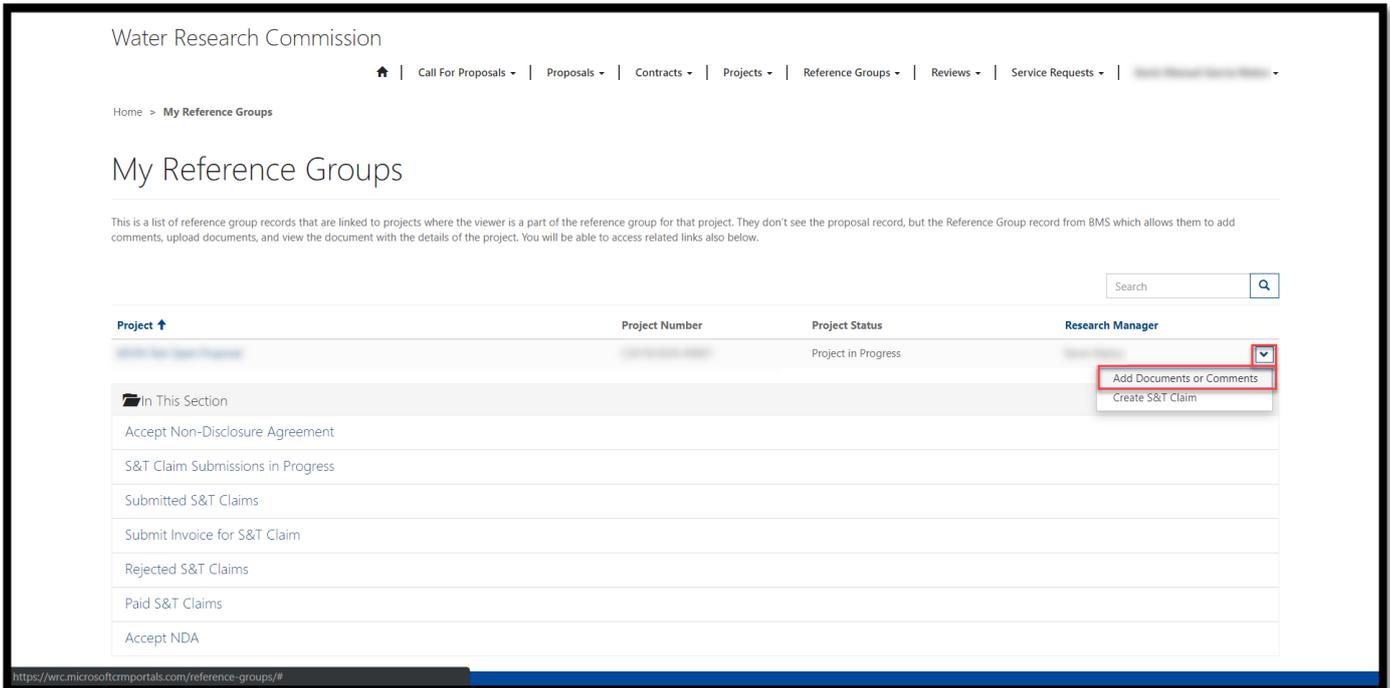
1. To view the *My Reference Groups* page, click on the **Reference Groups** option in the Navigation Menu and then click on **Reference Groups**.



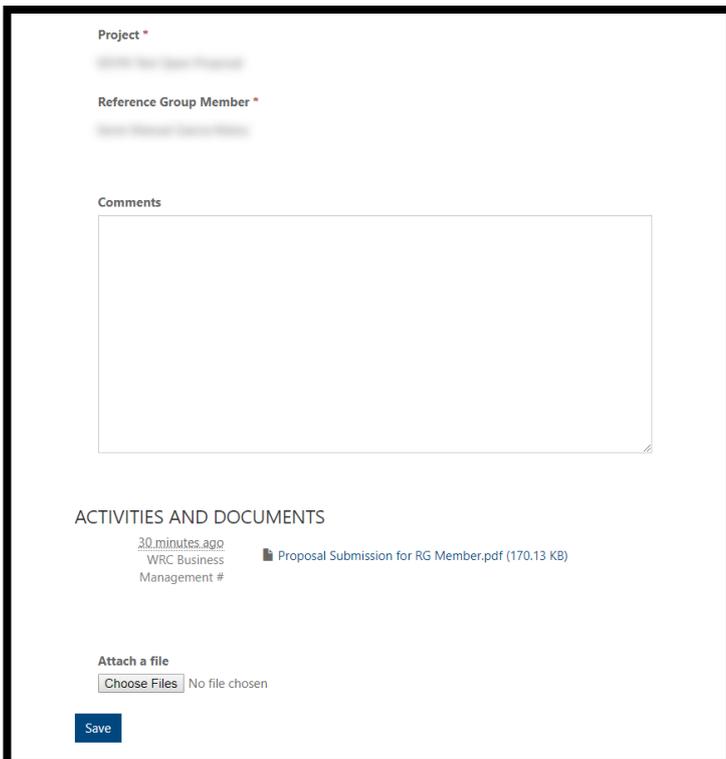
2. The *My Reference Groups* page displays a list of reference group records for WRC funded projects where you have accepted the WRC's invitation to be a member of the reference group for the project.
3. The *My Reference Groups* page also contains links to the related pages that display information 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.



- 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.

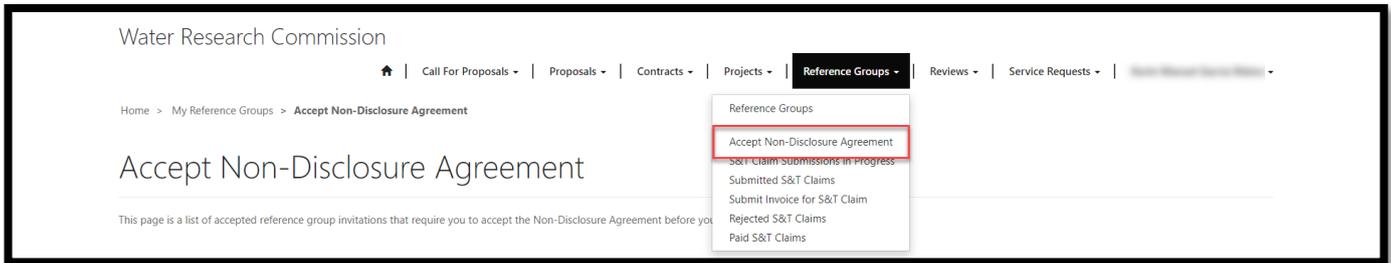


- In the *Reference Group Project Details* window, you can view and download the attached *Proposal Submission for RG Member* document, which contains the full details of the project.
- In this window, you can also add any comments or attach any documents and save your changes by clicking on the **Save**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

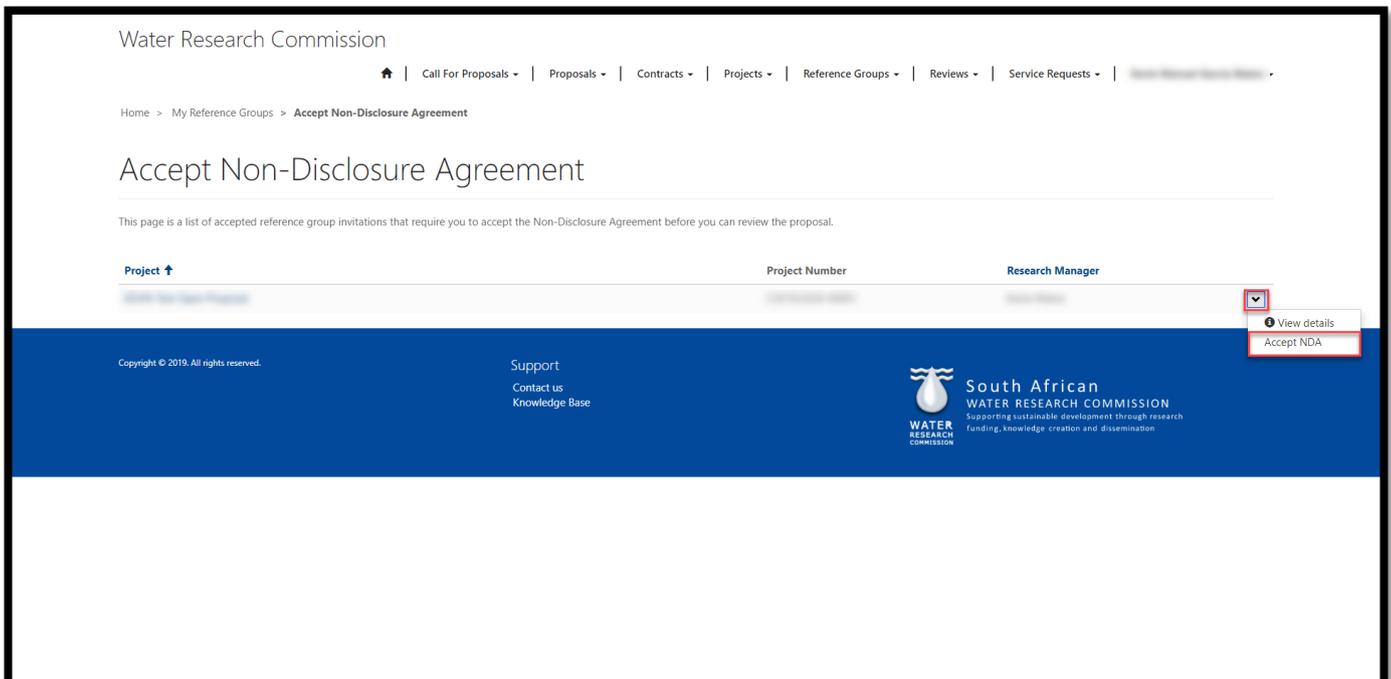


## Accept Non-Disclosure Agreement Page

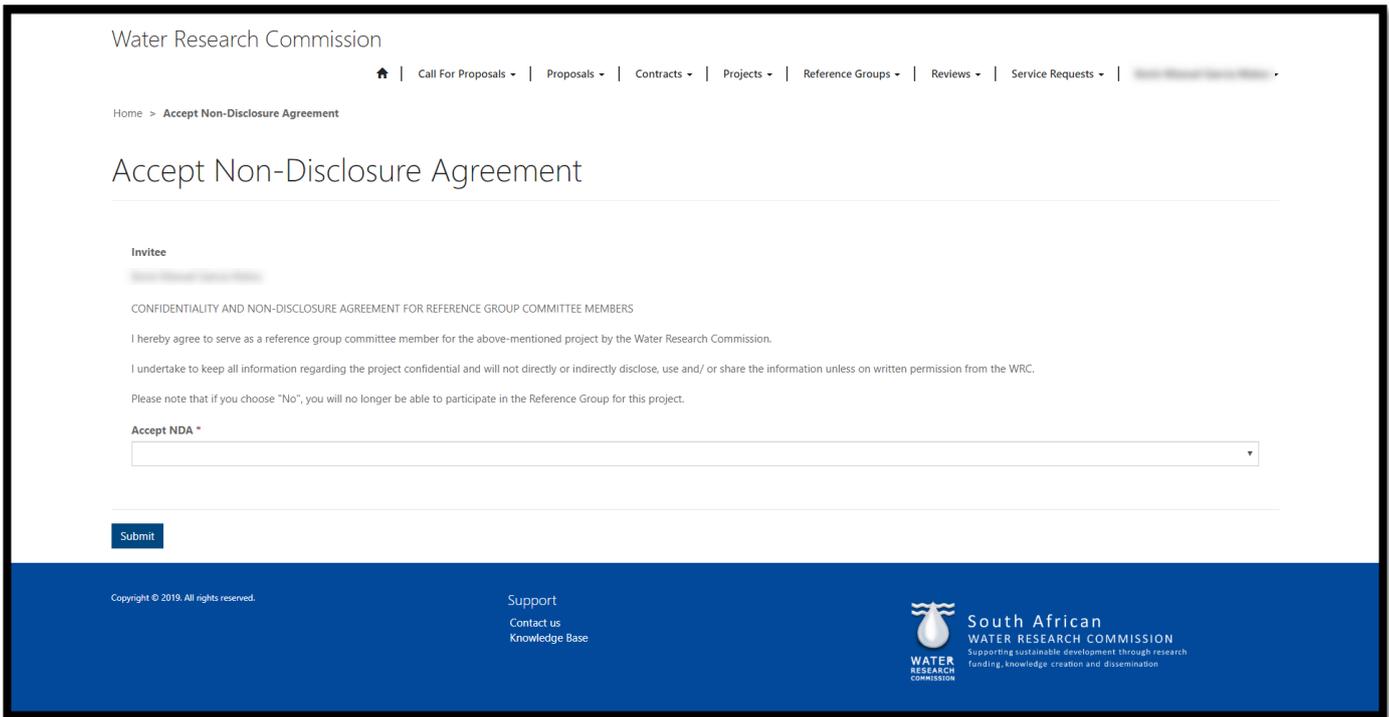
1. To view the *Accept Non-Disclosure Agreement* page, click on the **Reference Groups** option in the Navigation Menu and then click on **Accept Non-Disclosure Agreement**.



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.



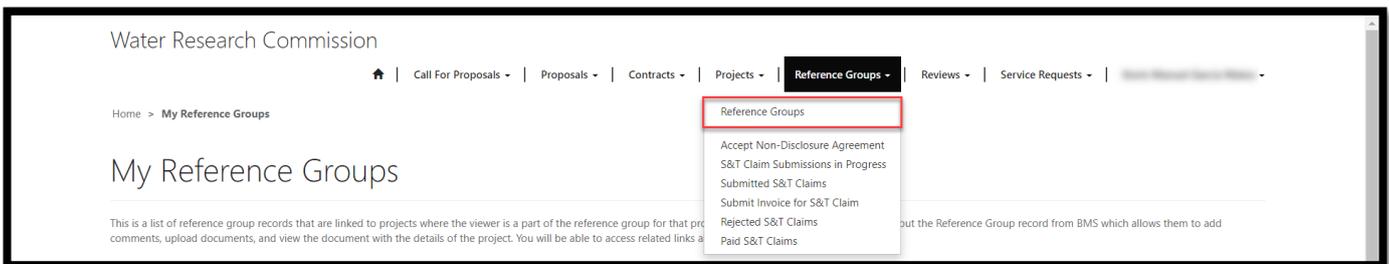
7. On the *Accept Non-Disclosure Agreement Form* page, you can read the agreement, select your choice between yes or no in the *Accept NDA* field, and submit your response to the WRC by clicking on the **Submit** button at the bottom of the page. This will re-direct you to the *My Reference Group* page.



- 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**

- 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.



- 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.



## My Reference Groups

This is a list of reference group records that are linked to projects where the viewer is a part of the reference group for that project. They don't see the proposal record, but the Reference Group record from BMS which allows them to add comments, upload documents, and view the document with the details of the project. You will be able to access related links also below.

Search

Project <span>↑</span>	Project Number	Project Status	Research Manager
<a href="#">[Project Name]</a>	[Project Number]	Project in Progress	[Research Manager] <input type="button" value="v"/>
<b>In This Section</b>			
<a href="#">Accept Non-Disclosure Agreement</a>			
<a href="#">S&amp;T Claim Submissions in Progress</a>			
<a href="#">Submitted S&amp;T Claims</a>			
<a href="#">Submit Invoice for S&amp;T Claim</a>			
<a href="#">Rejected S&amp;T Claims</a>			
<a href="#">Paid S&amp;T Claims</a>			
<a href="#">Accept NDA</a>			

Add Documents or Comments  
Create S&T Claim

<https://wrc.microsoftportals.com/reference-groups/#>

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).



## Create S&T Claim

Please note that you will only be able to create Accommodation and Other Expense line items once you have created the S&T Claim.

### Claim Information

Date of Meeting \*

### BANK DETAILS

Bank *	Account Number *
Branch Name *	Branch Code *
Is the Beneficiary an Organization *	Beneficiary Name *
Is the Beneficiary Registered for VAT * No Yes	VAT Number

### Subsistence Allowance

Description

Departure from Home Town/City

Arrival Back in Home Town/City

### Transport

#### AIRFARE

From

To

Amount

#### CAR RENTAL

From

To

Company

Amount

#### PRIVATE CAR

From

To

KM Travelled

Vehicle Type

Model and Type

Petrol or Diesel

Engine CC

### Accommodation

Total Amount

---

### Meals

#### BREAKFAST

Description

Amount

#### LUNCH

Description

Amount

#### DINNER

Description

Amount

### Other Expenses

Total Amount

---

### Documents

Attach a file

Choose Files No file chosen

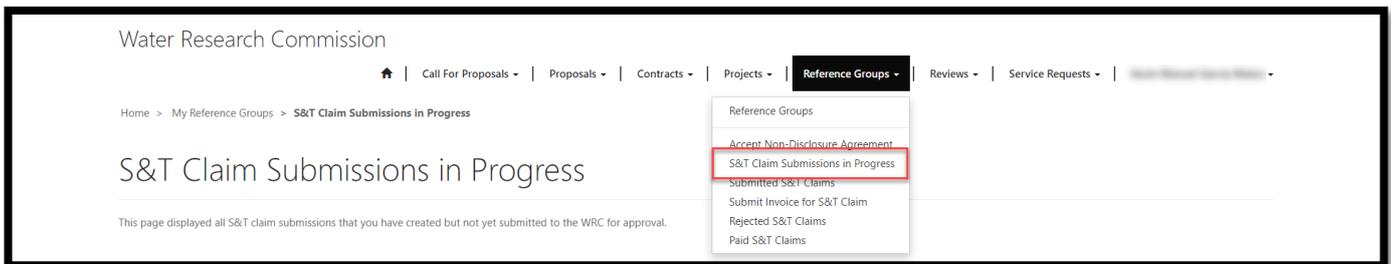
Save



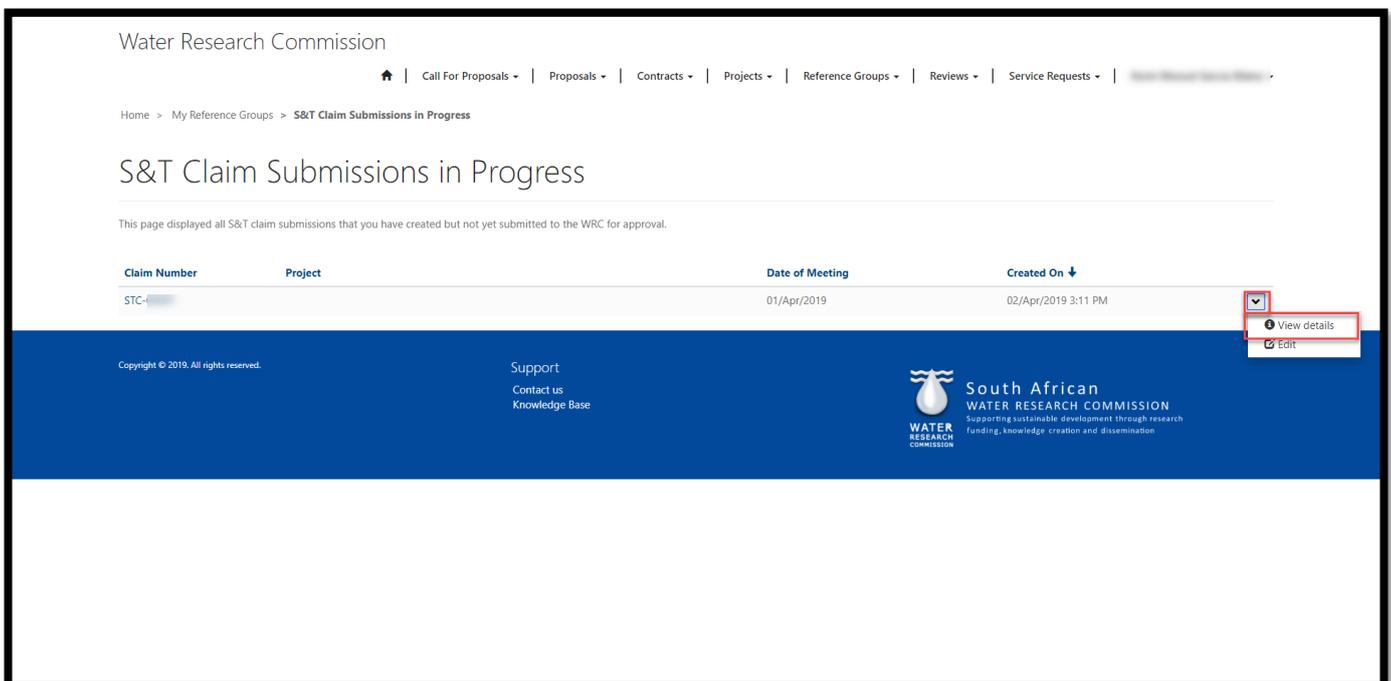
- You will be re-directed to the [S&T Claim Submissions in Progress](#) page where you can continue to edit your S&T claim record and add related *Accommodation* and *Other* expenses.
- Note:** You will only be able to add individual *Accommodation* and *Other Expense* records to the S&T claim after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

## **S&T Claim Submissions in Progress Page**

- 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**.



- 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.
- 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.



- 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.



Water Research Commission

Home > My Reference Groups > S&T Claim Submissions in Progress

## S&T Claim Submissions in Progress

This page displayed all S&T claim submissions that you have created but not yet submitted to the WRC for approval.

Claim Number	Project	Date of Meeting	Created On ↓
STC-██████		01/Apr/2019	02/Apr/2019 3:11 PM

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funding, knowledge creation and dissemination

- 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 save your changes often using the **Save** button at the bottom of the form (see screenshot on the next page).



## Edit S&T Claim

This is the submissions page setup

### Claim Information

Project \*  
Claim Number  
STC  
Date of Meeting \*  
01/Apr/2019

### BANK DETAILS

Bank \*  
Branch Name \*  
Is the Beneficiary an Organization \*  
Is the Beneficiary Registered for VAT \*  
Account Number \*  
Branch Code \*  
Beneficiary Name \*  
VAT Number

### Subsistence Allowance

Description  
Departure from Home Town/City  
Arrival Back in Home Town/City

### Transport

#### AIRFARE

From  
To  
Amount  
R

#### CAR RENTAL

From  
To  
Company  
Amount  
R

#### PRIVATE CAR

From  
To  
KM Travelled  
Vehicle Type  
Model and Type  
Petrol or Diesel  
Engine CC

### Accommodation

Total Amount  
Create S&T Accommodation Expense  
Name | Amount | Created On  
02/Apr/2019 3:14 PM

### Meals

#### BREAKFAST

Description  
Amount  
R

#### LUNCH

Description  
Amount  
R

#### DINNER

Description  
Amount  
R

### Other Expenses

Total Amount  
Create S&T Other Expense  
Name | Amount | Created On  
02/Apr/2019 3:15 PM

### Documents

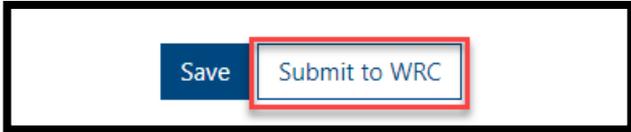
3.0245.800

Attach a file  
Choose Files | No file chosen  
Submit to WRC



## Submit an S&T Claim to WRC

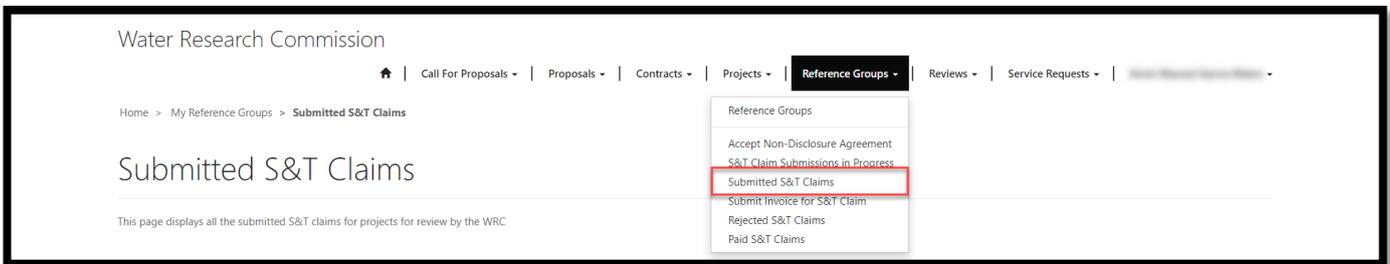
1. When you are ready to submit your completed S&T claim to the WRC for approval, open the *Edit S&T Claim* page as detailed in **step #4 and step #5** in the [S&T Claim Submissions in Progress](#) section above, and click on the **Submit to WRC** button at the bottom of the page. You will be re-directed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



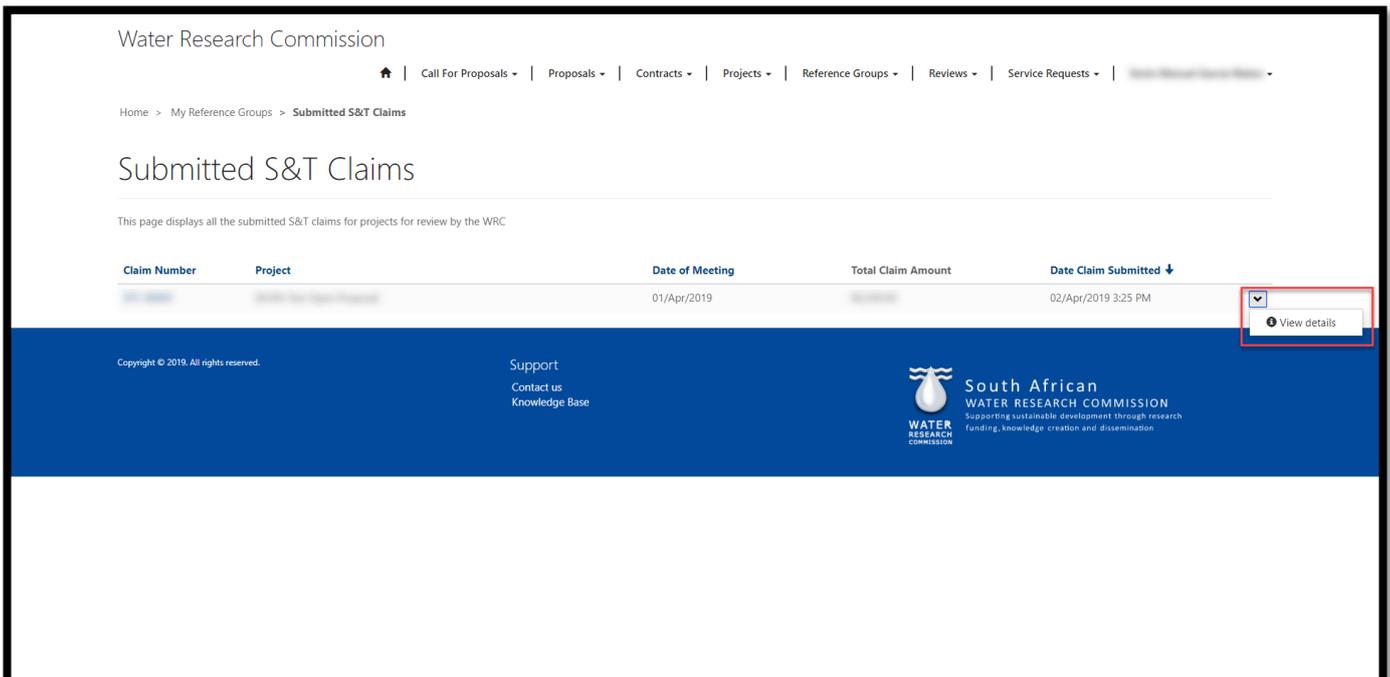
2. **Note:** Once the S&T claim is submitted to the WRC, you will not be able to edit the details of the claim as it will no longer appear in the list of S&T claims on the *S&T Claim Submissions in Progress* page.

## 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**.

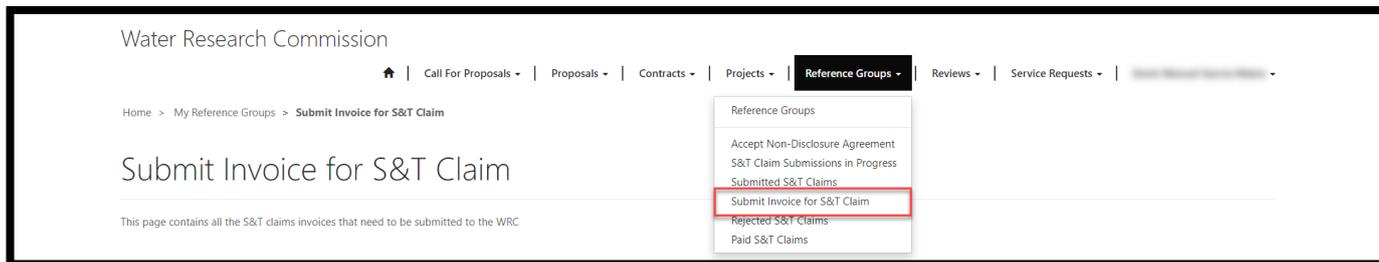


2. The Submitted S&T Claims page displays a list of S&T claim records that you as a Reference Group Member for the project have submitted to the WRC and are pending approval.
3. To view the details of the submitted S&T claim, click on the arrow on the far right of the S&T claim record and select the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

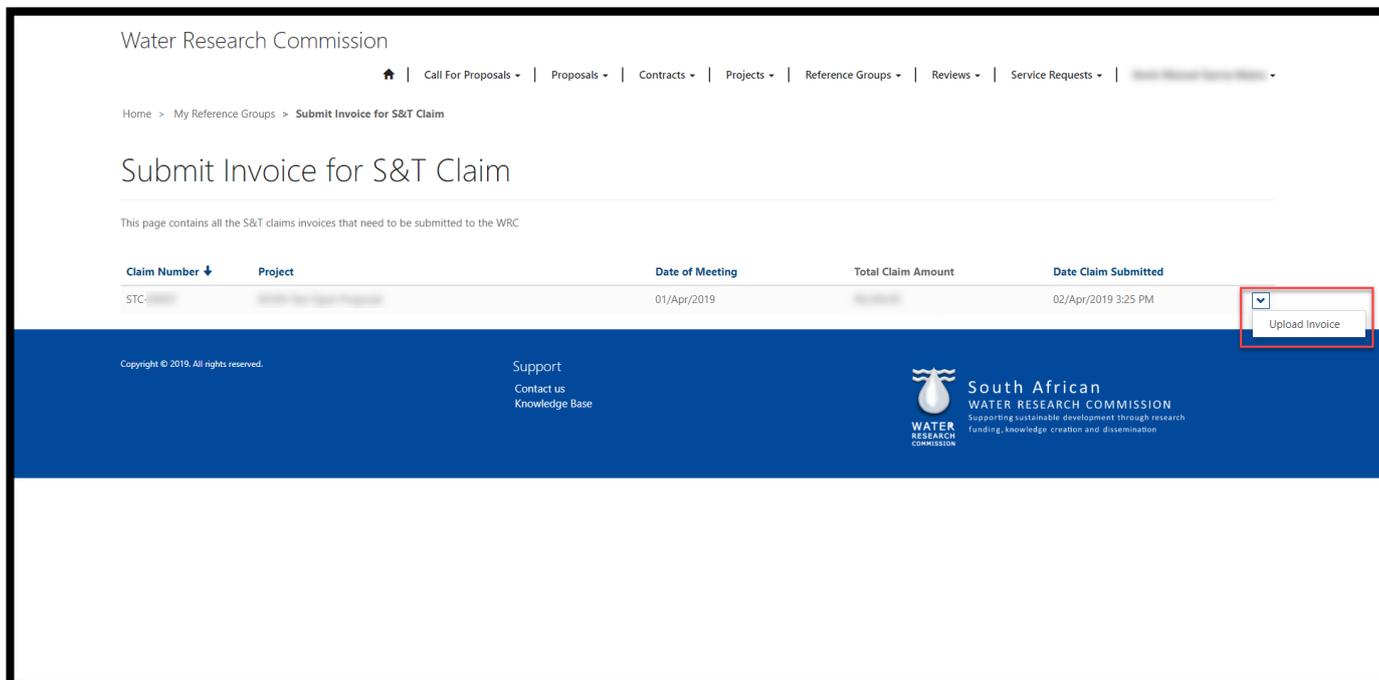


## Submit Invoice for S&T Claim Page

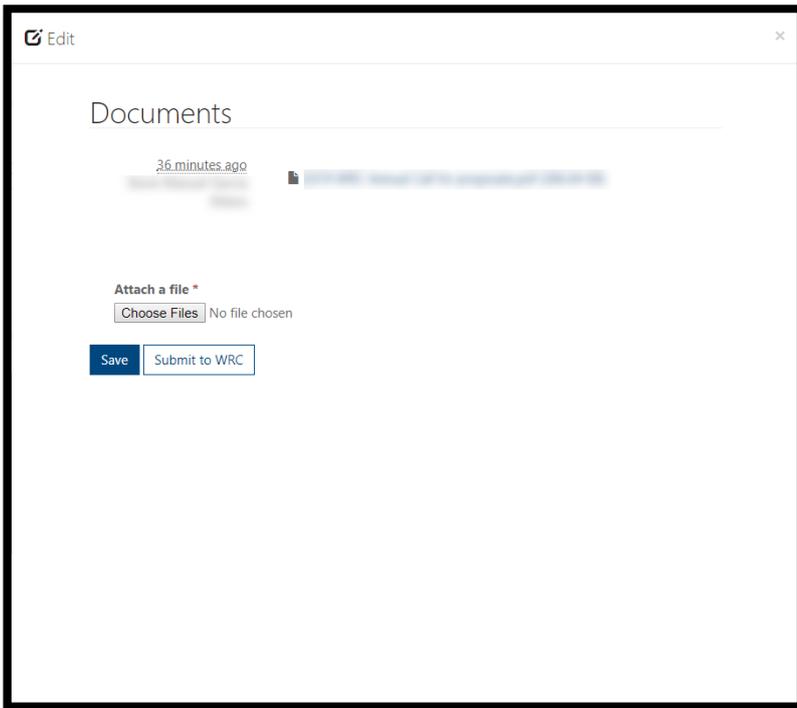
1. To view the *Submit Invoice for S&T Claim* page, click on the **Reference Groups** option in the Navigation Menu and then click on **Submit Invoice for S&T Claim**.



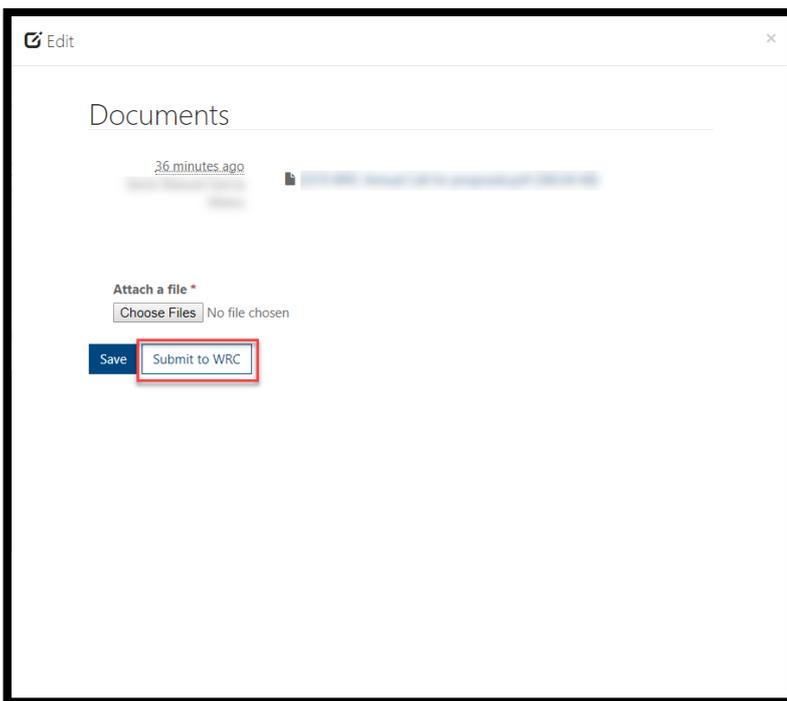
2. The *Submit Invoice for S&T Claim* page displays a list of S&T claim records where the WRC has requested that you submit an invoice for the S&T claim.
3. To upload and submit the invoice for the S&T claim, click on the arrow on the far right of the S&T claim record and select the **Upload Invoice**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

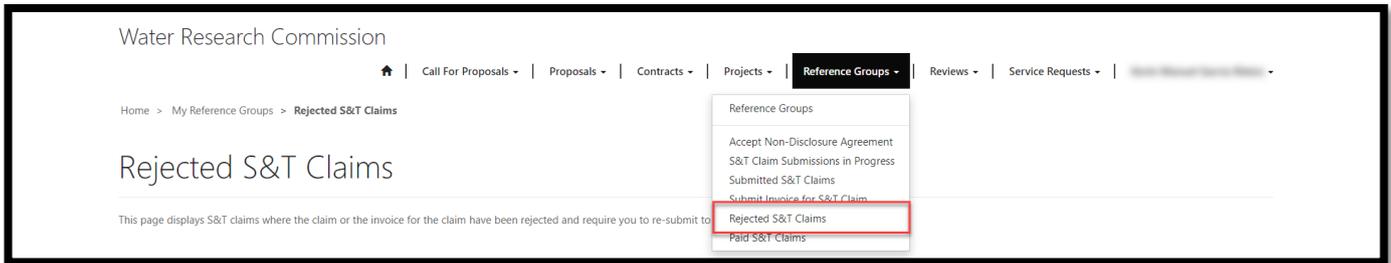


6. To submit the uploaded invoice to the WRC for approval, re-open the *Submit S&T Claim Invoice* window and click the **Submit to WRC** button. This will re-direct you to the [Submitted S&T Claims](#) page.

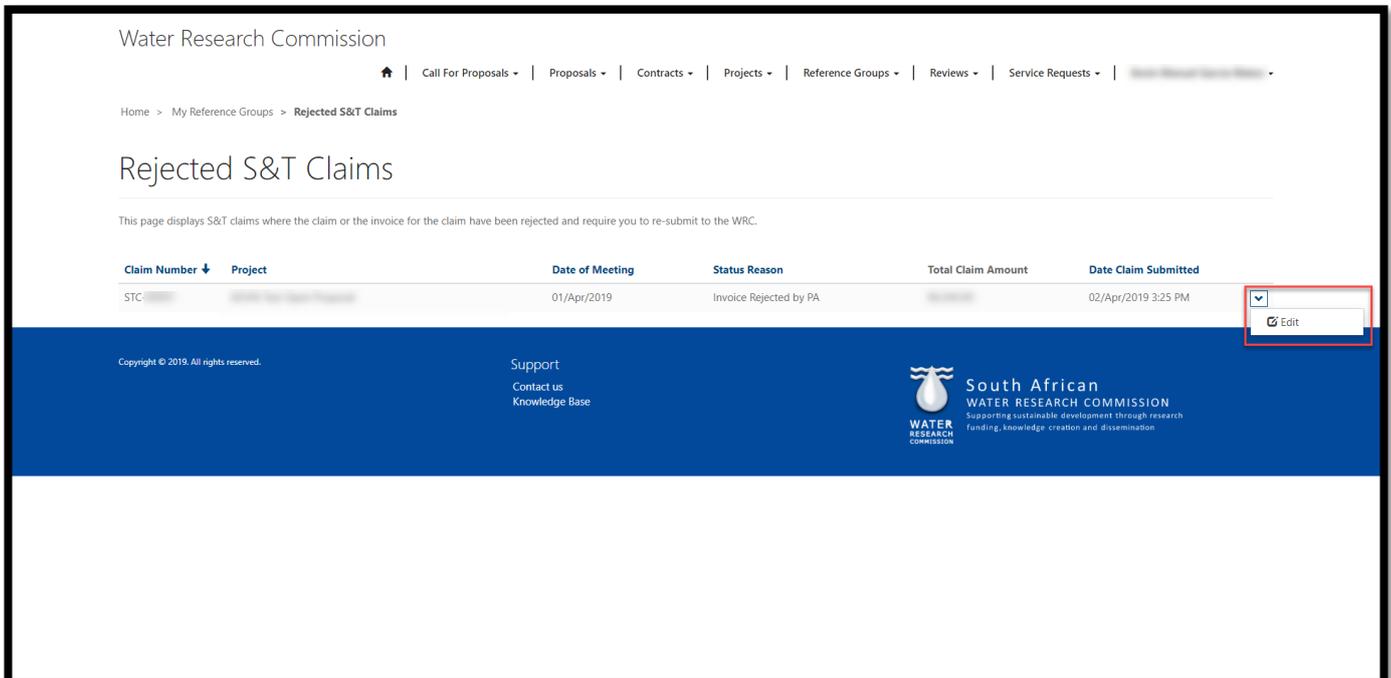


## Rejected S&T Claims Page

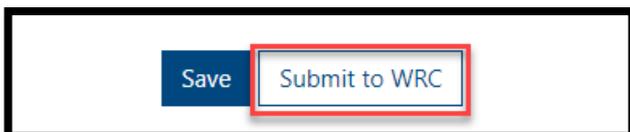
1. To view the *Rejected S&T Claims* page, click on the **Reference Groups** option in the Navigation Menu and then click on **Rejected S&T Claims**.



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.



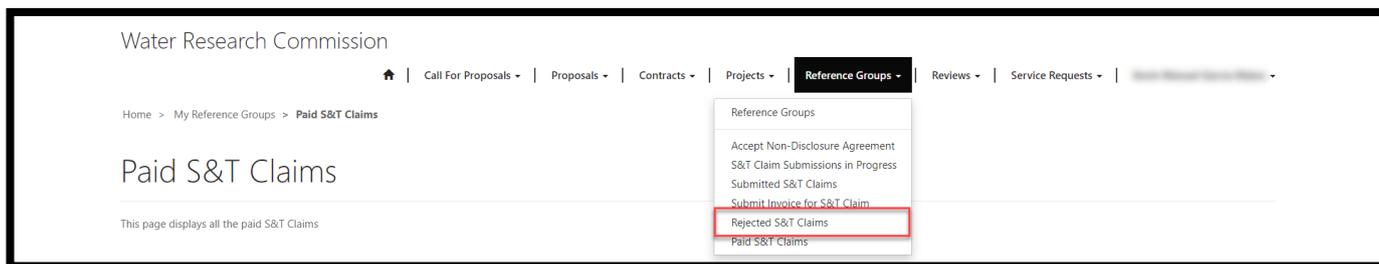
4. You can edit the S&T claim as detailed in **step #4 to step #5** in the [S&T Claim Submissions in Progress Page](#) section of this document. Remember to save any changes made to the S&T claim before re-submitting it to the WRC for approval.
3. To submit the rejected S&T claim back to the WRC for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



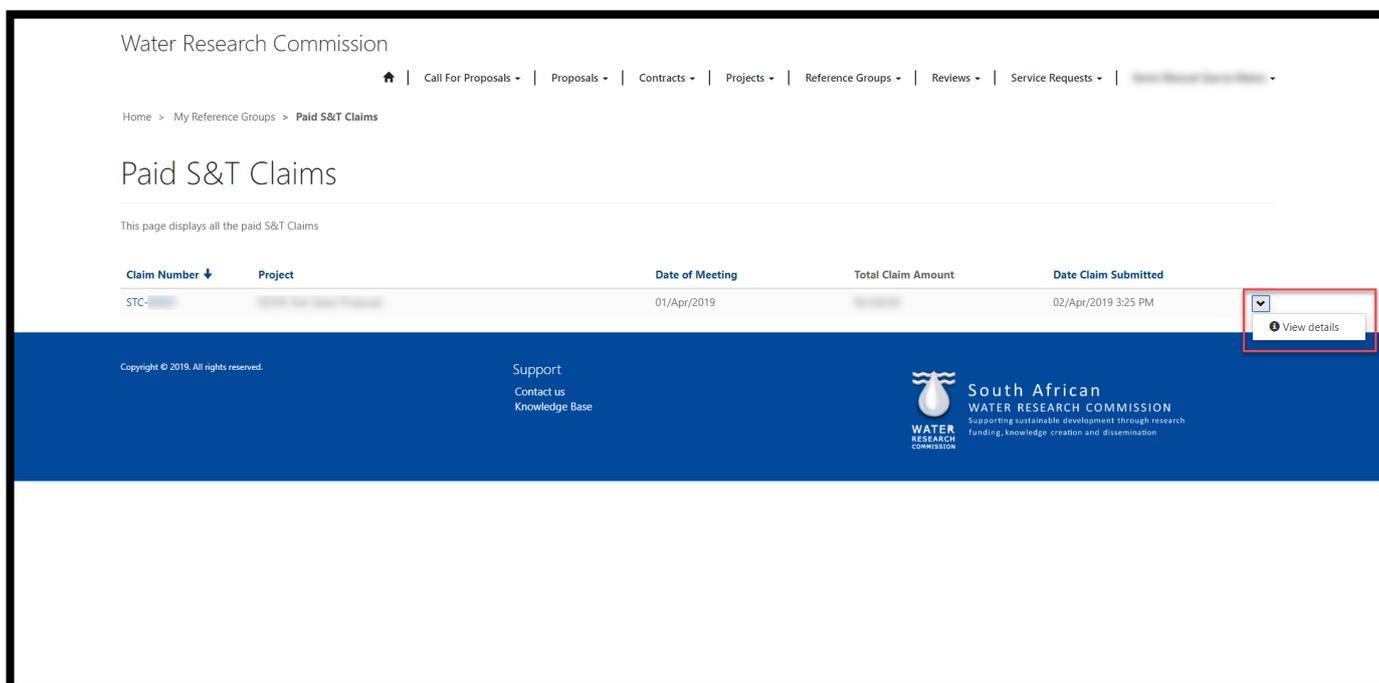
4. **Note:** Once the S&T claim is submitted to the WRC, you will not be able to edit the details of the claim as it will no longer appear in the list of rejected S&T claims on the *Rejected S&T Claims* page.

## 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.

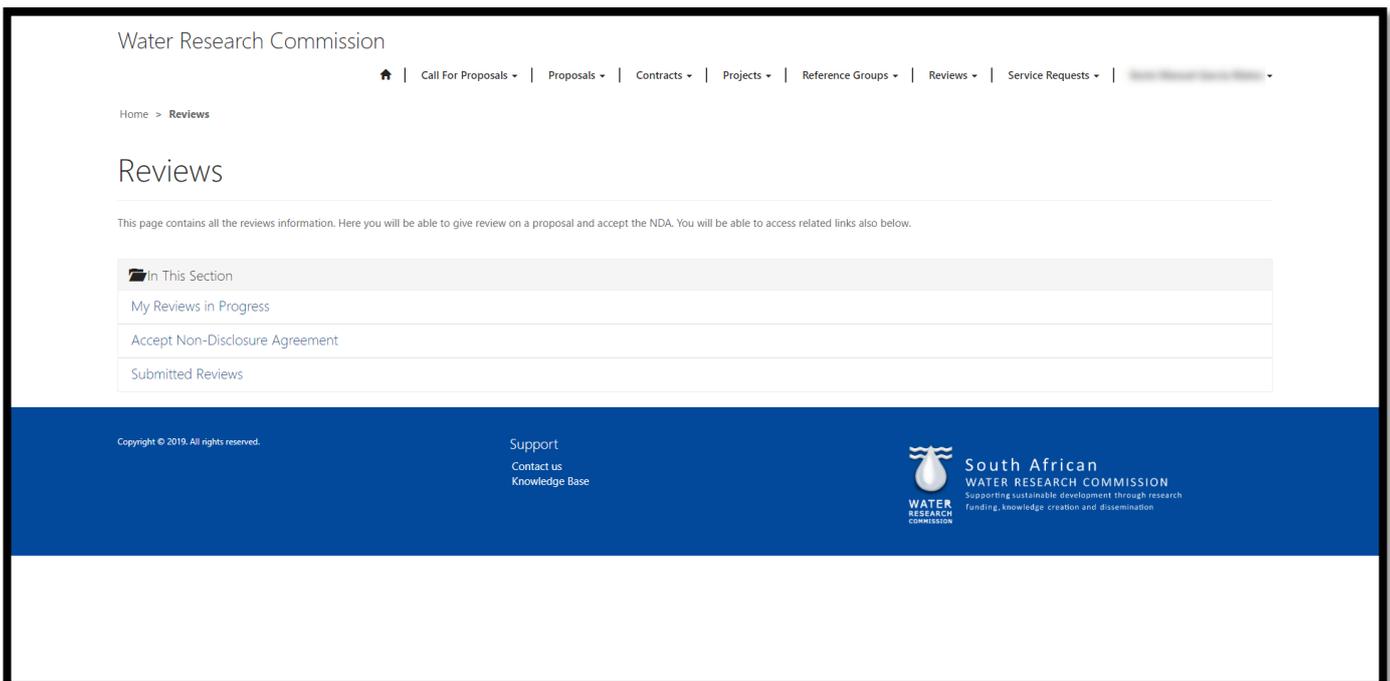


### Reviews Page

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

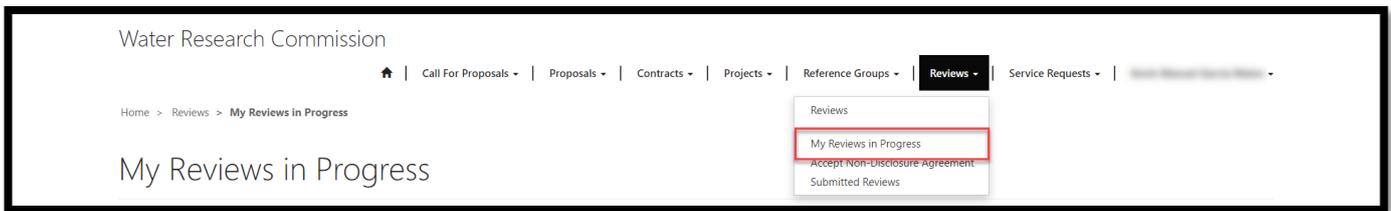


2. The *Reviews* page contains links to the related pages that display information regarding reviews that the you have been invited to complete as a *Reviewer* for proposals that the WRC is considering to fund. To view the related pages, you can click on the links under the **In This Section** section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

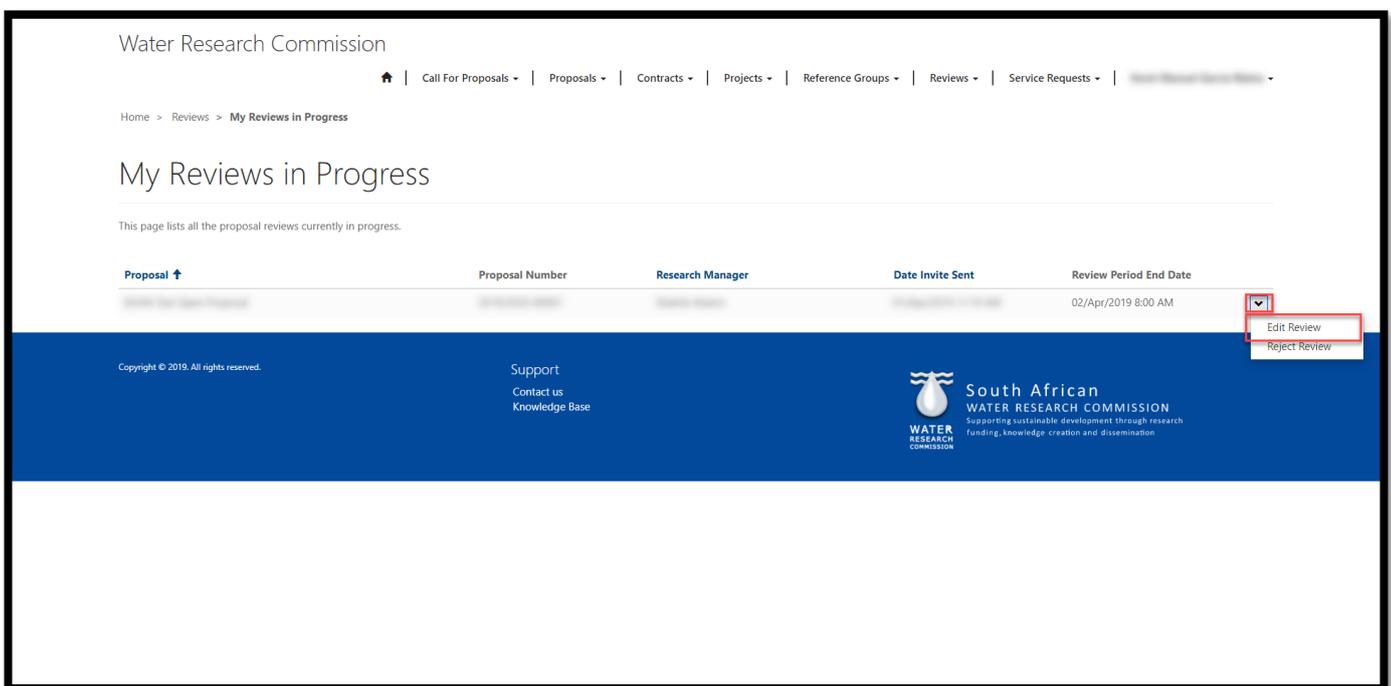


## My Reviews in Progress Page

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).



## Edit Review

### Review

#### RELEVANCE

Relevance Score

Comments

#### SCIENTIFIC/TECHNICAL SOUNDNESS AND CREDIBILITY

Scientific/Technical Score

Comments

#### INNOVATION

Innovation Score

Comments

#### KNOWLEDGE APPLICATION/COMMERCIALISATION

Applications/Commercialisation Score

Comments

#### KNOWLEDGE DISSEMINATION

Knowledge Dissemination Score

Comments

#### VALUE FOR MONEY

Value for Money Score

Comments

6.58Ks ago  
WRC Business Management # Proposal Submission for Reviewer.pdf (165.70 KB)

Attach File  
 No file chosen



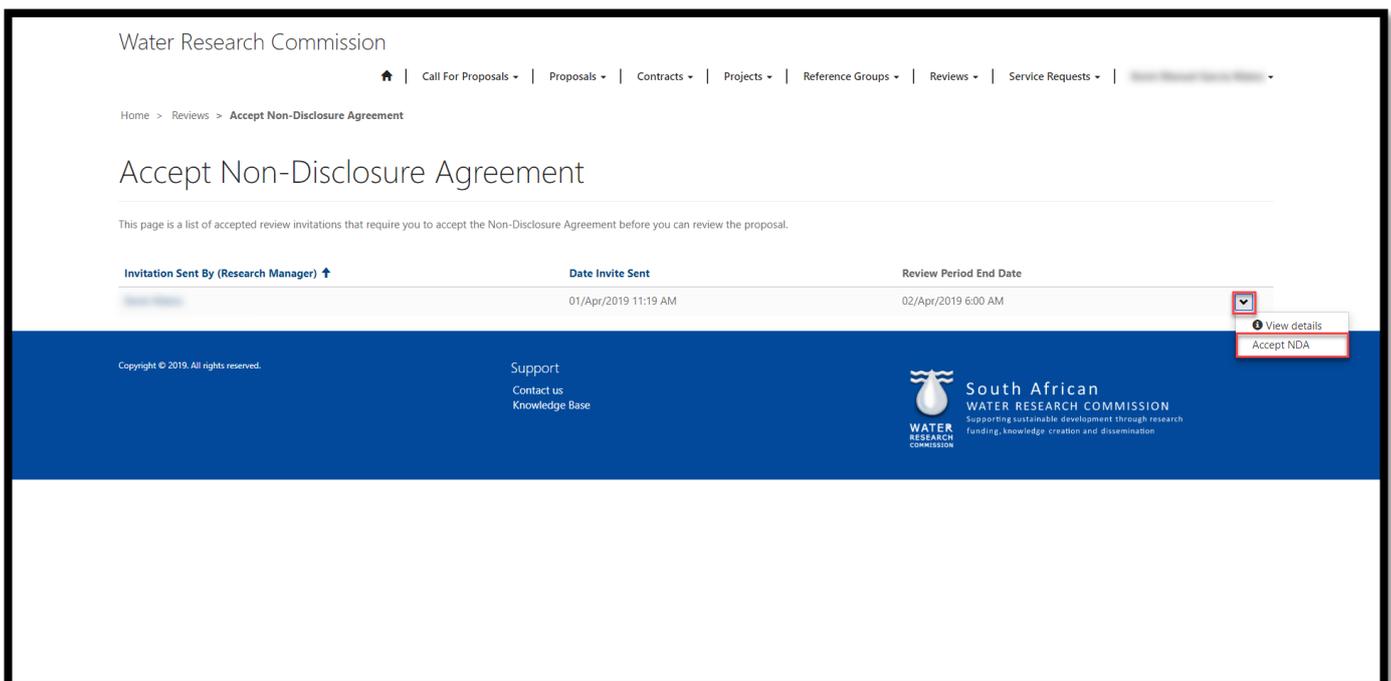
- Note:** Please remember to save your changes by clicking on the **Save** button at the bottom of the window. This will re-direct you back to the *My Reviews in Progress* page. You can follow the **steps #3 and #4** above to come back and edit the review at any time.

## Accept Non-Disclosure Agreement Page

- 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**.



- 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.
- 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.
- 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.
- 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.
- 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.

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Home > Reviews > My Reviews in Progress > **Accept Non-Disclosure Agreement**

## Accept Non-Disclosure Agreement

I undertake to keep all information regarding the above-mentioned project disclosed to me highly confidential and will not use the information without obtaining prior written permission from the WRC.

**Reviewer**

CONFIDENTIALITY AND NON-DISCLOSURE AGREEMENT FOR WRC PROPOSAL REVIEWERS

I hereby agree to review this research proposal submitted to the Water Research Commission.

I undertake to keep all information regarding the proposal, including both the content of the proposal and the outcomes of my review, confidential and will not directly or indirectly disclose, use and/ or share the information for any personal or commercial purpose.

Please note that if you choose "No", you will no longer be able to review this proposal.

Accept NDA \*

**Submit**

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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.

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Home > Reviews > My Reviews in Progress

## My Reviews in Progress

This page lists all the proposal reviews currently in progress.

Proposal ↑	Proposal Number	Research Manager	Date Invite Sent	Review Period End Date
				02/Apr/2019 8:00 AM

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Edit Review  
Reject Review

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.

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Home > Reviews > My Reviews in Progress > Reject Review

## Reject Review

Reject Review  
 No  Yes

Reason for Rejecting Review

Other Reason for Rejecting Review

**Submit to WRC**

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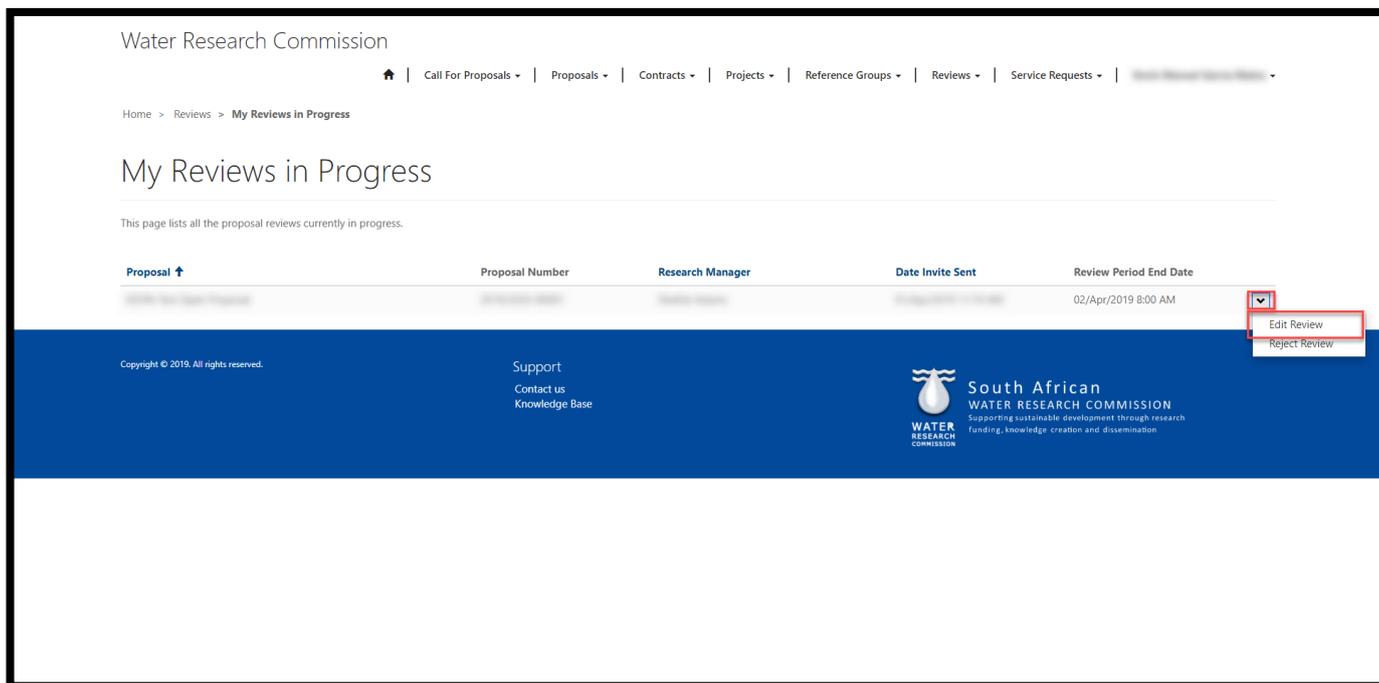
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5. **Note:** Please enter the details before submitting the review rejection to the WRC, as you will only be able to submit the rejection once. After the review rejection is submitted, you will not be able to edit the review and it will no longer appear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



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Home > Reviews > My Reviews in Progress

### My Reviews in Progress

This page lists all the proposal reviews currently in progress.

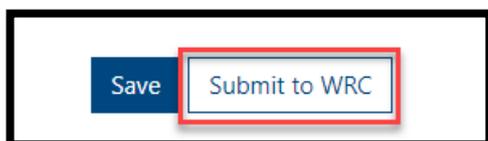
Proposal ↑	Proposal Number	Research Manager	Date Invite Sent	Review Period End Date
				02/Apr/2019 8:00 AM

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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.



Save Submit to WRC

## 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**.



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Home > Reviews > Submitted Reviews

### Submitted Reviews

Reviews

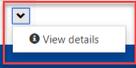
- My Reviews in Progress
- Accept Non-Disclosure Agreement
- Submitted Reviews

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.

## Submitted Reviews

This page displays all the reviews you have submitted to the WRC.

Proposal ↑	Proposal Number	Research Manager	Date Review Submitted ↓
<a href="#">Water Research Commission</a>	<a href="#">2019/00000000</a>	<a href="#">Water Research Commission</a>	01/Apr/2019



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## 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](mailto: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
<b>C – Critical</b>	1 – 4 hours
<b>H – High</b>	4 – 8 hours
<b>M – Medium</b>	1 – 2 working days
<b>L – Low</b>	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.

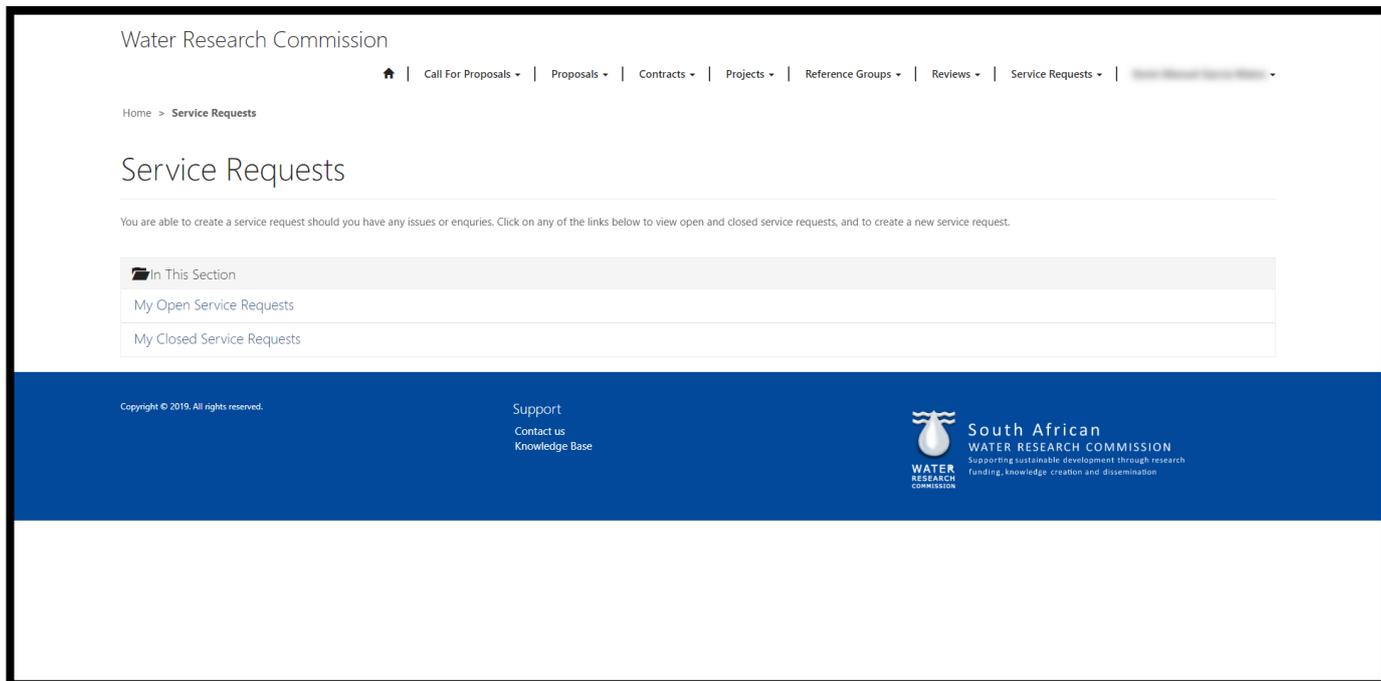


### Service Requests Page

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.

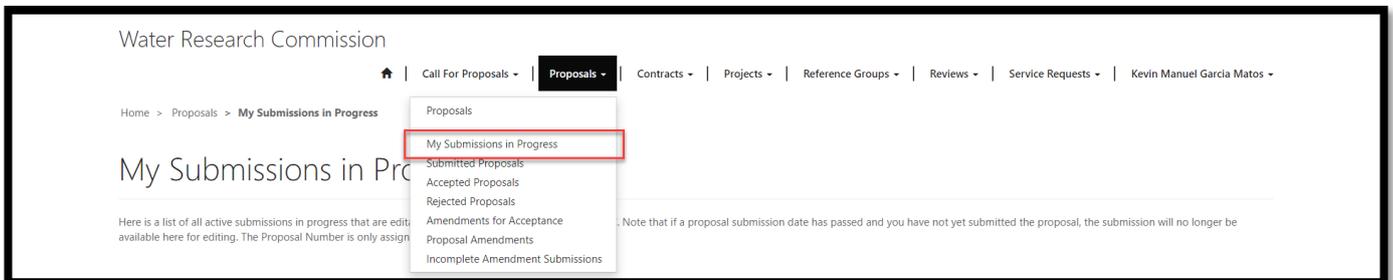


## Create a Service Request

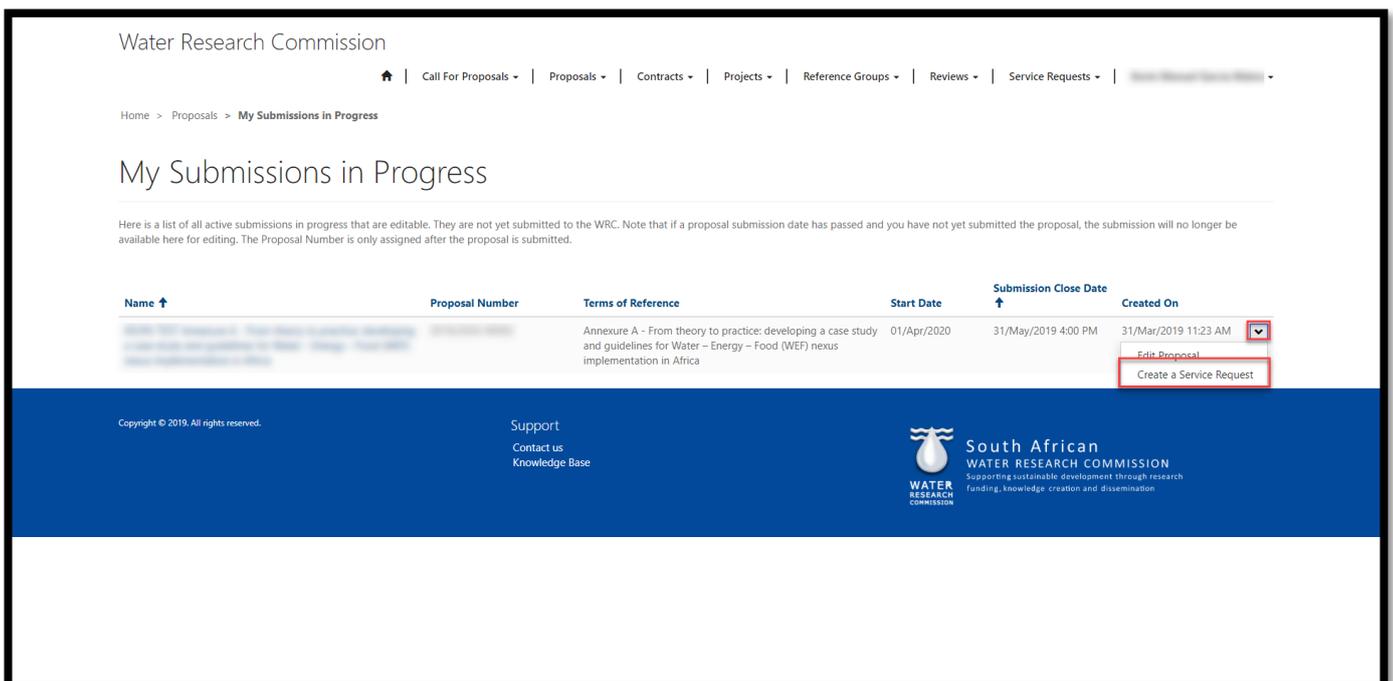
1. In the BMS Portal, there are different ways to create a service request depending on the nature of the request:
  - a. [Create a Service Request from a Proposal Submission in Progress](#)
  - b. [Create a Service Request from a Proposal Amendments Submission in Progress](#)
  - c. [Create a Service 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.

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Home > All Service Requests > Open a New Service Request

## Open a New Service Request

### Summary

Service Request Details

Contact

Service Request Title \*

Type

Category \*

Organisation \*

Proposal/Project

Description

Attach a file

Choose Files No file chosen

Create Service Request Cancel

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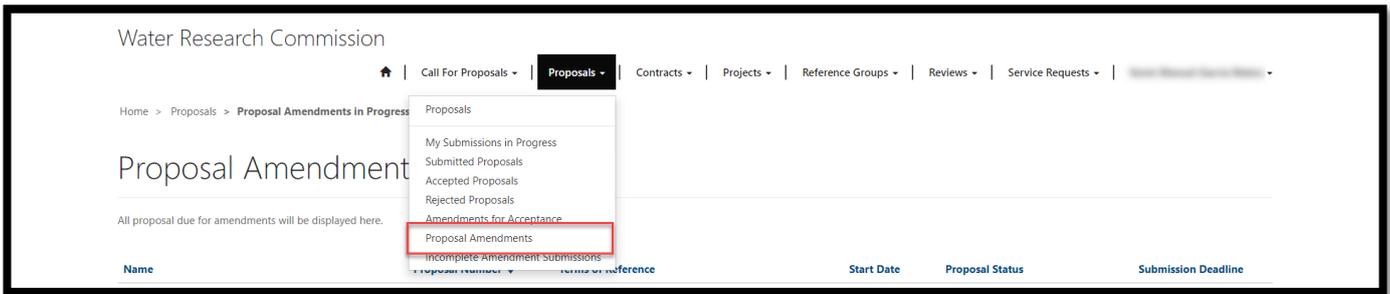
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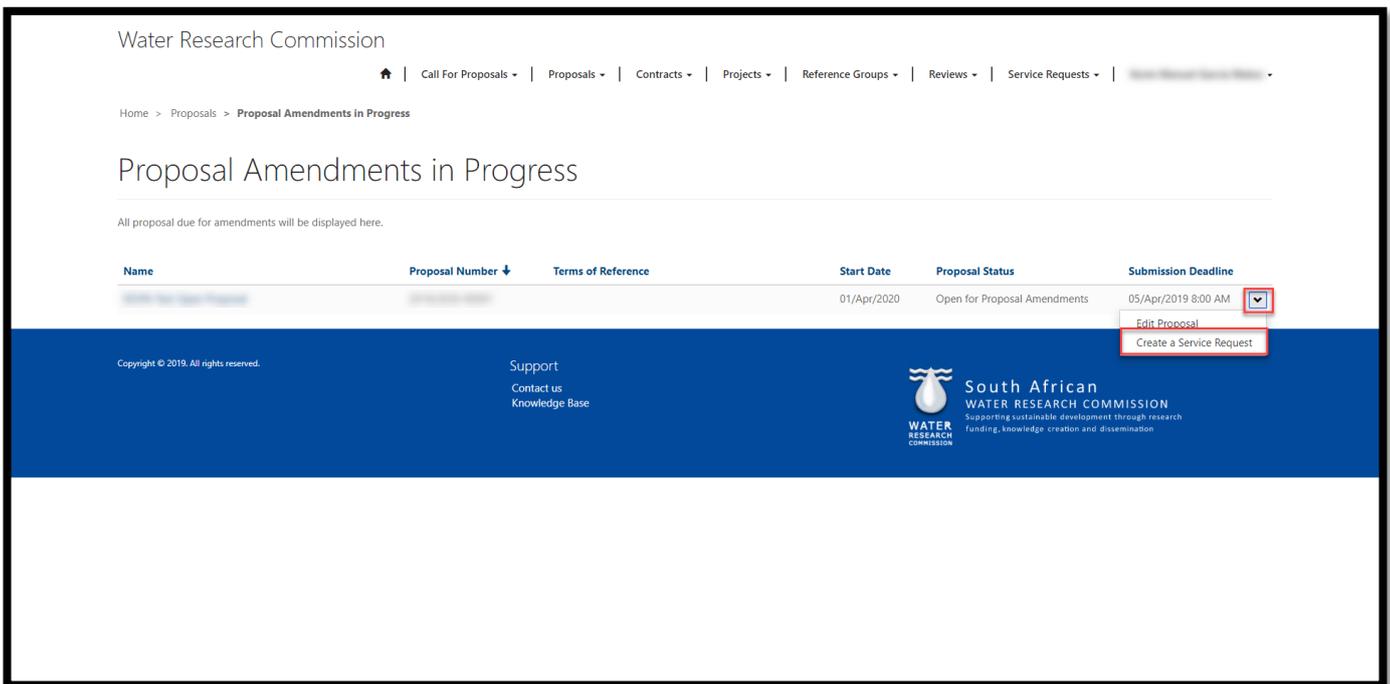
6. You will be re-directed to the *Open Service Requests* page. You can follow the steps in the [My Open Service Requests](#) section of this document to track the progress of your service request.

### 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.



- 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.



- 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.
- 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).



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Home > All Service Requests > Open a New Service Request

## Open a New Service Request

### Summary

#### Service Request Details

Contact

Service Request Title \*

Type

Category \*

Organisation \*

Proposal/Project

#### Description

Attach a file

Choose Files No file chosen

Create Service Request Cancel

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- 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

- 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.
- 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.

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Home > Projects > My Active Projects

## My Active Projects

This page display all the active projects. I.e Projects that are in progress.

Contract Number

Name

Start Date

Enc

Total Amount Paid

Research Manager

Project Status

Projects  
 My Active Projects  
 Deliverables  
 Deliverable Submissions  
 Submitted Deliverables  
 Rejected Deliverables  
 Submit Invoice for Deliverable  
 Paid Deliverables  
 Capital Expenses  
 Completed Projects



- 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.

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Home > Projects > My Active Projects

## My Active Projects

This page display all the active projects. I.e Projects that are in progress.

Contract Number	Name	Start Date	End Date	Total Budget	Total Amount Paid	Research Manager	Proposal Status
		01/Apr/2019	31/Mar/2022				Project in Progress

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- 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.
- 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).



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Home > All Service Requests > Open a New Service Request

## Open a New Service Request

### Summary

#### Service Request Details

Contact

Service Request Title \*

Type

Category \*

Organisation \*

Proposal/Project

#### Description

Attach a file

Choose Files No file chosen

Create Service Request Cancel

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- 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

- 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.

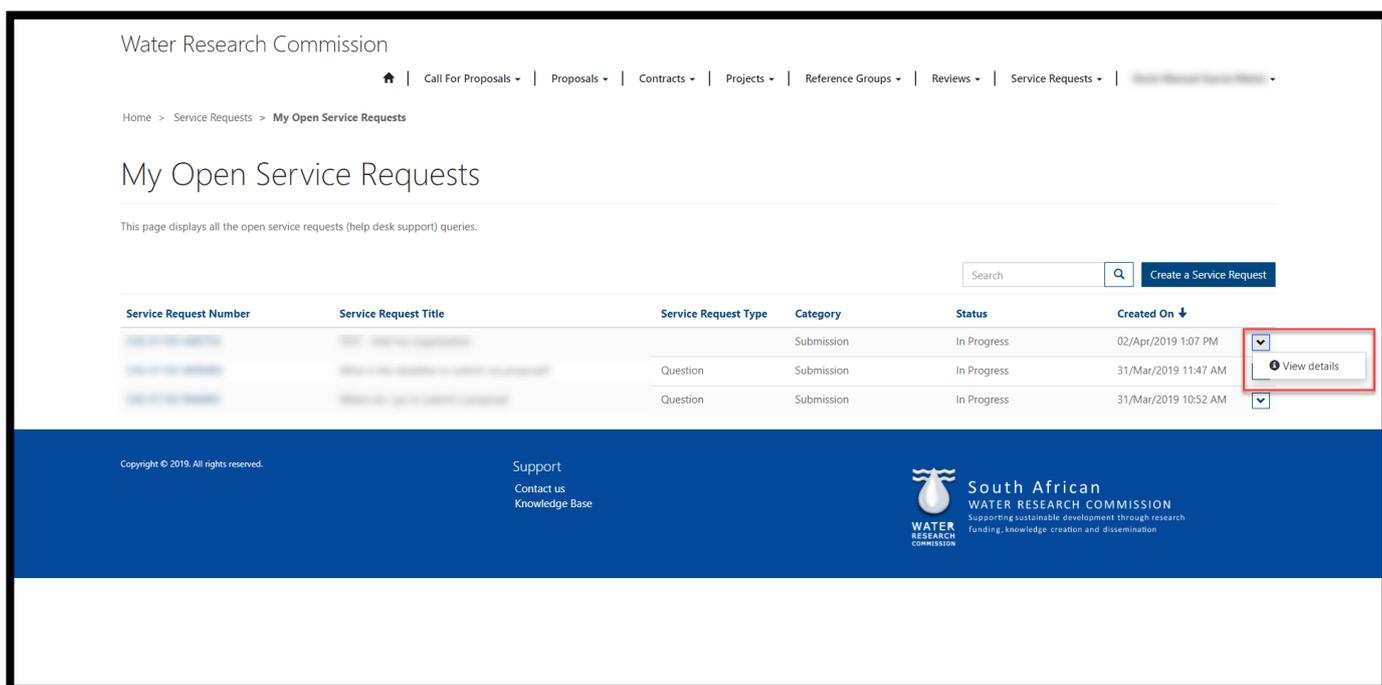


## My Open Service Requests Page

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**.



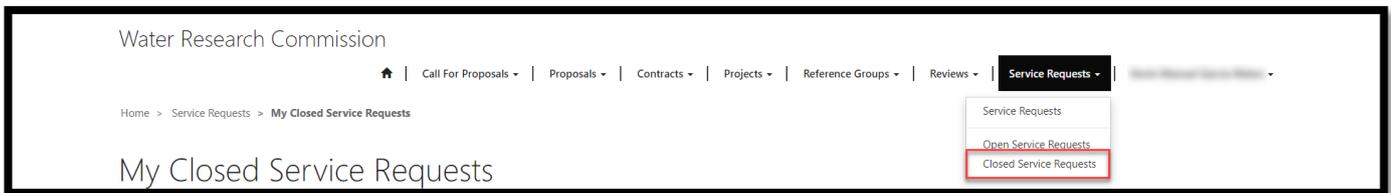
2. The *My Open Service Requests* page displays a list of service requests that you have opened and that are still in progress.
3. You can track the status of your service request by checking the *Status* column for each service request in listed on the page.
4. You can also create a new service request 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.



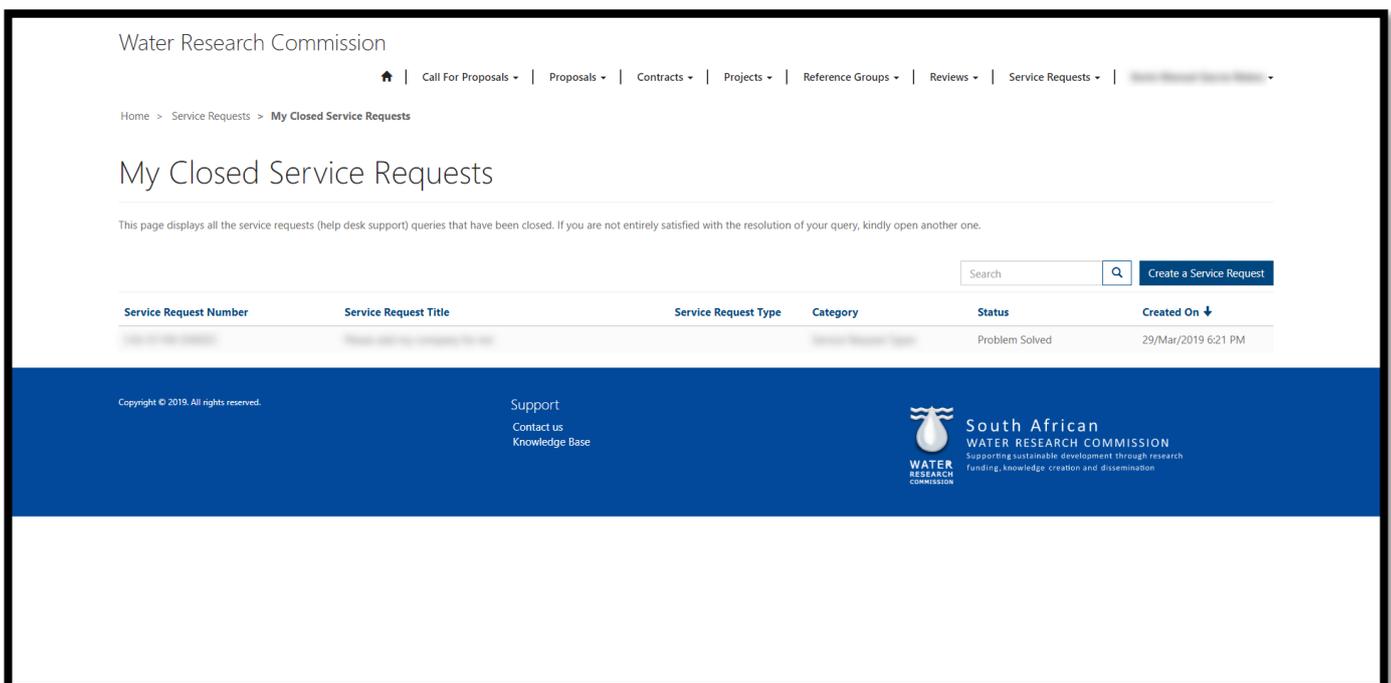
6. **Note:** A service request cannot be edited after it is created. If further information is needed, the BMS Support Team will be in contact via email or phone. Once the WRC Business Systems Support Team is satisfied that the request can be closed, they will close the request and it will appear on 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](mailto:bms-support@wrc.org.za).

