WILMA

Water Industry Licensing Management Application

WILMA PORTAL MANUAL

Licensee

Table of Contents

Licensee Contact User's Manual

Navigating through the WILMA Portal

To access the WILMA Portal, licensees need to have an individual account created specifically for them. This account serves as their login credentials to access the portal's features and functionalities. Once the account creation process is complete, auditors will receive an email notification from the system that confirms the successful setup of their account. This email typically contains important details, such as login credentials and instructions on how to reset their password.

A WILMA Portal user has invited you into their organization. Please reset your password before logging in.

Use the username provided to login in the portal:

- Username: testlicensee.wilma@example.com

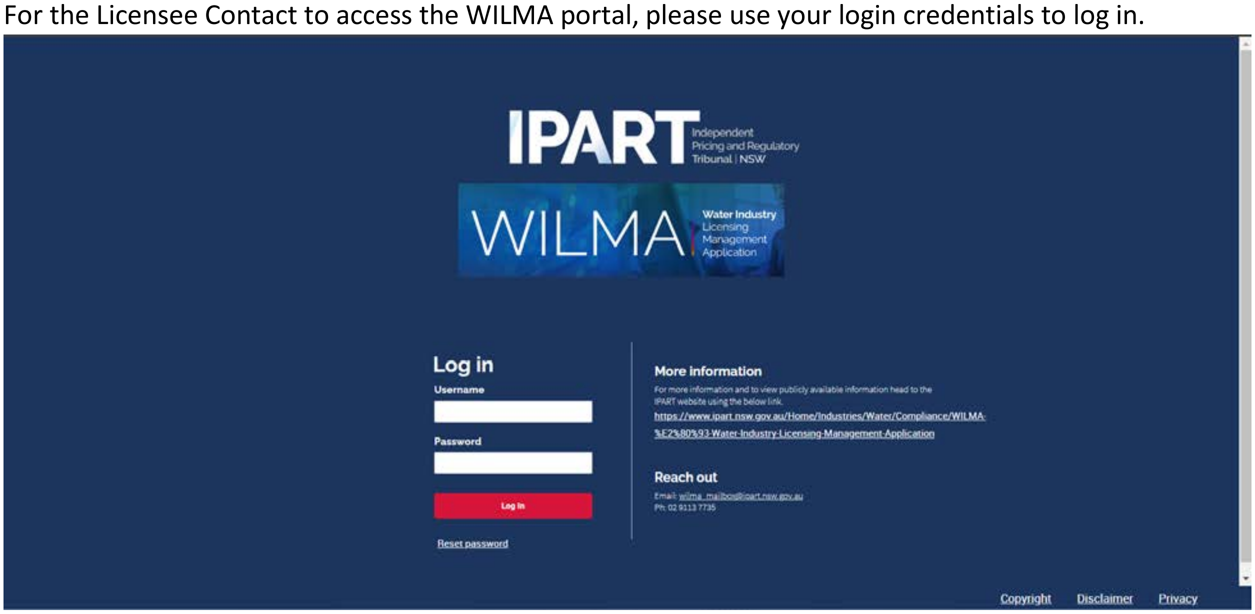
Welcome to WILMA Portal and please reach out if any help is needed.

Access the WILMA Portal

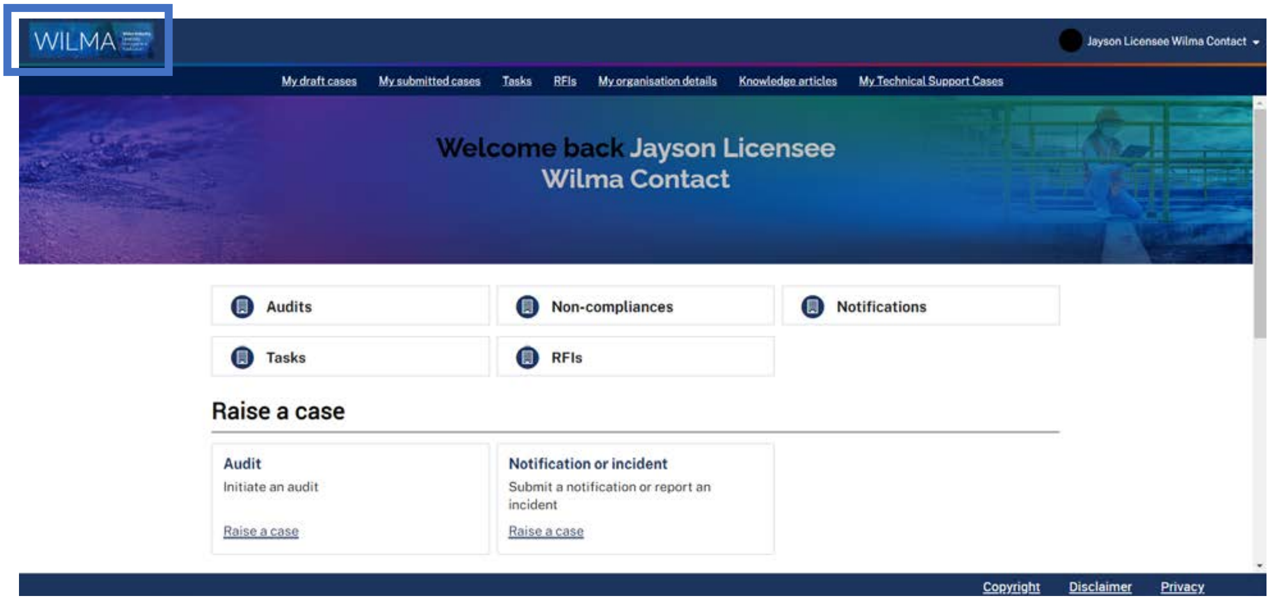
Regards,
IPART WILMA team

After successfully completing the password reset process, the licensee can now log in to the WILMA portal using their login credentials.

For the Licensee Contact to access the WILMA portal, please use your login credentials to log in.

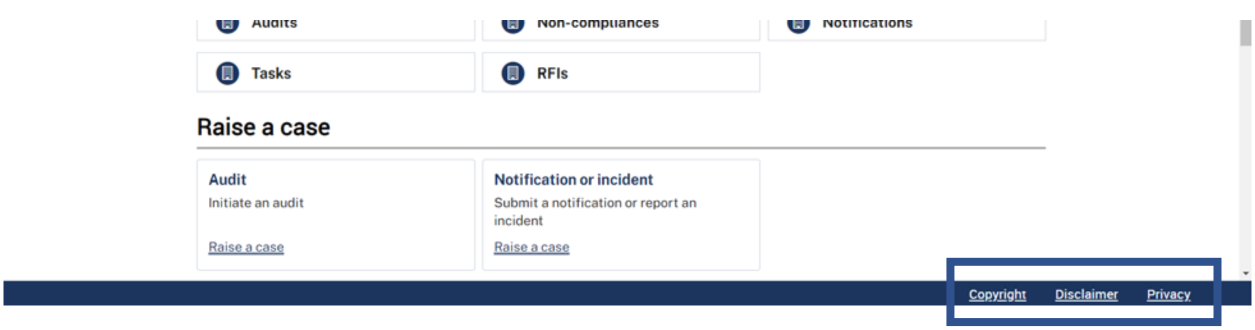


In the upper left corner of the portal, you will find easy access to the Home Button, which is prominently highlighted below. This WILMA icon serves as a convenient shortcut to the portal's landing page or home page, regardless of your current location within the portal. By selecting the Home Button, you can effortlessly navigate back to the central hub of the portal, ensuring smooth and convenient access to essential features and information. It provides a seamless and efficient way to stay connected and easily navigate within the portal.

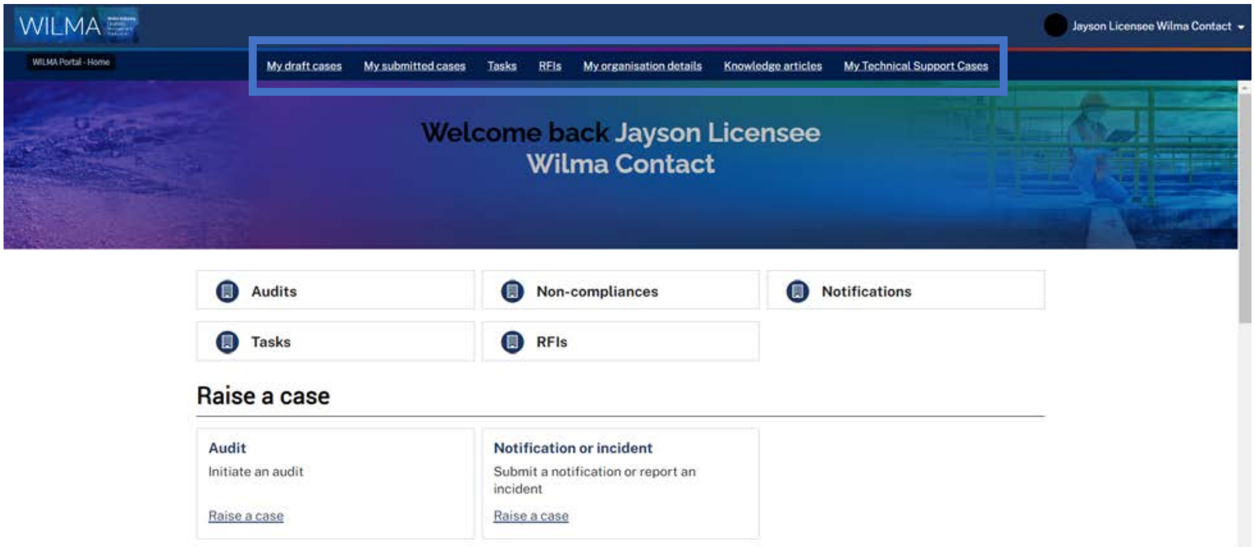


As you navigate at the bottom right part of the WILMA portal, you will find the links for Copyright, Disclaimer and Privacy, which is prominently highlighted below.

a. **Copyright**: This link asserts the ownership of the content within the portal and notifies users that they cannot reproduce or distribute any materials without proper authorization.
b. **Disclaimer**: This links clarifies the scope and limitations of the information provided in the portal. It helps protect you from potential legal claims by stating that the content is for informational purposes only and should not be considered as professional advice. It may also specify that the information provided may be subject to change without notice.
c. **Privacy**: This link explains how personal data is collected, used, stored, and protected within the service portal and associated materials. It ensures compliance with data protection laws and assures users that your privacy is respected.



If the logged-in user is one of the Licensee Contact, as you navigate through this guide, you'll notice a Ribbon Banner at the top, tailored specifically for logged-in users like yourself. This intuitive menu offers a range of features and functionalities designed to enhance your experience and streamline your tasks. Let's dive in and explore the exciting capabilities at your fingertips.



1. **My Draft Cases**: This section displays a list of all cases that you have initiated and saved in draft or draft cancelled status. It allows you to easily access and manage your saved case drafts for further processing or modifications.

2. **My Submitted Cases**: This section provides a list of all cases that you have successfully submitted. It allows you to view and track the progress of your submitted cases, excluding those in the Draft or Draft cancelled state.

3. **Tasks:** This section displays a comprehensive list of all tasks assigned to your Licensee company contact group. You can view tasks regardless of their state. Clicking on a task number allows you to access the detailed information of that specific task in the form view.

4. **RFIs**: In this section, you can view the list of all RFIs that have been issued to your Licensee company. Please note that RFIs in draft and draft cancelled states are excluded from the list. You can only view the RFIs issued to your Licensee contact group, but you cannot access or respond to them.

   Note: Contacts belonging to this group have the ability to take action on any RFI or task on a first-come, first-served basis. Other contacts within the group will have view-only access until the task or RFI has been actioned upon.

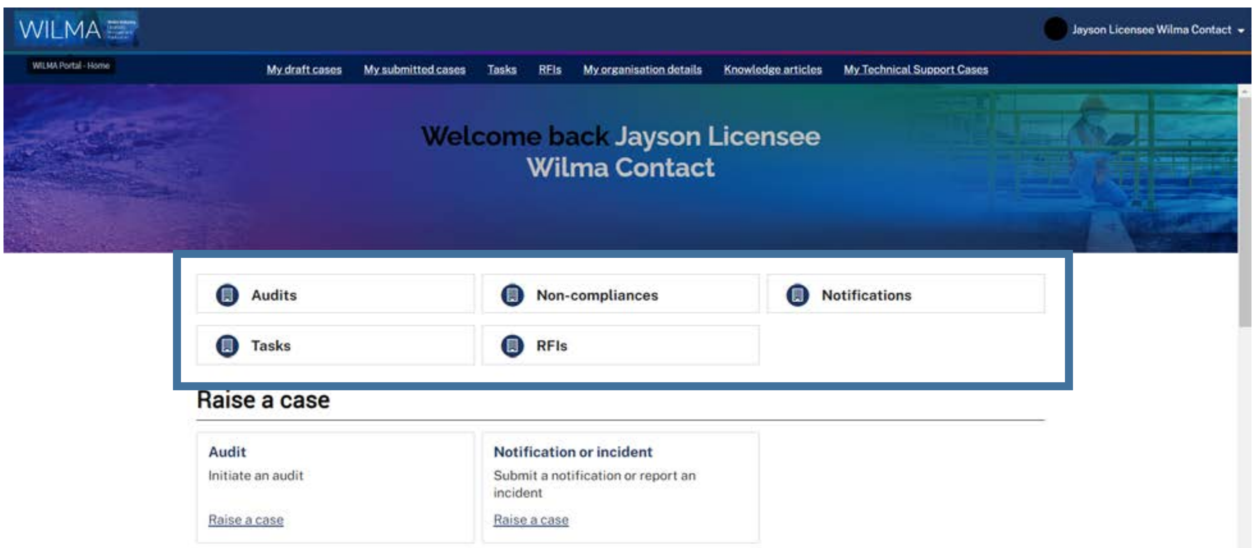
5. **My Organisation Details**: This section displays detailed information about the organization associated with the logged-in user. It includes essential details such as organization ID, organization type, email, and other relevant information. Please note that all the fields in this section are read-only, and no changes can be made.

In addition, you will find a related list called "Contacts" on the My Organization Details form. Clicking on it will redirect you to the list of contacts that belong to your Licensee organization.

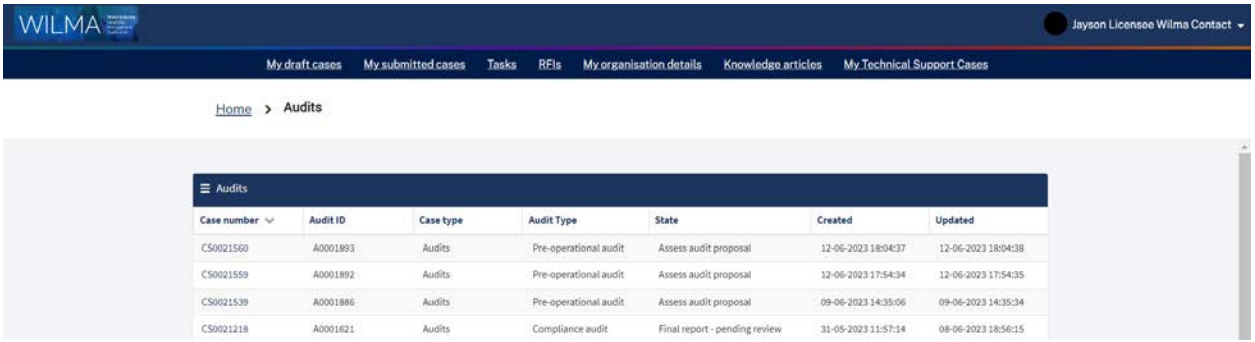
6. **Knowledge Articles**: Unlock a wealth of knowledge articles and resources designed to enhance your experience with the WILMA portal, providing invaluable assistance and guidance.

7. **My Technical Support Cases**: Stay informed about the status and progress of technical support cases raised by the Licensee contact, ensuring effective troubleshooting and resolution.

As you explore this guide, you'll come across various clickable elements that provide a range of features and functionalities, aimed at improving your user experience and optimizing task management. Refer to the provided screenshot for visual reference.

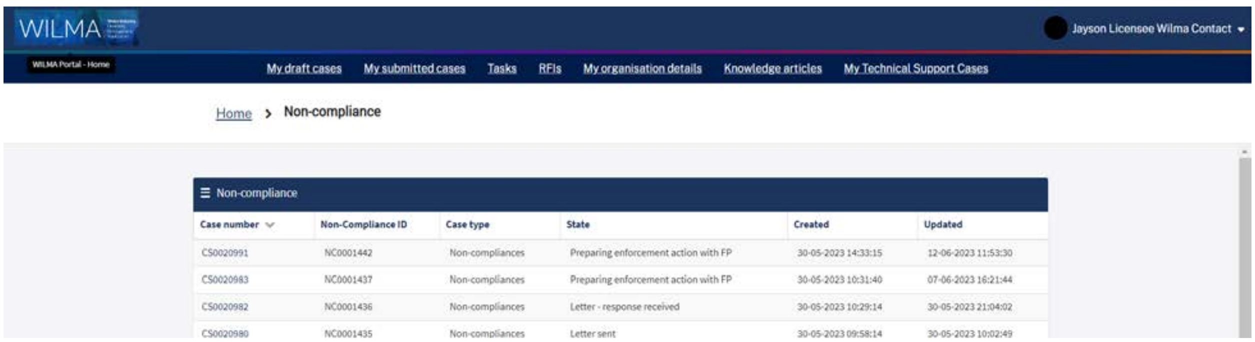


1. **Audits**: This section allows you to view the list of cases with the case type "Audits" that are raised against your Licensee organization. You will be able to see audits for both Compliance and Pre-operation audit types. However, please note that audits in draft or draft cancelled state will not be visible in this list. Compliance audits raised against your licensee organization and the audit initiation letters are approved and sent for your review and response.



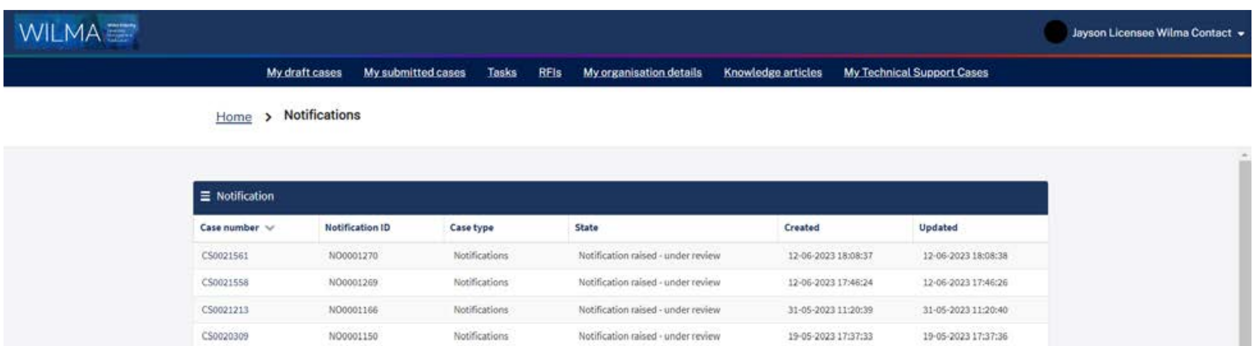
Case number	Audit ID	Case type	Audit Type	State	Created	Updated
CS0021560	A0001893	Audits	Pre-operational audit	Assess audit proposal	12-06-2023 18:04:37	12-06-2023 18:04:38
CS0021559	A0001892	Audits	Pre-operational audit	Assess audit proposal	12-06-2023 17:54:34	12-06-2023 17:54:35
CS0021539	A0001886	Audits	Pre-operational audit	Assess audit proposal	09-06-2023 14:35:06	09-06-2023 14:35:34
CS0021218	A0001621	Audits	Compliance audit	Final report - pending review	31-05-2023 11:57:14	08-06-2023 18:56:15

2. **Non - compliances**: In this section, you can view the list of cases with the case type "Non-compliances" cases submitted against your Licensee organization. You will see the list of non-compliances cases once the Non-compliances letters are approved and sent for your response.



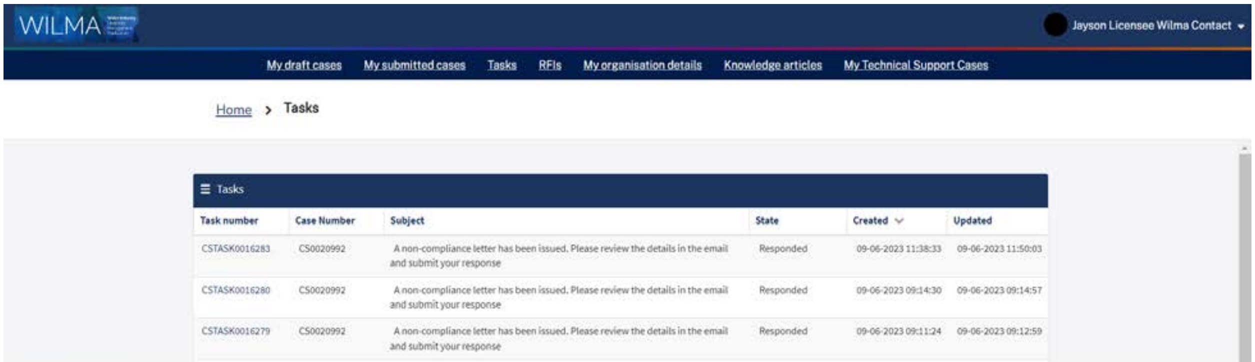
Case number	Non-Compliance ID	Case type	State	Created	Updated
CS0020991	NC0001442	Non-compliances	Preparing enforcement action with FP	30-05-2023 14:33:15	12-06-2023 11:53:30
CS0020983	NC0001437	Non-compliances	Preparing enforcement action with FP	30-05-2023 10:31:40	07-06-2023 16:21:44
CS0020982	NC0001436	Non-compliances	Letter - response received	30-05-2023 10:29:14	30-05-2023 21:04:02
CS0020980	NC0001435	Non-compliances	Letter sent	30-05-2023 09:58:14	30-05-2023 10:02:49

3. **Notifications**: In this section, you can view the list of cases with the case type "Notifications" that are submitted by the Licensee contacts of your Licensee organization. You will be able to view notifications that have been successfully submitted, excluding any cases in draft or draft cancelled state.

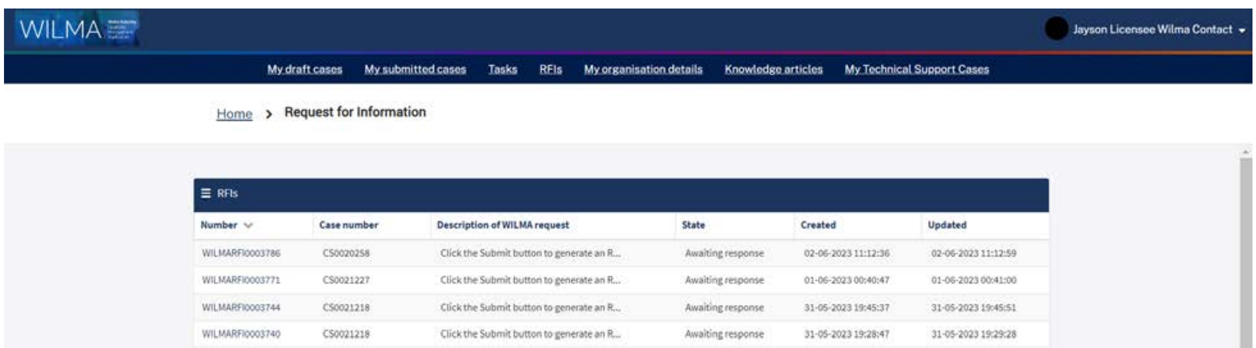


Case number	Notification ID	Case type	State	Created	Updated
CS0021561	NO0001270	Notifications	Notification raised - under review	12-06-2023 18:08:37	12-06-2023 18:08:38
CS0021558	NO0001269	Notifications	Notification raised - under review	12-06-2023 17:46:24	12-06-2023 17:46:26
CS0021213	NO0001166	Notifications	Notification raised - under review	31-05-2023 11:20:39	31-05-2023 11:20:40
CS0020309	NO0001150	Notifications	Notification raised - under review	19-05-2023 17:37:33	19-05-2023 17:37:36

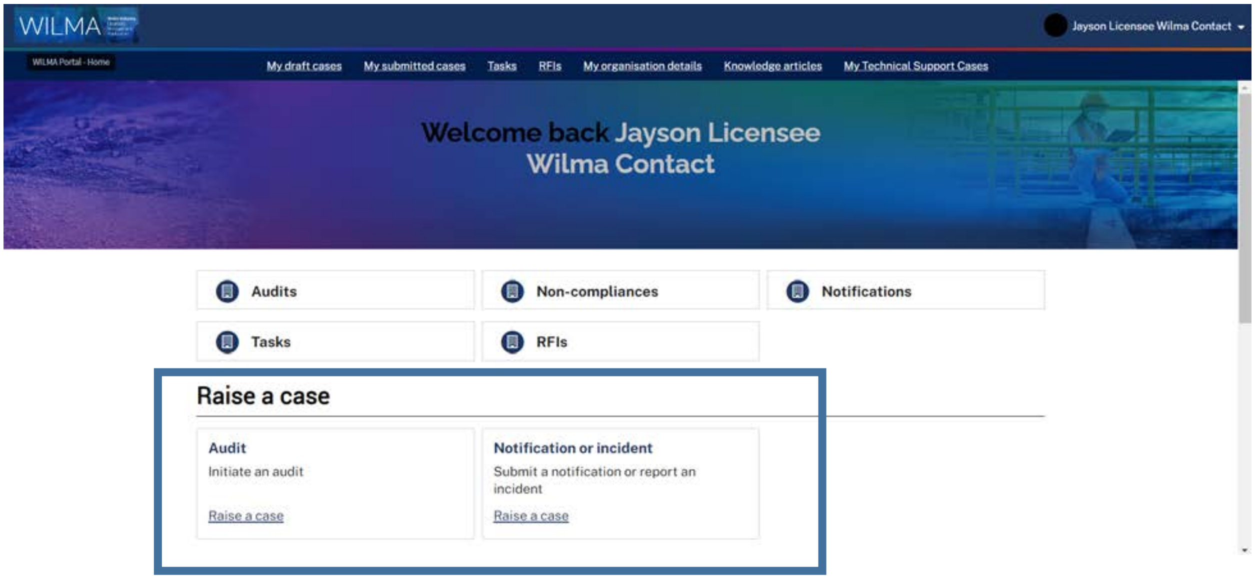
4. **Tasks**: This section displays a comprehensive list of tasks assigned to your Licensee company contact group. You can view all tasks assigned to your Licensee contact group, regardless of their state. By clicking on a task number, you can access the details of that task in the form view.



5. **RFIs**: This section allows you to view the list of all RFIs that were issued to your Licensee company. RFIs in draft and draft cancelled states are excluded from the list. You can see all the RFIs issued to your Licensee contact group. By clicking on an RFI number, you can access the relevant details of that RFI in the form view.

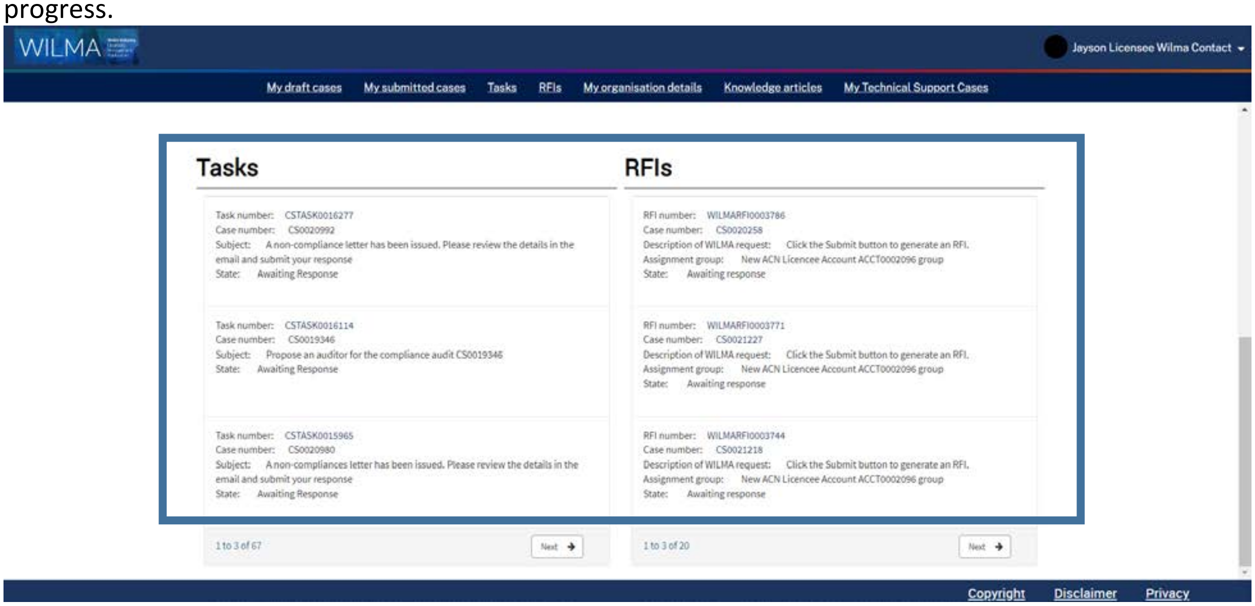


As you explore the "Raise a Case" section of the portal, you will encounter two types of forms available for raising a case, as depicted in the highlighted screenshot. These forms offer different options and functionalities for submitting your case.



1. **Audit**: Initiate a compliance audit
2. **Notification or incident**: Submit a notification or report an incident

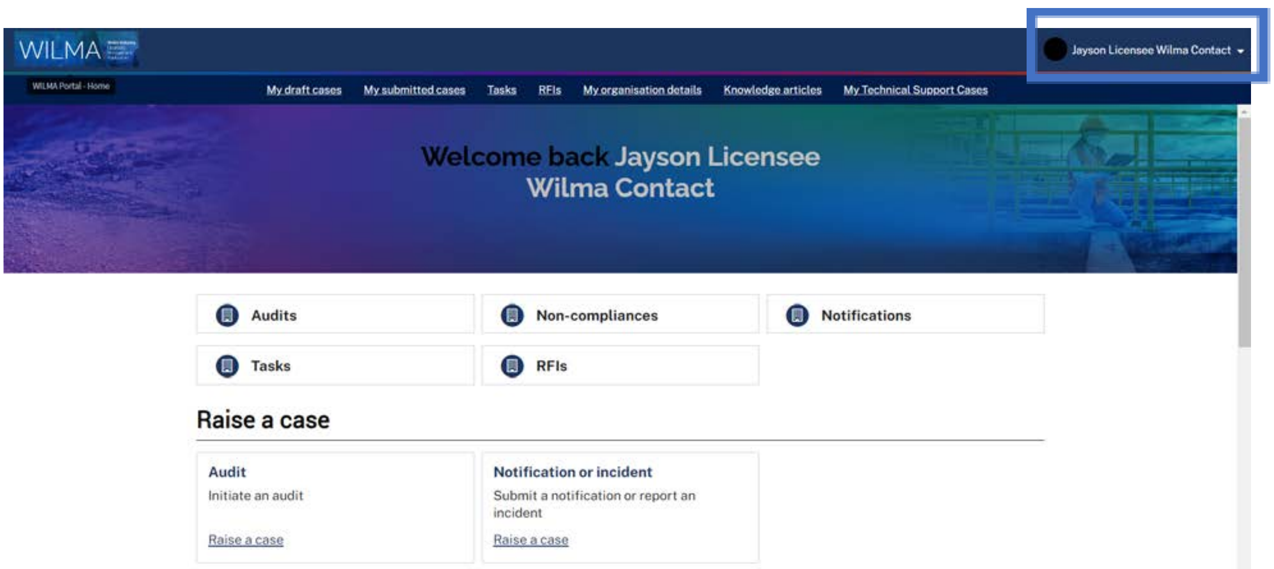
As you navigate through the portal, you will come across two sections: "Tasks" and "RFIs" for Licensees. They provide a convenient overview of the tasks assigned to you and the RFIs that require your attention, these intuitive features allow you to stay informed and effortlessly keep track of your progress.



1. **Tasks**: This section displays the latest top 3 tasks that are assigned to the Licensee contact company and are awaiting a response. It provides a quick overview of the pending tasks that require attention from the Licensee group members.

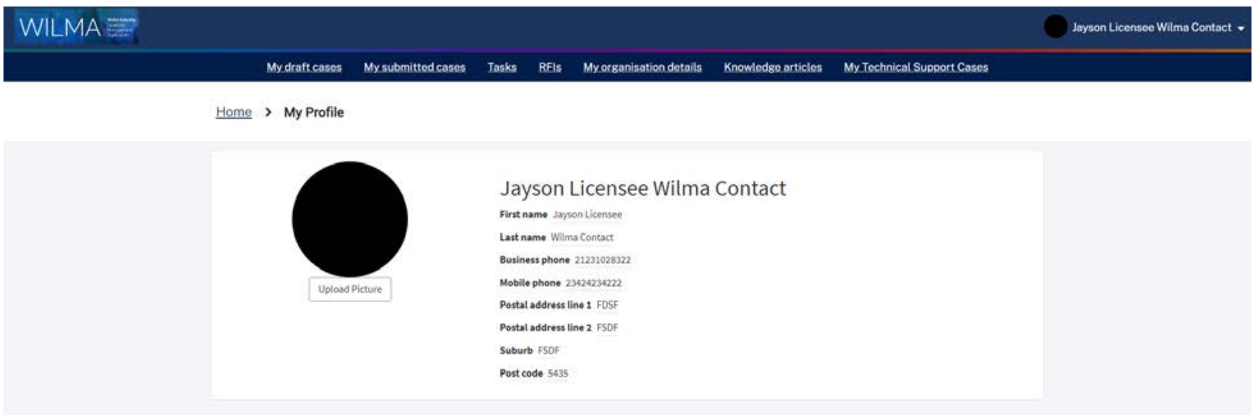
2. **RFIs**: This section showcases the latest top 3 RFIs that have been issued and are currently awaiting a response from the Licensee contact organization. It provides a quick overview of the pending RFIs that require a timely response from the Licensee contacts.

Located in the upper right corner of the portal, you will find convenient access to your Profile. By selecting this option, you can view and manage your personal information within the portal, such as your name, contact details, and any other relevant details associated with your profile. Additionally, you will also find the option to Logout, providing a secure and hassle-free way to exit the portal when necessary. This feature grants you control over your profile settings and contributes to a seamless user experience throughout your interaction with the portal.



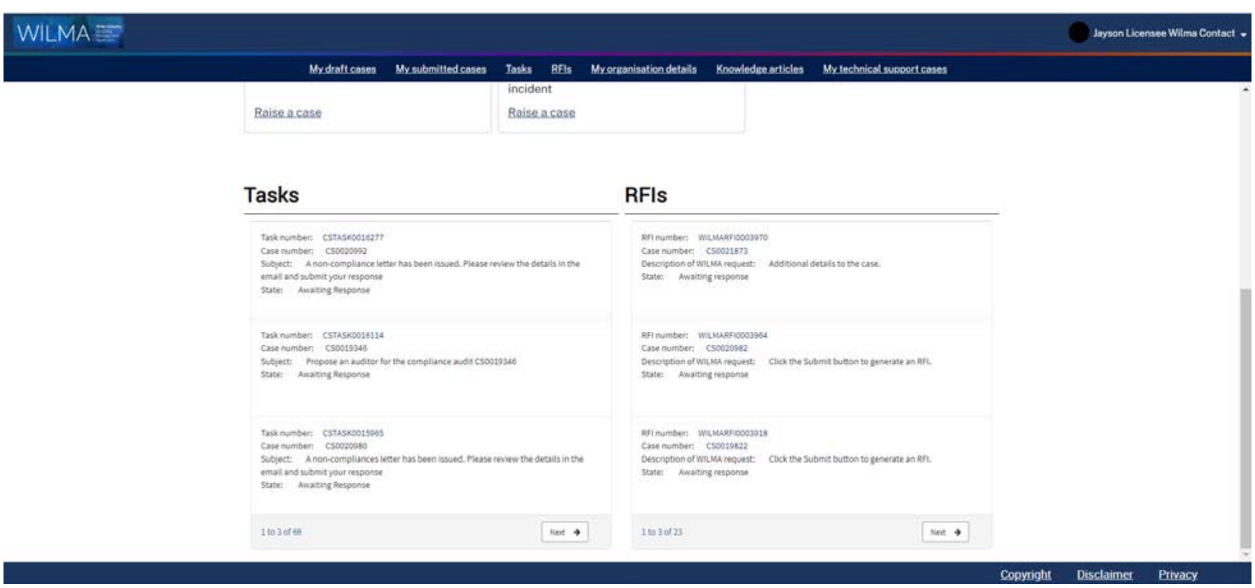
User Profile

When accessing the user's profile, you will have a comprehensive view of your personal information, including your Name, Business Phone Number, Mobile Phone Number, Postal address line 1, Postal address line 2, Suburb, Post Code, and Uploaded Picture. This page provides you with the ability to review and modify these specific details, ensuring they are up to date and accurate. Any updates made to the above fields will also reflect on the Licensee contact record in the backend and agent workspace. Take advantage of the editing functionality to make any necessary changes or additions, ensuring your profile reflects the most current and relevant information.

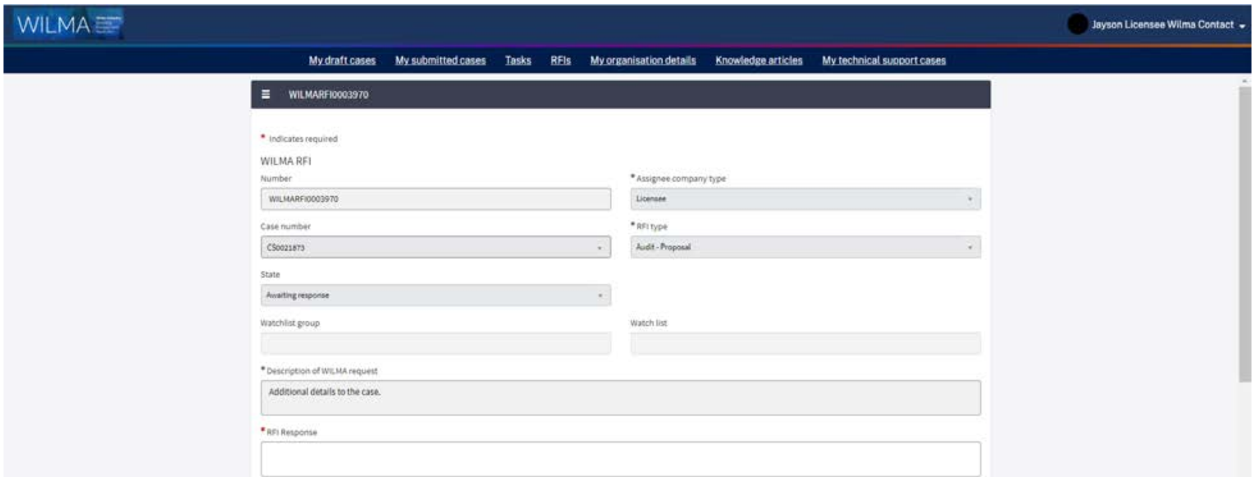


Licensee contact to respond on RFI Process

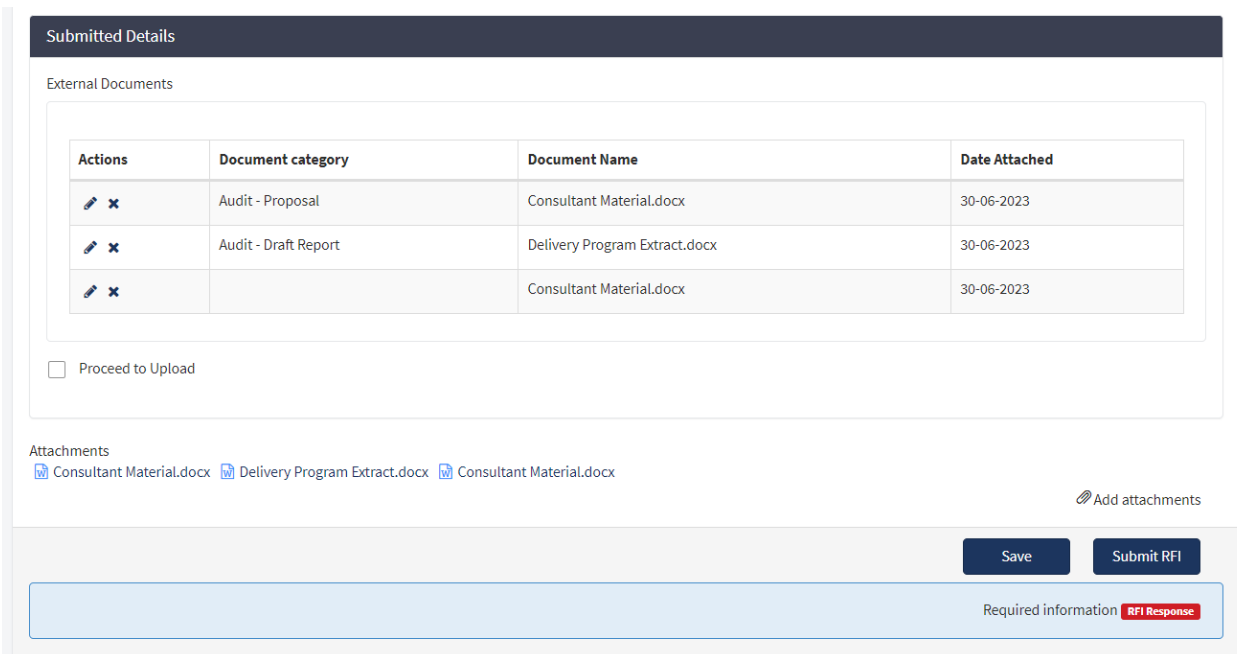
1. The Licensee should see the requested RFI with case number and RFI number that is awaiting for response on the “RFIs” section located at the bottom part of the portal



2. The Licensee should be able to select on the RFI number and can respond to the requested RFI, populate the mandatory fields and attach additional documents if applicable



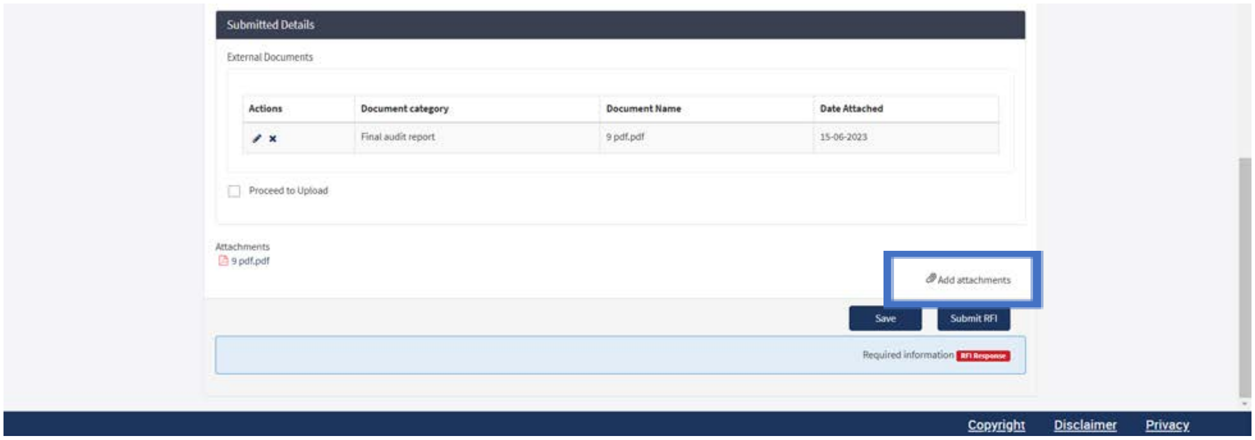
3. For the additional attachments, you can upload on the “Submitted Details” section



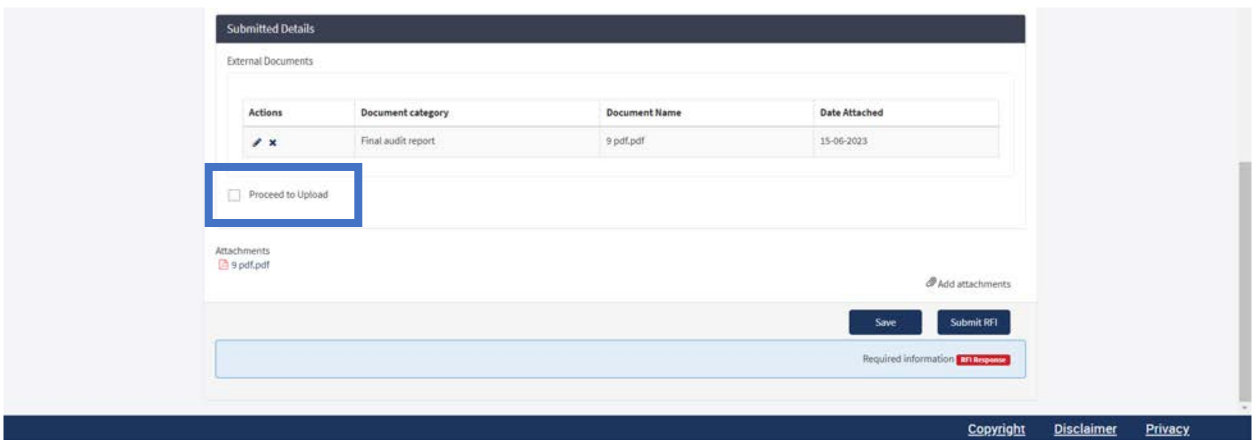
NOTE: Licensees will have access to delete attachments that were added by iPART but ensure NOT TO.

How to upload external documents

a. To upload additional documents, select "Add attachments" and select the document that you would want to add.

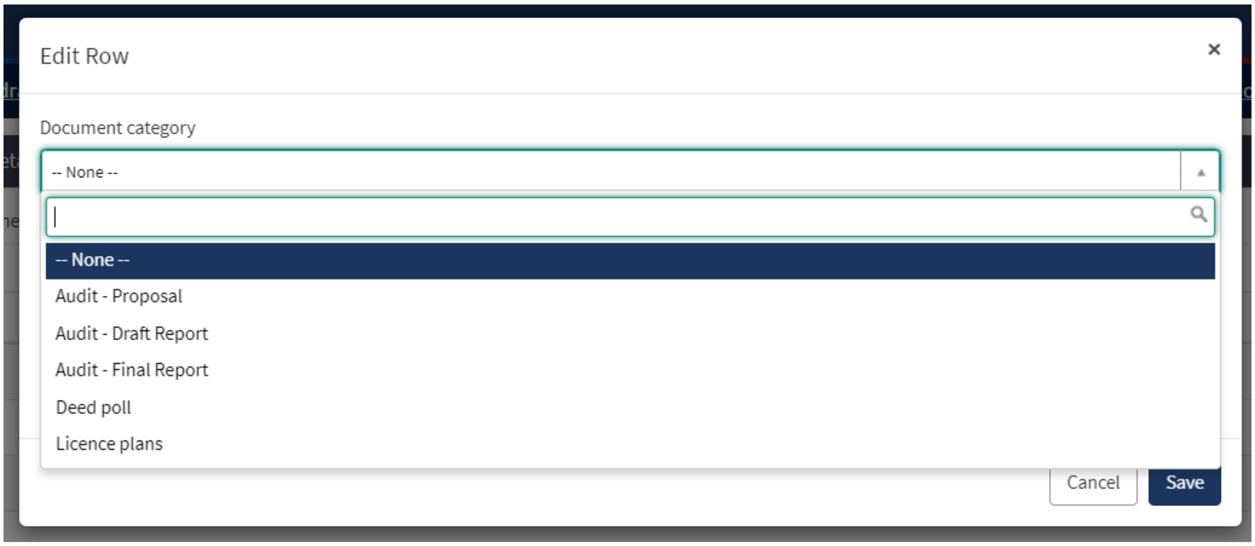


b. Check 'Proceed to upload'.

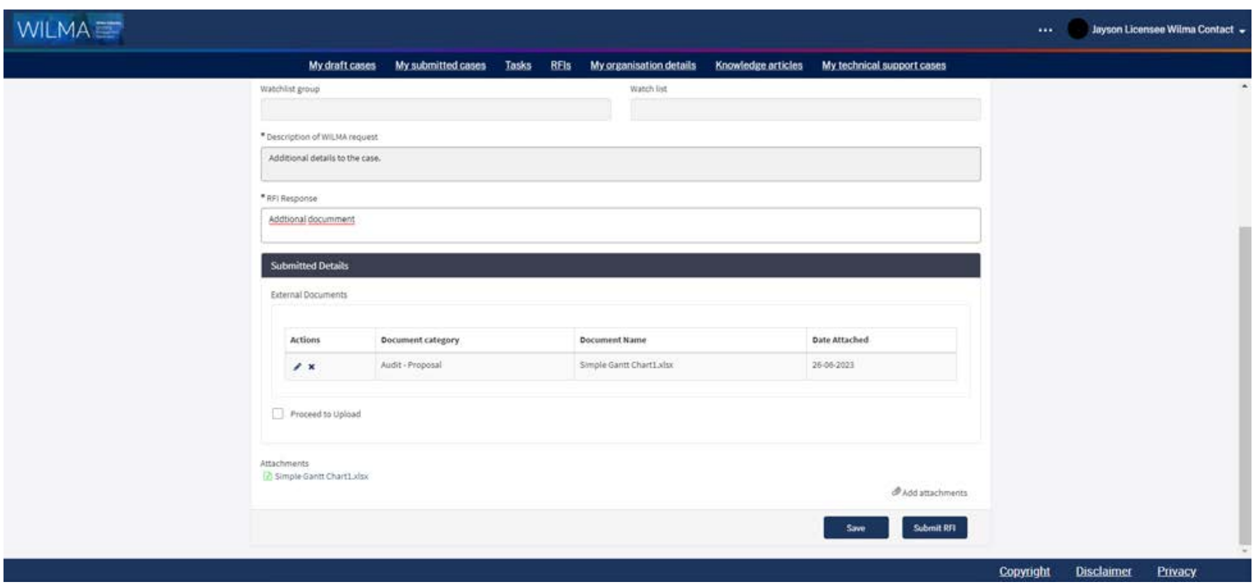


4. Once the documents are uploaded make sure to add a category by clicking on the "Edit Row" icon under "Actions column", then the Edit Row dialog box will pop-up and the Licensee will have the options on what categories to add accordingly to the specific RFI.

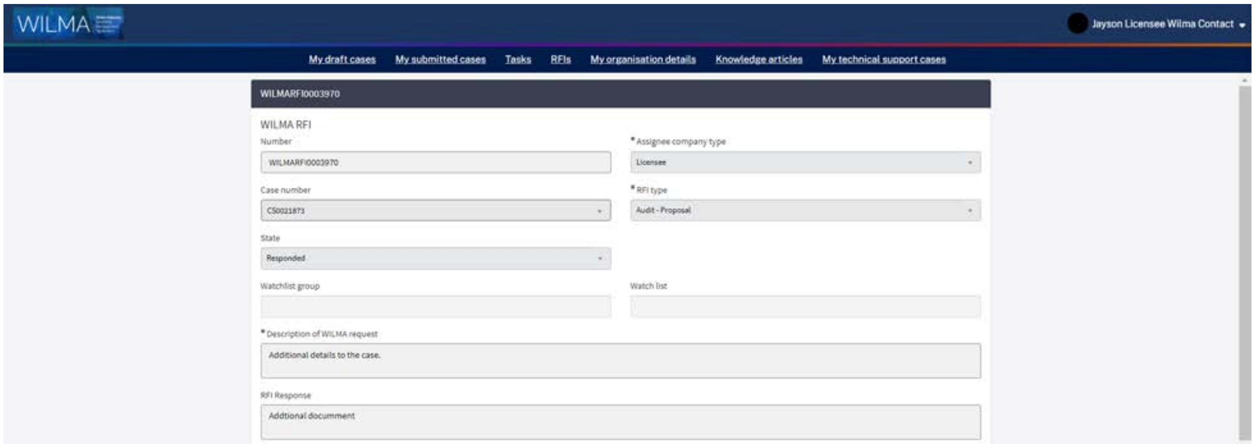
   Note: After uploading the documents, it is mandatory to select the appropriate category from the dropdown menu. This ensures proper organization and categorization of the documents for easy retrieval and reference.



5. Once the RFI has been completed you can select the "Submit RFI" button



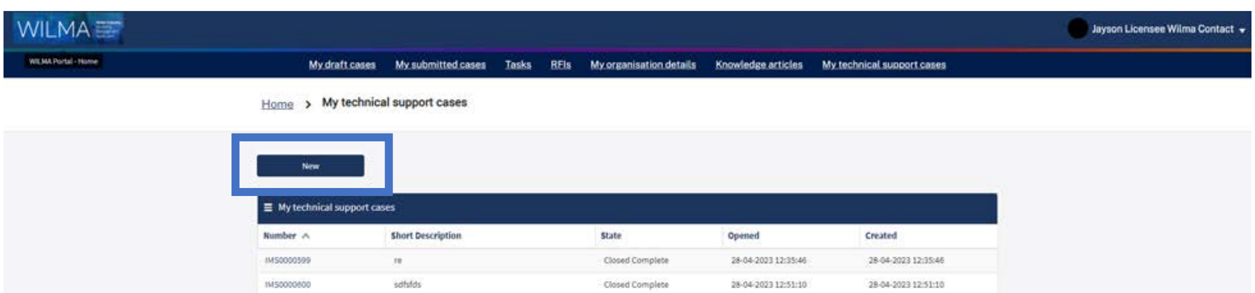
6. Once the RFI has been submitted, the state of the RFI will be changed to “Responded”



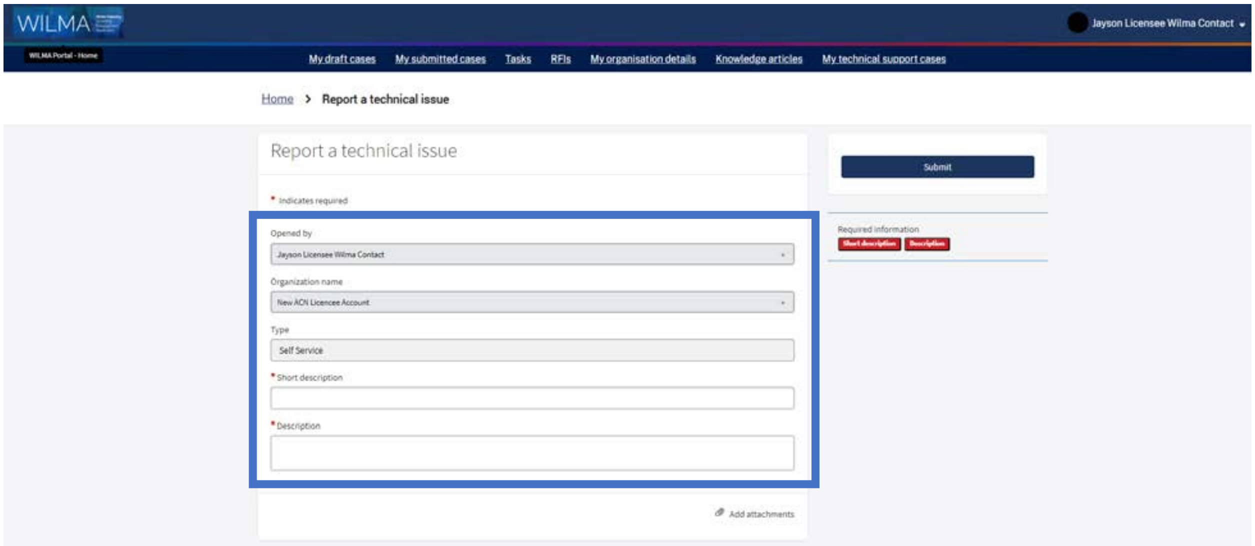
How to raise a Technical Support Case

1. To access the technical support cases, the licensee user should navigate to the "My Technical Support Cases" menu located on the ribbon banner at the top of the portal.

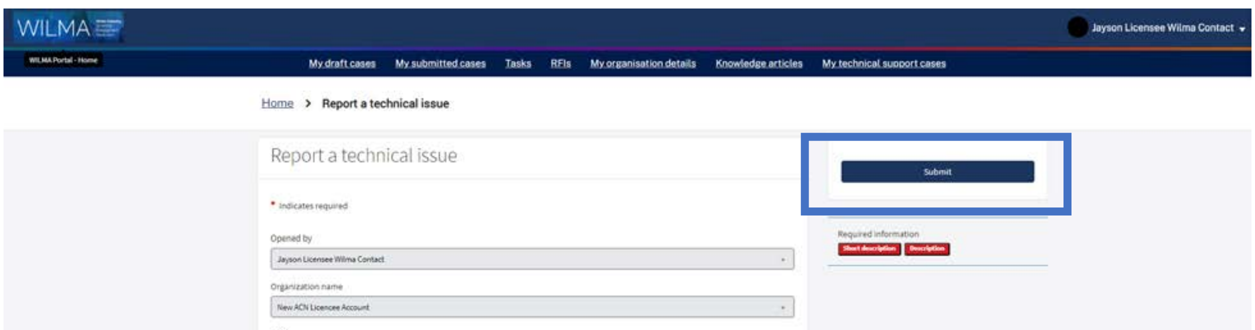
2. On the "My Technical Support Cases" page, click on the "New" button to create a new support case.



3. After clicking on "New," you will be redirected to the "Report a Technical Issue" form. The form will contain pre-populated fields with your information from the database, as well as mandatory fields that you need to fill in before submitting the form.



4. To submit the case, click on the "Submit" button located on the right side of the form.



5. After clicking "Submit," you will be redirected to a page displaying all the details you entered for the case. You can track the progress of your request by revisiting this page in the My Technical Support Cases menu.