WILMA
Water Industry Licensing Management Application

WILMA PORTAL MANUAL
Auditor

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WILMA Auditor User's Manual

Navigating through the WILMA Portal

To access the WILMA Portal, auditors 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: testauditor.wilma@example.com

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

Access the WILMA Portal

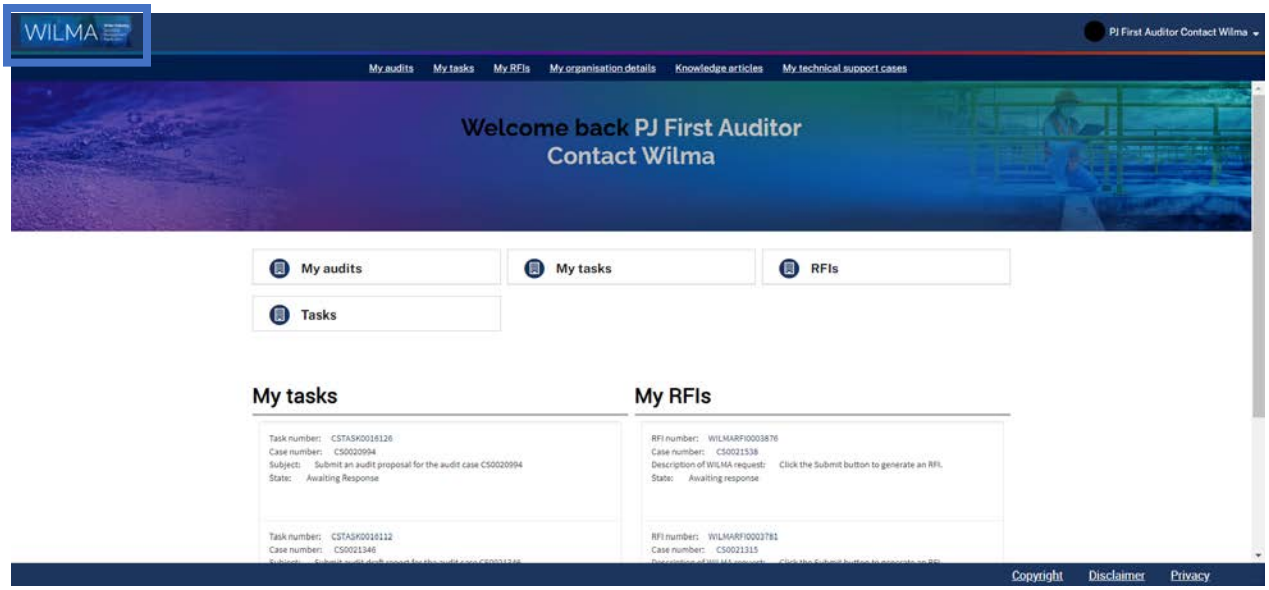
Regards,
IPART WILMA team

IPART Independent Pricing and Regulatory Tribunal | NSW

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

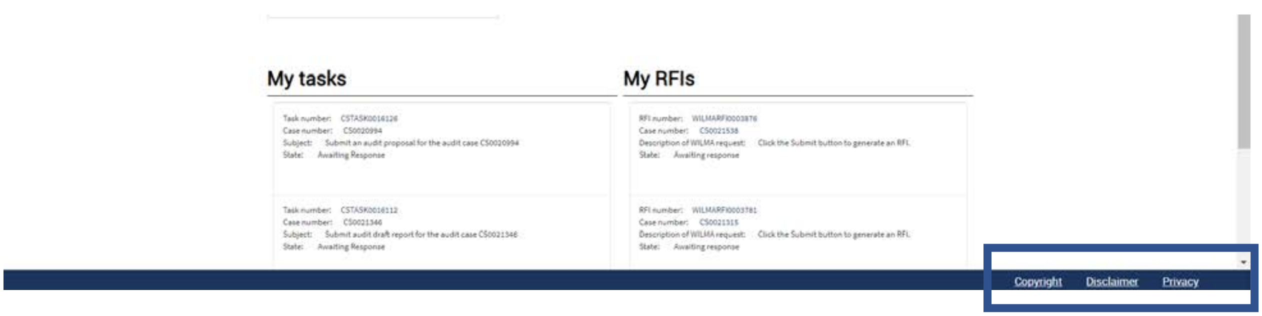
For the WILMA Auditor to access the WILMA portal, please use your login credentials to log in.

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.

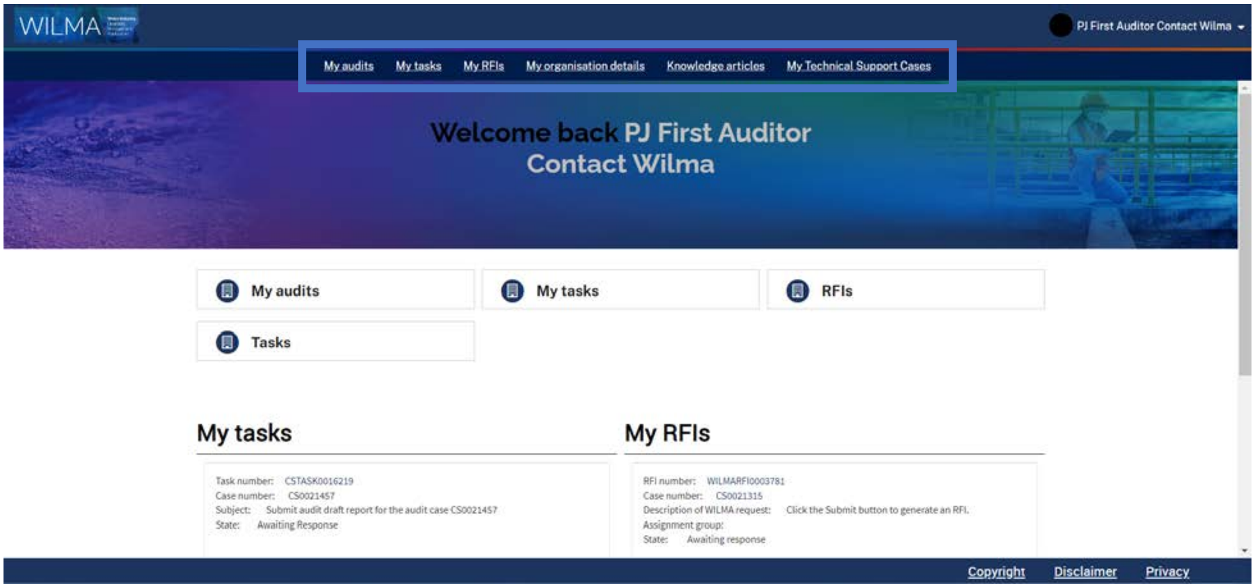


As you navigate at the bottom right part of the WILMA portal, you will find the links for Copyright, Disclaimer and Privacy, which is prominently highlighted below.

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 WILMA Auditor, 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 audits**: This section provides the list of all audits where you are assigned as the auditor. Clicking on a case number allows you to view all the relevant fields based on the case form configurations.

2. **My tasks**: A task refers to an action item assigned to a council user that requires their attention to progress the case. In this section it displays the list of all tasks that are assigned to the Auditor logged-in, irrespective of the state of the task, as the auditor you can see all the tasks that were assigned to you. When you click on a task number, you can see the details of that task in the form view.

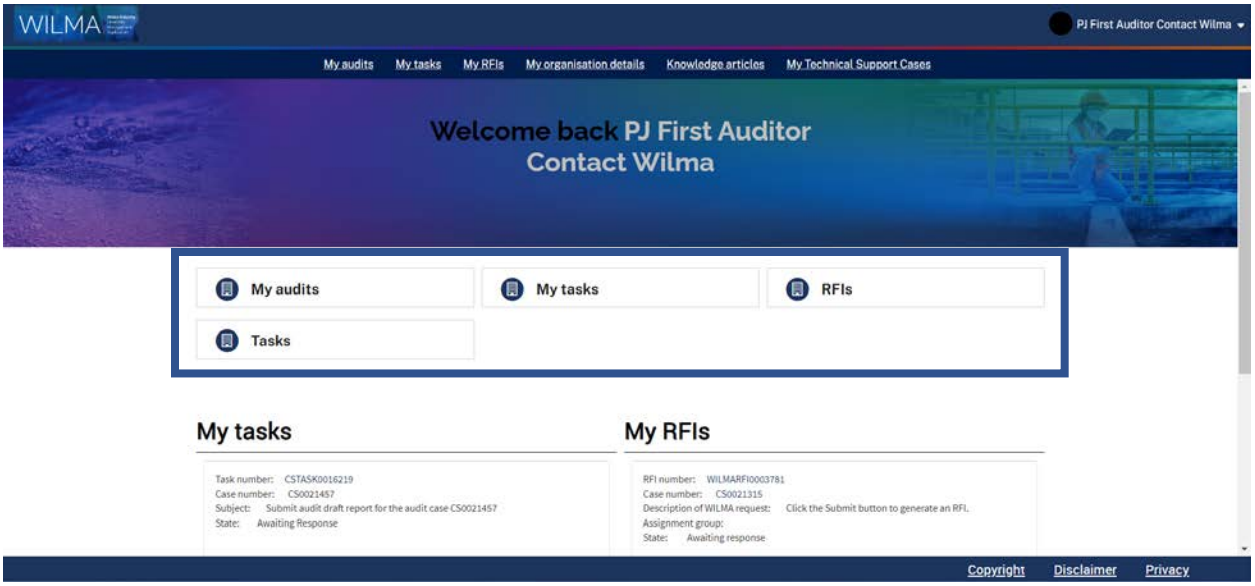
3. **My RFIs**: This section provides the list of all RFIs that were issued to the Auditor contact. Auditor contact can click on the RFI number and open the form view of the RFI

4. **My organisation details**: In this section it provides the details in which the Auditor contact organization belongs. In the related lists of the form, you can see the "Contacts", and when you click it, you will be redirected to the list of contacts that belong to your Auditor company.

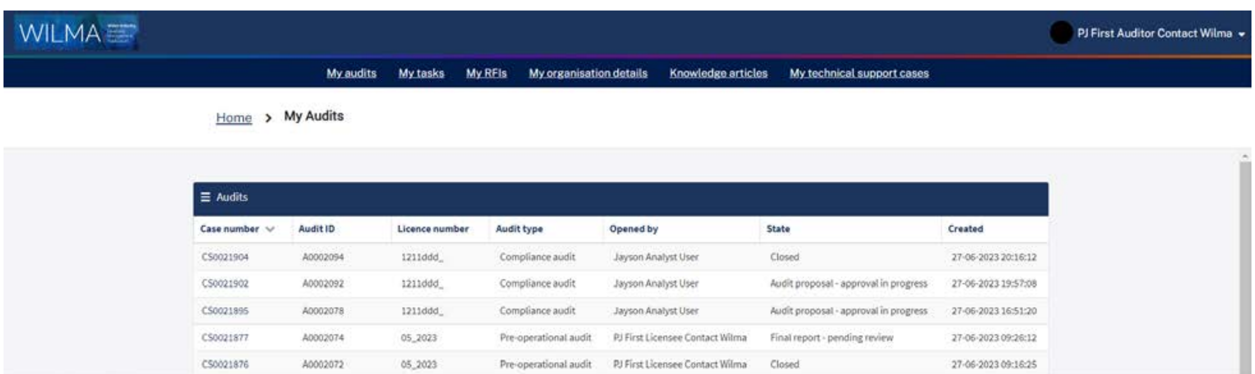
5. **Knowledge Articles**: Unlock a wealth of knowledge articles and resources designed to enhance your experience with the WILMA portal, providing invaluable assistance and guidance.

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

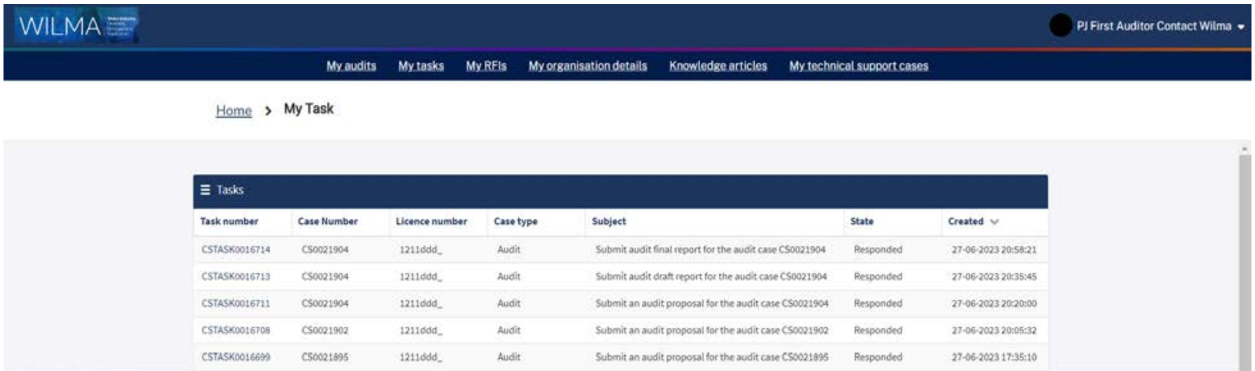
As you explore this guide, you'll come across various clickable elements that provide a range of features and functionalities, aimed at improving your user experience and optimizing task management. Refer to the provided screenshot for visual reference.



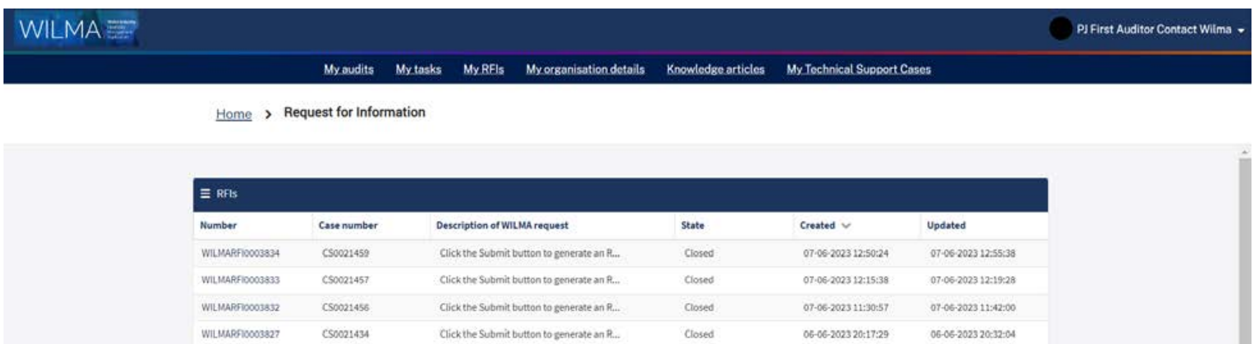
1. **My Audits**: In this provides the list of cases that were assigned to the Auditor contact as the auditor contact. The audit cases appear in this section where you have been nominated as the auditor.
    a. For compliance audit, the cases appear in this list one you are nominated successfully as an auditor.
    b. For pre-operational audits, cases appear in this list as soon as the Licensee submits an audit case.



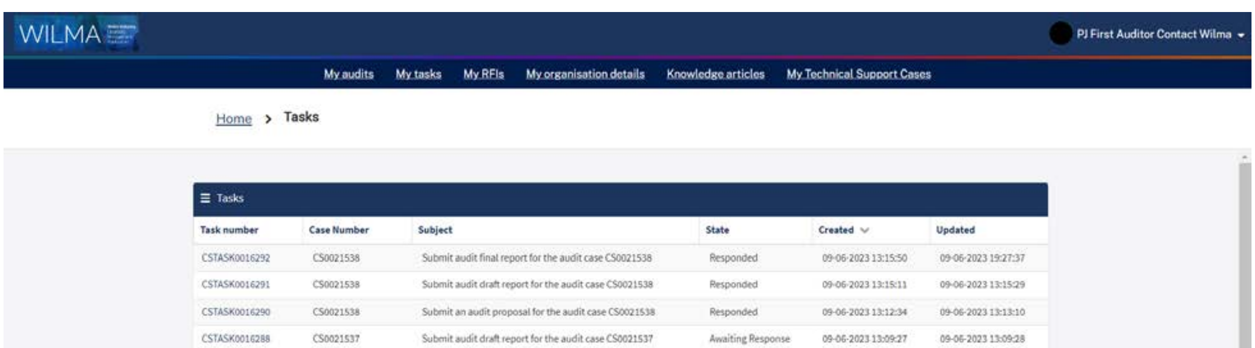
2. **My tasks**: This section provides the list of all tasks that are assigned the Auditor contact. Irrespective of the state of the task, as an Auditor contact you can see all the tasks that are assigned to you. When you click on a task number, you can see the details of that task in the form view.



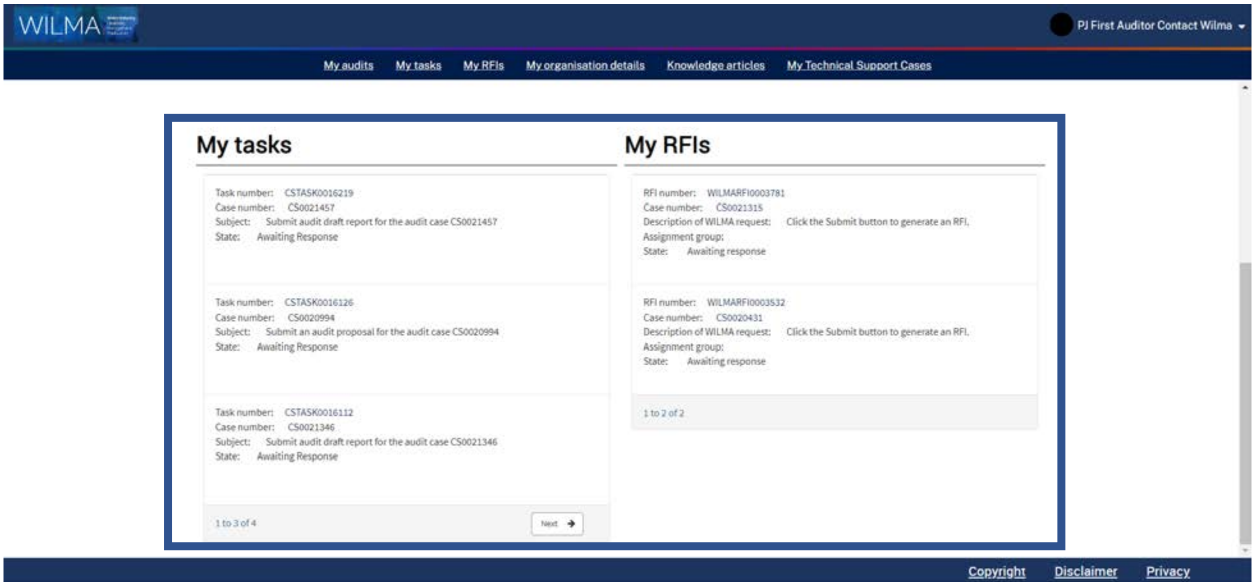
3. **RFIs**: This section allows you to view the list of all RFIs that were issued to your Auditor company. You can see all the RFIs issued to your Auditor contact group. By clicking on an RFI number, you can access the relevant details of that RFI in the form view.



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



As you navigate through the portal, you will come across two sections: "My tasks" and "My RFIs" for Auditors. 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.



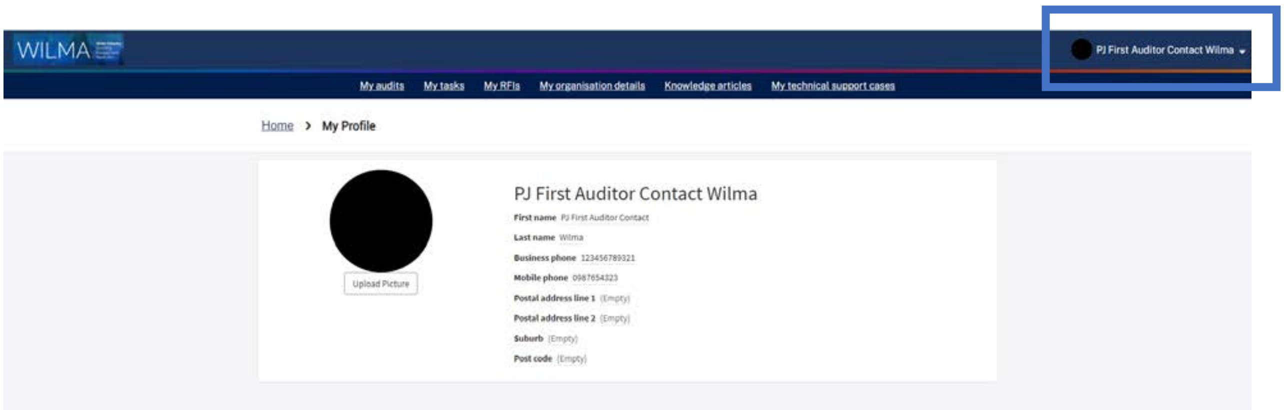
1. **My tasks**: This section displays the latest top 3 tasks that are assigned to the WILMA Auditor company and are awaiting a response. It provides a quick overview of the pending tasks that require attention from the WILMA Auditor group members.

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

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.

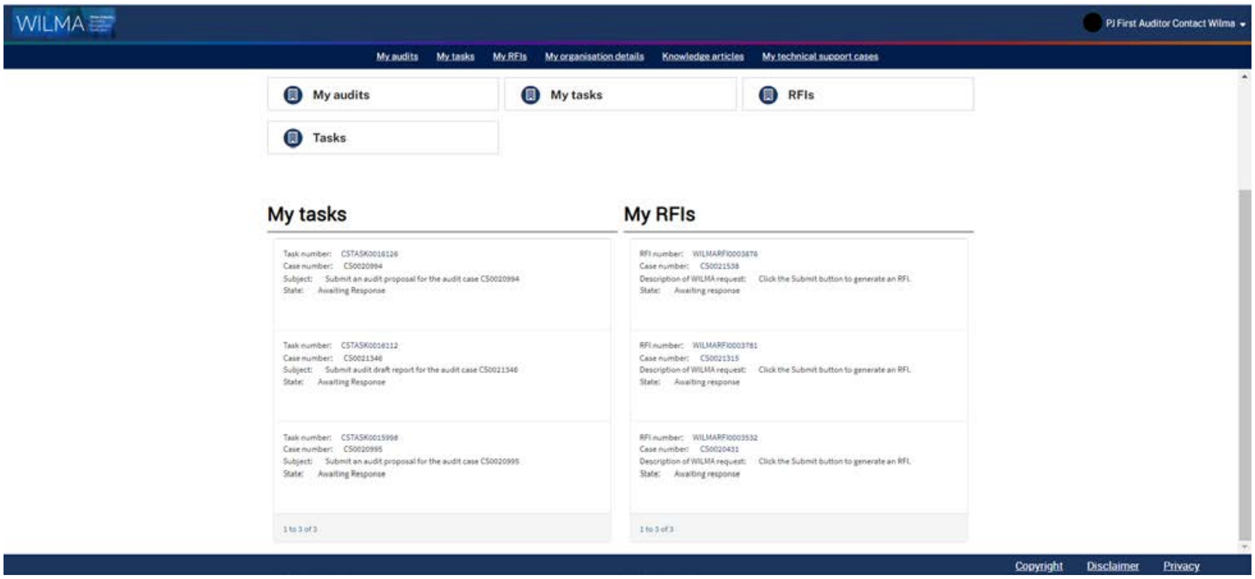
User Profile

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 WILMA Auditor 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.

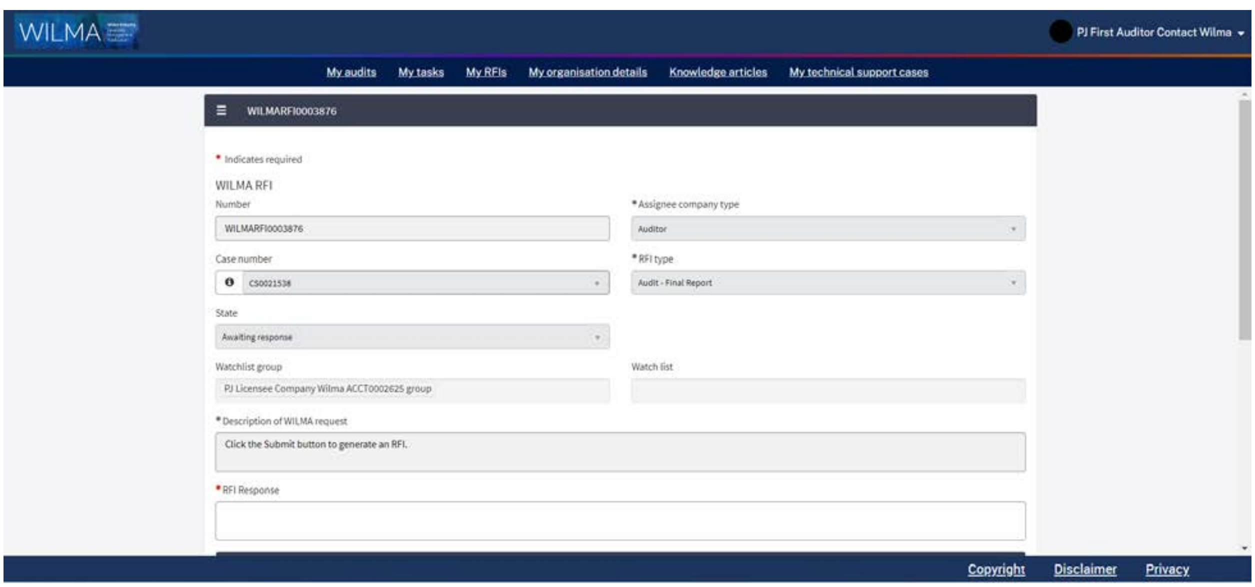


WILMA Auditor to respond on RFI Process

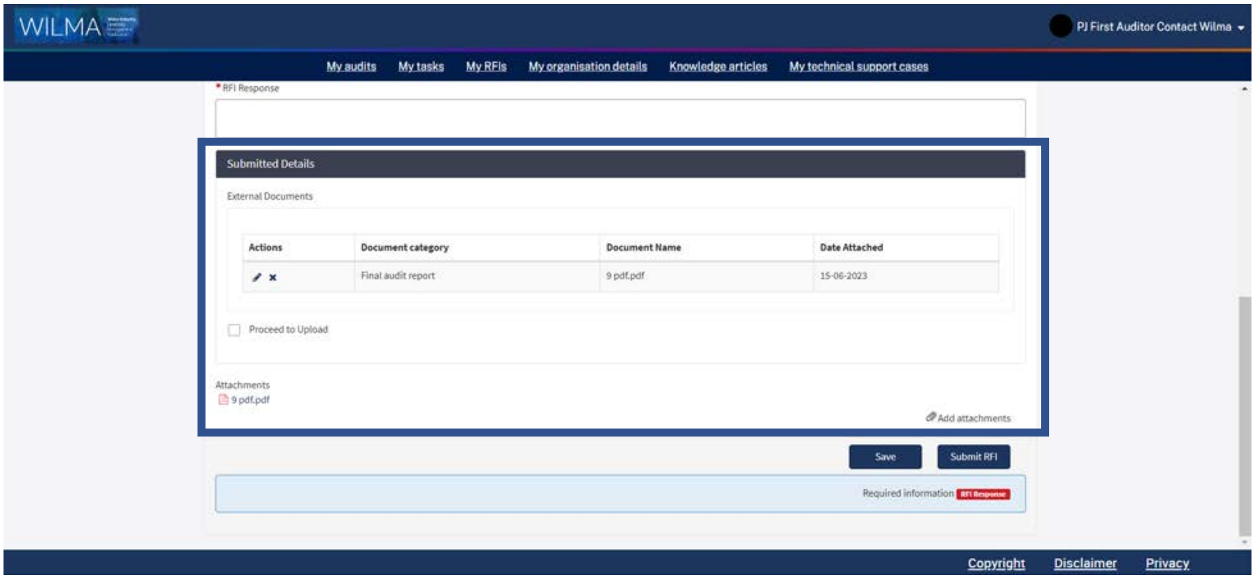
1. The WILMA Auditor should see the requested RFI with case number and RFI number that is awaiting for response on the “My RFIs” section located at the bottom part of the portal



2. The WILMA Auditor 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

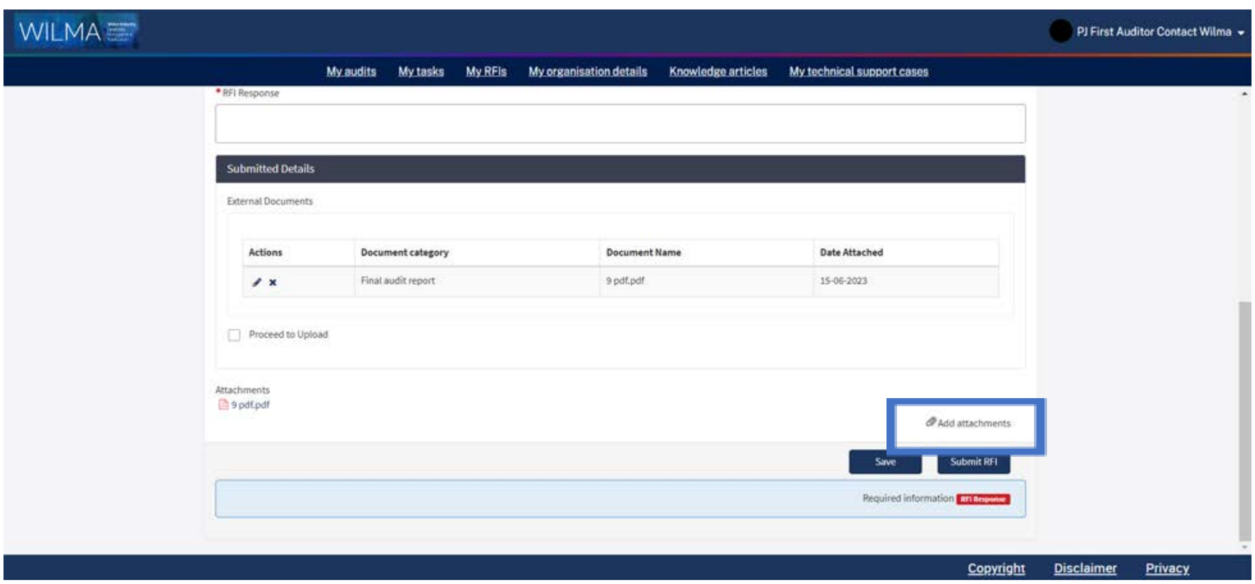


3. For the additional attachments, you can upload on the “Submitted Details” section

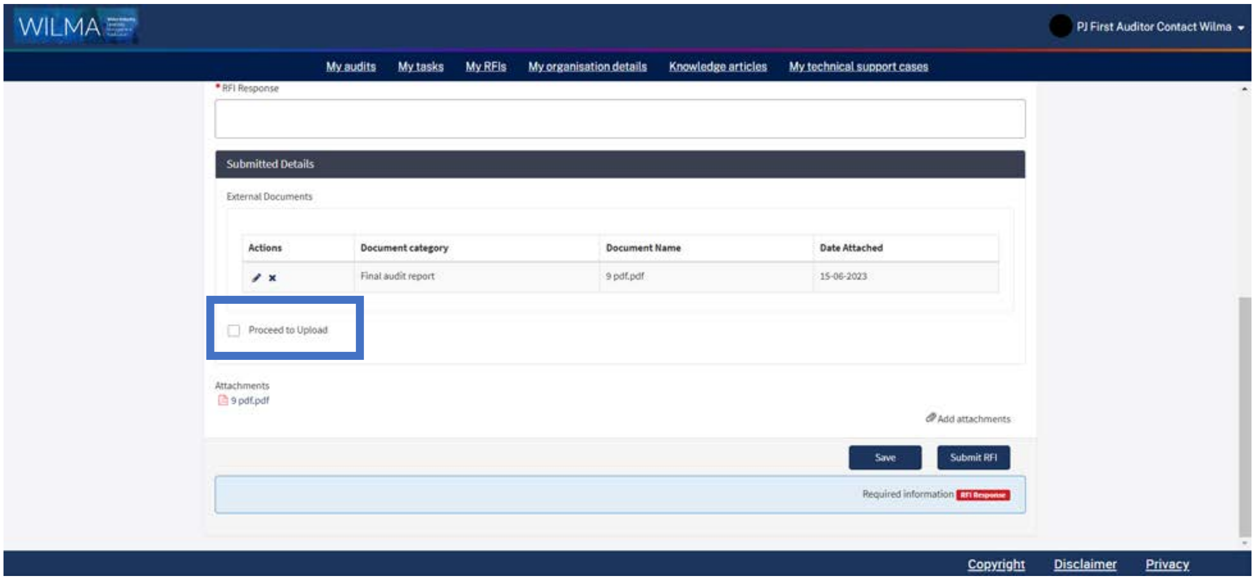


How to upload external documents

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

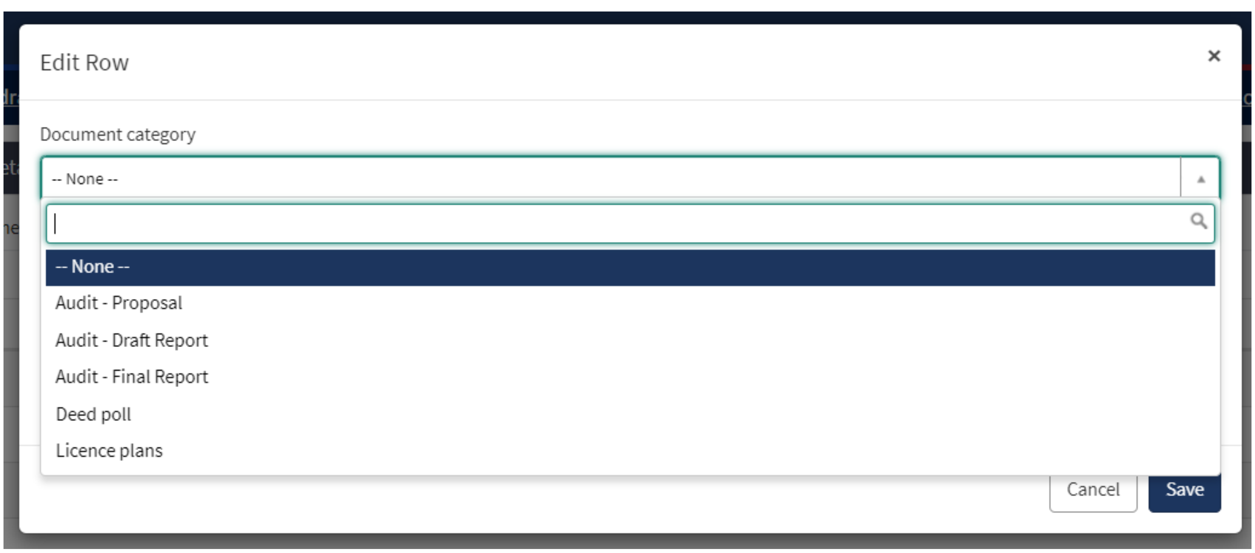


b. Check ‘Proceed to upload’.

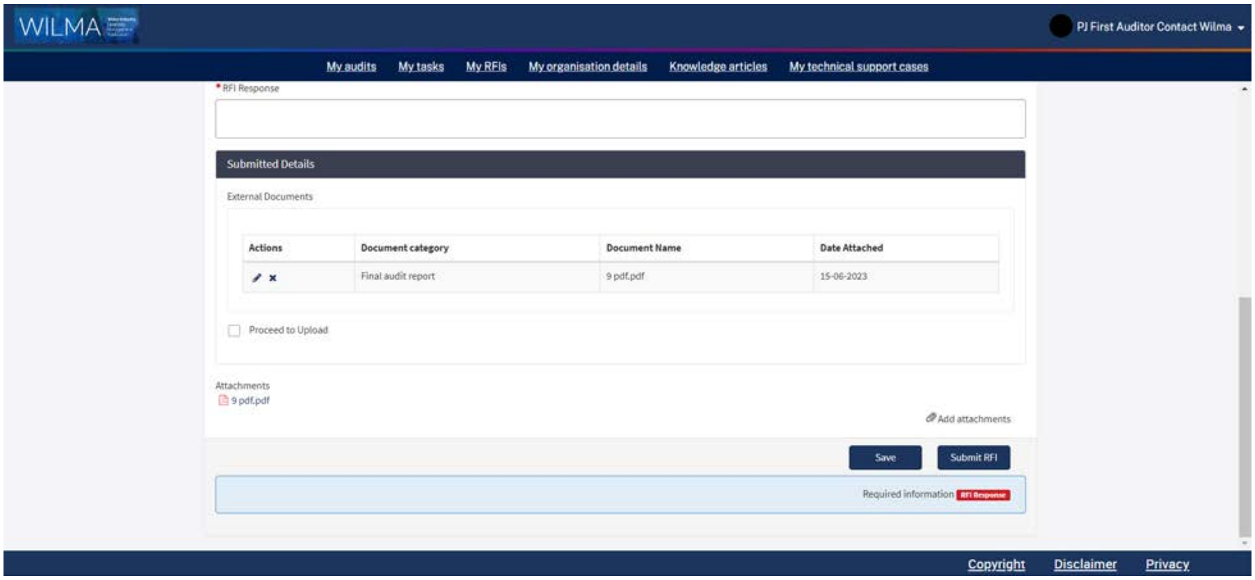


4. Once the documents are uploaded make sure to add a category by clicking on the “Edit Row” icon under “Actions column”, then the Edit Row dialog box will pop-up and the WILMA Auditor will have the options on what categories to add accordingly to the specific RFI.

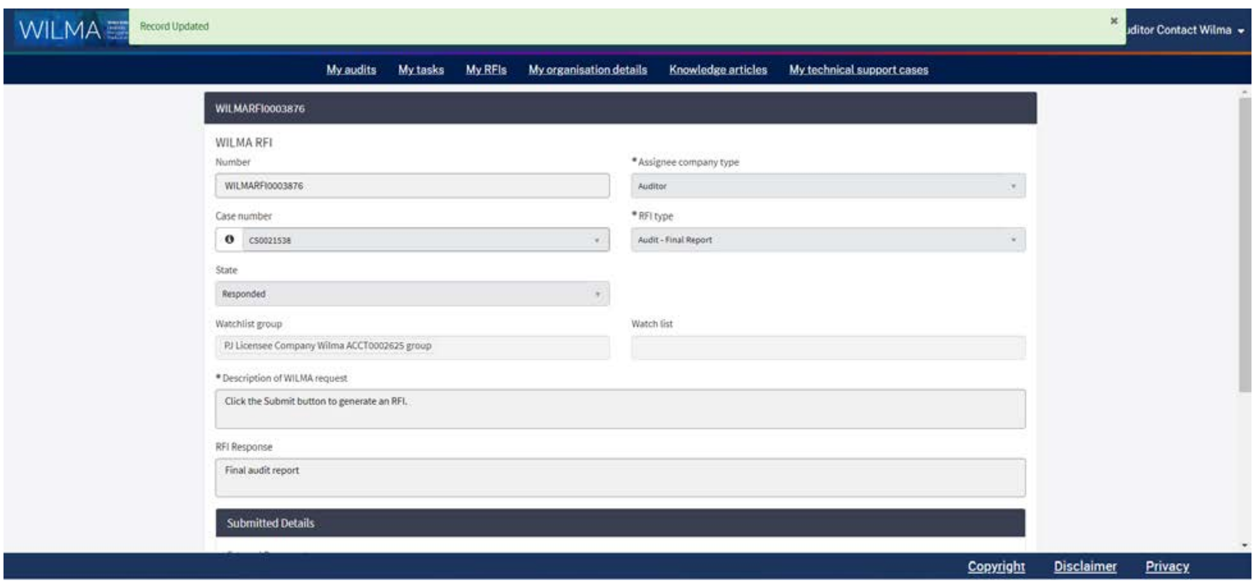
Note: After uploading the documents, it is mandatory to select the appropriate category from the dropdown menu. This ensures proper organization and categorization of the documents for easy retrieval and reference. Furthermore, it is crucial not to delete any documents sent along with RFIs by analysts. These documents contain important information and context for the case, and their retention is necessary for reference and documentation purposes.



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”

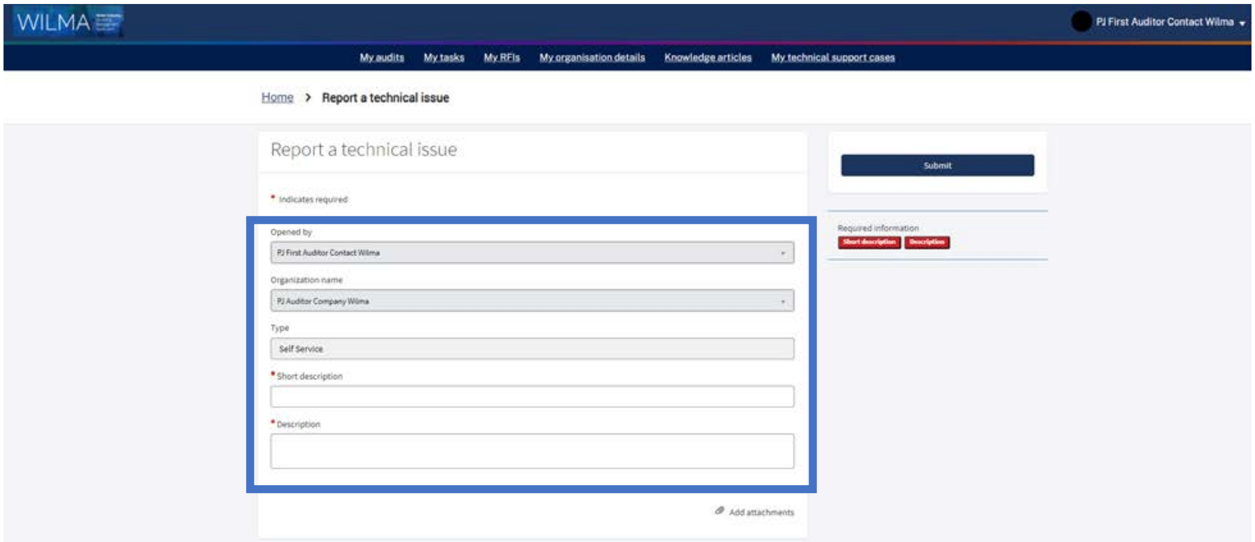


How to raise a Technical Support Case

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

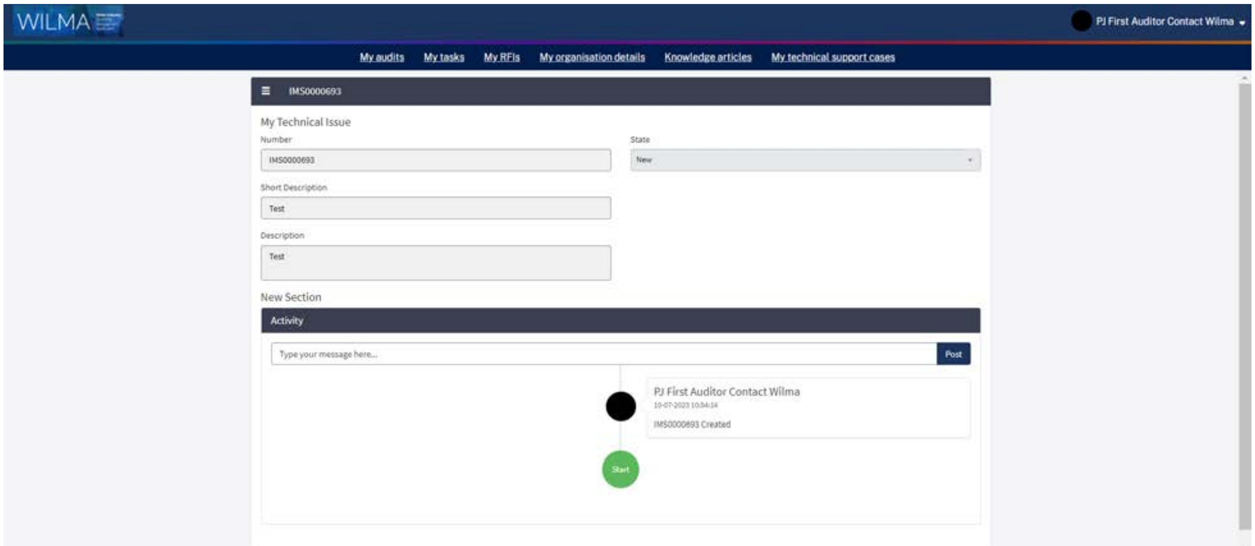
2. On the "My Technical Support Cases" page, click on the "New" button to create a new support case.

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.


WILMA
PJ First Auditor Contact Wilma
My audits
My tasks
My RFIs
My organisation details
Knowledge articles
My technical support cases
IMS0000693
My Technical Issue
Number
IMS0000693
State
New
Short Description
Test
Description
Test
New Section
Activity
Type your message here...
Post
PJ First Auditor Contact Wilma
IMS0000693 Created
Start