BONDS MANAGEMENT SYSTEM

BMS

PUBLIC USERS GUIDE

Department of Water Resources

Sacramento, CA

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DWR'S Bond Management System Public User Guide Part 1: User Registration; Organization Registration and Administration; and Prepare and Submit Proposal for Funding

1. Introduction

The BMS is located at http://www.water.ca.gov/bms/. It has been designed to implement a repeatable and defendable bond process, ease of application, and electronic processing of grant and loan proposals.

1.1. Purpose

The purpose of this user guide and training manual for the Bonds Management System (BMS) is to provide public users with the necessary information to understand the basic operations and navigations of the software when registering and using the BMS. The public user guide is a detailed procedures and a step-by-step approach to using the BMS. The BMS provides a single online system for applying for funds from DWR.

1.2. Additional Help

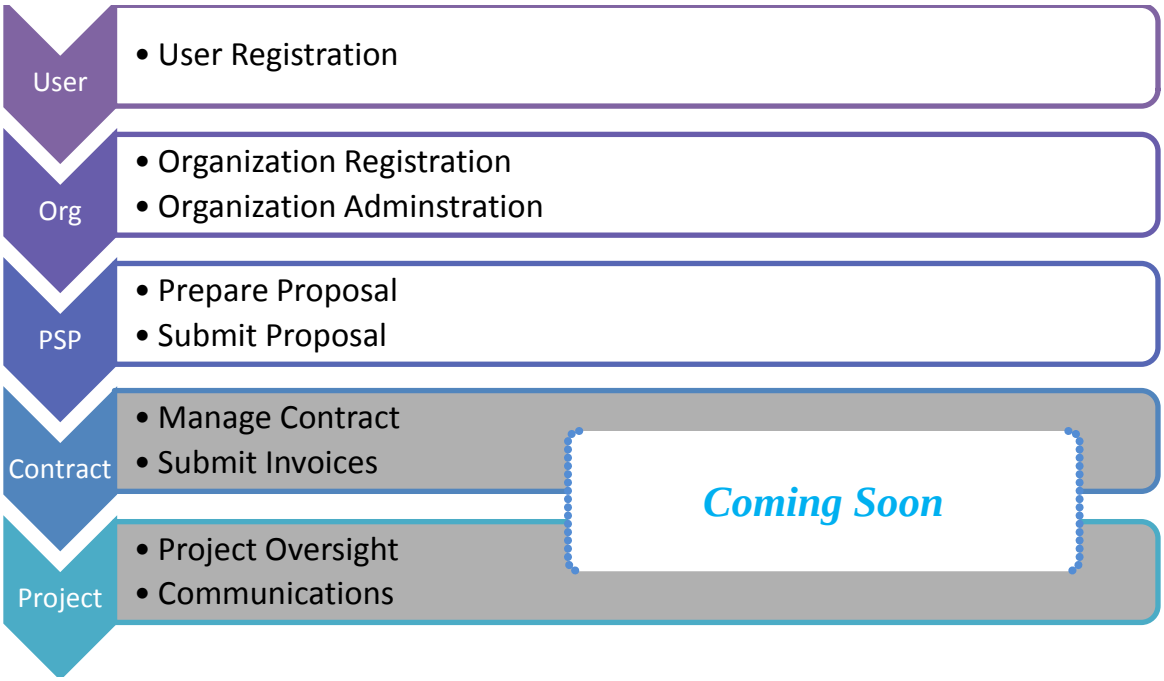
Additional help is available by email from BMSAdmin@water.ca.gov and phone at 888-907-4267. However, program specific questions should be addressed to program managers and staff. Your comments on this user guide to the email address above are welcomed.

1.3. Acronyms and Abbreviations

Acronyms and Abbreviations	Description
BMS	Bond Management System
DWR	Department of Water Resources
PSP	Proposal and Solicitation Package

1.4. User Interface Modules

The user interface of BMS has been designed to be an easy-to-use, intuitive interface with self explanatory screen annotations. This modular design also facilitates ease-of-use and provides for quick navigation. The purpose, utility, and process of navigation for each module available to the public have been detailed in this document.



The following are the five (5) different interface modules associated with BMS that public users may have access that are addressed in this user guide:

1. User Registration
2. Organization Registration
3. Organization Administration
4. Prepare Proposal
5. Submit Proposal

2. Navigating through the BMS

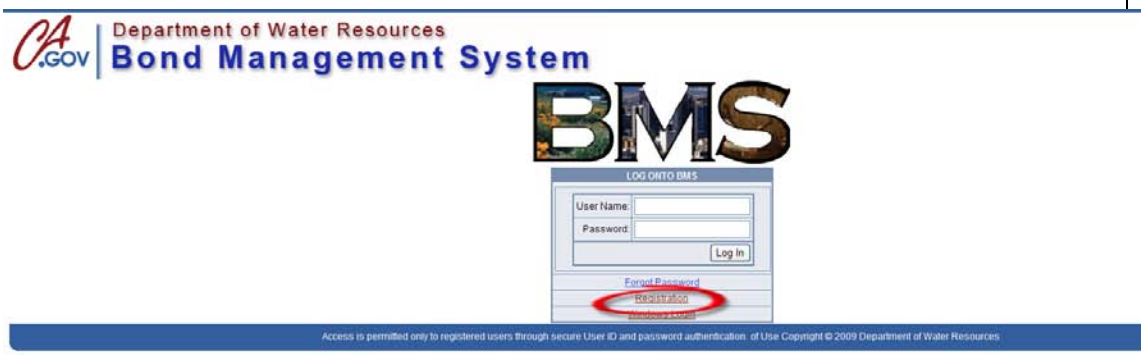
The focus of this section is to help users learn the key features of the system. The BMS is an interactive system that can be best learned through use. The key features are described below for the purpose of reference and user training. The BMS was designed on Internet Explorer 7.0 and therefore should work best on this system. It is best when using BMS to use the BMS function keys (not the browser's arrows) and to **frequently save your entries**; otherwise your data may be lost. The refresh key may also prove helpful.

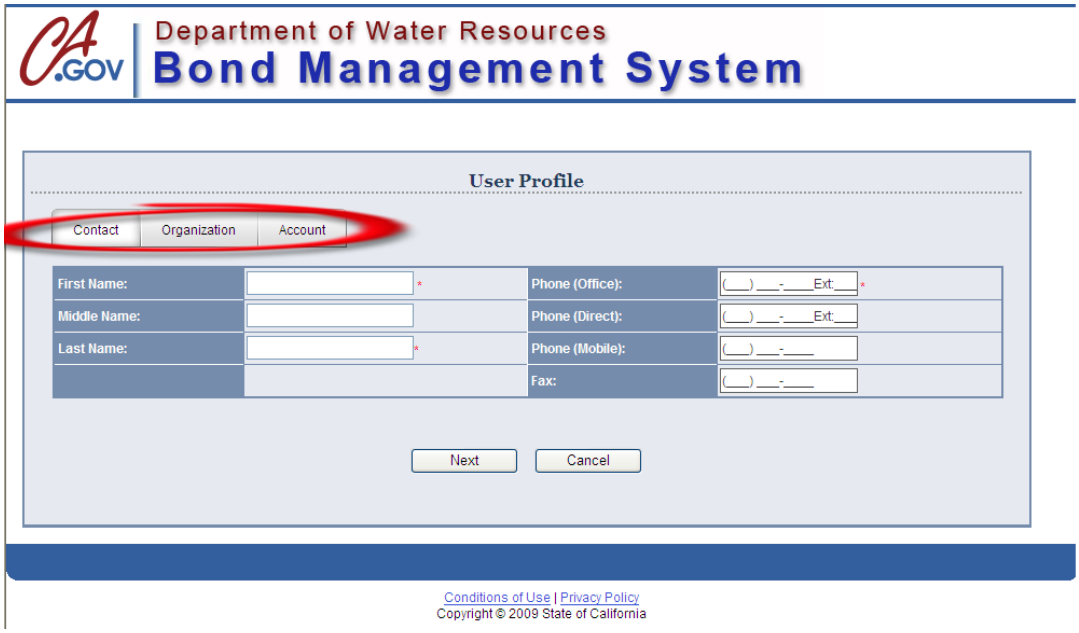
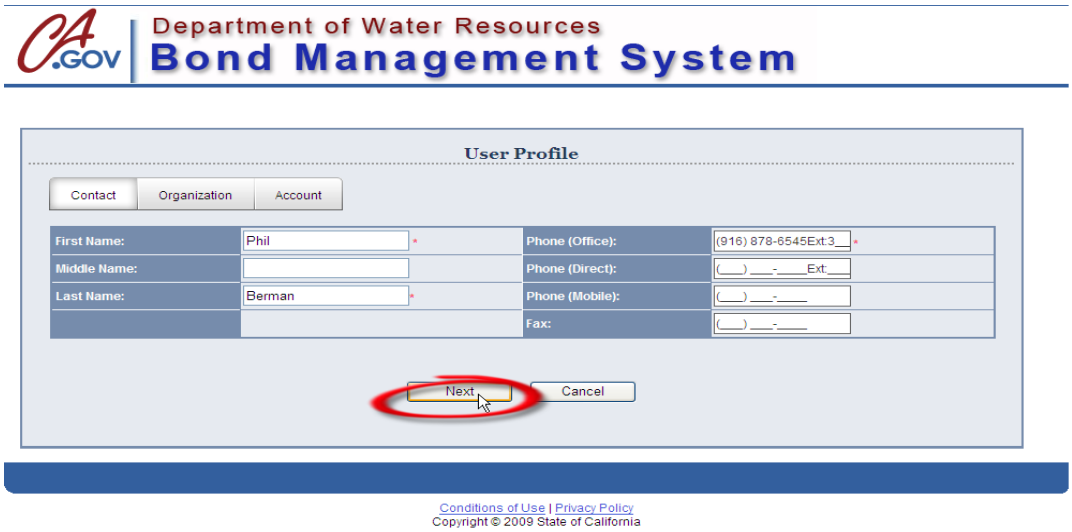
2.1. User Registration

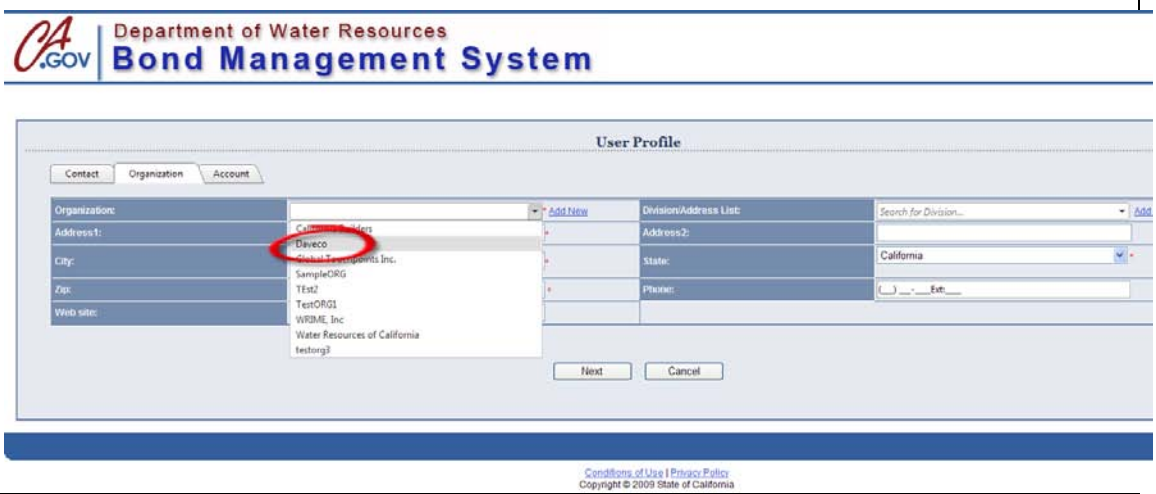
The ***User Registration*** module allows a Public User to:

1. create a Public User account with a login and password
2. specify user profile details
3. modify user account details
4. reset the account password

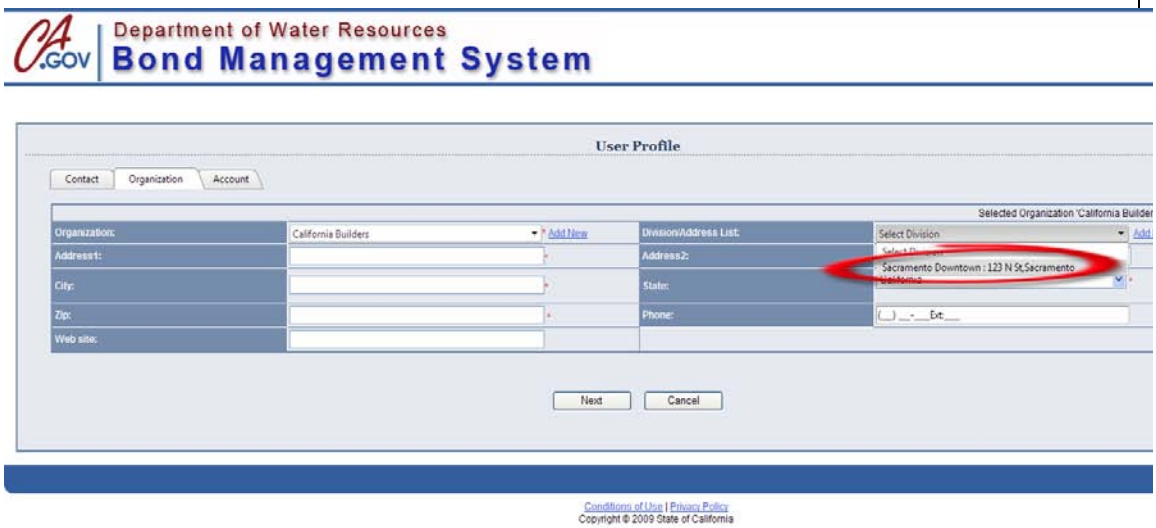
All of these processes are discussed below.

Step#	Process
A.	**Procedure for setting up a new Public User Account**
1.	Enter http://www.water.ca.gov/bms/ in Internet Explorer and press Enter.
2.	The BMS Home Page is displayed. Click on the Sign in to BMS button.
3.	The BMS Login page is displayed. On the **Login** page, click on the ***Registration*** hyperlink.
4.	

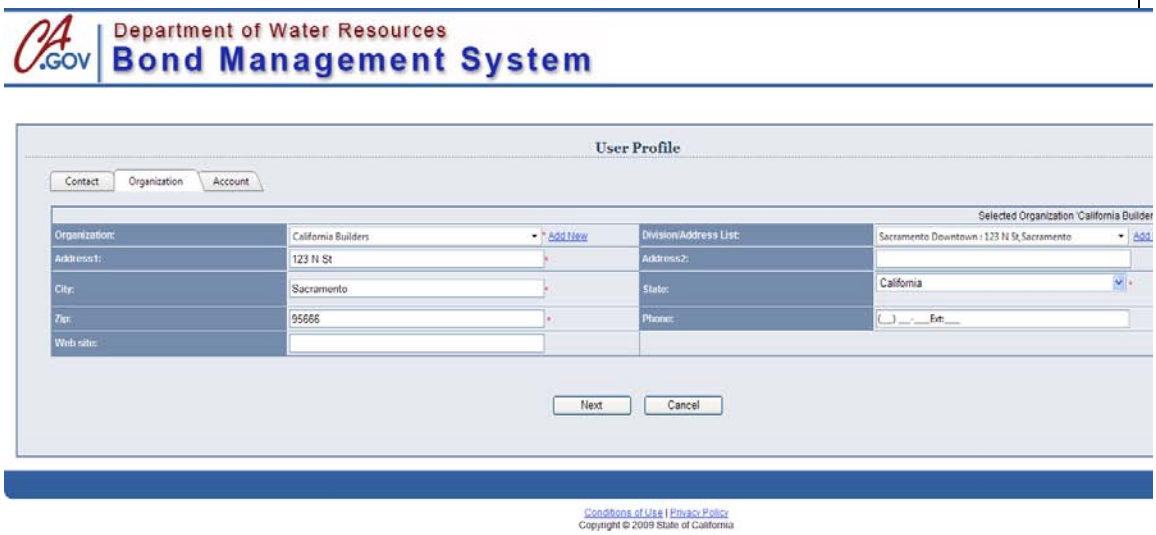
5.	The **'User Registration'** page is displayed. On the User Registration page, the following **three** tabs are visible – ▪ **Contact** ▪ **Organization** ▪ **Account**
6.	
7.	On the **Contact** section enter values for the all the *mandatory* fields. (Mandatory fields are marked with an *****) Then click on the **Next** button on the **Contact** tab.
8.	

9.	The **Organization** section will be displayed.
10.	
	Selecting an Organization
11.	On the Organization section – ▪ Search for and carefully select an existing Organization/Organization name from the *Organization* drop-down field Select a Branch from the *Division/Address List* drop-down field
12.	
STOP	If your organization is not found, click here for instructions on how to add a new Organization.

Selecting a Division

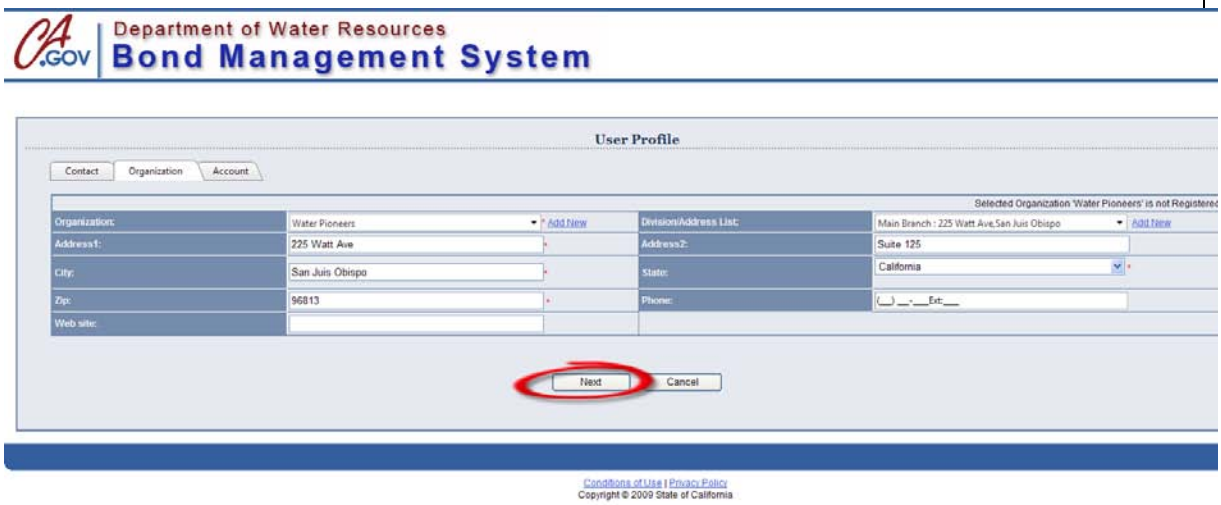
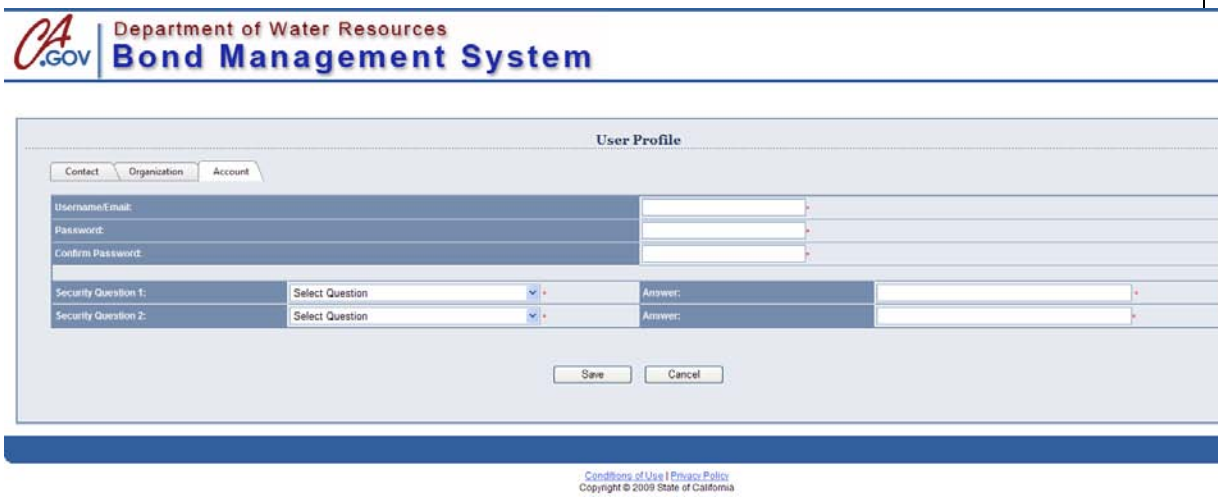


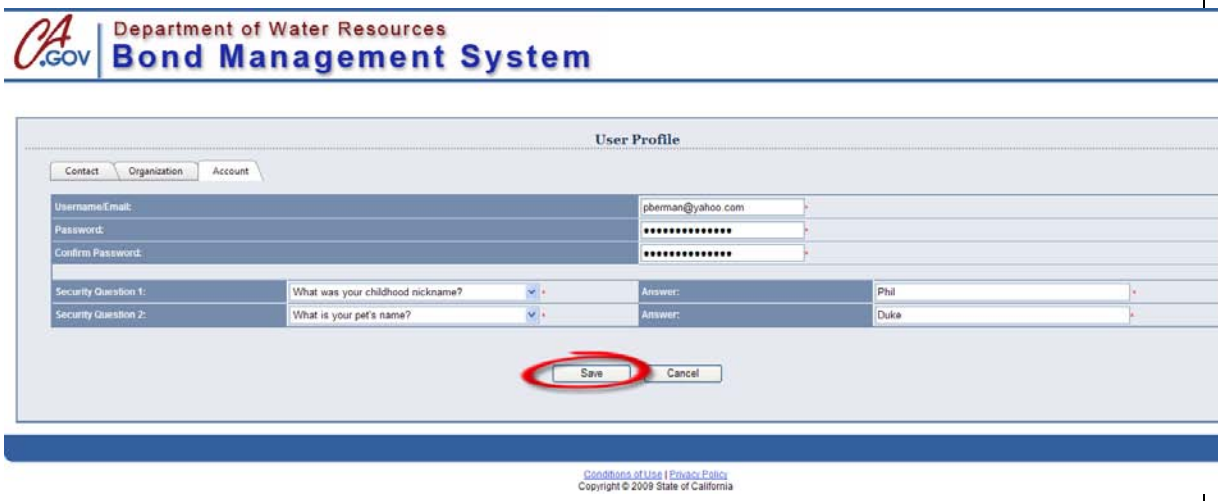
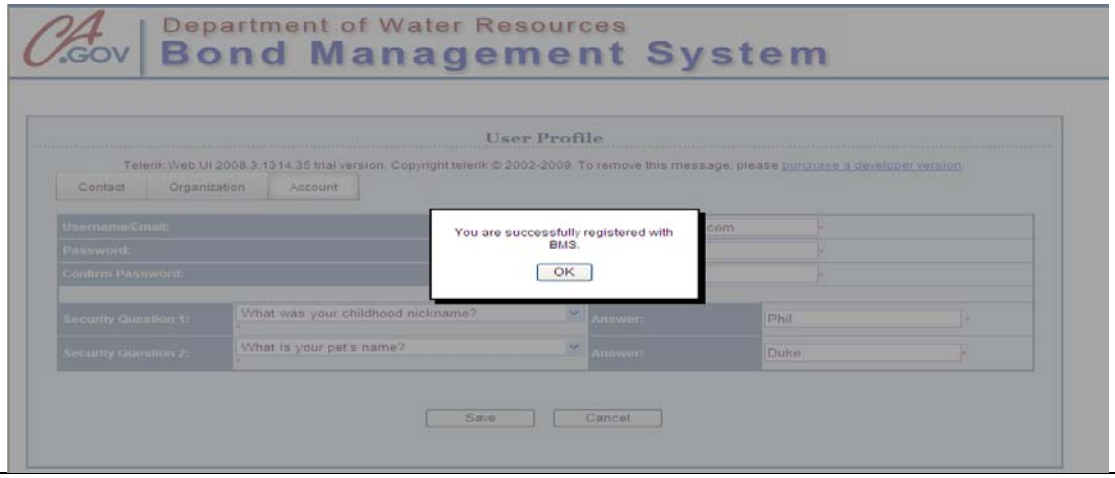
13. Values for the *Address*, *City*, *State*, *Zip*, *Phone* and *Website* fields for the selected Organization and Branch will be auto-populated by the system

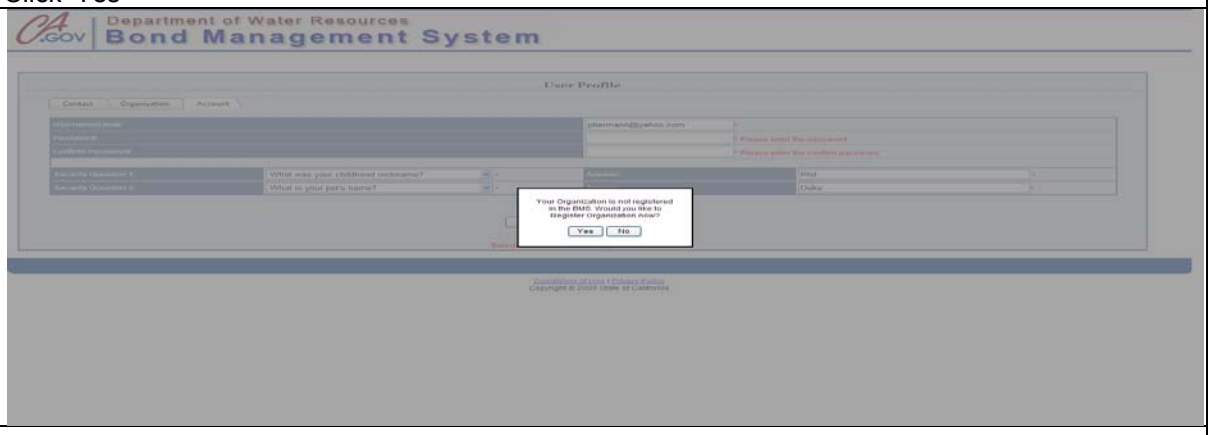
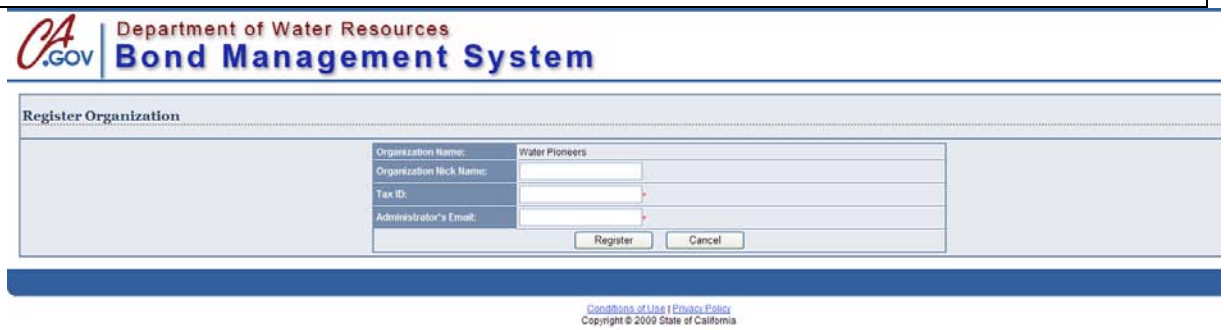
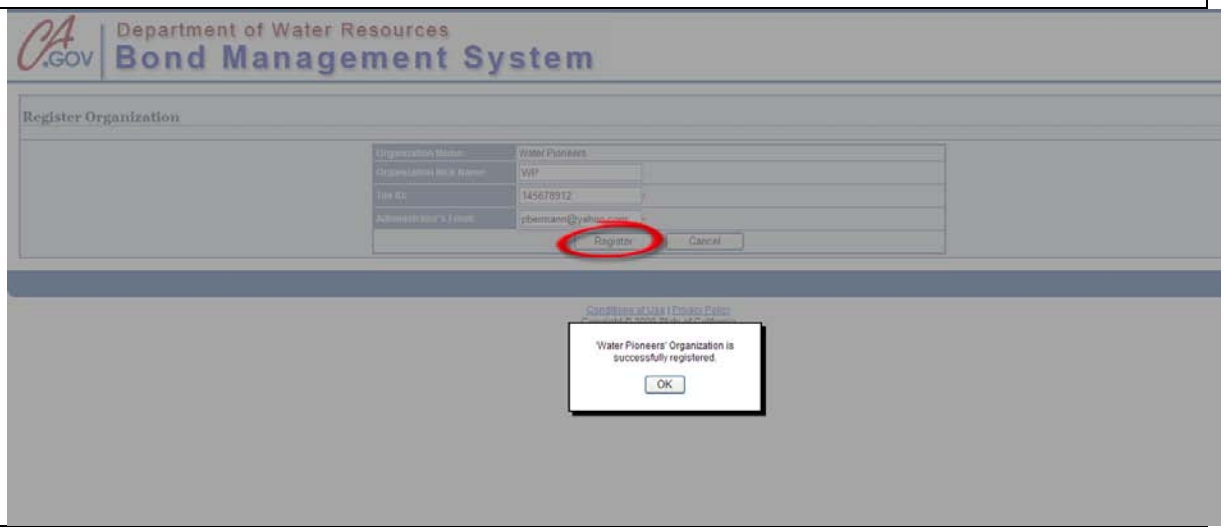


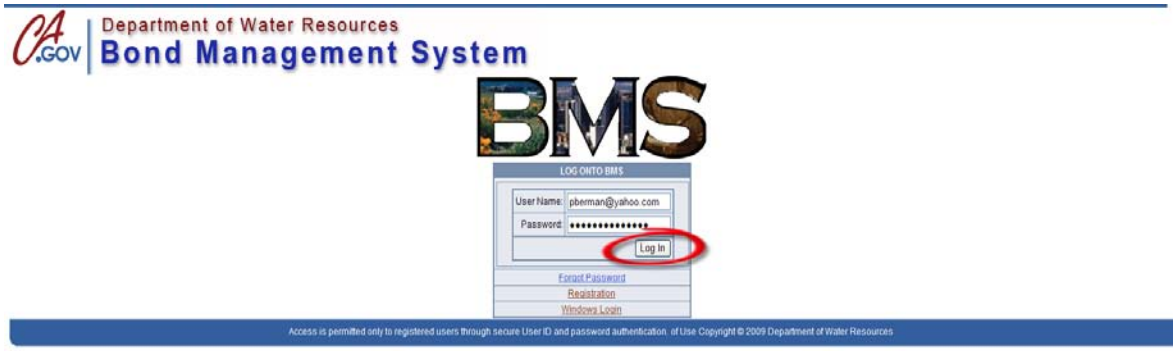
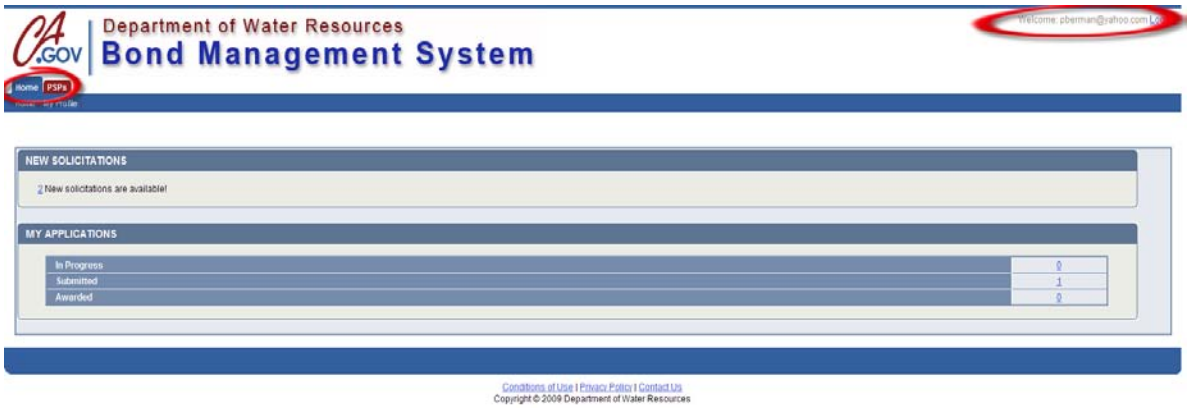
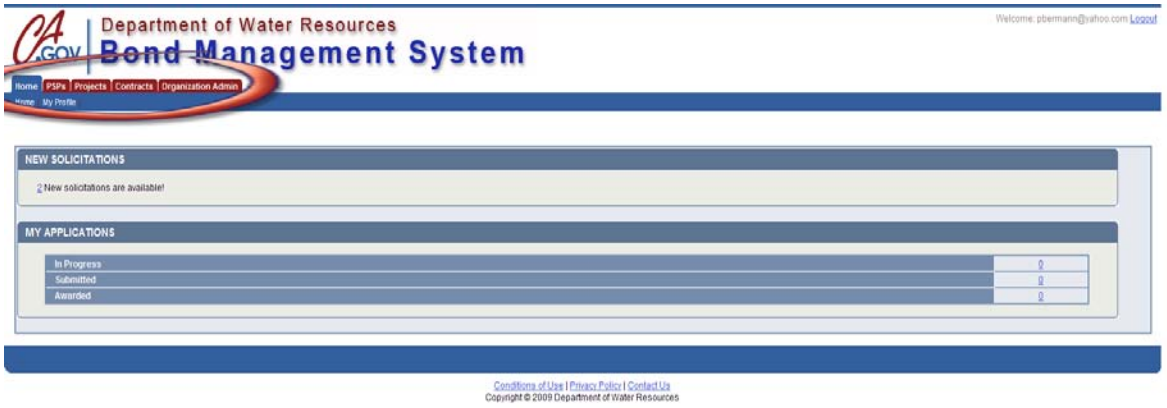
14. Verify the values for the *Address*, *City*, *State*, *Zip*, *Phone* and *Website* fields for the selected Organization and Branch auto-populated by the system are correct for your organization.

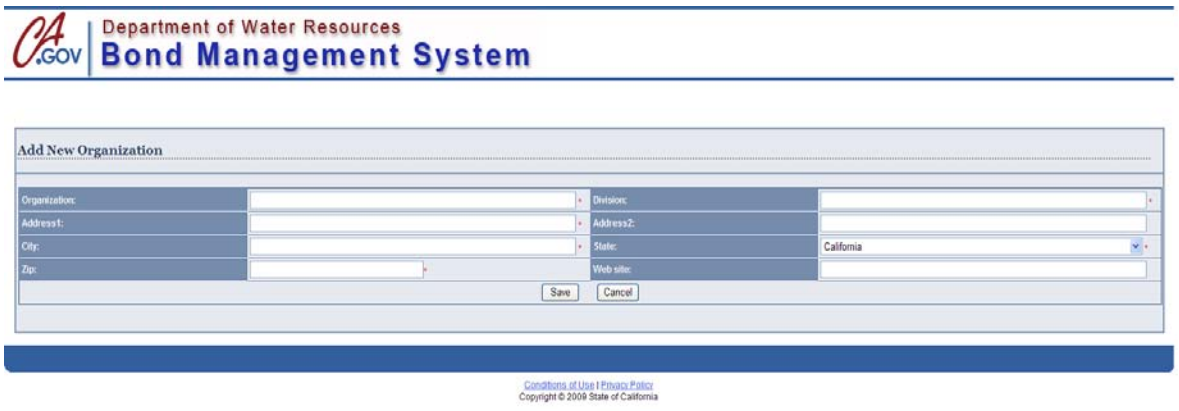
STOP If your Division/Branch is not found, click here for instructions on how to add a new Branch/ Division.

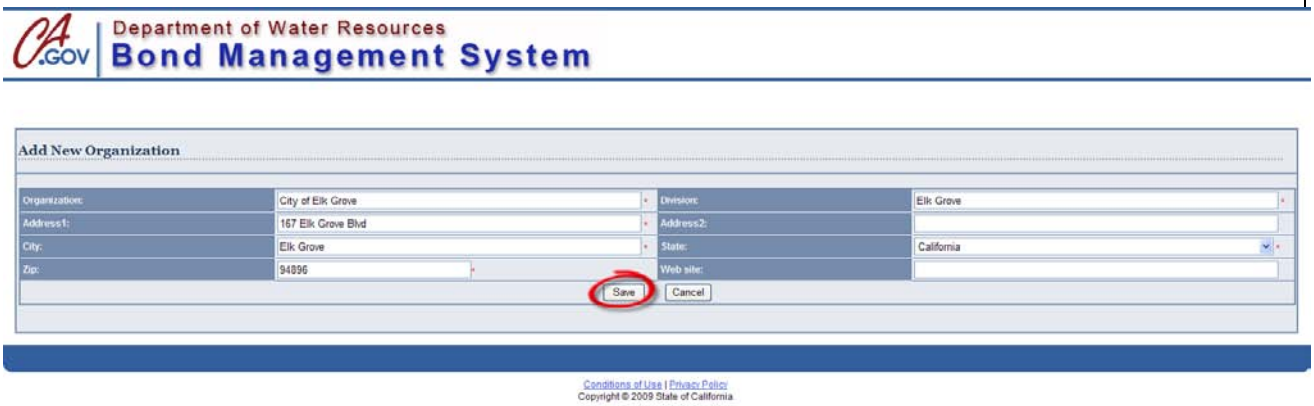
15.	Then click on the **Next** button on the **Organization** tab.
16.	
17.	The **Account** section will be displayed.
18.	
19.	On the **Account** section do the following – ▪ Specify a Username. This will be your Public User's email address ▪ Specify a Password (must be at least 7 characters long and must contain at least three of the four groups; lowercase alpha, uppercase alpha, numeric, and special characters) ▪ Confirm the Password ▪ Select a Security Question from the ***Security Question 1*** drop-down selection ▪ Provide an answer to the selected Security Question 1 ▪ Select a Security Question from the ***Security Question 2*** drop-down selection ▪ Provide an answer to the selected Security Question 2 Click on the **Save** button on the **Account** tab.

20.	
21.	The User Registration Confirmation pop-up window is displayed with the following message: *'You are successfully registered with BMS.'*
22.	
23.	Click **OK** on this message window.
24.	

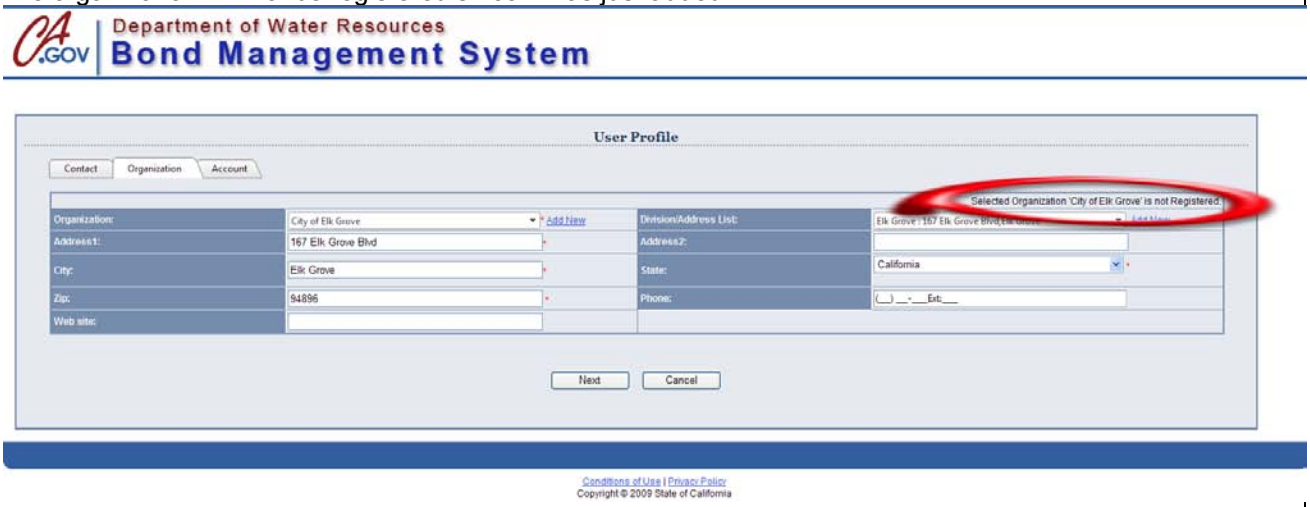
25.	If the Organization selected (on the *Organization* tab) during User Registration is a **new** (unregistered) Organization, then the following additional message is displayed at the end of the User Registration process: *'Your Organization is not registered in the BMS. Would you like to Register Organization now?'* Click 'Yes'
26.	
27.	The Public User is redirected to the Register Organization page.
28.	
29.	Enter *Organization Nick Name, Tax ID and Administrator's Email.* **Remember to provide an email that has already been registered with BMS**. Click Register.
30.	

31.	Click Ok.
32.	The Public User is then redirected back to the BMS Login page. On the Login page, type in the Username and Password specified during User Registration. Then click the **Log In** button. 
33.	The BMS Home page for the Public User is displayed with the following tabs – ▪ Home ▪ PSPs ▪ Organization Admin (visible only if the Public User is an Organization Administrator)
34.	Non-Organization Admin User home page. 
35.	*Organization* Admin Home Page 

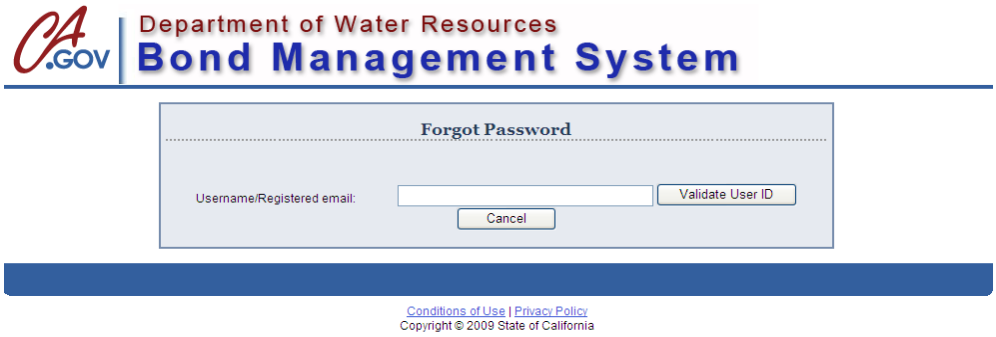
B.	**Procedure for creating a new Organization during User Registration**
36.	If the Public User wishes to enter a new Organization name (one that does not exist in BMS) then this can be accomplished as follows: ▪ During the **User Registration** process, click on the **'Add New'** link on the Organization tab to bring up the **'Add New Organization'** page ▪ On the 'Add New Organization' page, enter a new Organization name (one that does not exist in BMS) in the *Organization* field ▪ Enter values for the *Address*, *City*, *State*, *Zip*, and *Website* (optional) of the Organization ▪ Click on the **Save** button
37.	 The **Add New Organization** page 

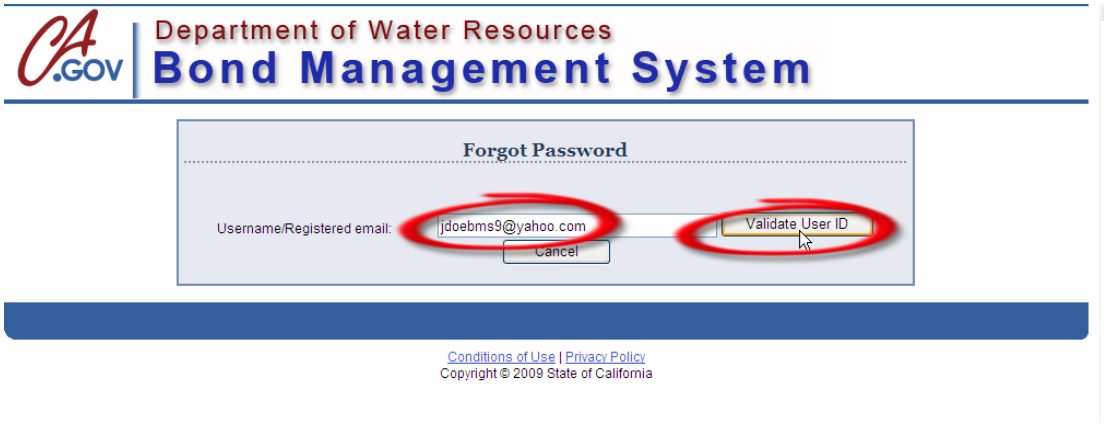
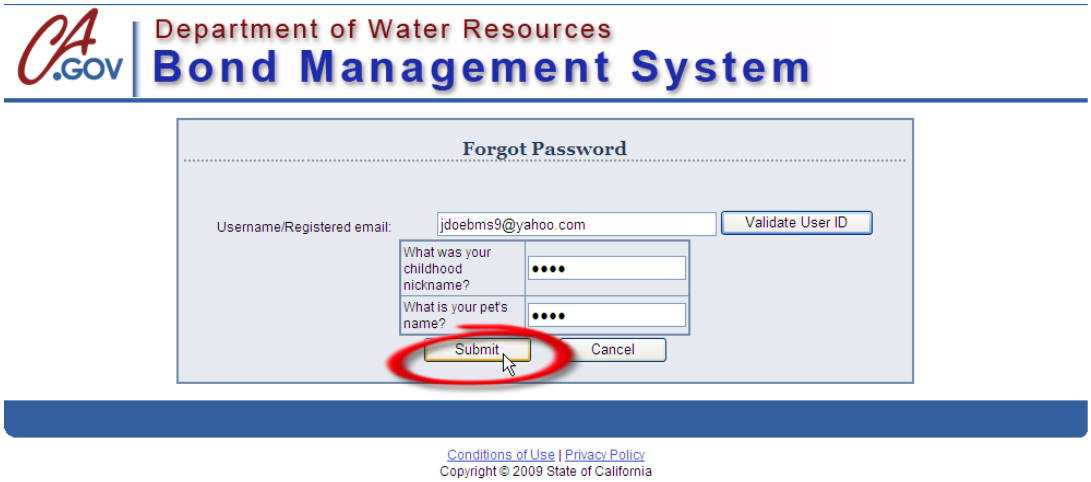


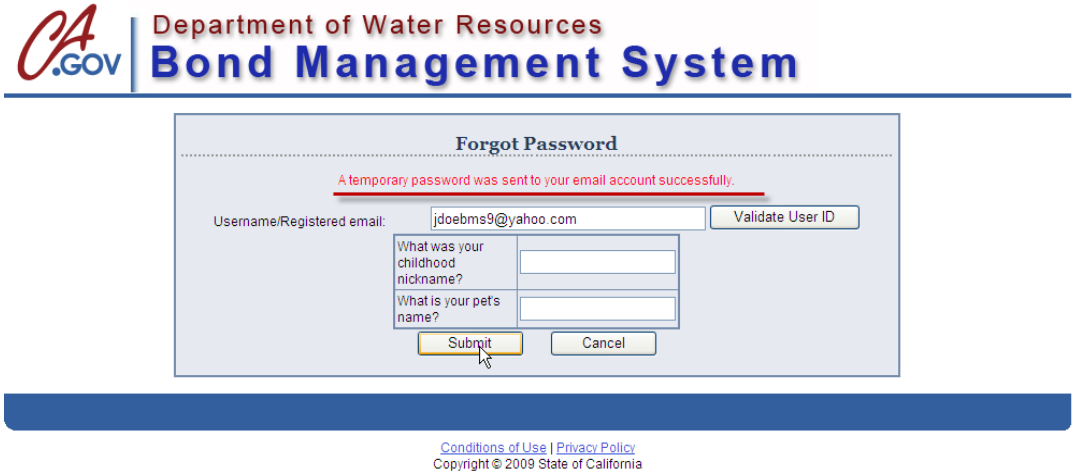
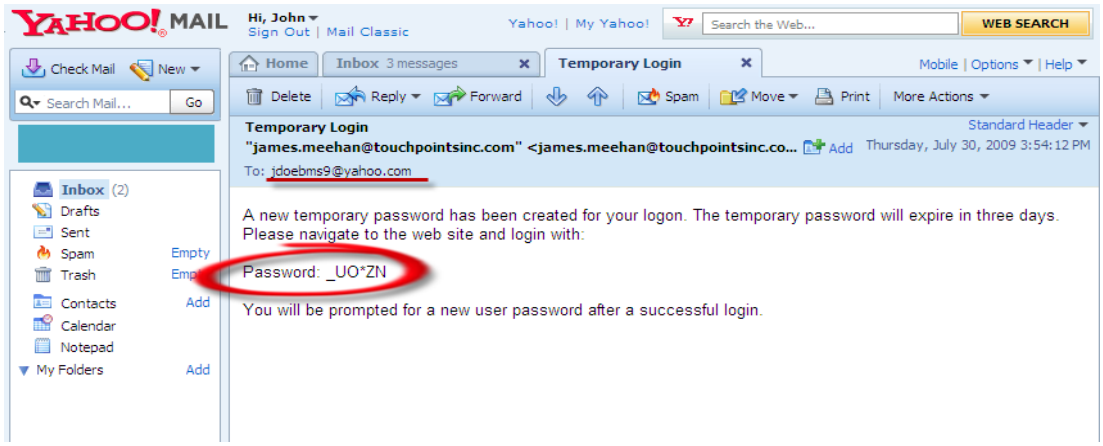
The organization will not be registered since it was just added.

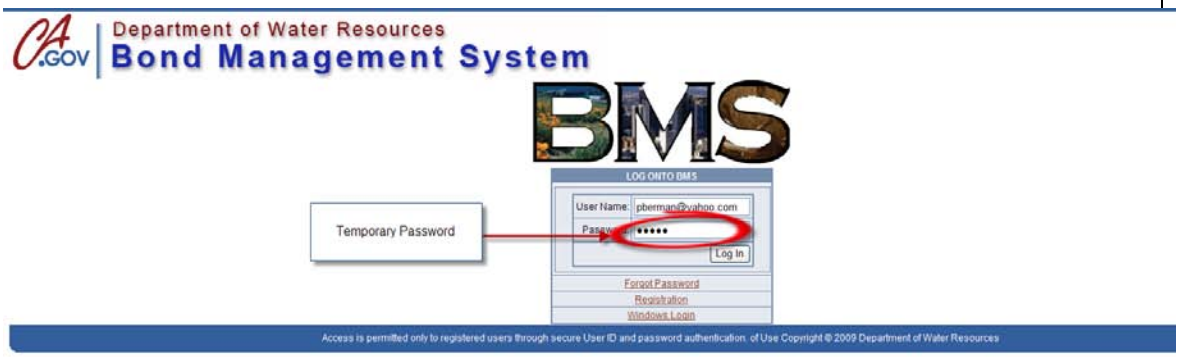
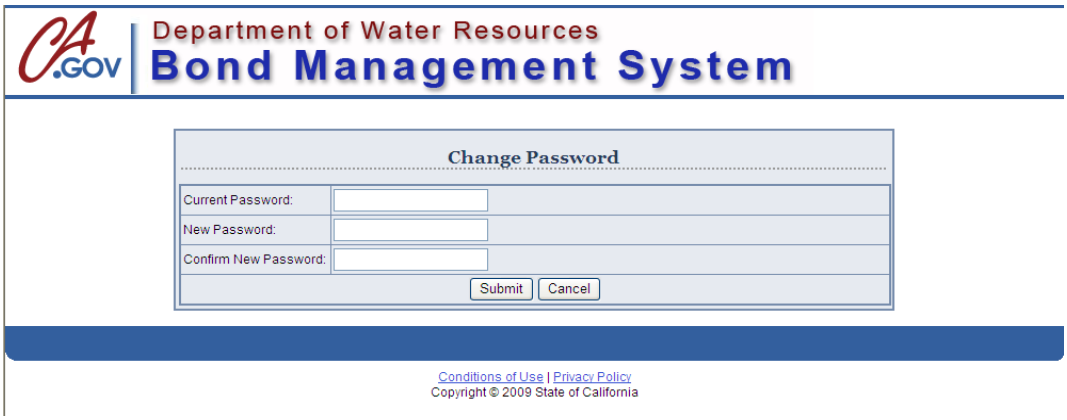
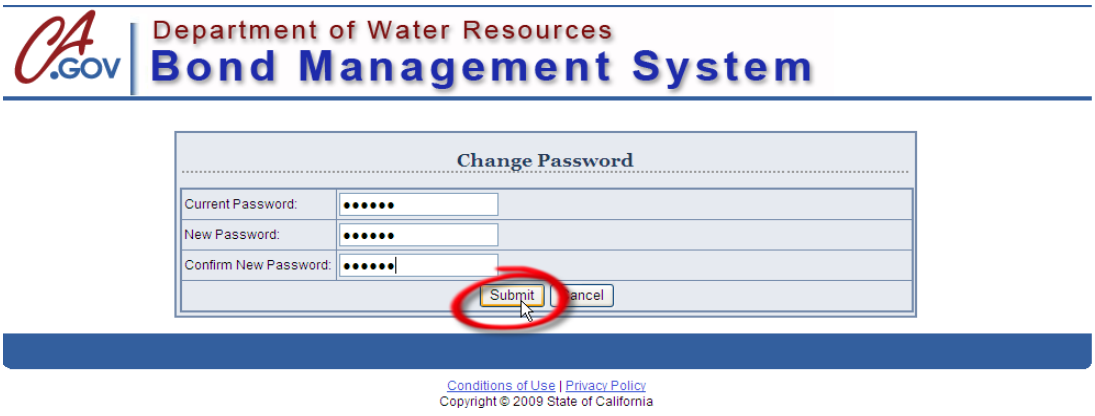


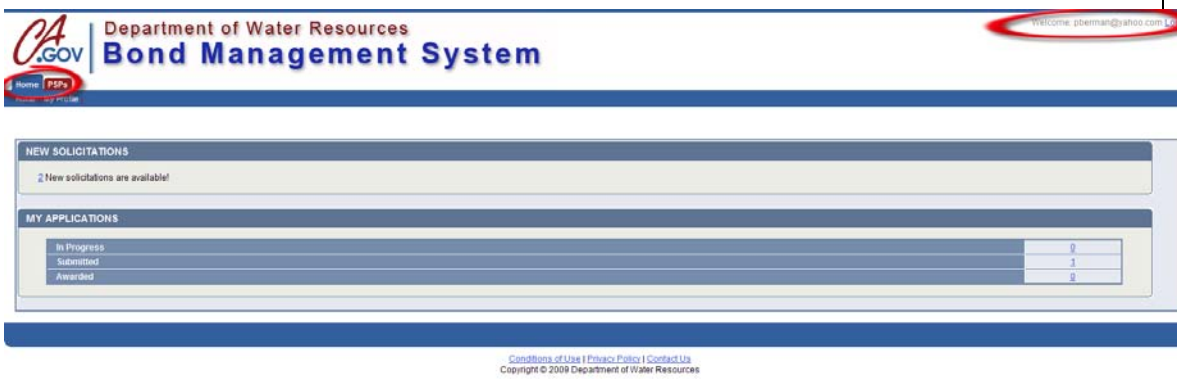
Follow the same procedure in steps 13 through 30 to complete the registration process for the user and the organization. Instructions for adding a branch to your organization can be found on page 66.

C.	**Procedure for when the user forgets his/her BMS Account Password**
38.	On the Login page, click on the ***Forgot Password*** link.
39.	
40.	The '**Forgot Password'** page will be displayed.
41.	**Forgot Password page** 
42.	On the **'Forgot Password'** page enter the (valid) *Username/Registered email* of the Public User *whose account password is to be reset*. Then click on the ***Validate User ID*** button.

43.	
44.	The *two* Security Questions (defined during the *User Registration* process) associated with the user account are displayed.
45.	 Remember you have only 3 unsuccessful attempts. If you are unable to answer the questions correctly in three attempts, your account will get locked. Please contact BMS admin to unlock and reactivate your account.
46.	Provide *correct* answers to both Security Questions. Then click the **Submit** button.
47.	

48.	The following confirmation message is displayed on the **Forgot Password** page: *'A temporary password was sent to your email account successfully.'*
49.	
50.	An **email** containing the *temporary* Password and instructions on how to reset the account Password is sent to the Public User's email address.
51.	**Email indicating the temporary password** 
52.	Log in again using the valid Username and the *new* (temporary) password that was sent to the email account (same as the Username).

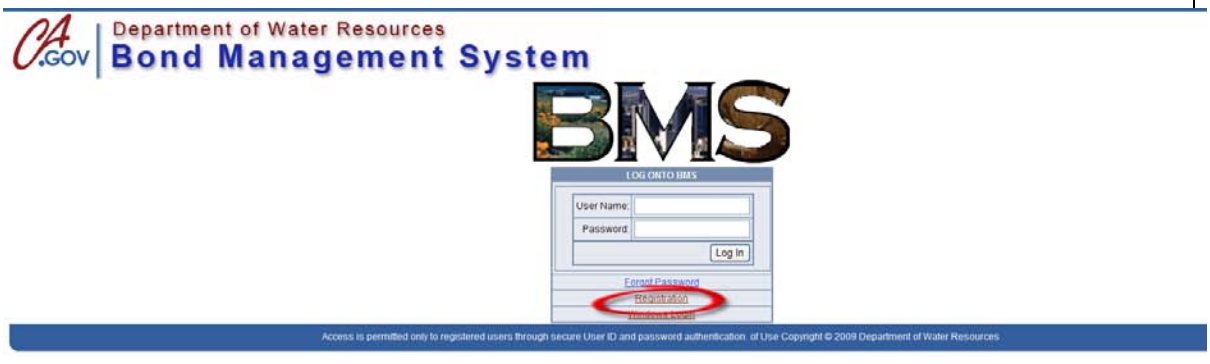
53.	
54.	The **'Change Password'** page will be displayed after validating the Username and (temporary) Password.
55.	
56.	Use the **'Change Password'** page to *reset* the account password. Then click on the ***Submit*** button.
57.	
58.	The account password is *reset* and the Public User is redirected to the **Home** page in BMS.

59.	**BMS Home page for the Public User** 

2.2. Organization Registration

The ***Organization Registration*** module allows an Organization Administrator to *register* a Public Organization in BMS. This process is necessary because Public Users are required to be authorized by a **registered** Public Organization in order to work on Proposals and submit Proposals in response to PSPs posted by DWR.

The process of ***Organization Registration*** is discussed below.

Step#	Process
A.	**Procedure for Registering a new Organization**
1.	Enter the URL for BMS in your web browser and press Enter.
2.	The BMS Login page is displayed. On the **Login** page, click on the *Registration* link.
3.	

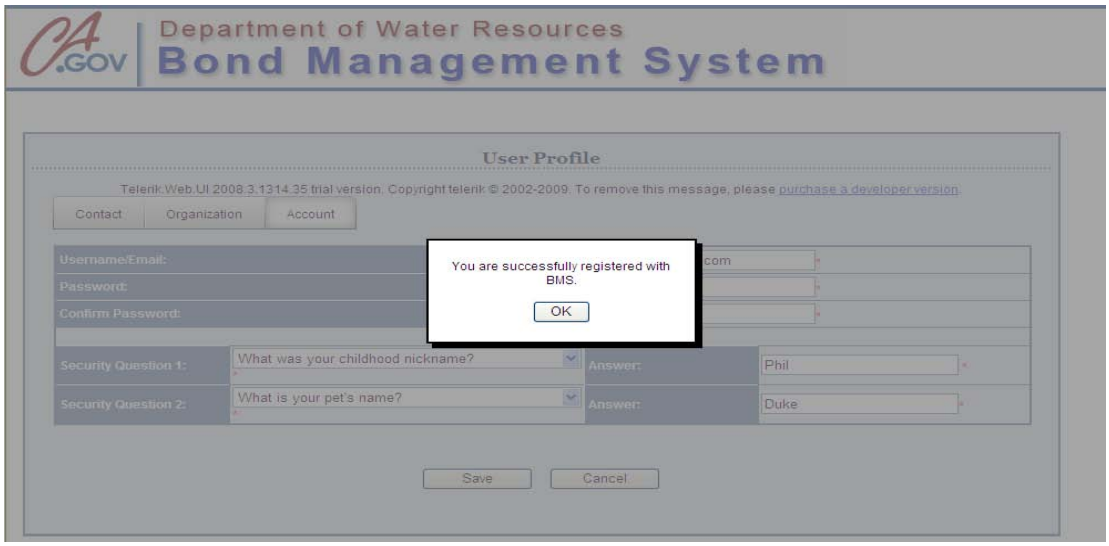
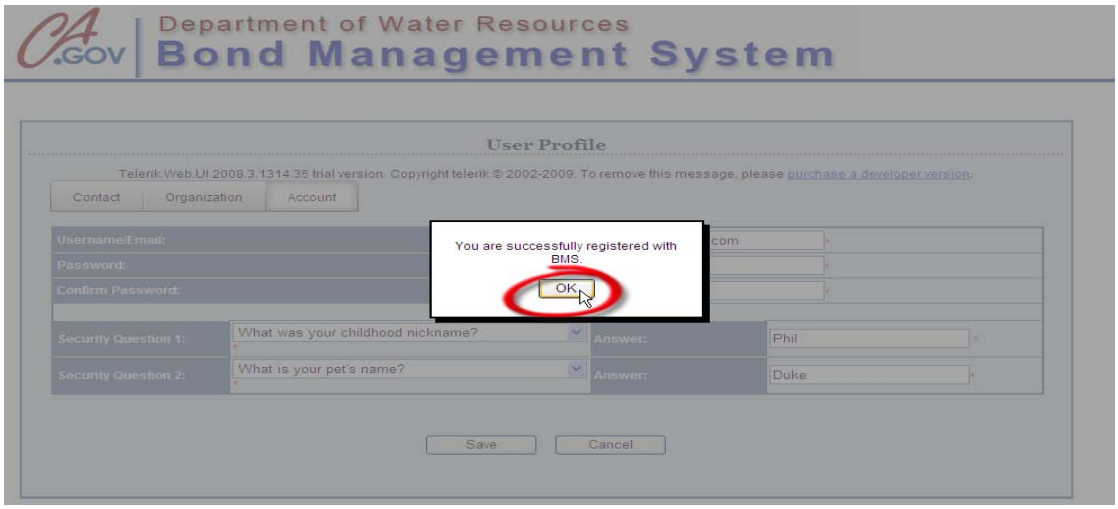
4.	The **'User Registration'** page is displayed. On the User Registration page, the following **three** tabs are visible – ▪ **Contact** ▪ **Organization** ▪ **Account**
5.	
6.	Click on *each* one of these three tabs sequentially and step through the **Contact**, **Organization** and **Account** sections in order to fill in the required details for each section. On the **Organization** section select an Organization that is currently **unregistered** in BMS. Alternatively, add a *new* Organization using the *Add New* link on the **Organization** tab.

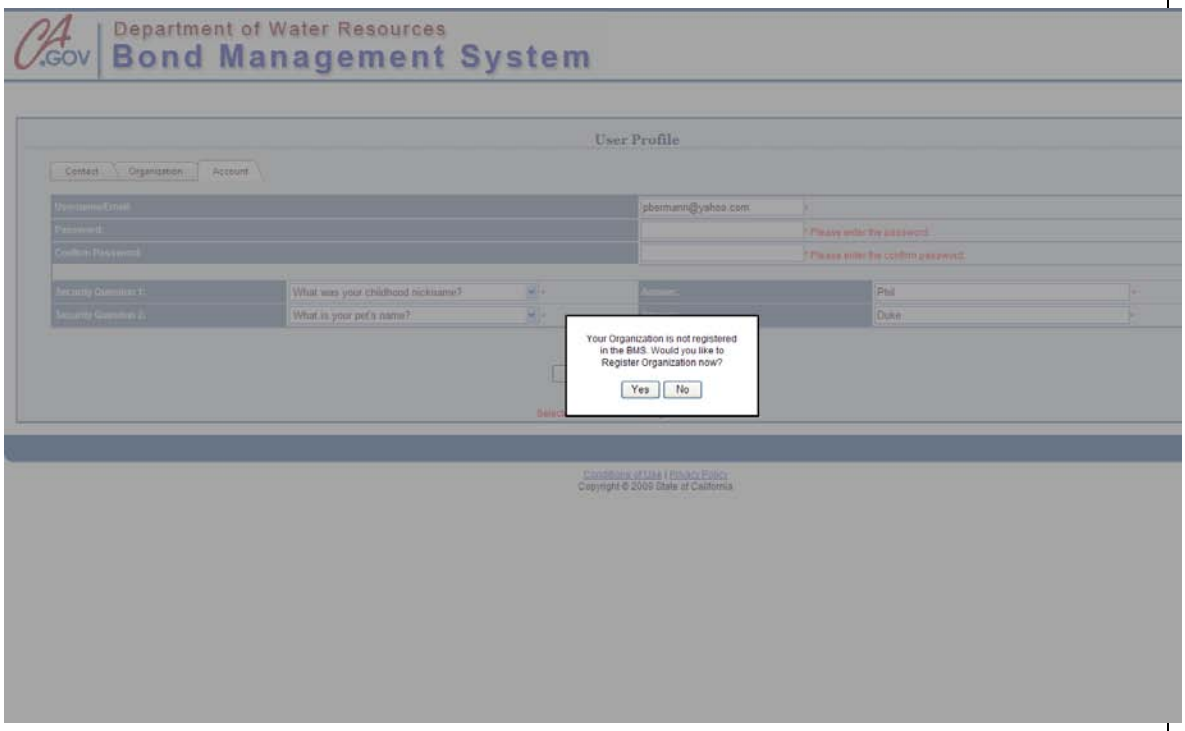
7.

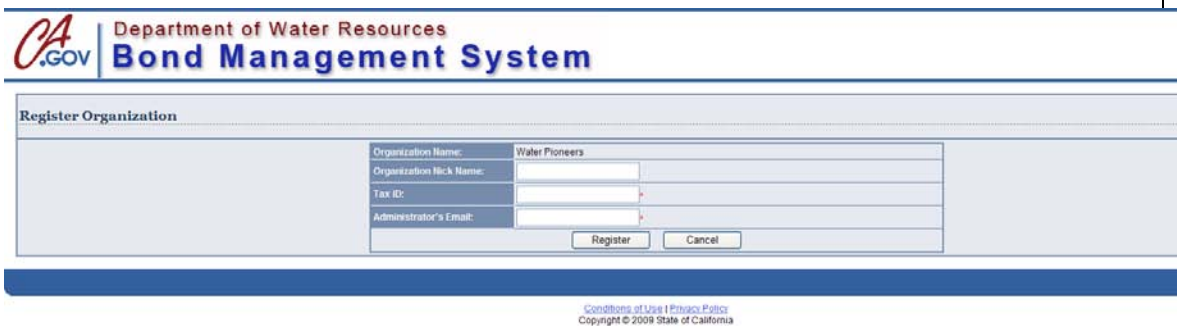
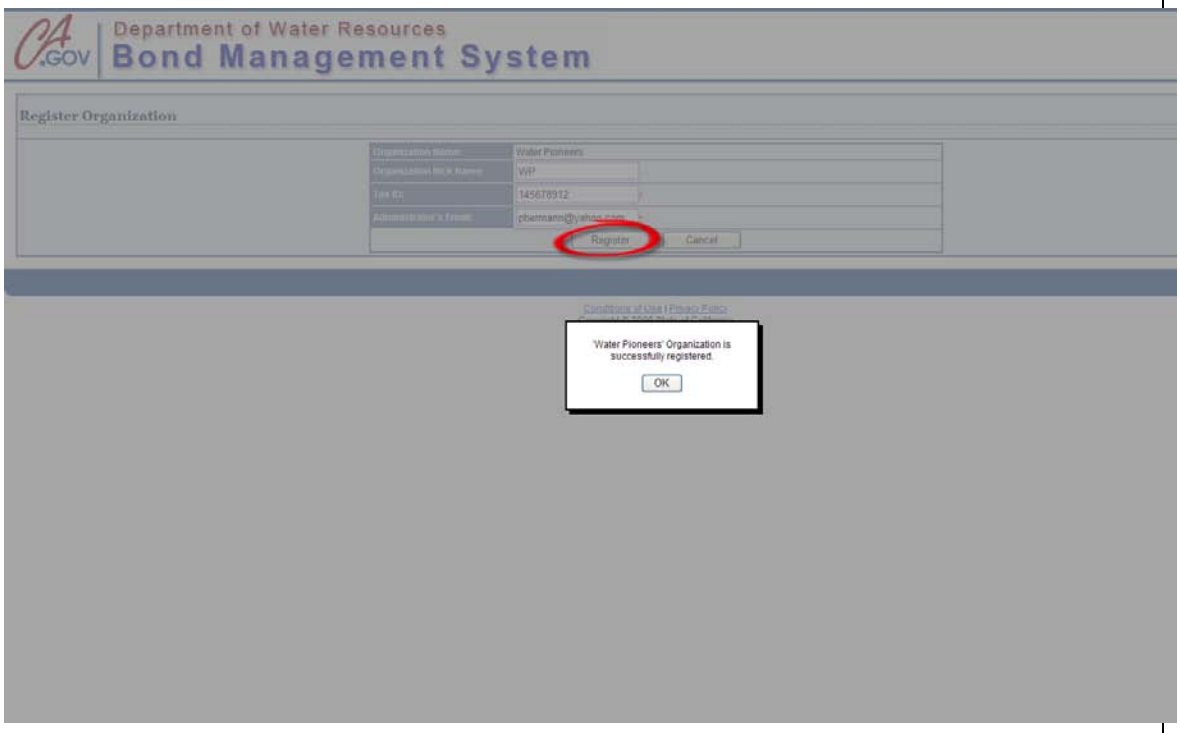
Department of Water Resources
Bond Management System
User Profile
Contact
Organization
Account
Organization:
City
Add New
City of Elk Grove
City of Rancho Cordova
City of Roseville
City of Roseville
City of Sacramento
City of Sacramento
city of fresno
new city
Branch/Address List:
Search for Branch
Add New
Address1:
Address2:
City:
State:
California
Zip:
Phone:
Ext:
Web site:
Next
Cancel
Conditions of Use | Privacy Policy
Copyright © 2009 State of California

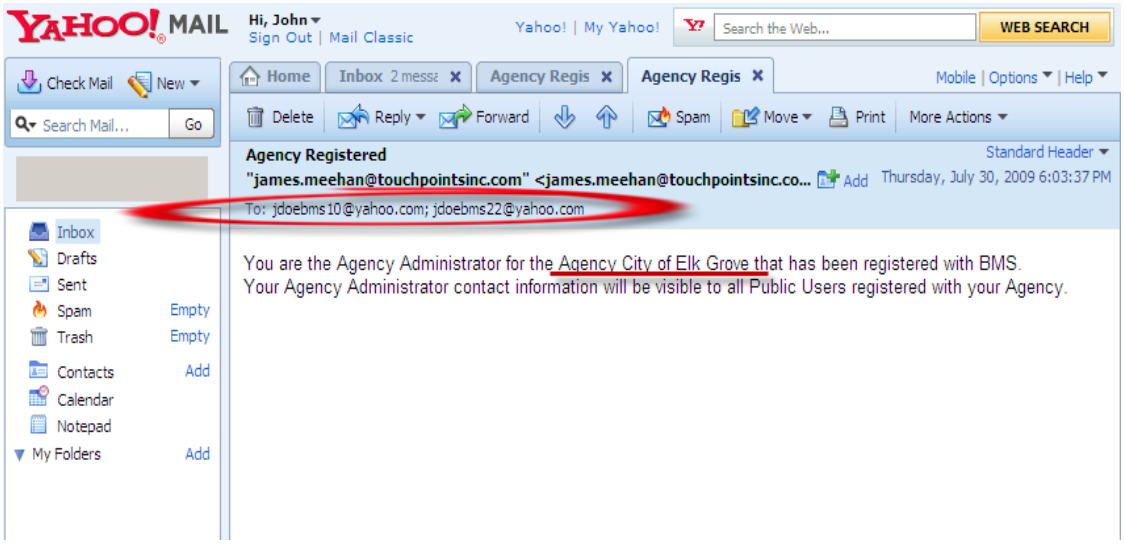
Department of Water Resources
Bond Management System
User Profile
Contact
Organization
Account
Selected Agency 'City of Elk Grove' is not Registered.
Organization:
City of Elk Grove
Add New
Branch/Address List:
Search for Branch
Main Branch
Add New
Address1:
Address2:
City:
State:
Zip:
Phone:
Ext:
Web site:
Next
Cancel

Department of Water Resources
Bond Management System
User Profile
Contact
Organization
Account
Selected Agency 'City of Elk Grove' is not Registered.
Organization:
City of Elk Grove
Add New
Branch/Address List:
Main Branch
Add New
Address1:
167 Elk Grove Blvd
Address2:
Suite 52
City:
Elk Grove
State:
California
Zip:
97890
Phone:
Ext:
Web site:
Next
Cancel

8.	Click on the Account tab and specify the required details to complete the **User Registration** process. *[For further details on the User Registration process, please refer to Section 2.1 (User Registration)]*
9.	Finally, click on the ***Save*** button displayed on the **Account** tab.
10.	The User Registration Confirmation message window will be displayed with the following message: *'You are successfully registered with BMS.'*
11.	
12.	Click on the **'OK'** button on this message window.
13.	
14.	The following *additional* message is displayed prompting a *Yes/No* answer: *'Your Organization is not registered in BMS. Would you like to register the Organization now?'*

15.	
16.	In order to *register* the Organization, click on the **'Yes'** button on the message window.

17.	The **Organization Registration** page will be displayed.
18.	
19.	On the Organization Registration page enter values for the following: ▪ Organization Nickname (optional) ▪ Tax ID (mandatory) ▪ Organization Administrator's Email (mandatory)
20.	Click on the ***Register*** button on the **Organization Registration** page.
21.	A confirmation window is displayed with the following message: *''<Organization Name>' Organization is successfully registered'*
22.	
23.	Click on the ***OK*** button on the confirmation message window.

24.	A *notification email* will be sent to the **Organization Administrator** regarding successful registration of the Organization. This email contains the following information : *'You are the Organization Administrator for the Organization "Organization Name" that has been registered with BMS. Your Organization Administrator contact information will be visible to all Public Users registered with your Organization.'*
25.	

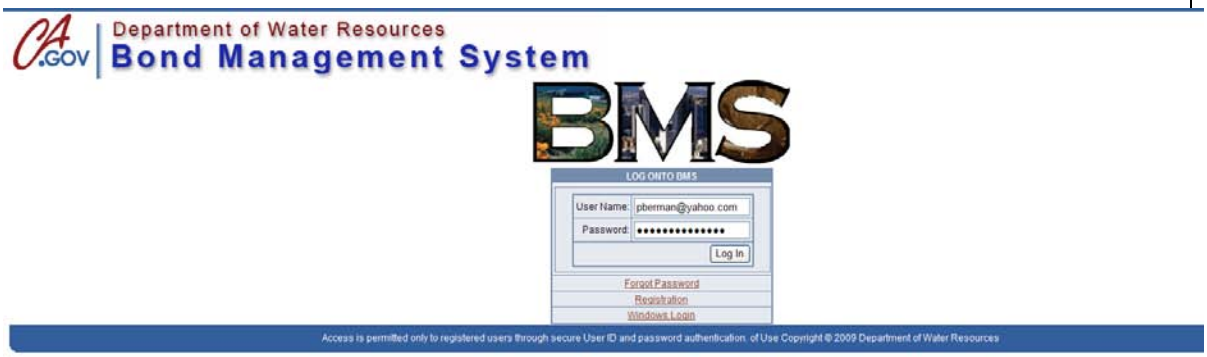
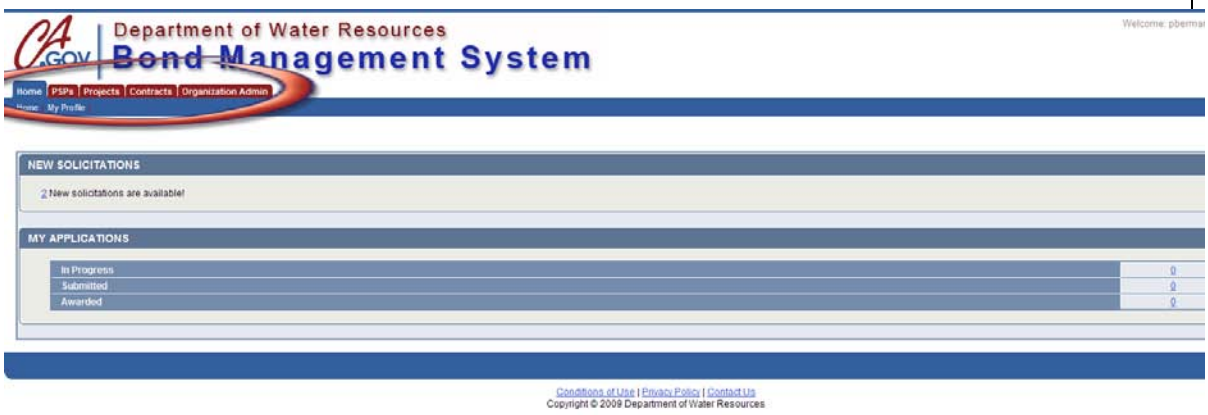
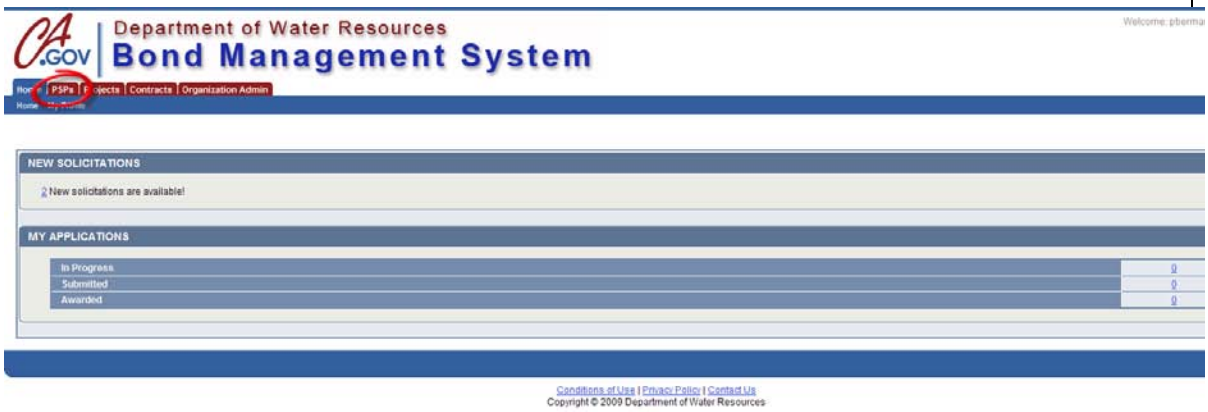
2.3. Organization Administration

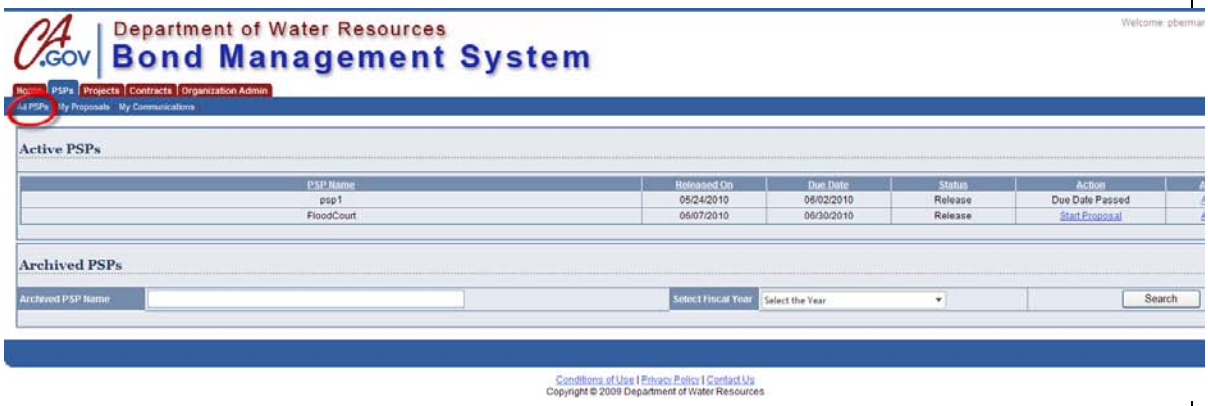
The ***Organization Administration*** module allows an Organization Administrator to perform the following operations in BMS -

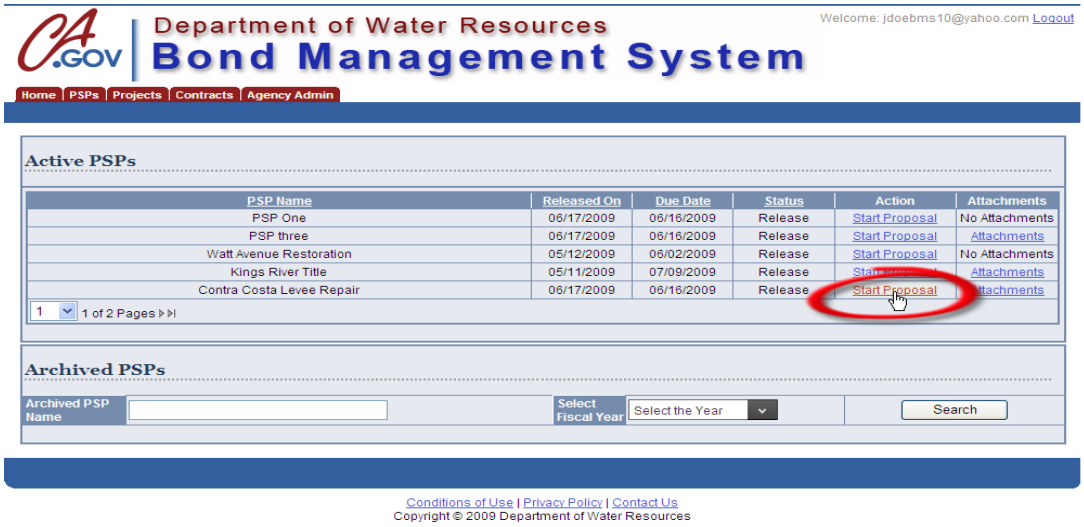
A. Track *PSPs*
B. Prepare, Track and Submit *Proposals*
C. View *Projects*
D. View *Contracts*
E. Grant and Revoke permissions for authorized Public Users of an Organization
F. Add and Remove 'authorized' Public Users for an Organization
G. Unlock a Public User's BMS account
H. View and edit account Profile Information

The procedure and steps associated with each operation of ***Organization Administration*** are discussed in this section.

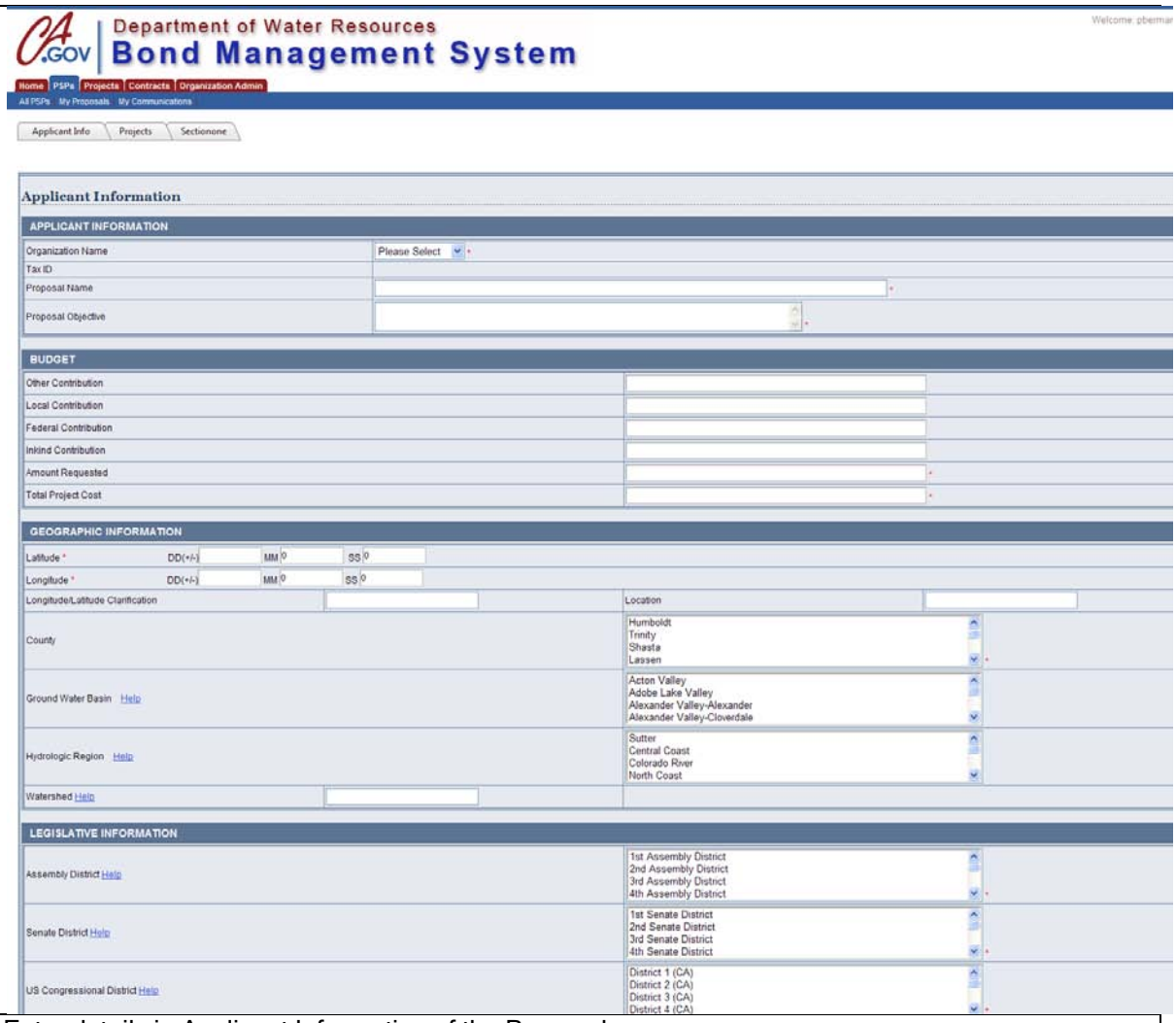
Step #	Process
A.	**Procedure to track PSPs**
1.	Enter the URL for BMS in Internet Explorer and hit Enter.
2.	The BMS **Login Page** will be displayed.
3.	
4.	On the Login page, enter your (Organization Administrator's) Username and Password and click on the ***Log In*** button.

5.	
6.	The **Home** page for the Organization Administrator will be displayed. On the **Home** page the following tabs/menu items are visible: ▪ ***Home*** ▪ ***PSPs*** ▪ ***Projects*** ▪ ***Contracts*** ▪ ***Organization Admin***
7.	
8.	Click on the **'PSPs'** menu item on the Home page.
9.	

10.	The following *three* sub-menu items will be visible under the **PSPs** tab: ▪ *All PSPs* ▪ *My Proposals* ▪ *My Communications*
11.	Click on the '**All PSPs'** sub-menu item under the PSP tab.
12.	
13.	The page listing the ***Active PSPs*** and ***Archived PSPs*** will be displayed.
14.	
B.	**<u>Procedure to Prepare, Track and Submit *Proposals*</u>**
15.	On the page listing the Active and Archived PSPs click on the *<u>Start Proposal</u>* (hyperlink) for the specific *active* PSP for which a Proposal is to be submitted.

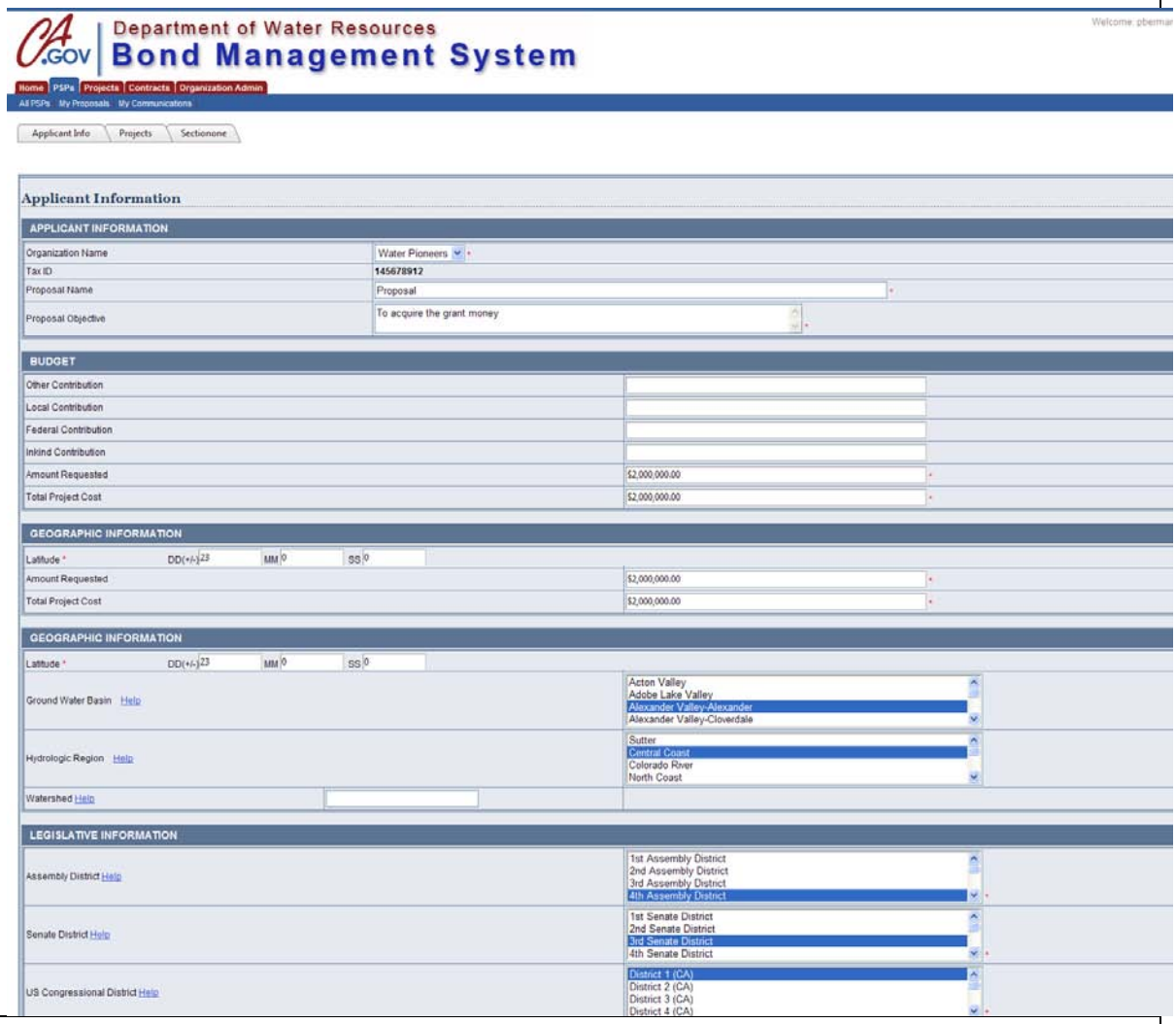
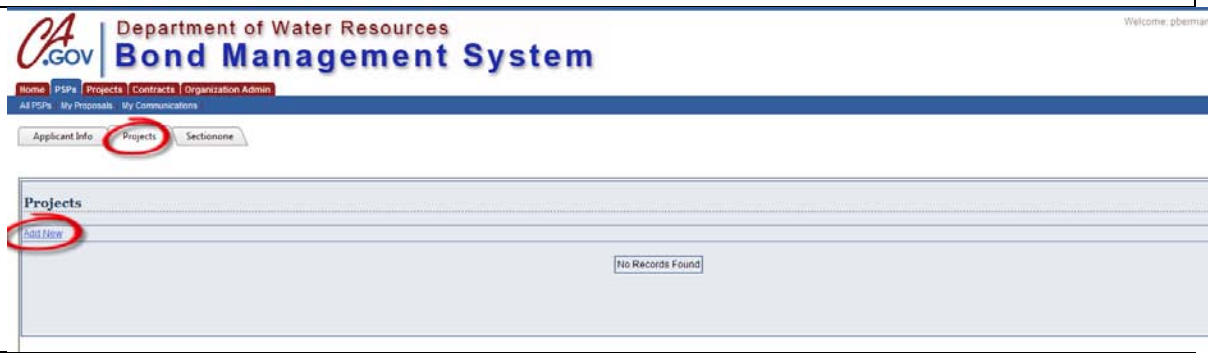
16.	
17.	The ***Proposal*** web form will be displayed with a *tabbed* view of various sections in the Proposal.
18.	**Proposal web form** The Proposal web form consists of tabs that represent sections in a PSP. The first two tabs are always: • *Applicant Info* • *Projects* The subsequent tabs will have the same name as the sections set in the PSP.

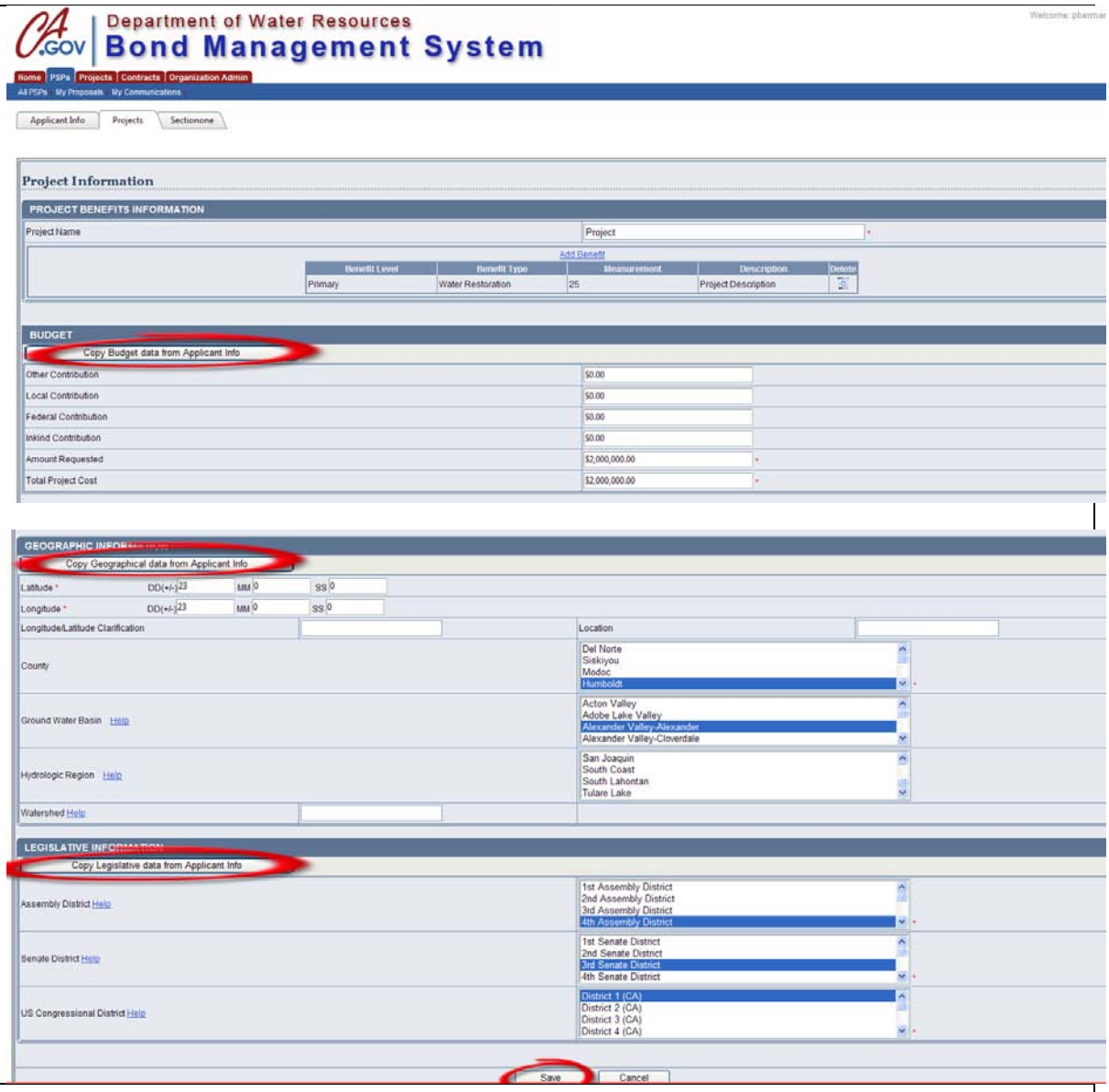
19.

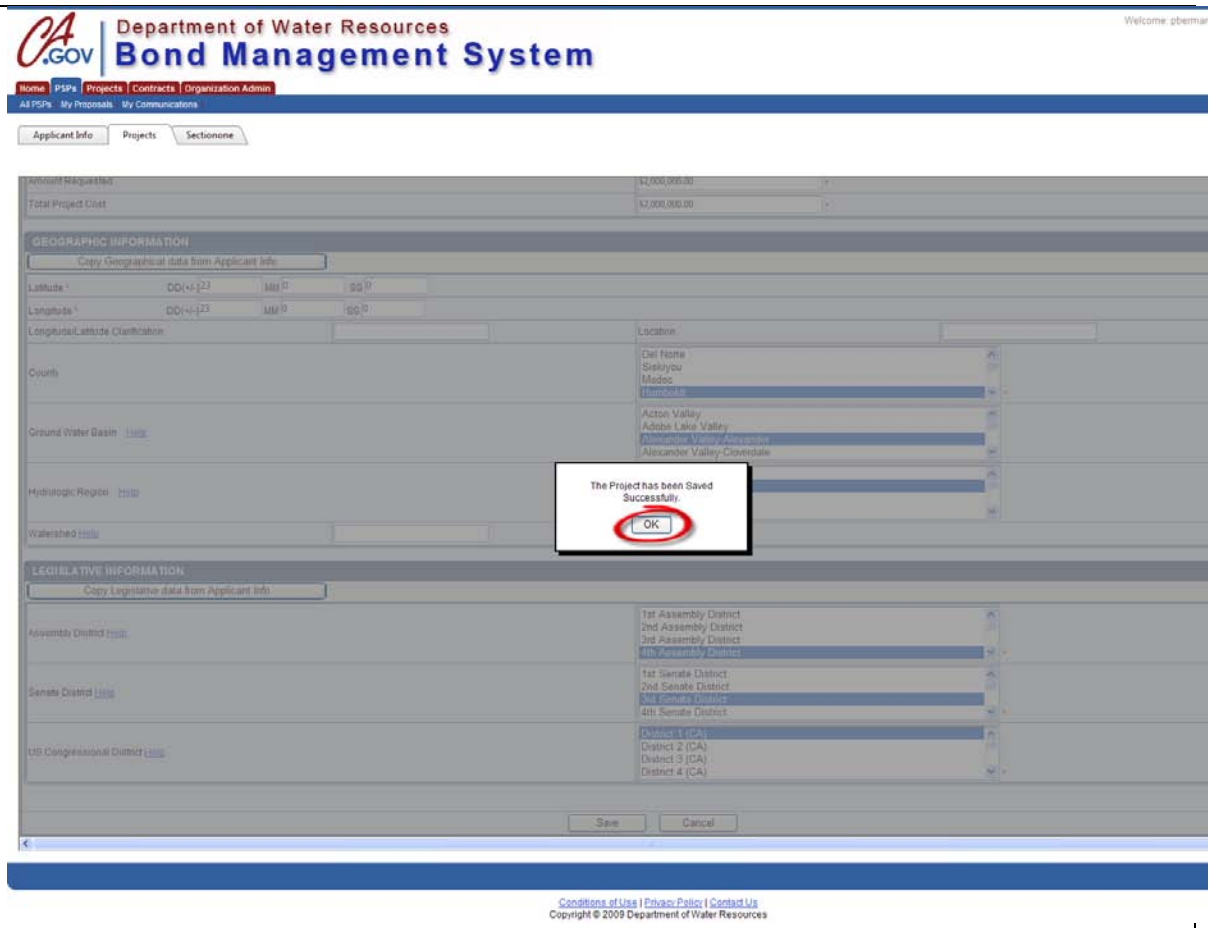
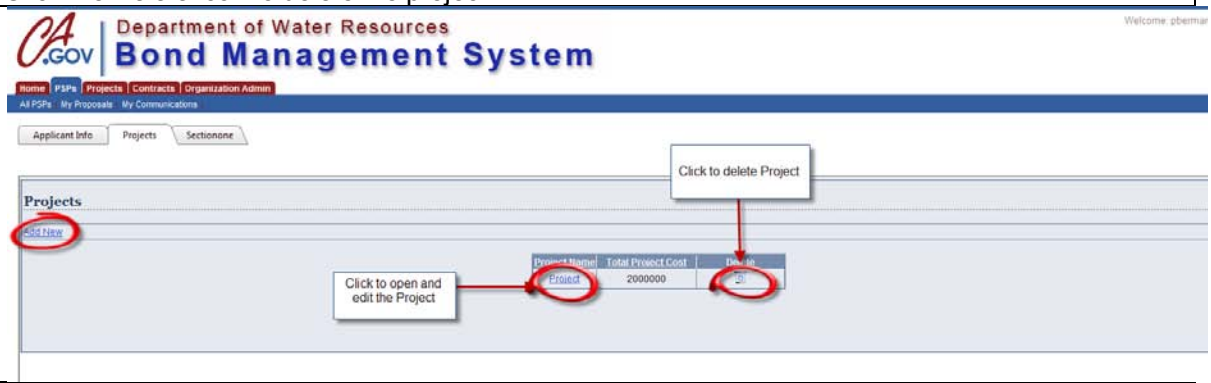


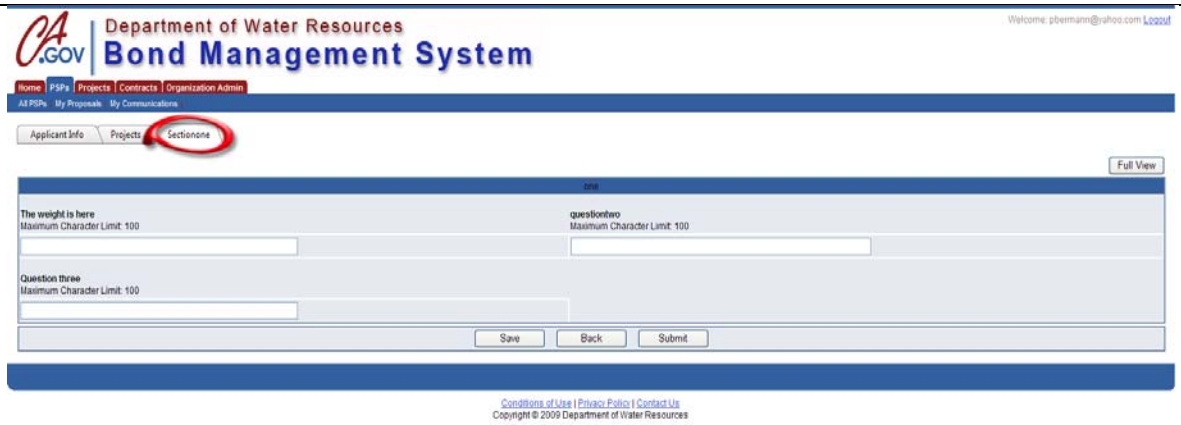
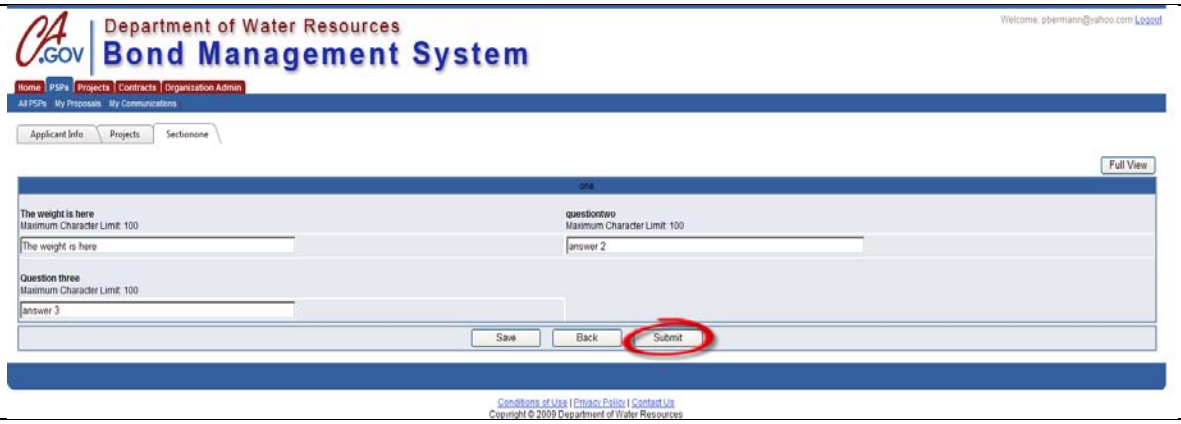
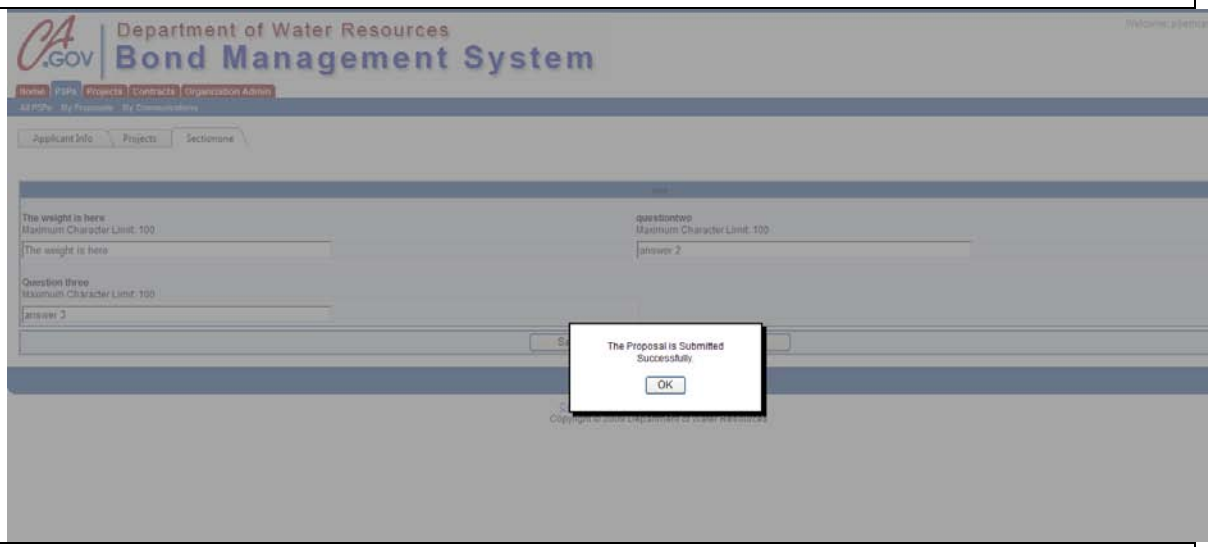
20. Enter details in Applicant Info section of the Proposal.

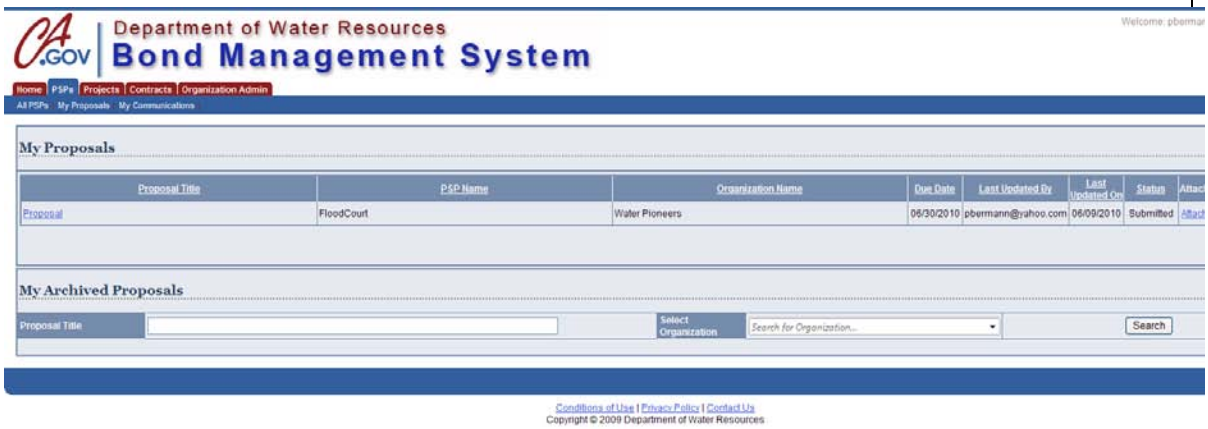
Click on the ***Save*** button on the Proposal web form.

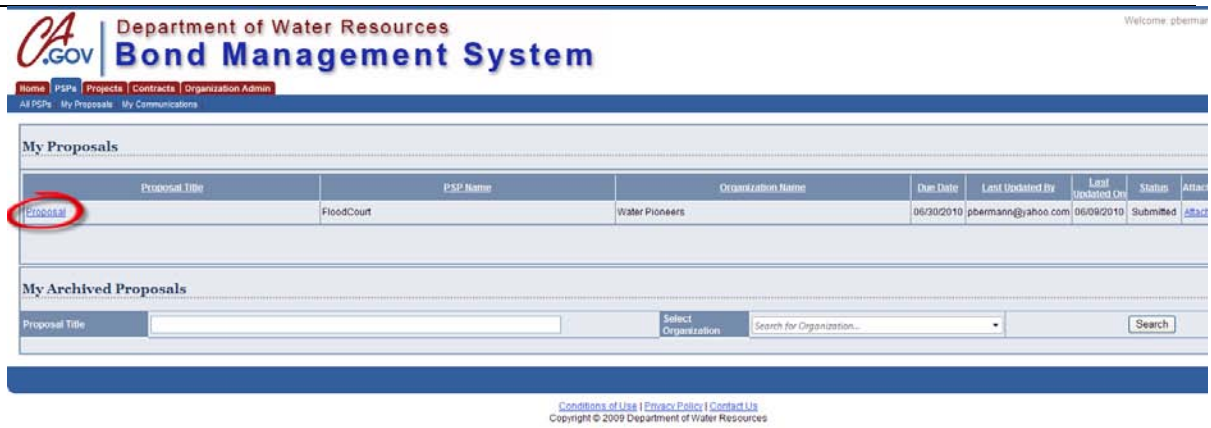
21.	
22.	Click on *Projects* tab. Click on *Add New* link.
23.	
24.	Enter Project details and click **Save**. You can copy budget data, geographical data and legislative data from the Applicant Info by simply clicking copy buttons on the form. See screenshot

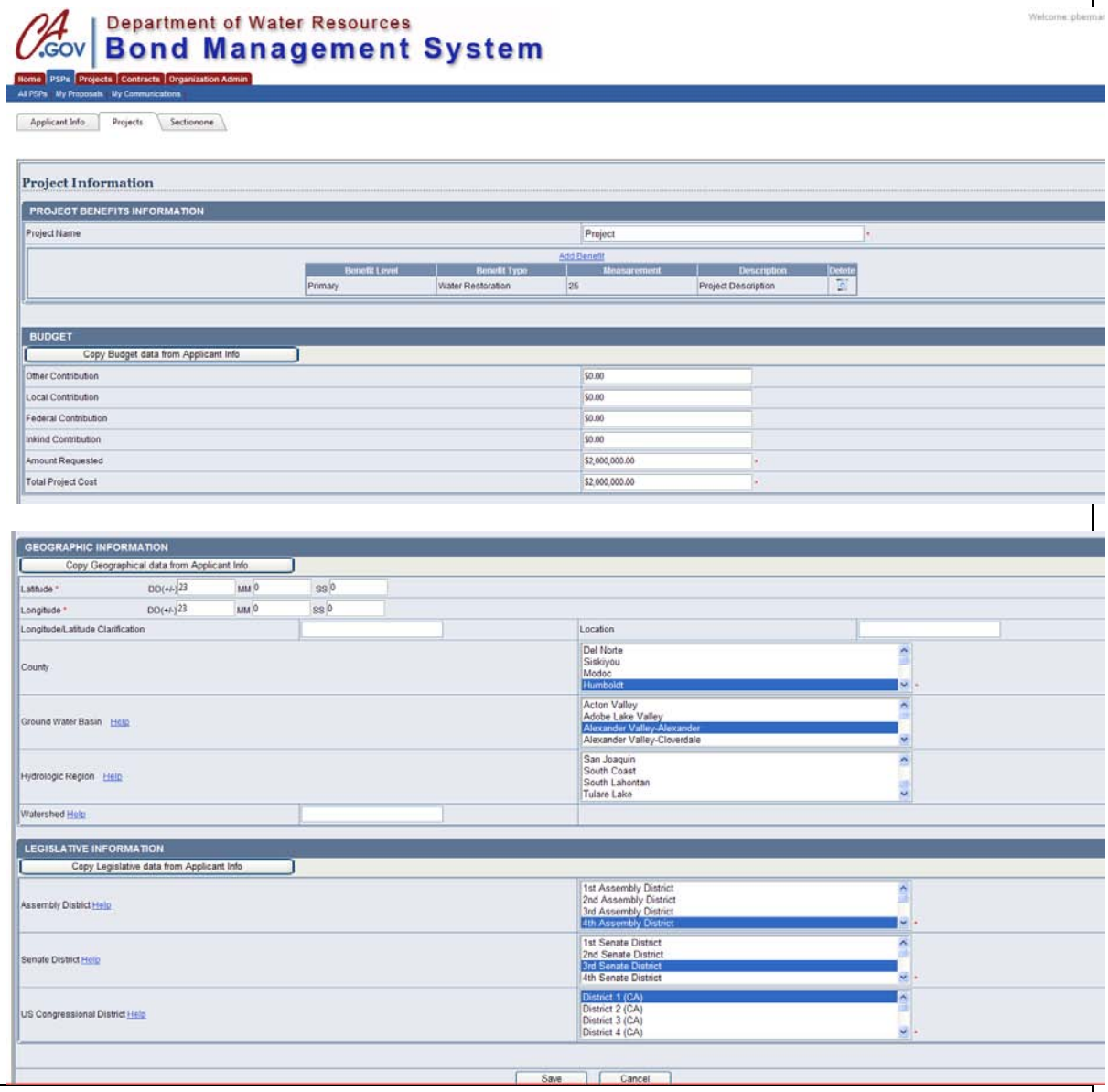
25.	
26.	*The Project has been Saved Successfully* message is displayed.

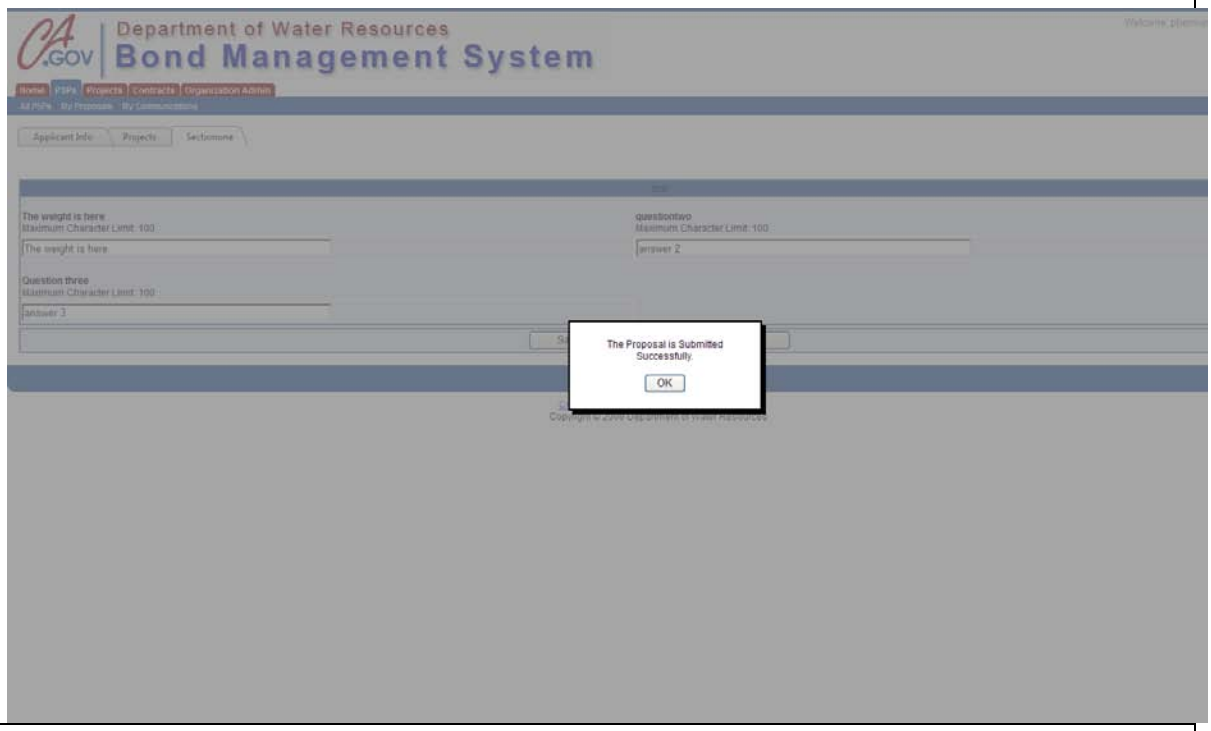
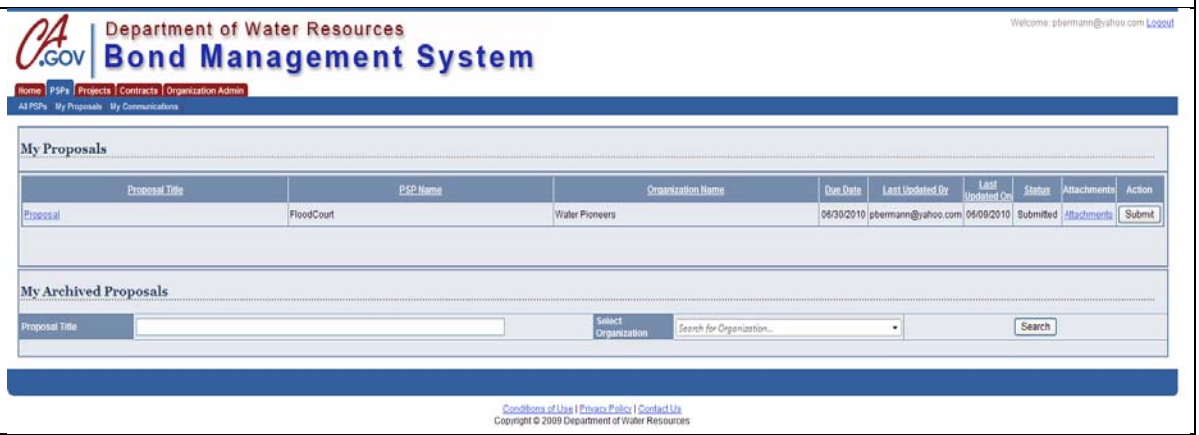
27.	 Click Ok to continue.
28.	If you navigate away from the *Project* tab and come back to it. The link to the project is displayed in a table view. Click on the Project name link to open and edit the project. Click *Add New* to add more projects to your proposals. Click the *Delete* icon to delete the project.
29.	
30.	Click on the other sections to navigate to them and enter details. **Remember to click *Save* after entering information on every page.**

31.	
32.	The section names vary according to the PSP except the first two sections. Once all the information is entered and saved click *Submit* to submit the proposal.
33.	
34.	*The Proposal is Submitted Successfully.* message is displayed.
35.	
36.	Click on the ***My Proposals*** sub-menu item under the **PSP** tab.

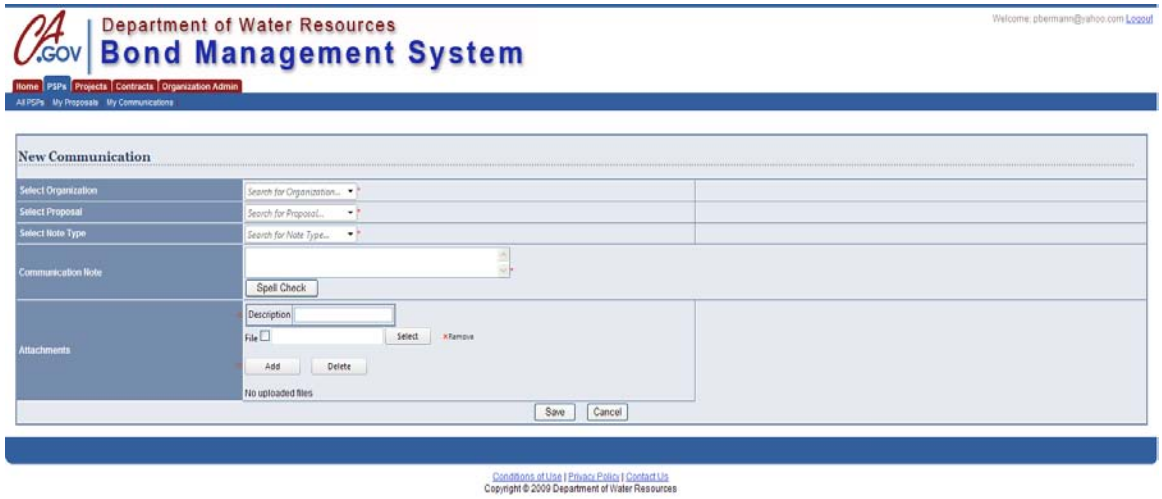
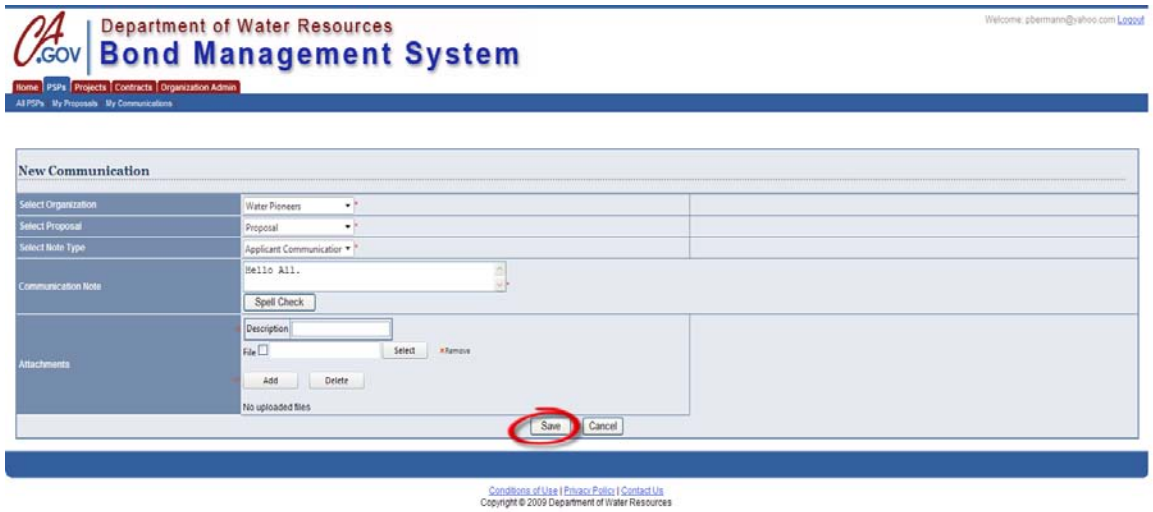
37.	
38.	The **'My Proposals'** page will be displayed. This page lists all the *Active* and *Archived Proposals*.
39.	**'My Proposals' page** 
40.	The following details are displayed for every *Active Proposal*: ▪ *Proposal Title (hyperlink)* ▪ *PSP Name* ▪ *Organization Name* ▪ *Due Date* ▪ *Last Updated By* ▪ *Last Updated On* ▪ *Status* ▪ *Attachments* ▪ *Action* The *Proposal* that has been saved in Step 20 appears (by name) under the *Active Proposals* section on the **My Proposals** page.

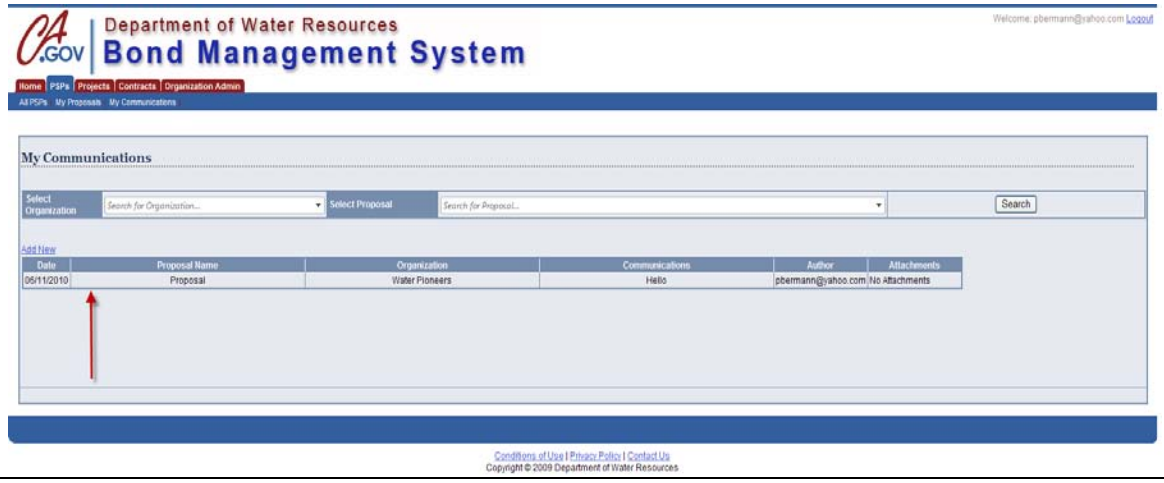
41.	
42.	Click on the *Proposal Name* (hyperlink) of this Proposal.

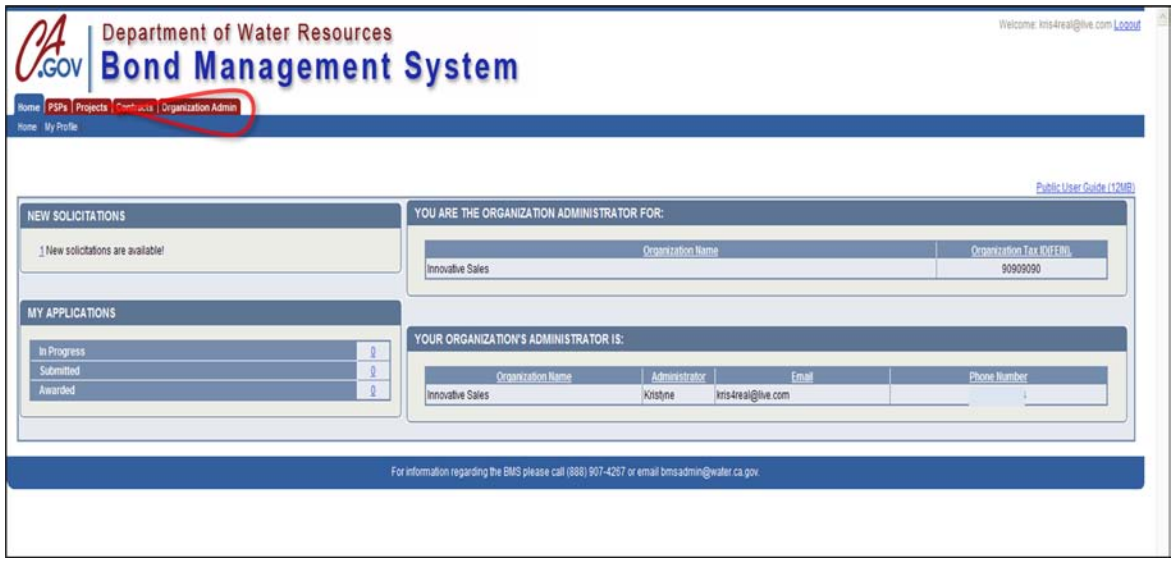
43.	
44.	The Proposal web form will be displayed with a *tabbed* view of various sections in the Proposal. Each section will contain details (if any) that have been previously filled out.
45.	Click on tabs to view and edit information previously entered. Click *Save* to save the entered information.
46.	Click on the **Submit** button on the *Proposal* web form. If you have already submitted a proposal, you can also re-submit a modified version.
47.	The Proposal will be submitted for *review*. A confirmation message stating successful submission of the Proposal will be displayed.

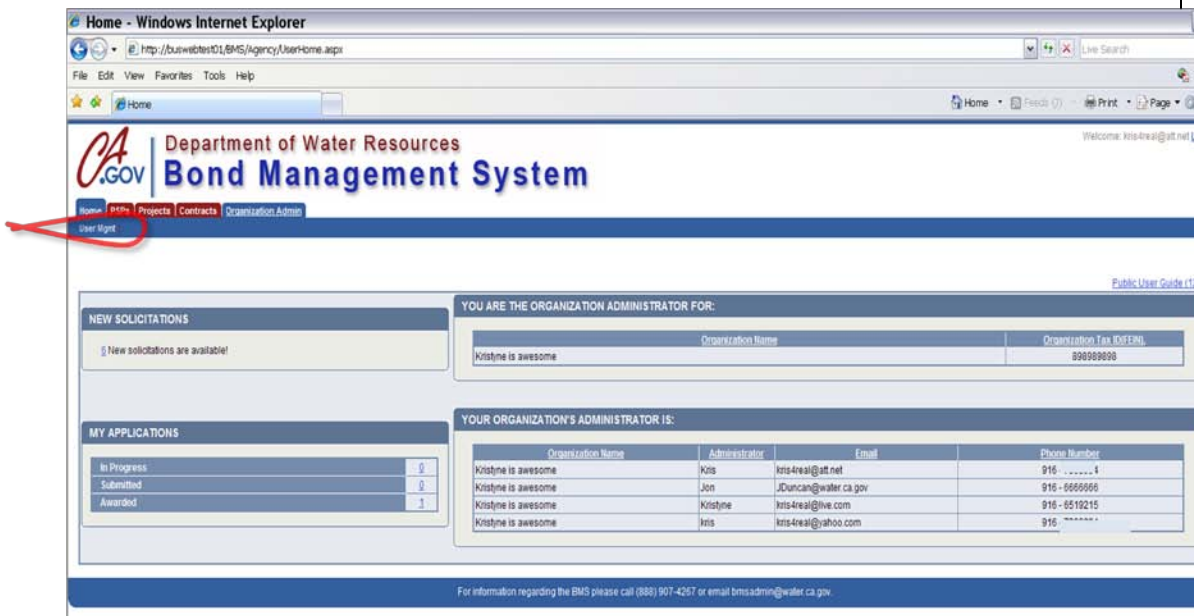
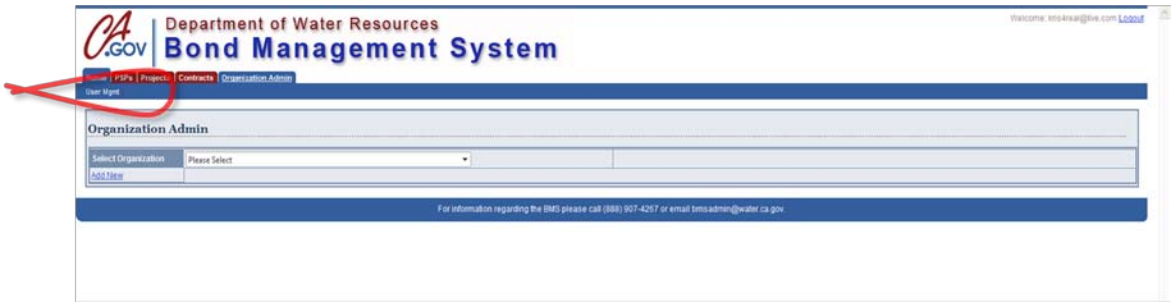
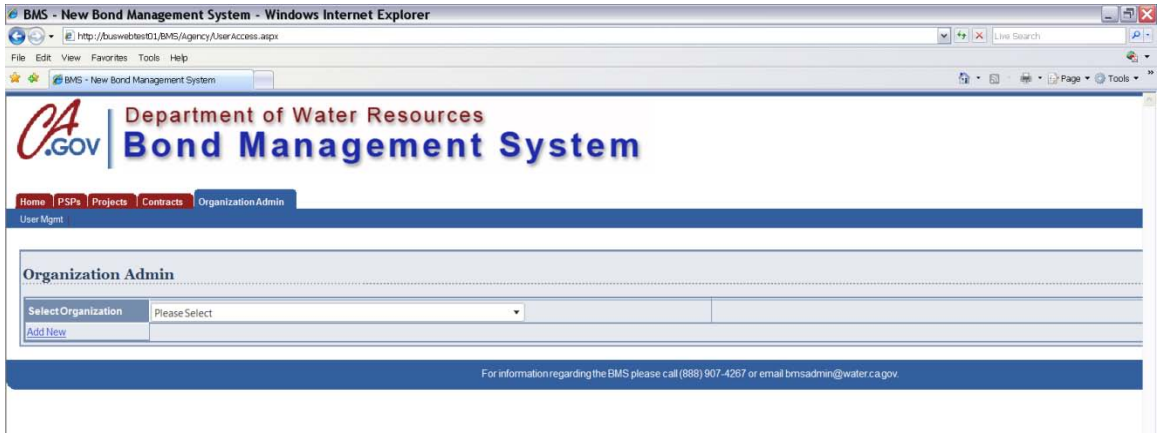
48.	
49.	You can also skip submitting the proposal for later.
50.	Click on the ***My Proposals*** sub-menu item under the **PSP** tab.
51.	
52.	Click on *Submit* button under *Action* column to submit the proposal. **Note: If you have already submitted a proposal by this name, it will get overwritten by the current version. To submit a different proposal, make sure to change the *Proposal Title.***
53.	Click on the '**My Communications'** sub-menu item under the **PSP** menu item.

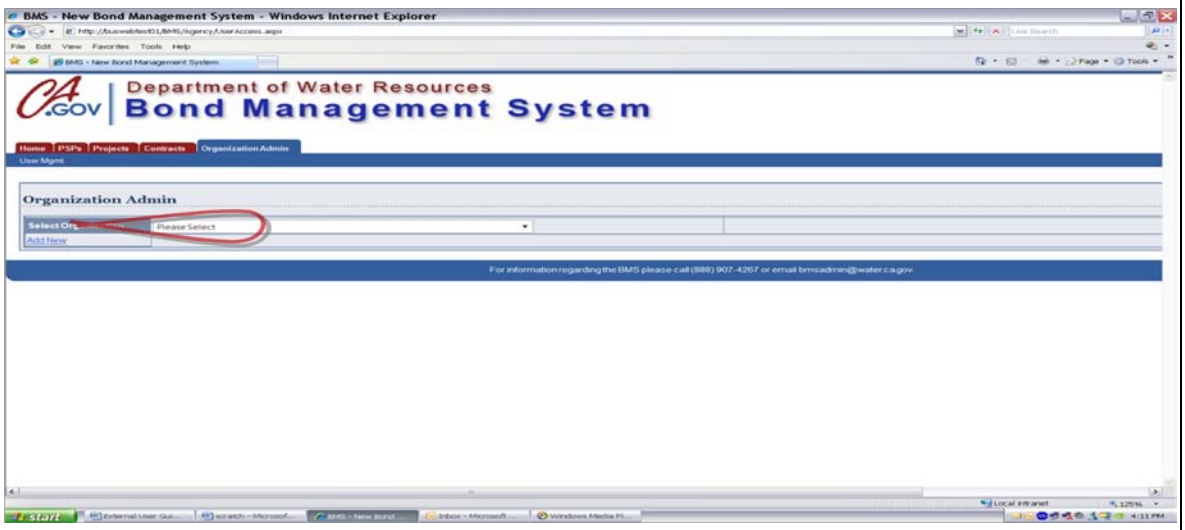
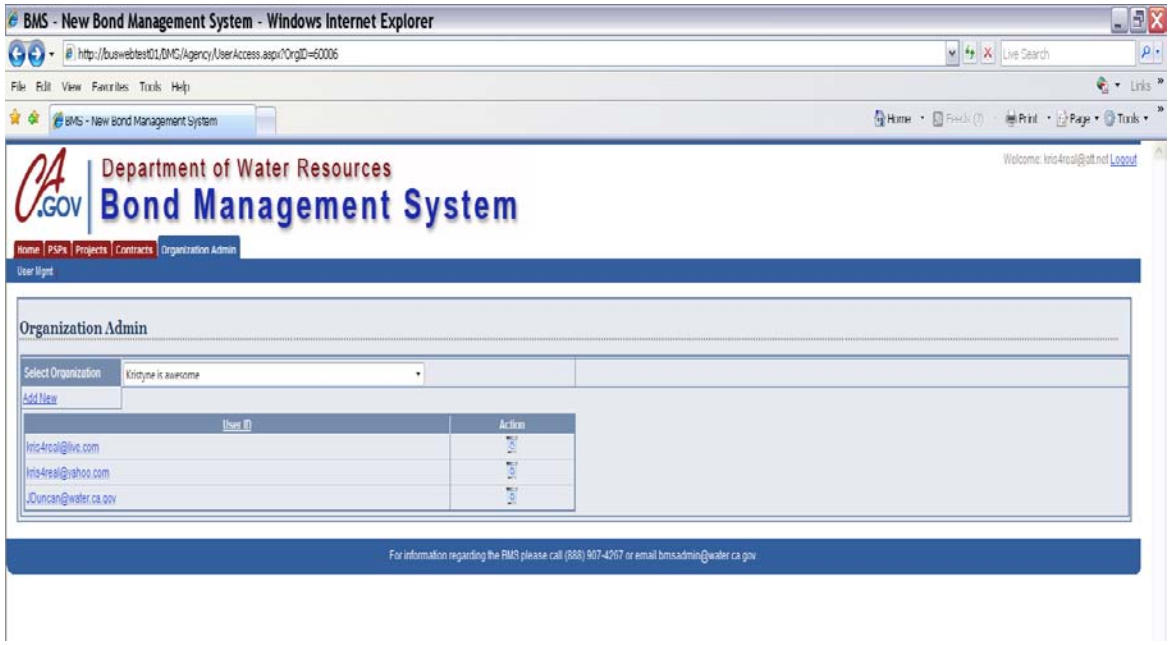
54.	
55.	The **'My Communications'** page will be displayed. Each entry on this page has the following details – ▪ *Date* ▪ *Proposal Name* ▪ *Organization* ▪ *Communication* ▪ *Author* ▪ *Attachments* An ***'Add New'*** hyperlink is also displayed on the **'My Communications'** page.
56.	
57.	Click on the ***'Add New'*** hyperlink on the **My Communications** page.

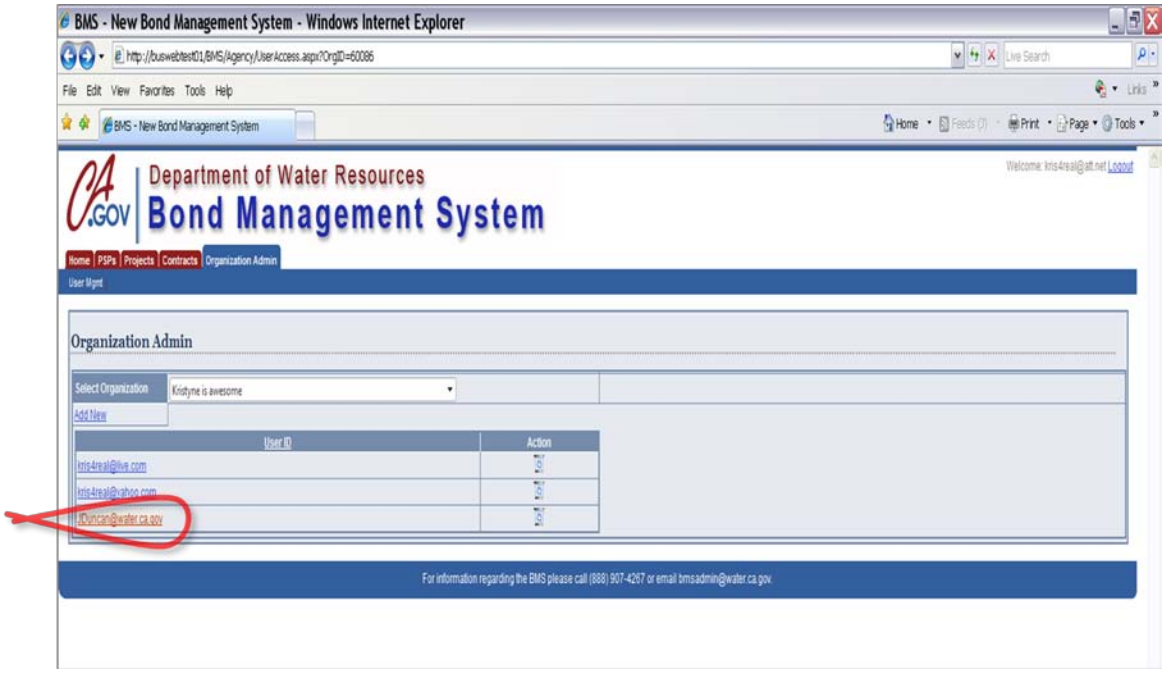
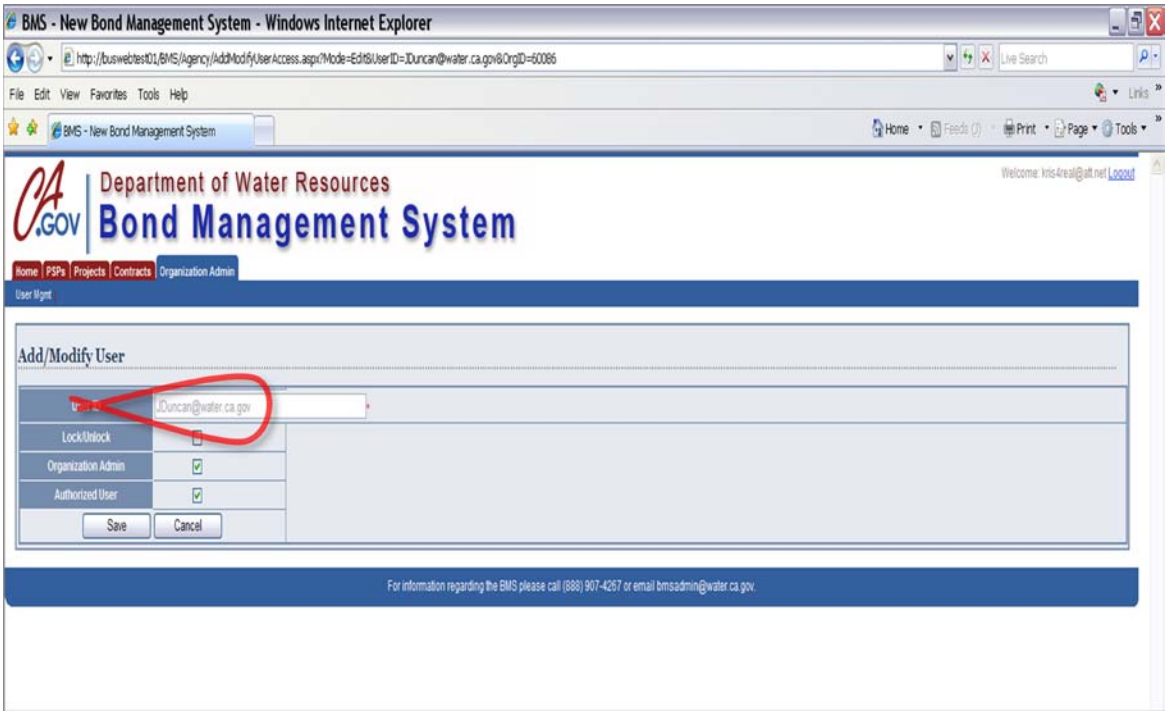
58.	The **'New Communication'** page will be displayed.
59.	
60.	On the '**New Communication**' page enter the following information : ▪ *Organization Name* ▪ *Proposal Name* ▪ *Note Type* ▪ *Communication Note* ▪ *Attachments – upload attachments if any*
61.	Enter relevant information on the **'New Communication'** page. Then click *Save* 
62.	The Communication entry along with the uploaded attachment (if any) will be saved. This saved entry will appear on the **'My Communications'** page and can be reviewed by DWR staff.

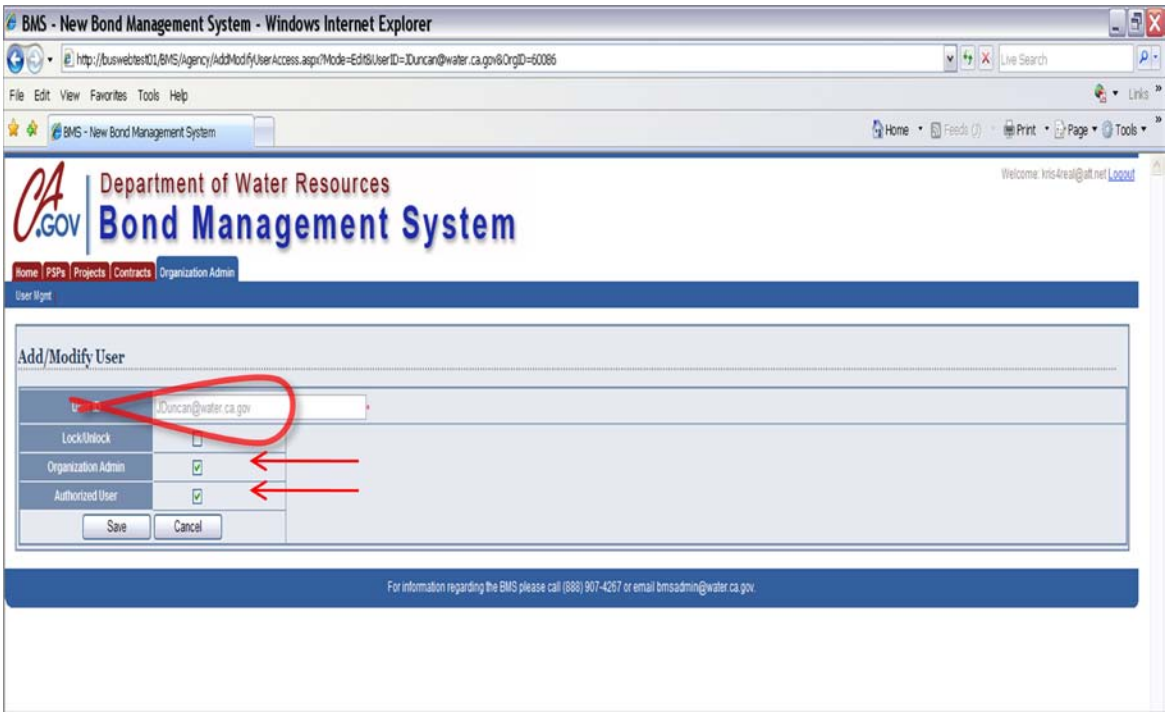
63.	

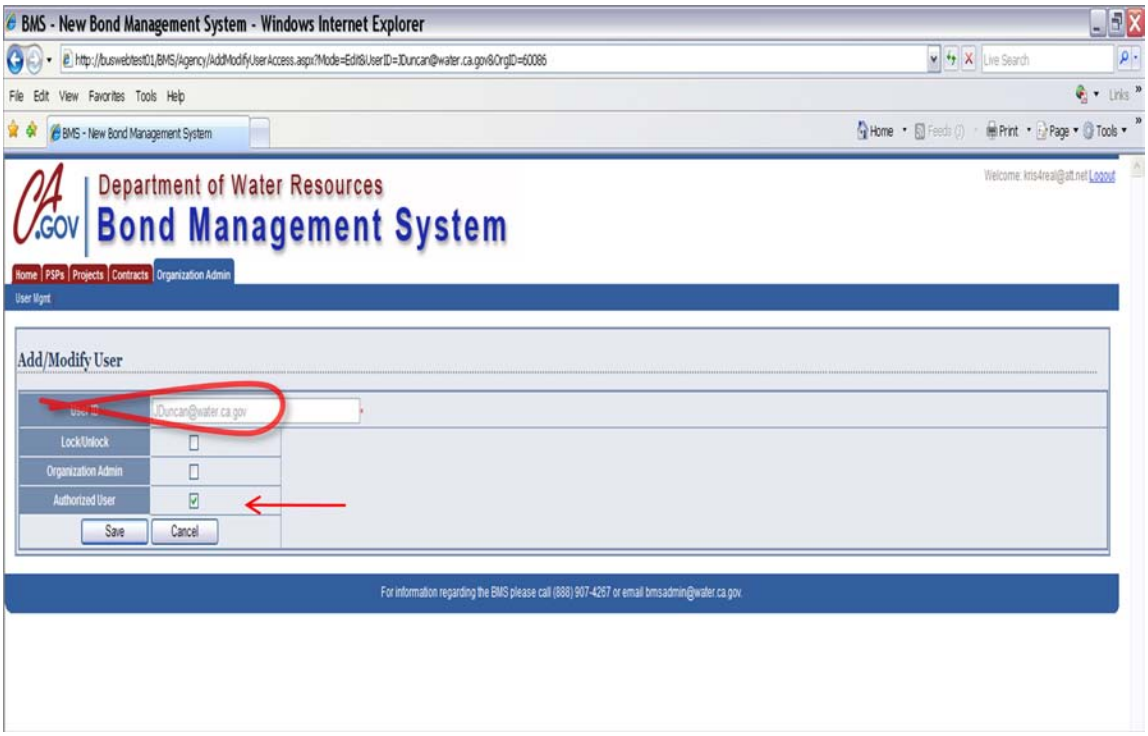
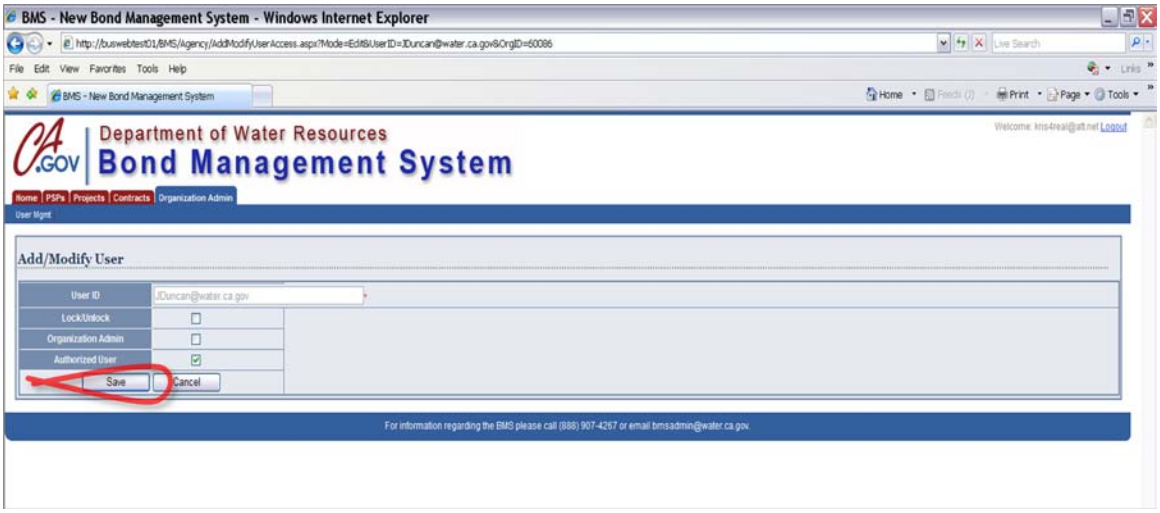
C.	<u>Procedure to Grant and Revoke permissions for authorized Public Users of an Organization</u> 1.1.1
64.	On the **Home** page click on the ***Organization Admin*** tab.
65.	
66.	The ***User Mgmt*** sub-menu item will be visible under the **Organization Admin** tab.

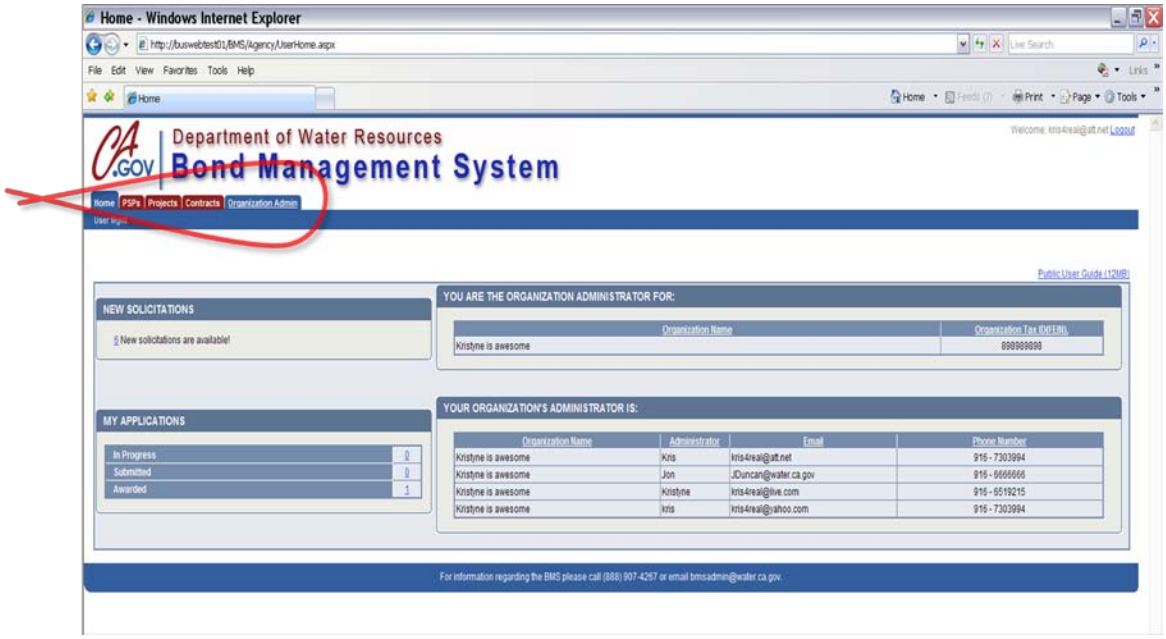
67.	
68.	Click on the ***User Mgmt*** sub-menu item.
69.	
70.	The **'Organization Admin'** page is displayed. This module allows you to lock and unlock user accounts, give administrator access to additional staff, create new users, and edit organization contact information.
71.	

72.	On the **Organization Admin** page select an Organization from the *'Select Organization'* drop-down (that lists names of all Agencies that the Organization Administrator administers)
73.	
74.	A list of Public Users *registered* with (and authorized by) the selected Organization will be displayed.
75.	
76.	Click on the *name* (hyperlink) of a registered Public User on the **'Organization Admin'** page.

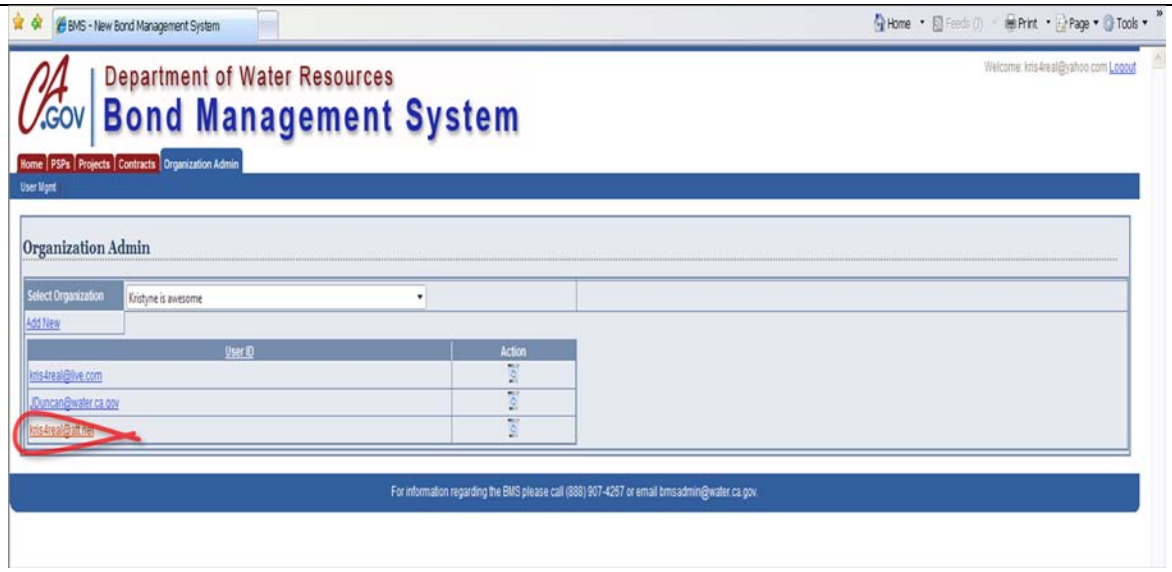
77.	
78.	The **'Add/Modify User'** page for the selected Public User will be displayed.
79.	

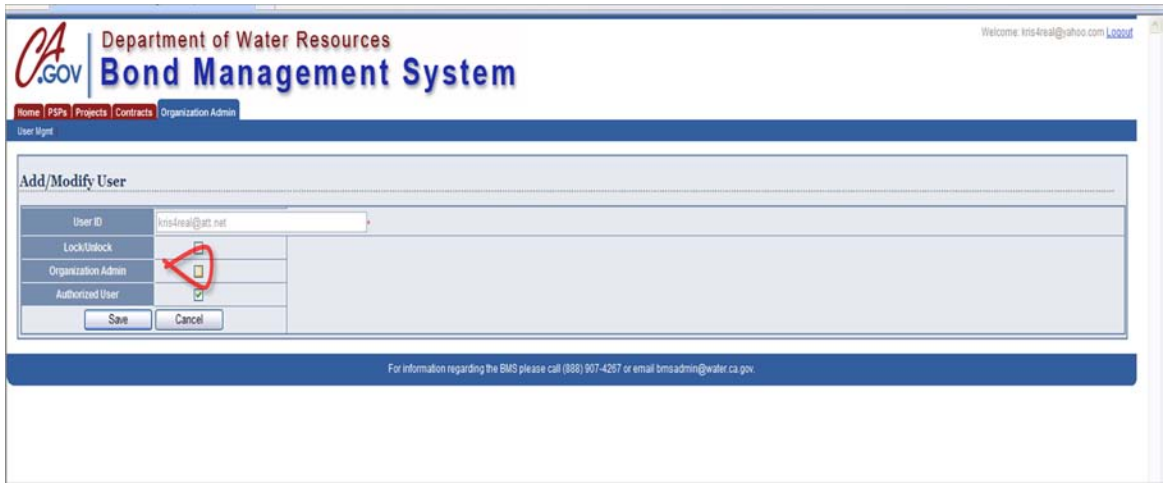
80.	On the **'Add/Modify User'** page, The Organization administrator can give authorization to different users. Enter the user's email account and either 1) Check the 'Authorized User' AND 'Organization Admin' checkboxes for the selected user to be granted access to your Organization Admin tools as well as your Proposals, Contracts, and Projects in BMS.
81.	
82.	Or, When a Public User registers for BMS, and selects your Organization, they will need to send the Organizations Administrator an e-mail to ask permission for a more limited access: 2) Check the 'Authorized User' checkbox for the selected Public User to be granted access to your Proposals, Contracts, and Projects in BMS.

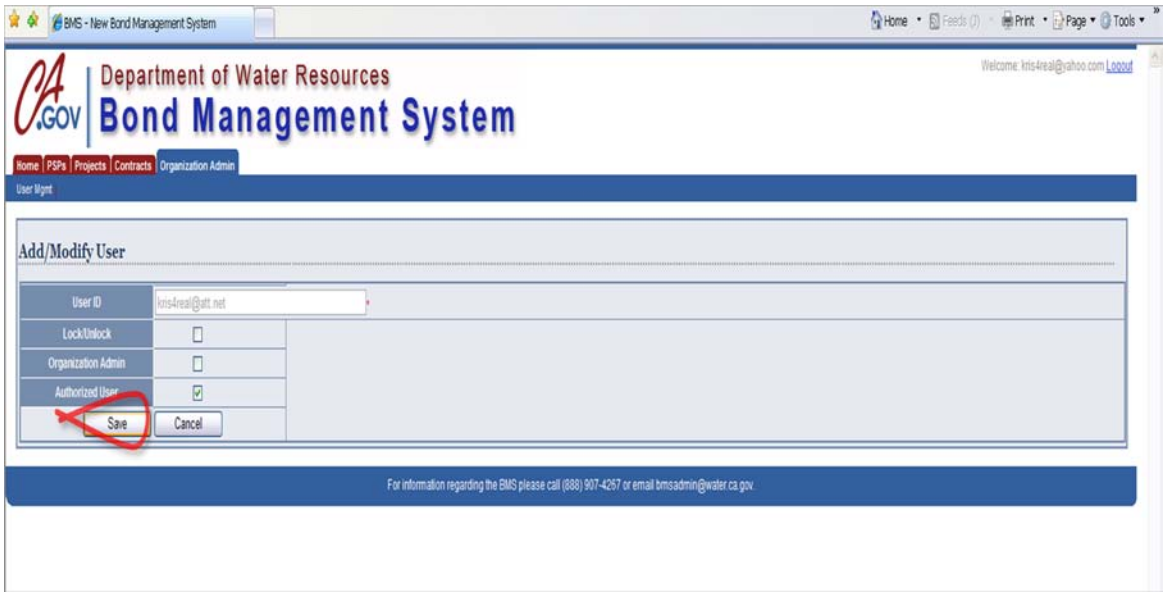
83.	
84.	Then click on the **Save** button. 
85.	Log out of BMS and log back in using the credentials of the same Public User who has been *granted* the *'Organization Administrator'* privilege.

86.	
87.	This Public User will have been *granted* the **'Organization Administrator'** privilege. The Home page of this Public User in BMS will resemble the Home page of an Organization Administrator in BMS. In addition to the *Home* and *PSPs* tabs, the following *additional* tabs will be visible on the **Home** page for this Public User: ▪ *Projects* ▪ *Contracts* ▪ *Organization Admin*
88.	
89.	Log back into BMS as the Organization Administrator. Navigate to the '**Add/Modify User'** page for the Public User who has been granted the 'Organization Administrator' privilege. On the '**Add/Modify User'** page un-check the **'Organization Admin'** checkbox in order to revoke the 'Organization Administrator' privilege. Then click on the **Save** button.

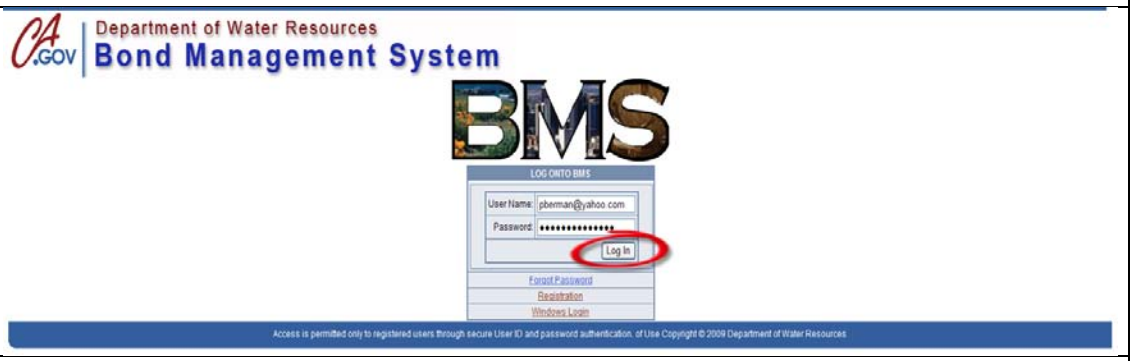
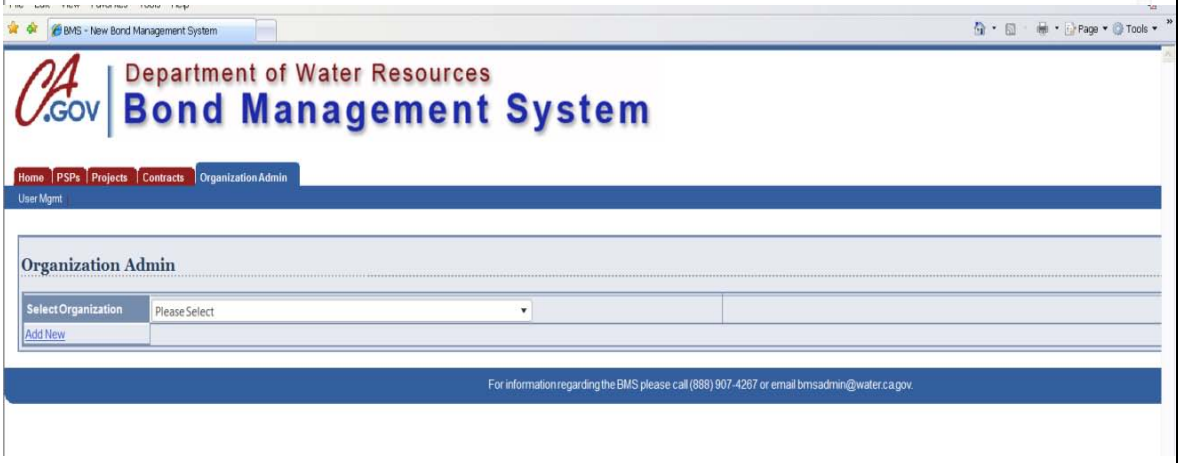
90.

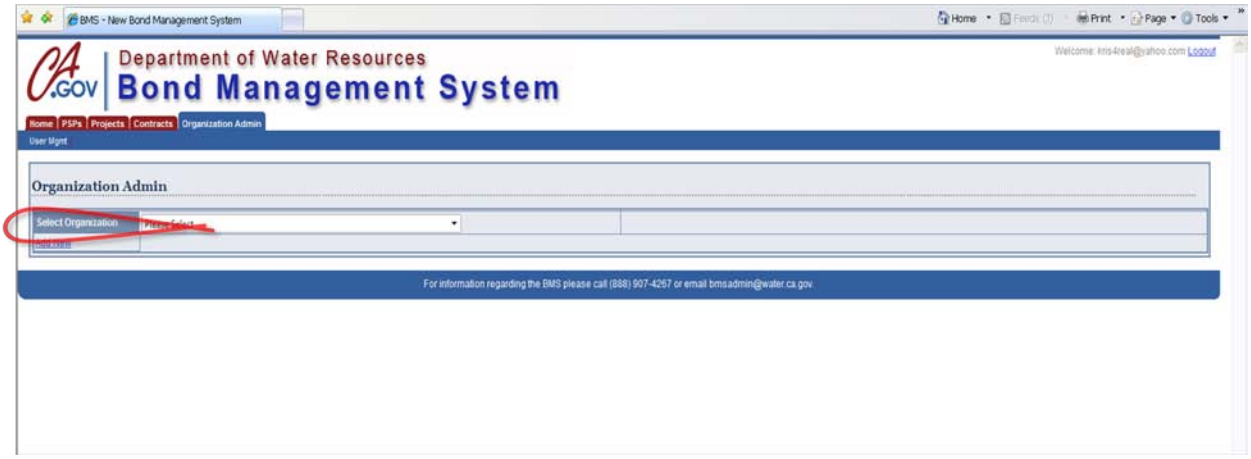
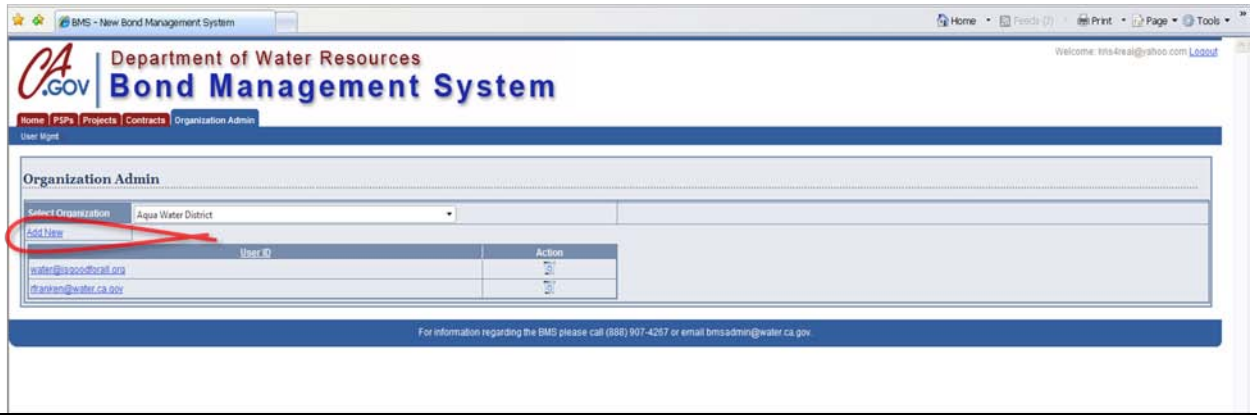

BMS - New Bond Management System
Department of Water Resources
Bond Management System
Home | PSPs | Projects | Contracts | Organization Admin
User Mgmt
Organization Admin
Select Organization
Kristyne is awesome
Add New
User ID
Action
kris4real@live.com
JDuncan@water.ca.gov
kris4real@att.net
For information regarding the BMS please call (888) 907-4267 or email bmsadmin@water.ca.gov.


Department of Water Resources
Bond Management System
Home | PSPs | Projects | Contracts | Organization Admin
User Mgmt
Add/Modify User
User ID
kris4real@att.net
Lock/Unlock
Organization Admin
Authorized User
Save
Cancel
For information regarding the BMS please call (888) 907-4267 or email bmsadmin@water.ca.gov.

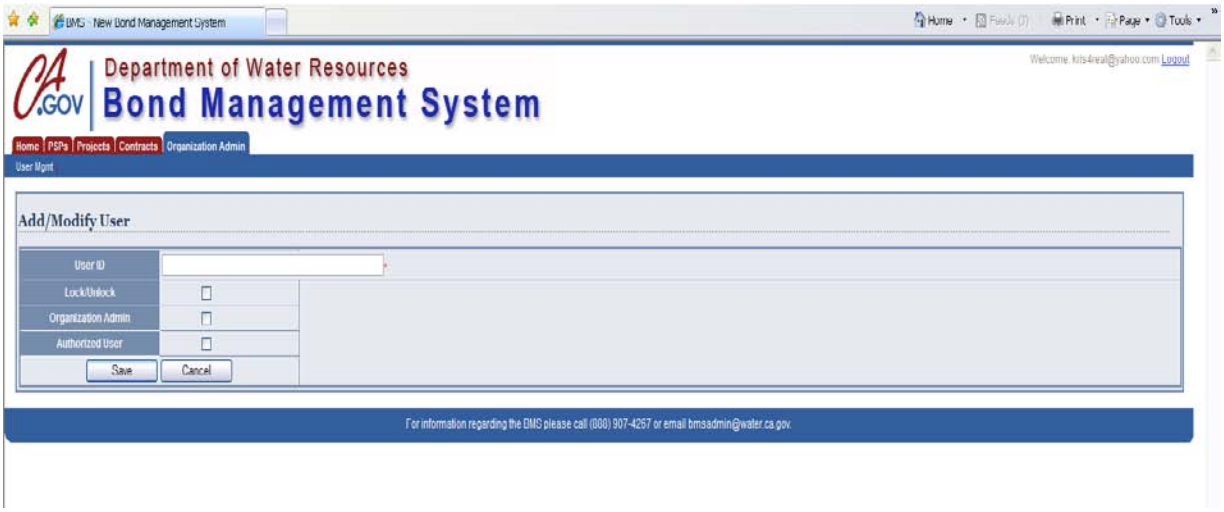

BMS - New Bond Management System
Department of Water Resources
Bond Management System
Home | PSPs | Projects | Contracts | Organization Admin
User Mgmt
Add/Modify User
User ID
kris4real@att.net
Lock/Unlock
Organization Admin
Authorized User
Save
Cancel
For information regarding the BMS please call (888) 907-4267 or email bmsadmin@water.ca.gov.

91.	Log out of BMS and log back in using the credentials of the same Public User whose '*Organization Administrator'* privilege has been *revoked*.
92.	
93.	This Public User will have his **'Organization Administrator'** privilege *revoked*. Only the *Home* and *PSPs* tabs will be visible on this Public User's **Home** page. The *Projects*, *Contracts* and *Organization Admin* tabs will no longer be visible on the **Home** page.
94.	

D.	**Procedure to Add and Remove 'authorized' Public Users for a specific Organization**
95.	Log into BMS as an Organization Administrator. Click on the ***'User Mgmt'*** sub-menu item displayed under '**Organization Admin'** on the **Home** page. This will bring up the **'Organization Admin'** page.
	
96.	 

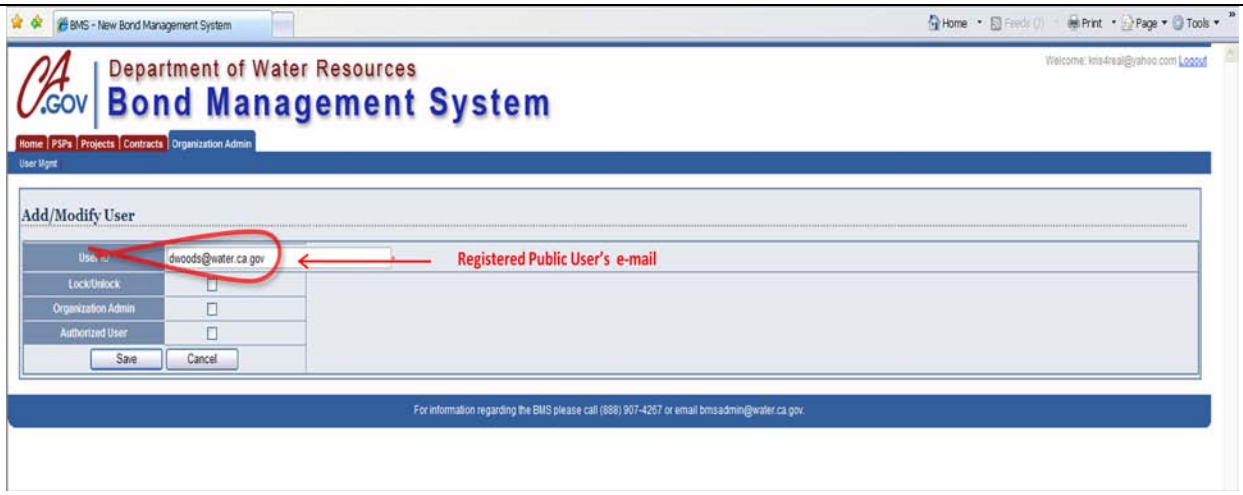
97.	On the **'Organization Admin'** page, select an Organization from the '**Select Organization'** drop-down selection. This will display the list of existing (if any) *registered/authorized* Public Users for the selected Organization.
98.	
99.	Click on the **'Add New'** hyperlink (displayed under the *'Select Organization'* drop-down selection). This will open the **'Add/Modify User'** page.
100	

101.

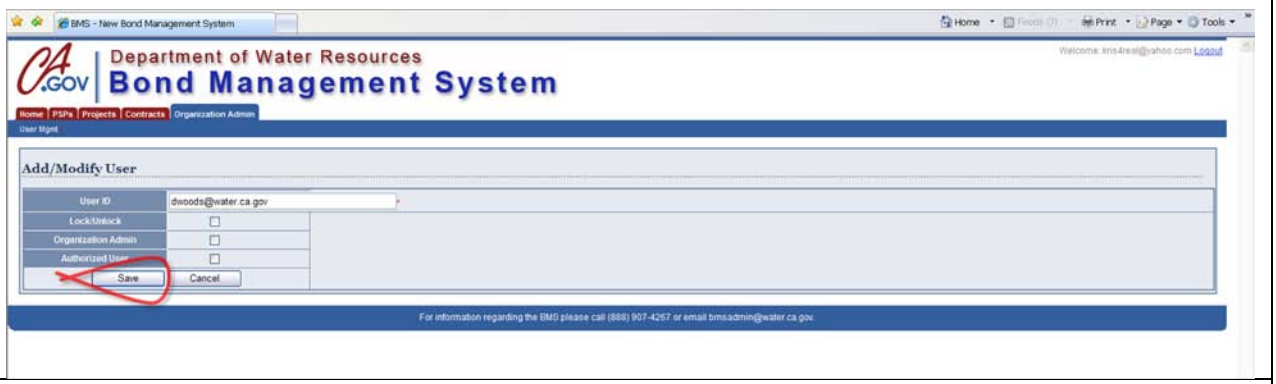


102. On the **'Add/Modify User'** page enter the Username of a Public User who is currently ***registered*** with BMS AND requires to be registered with this specific Organization

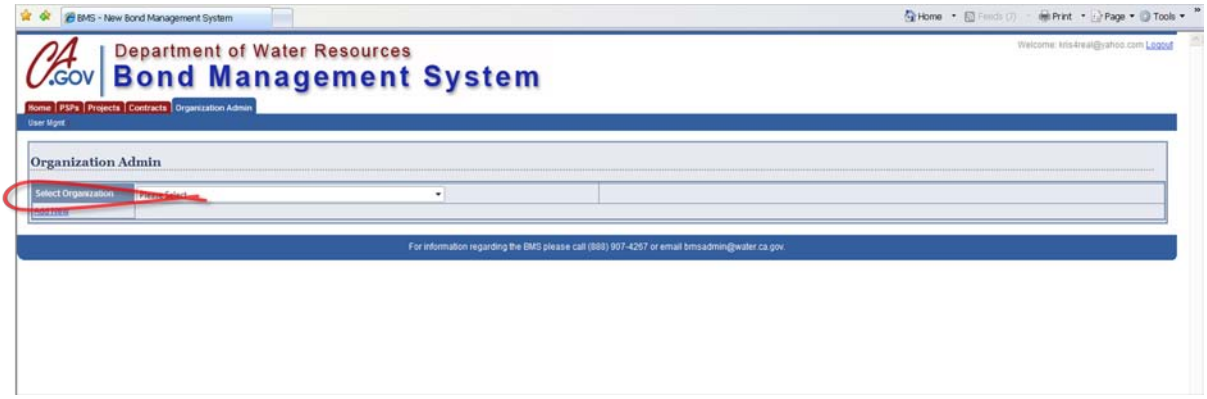
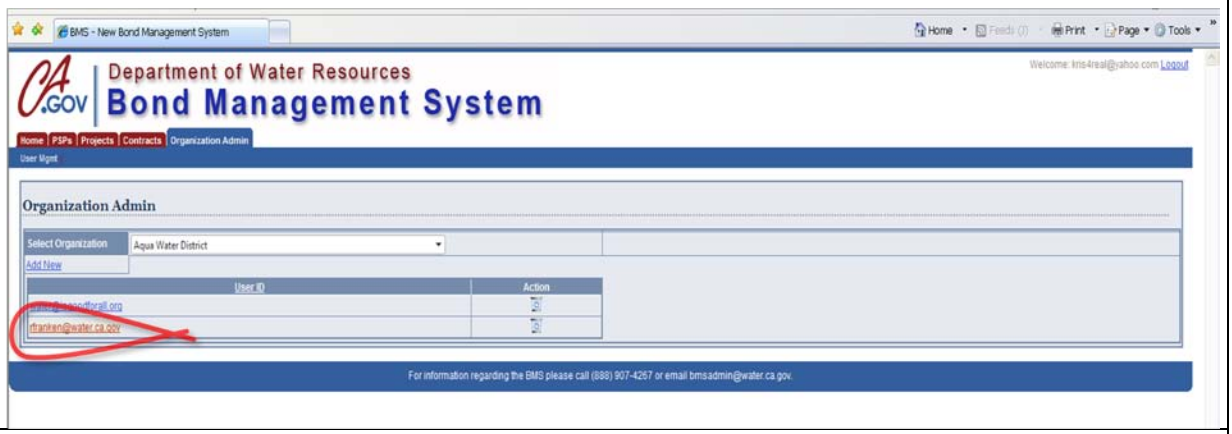
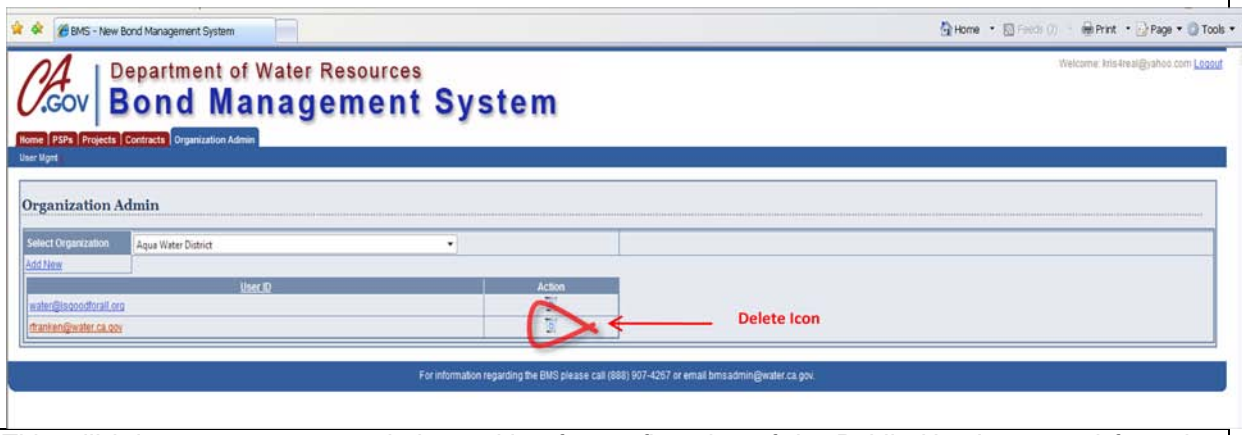
103.

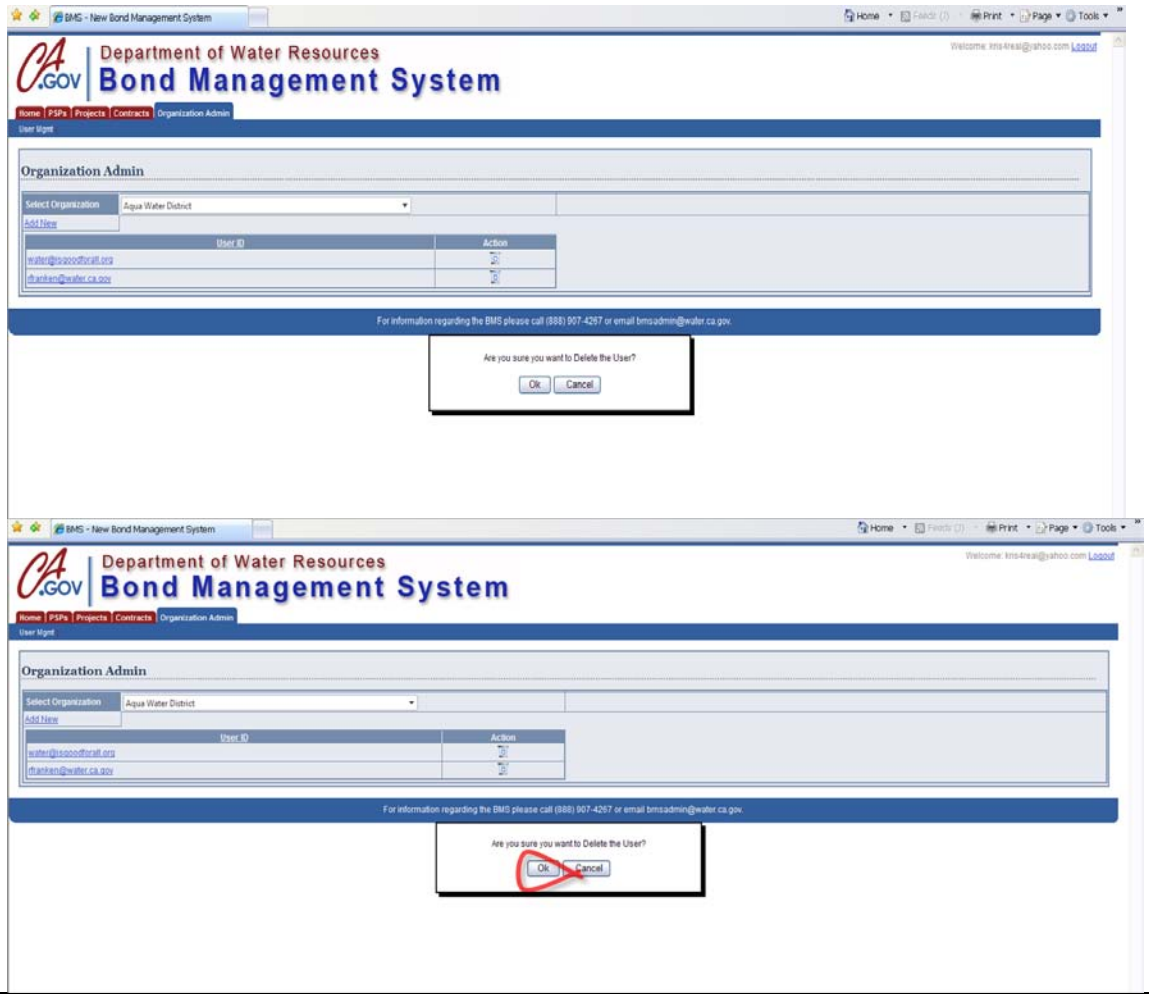
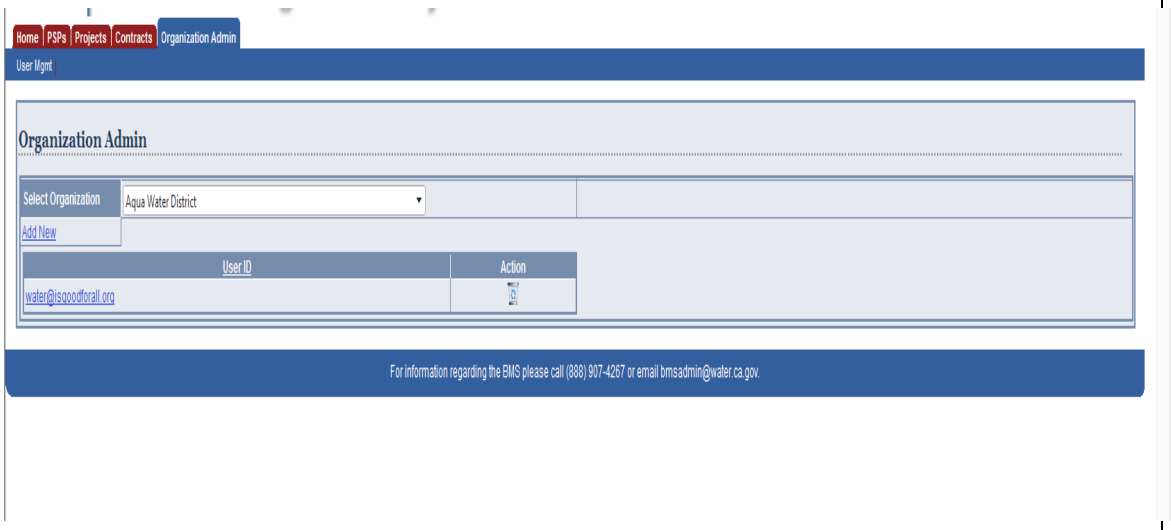


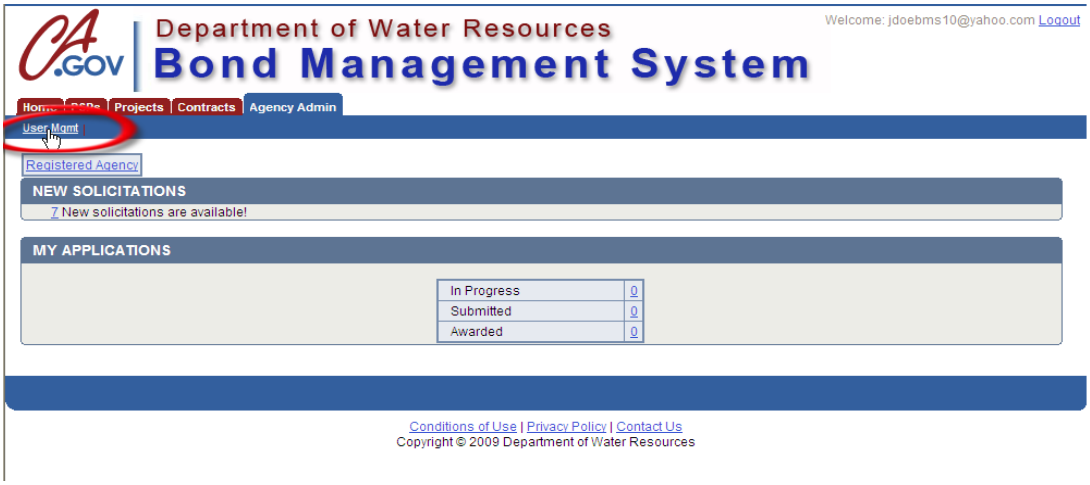
Then click on the **Save** button.

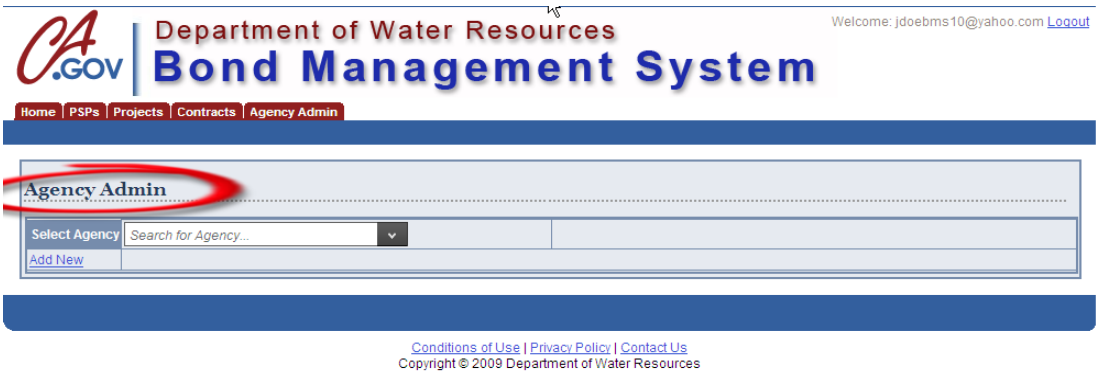
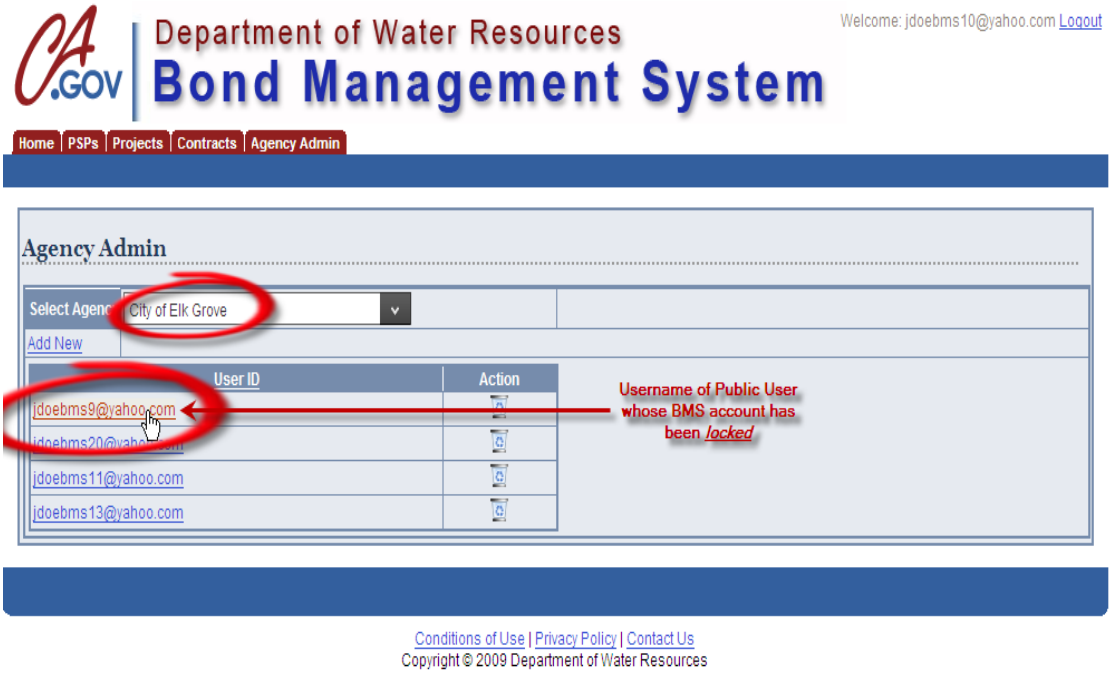


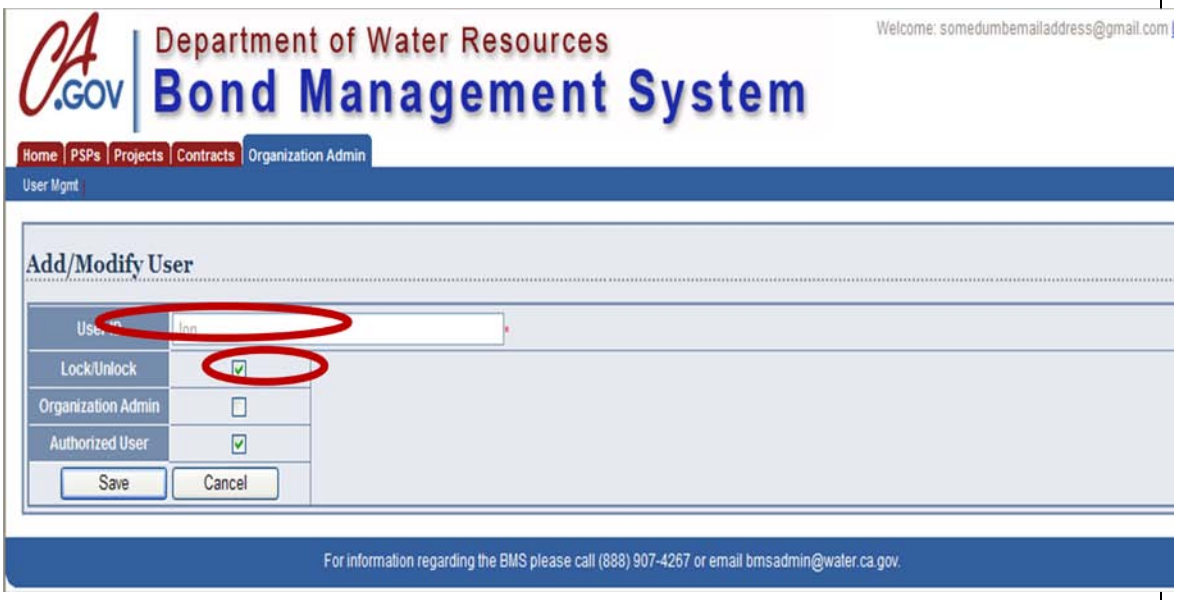
104. This Public User is now **added** to the list of *registered/authorized* Public Users for the selected Organization.

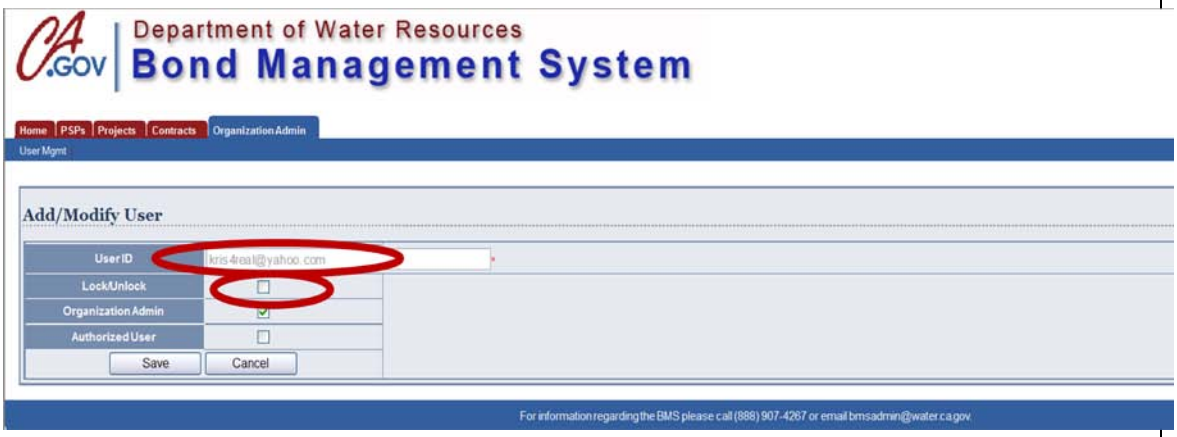
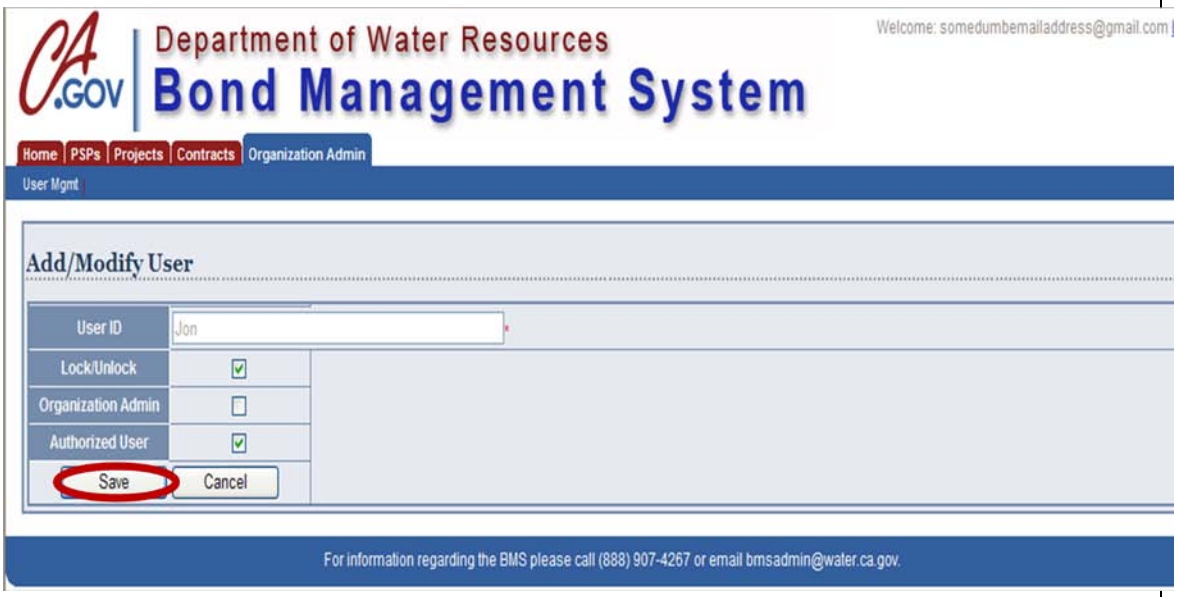
	To REMOVE a *registered/authorized* Public User from an Organization, Select the Organization from the Organization Admin page
105.	
106.	
107.	On the Organization Admin page for a specific Organization, click on the *Delete* icon under the **'Action'** column for a particular Public User who is *registered* with this Organization.
108.	
109.	This will bring up a message window asking for confirmation of the Public User's removal from the Organization. Click *'Ok'* on this message window to proceed.

110.	
111.	This Public User is no longer registered with the Organization and the user's name is now **removed** from the list of *registered/authorized* Public Users for the selected Organization.
112.	

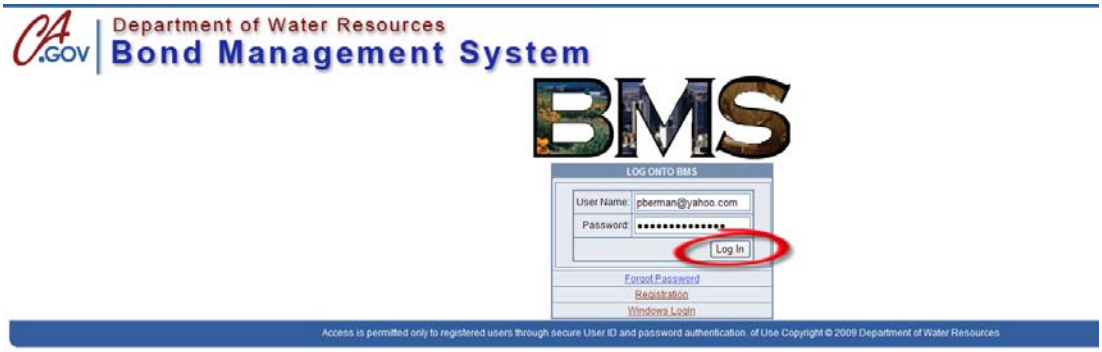
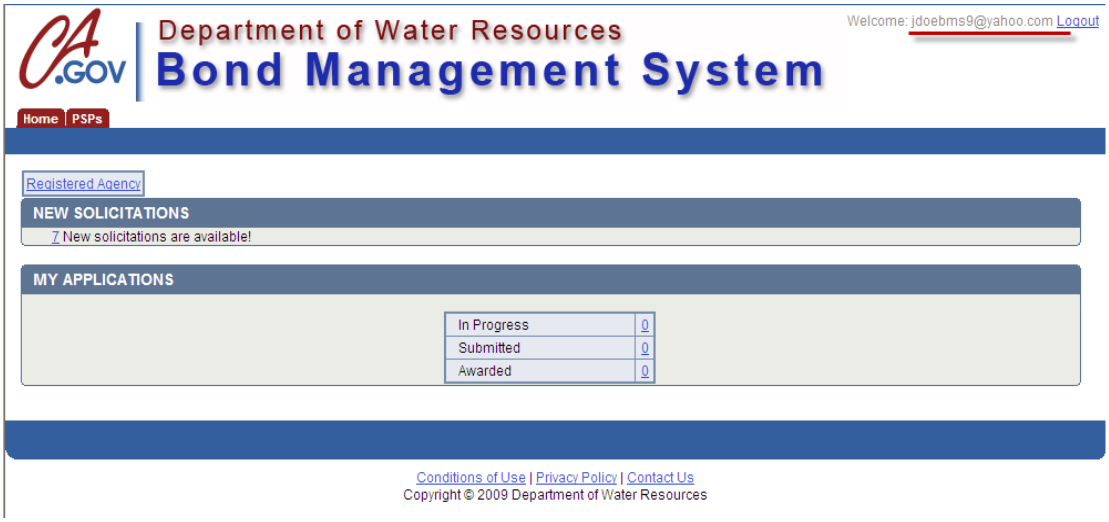
E.	**Procedure to 'unlock' a Public User's BMS account**
	If a Public User *('jdoebms9@yahoo.com'* in this example) has *three* unsuccessful login attempts while trying to log into BMS, the user's account is *locked* as a security measure. This account can be *unlocked by the Organization Administrator of an Organization with which the Public User is registered*.
113.	Click on the ***'User Mgmt'*** sub-menu item displayed under '**Organization Admin'** on the **Home** page. This will bring up the **'Organization Admin'** page.
114.	

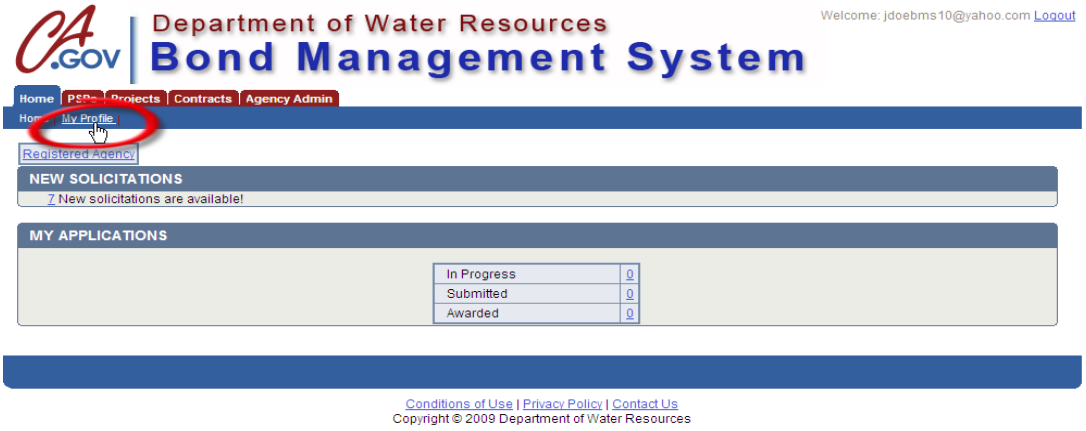
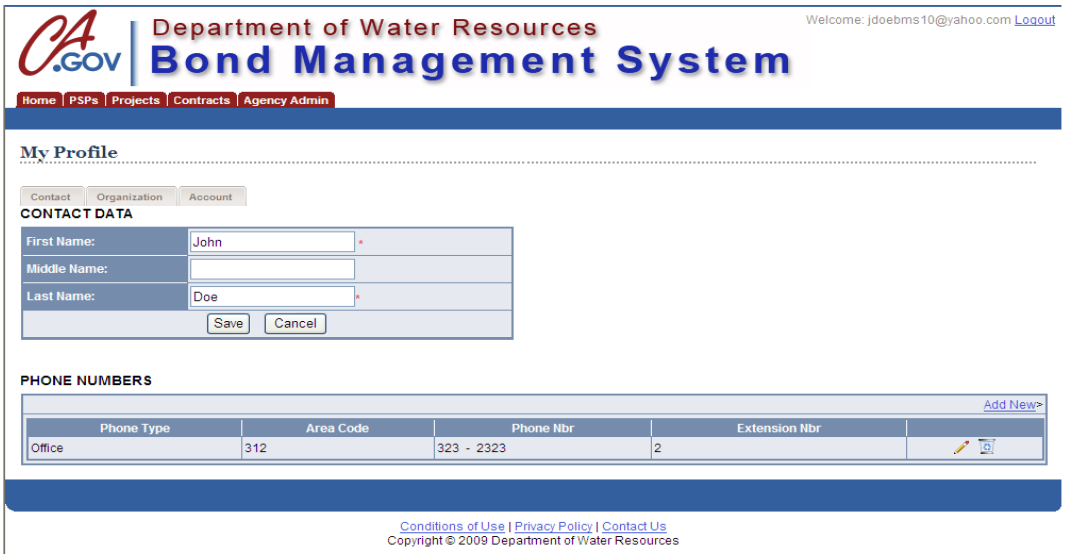
115.	
116.	On the **'Organization Admin'** page – ▪ select the Organization with which the Public User (whose BMS account is locked) is *registered* ▪ navigate to the '**Add/Modify User'** page for the Public User whose BMS account is *locked* On the '**Add/Modify User'** page the ***Unlock*** checkbox will be ***checked***. This implies that the user account is ***currently locked***.
117.	

118.	
119.	***Un-check*** the ***Unlock*** checkbox on the '**Add/Modify User**' page. Then click on the **Save** button.

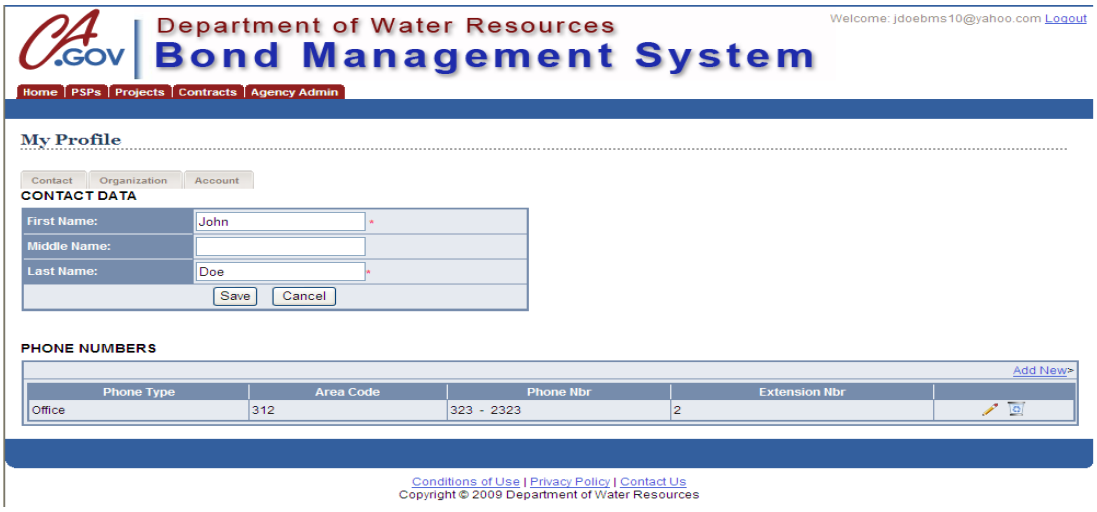
120.	 

121.	This Public User's account has now been ***unlocked***. The user will now be able to log into BMS using his Username and Password.

122.	 Department of Water Resources Bond Management System BMS LOG ONTO BMS User Name: pberman@yahoo.com Password: Log In Forgot Password Registration Windows Login Access is permitted only to registered users through secure User ID and password authentication. of Use Copyright © 2009 Department of Water Resources  Department of Water Resources Bond Management System Welcome: jdoebms9@yahoo.com Logout Home PSPs Registered Agency NEW SOLICITATIONS 7 New solicitations are available! MY APPLICATIONS In Progress 0 Submitted 0 Awarded 0 Conditions of Use | Privacy Policy | Contact Us Copyright © 2009 Department of Water Resources

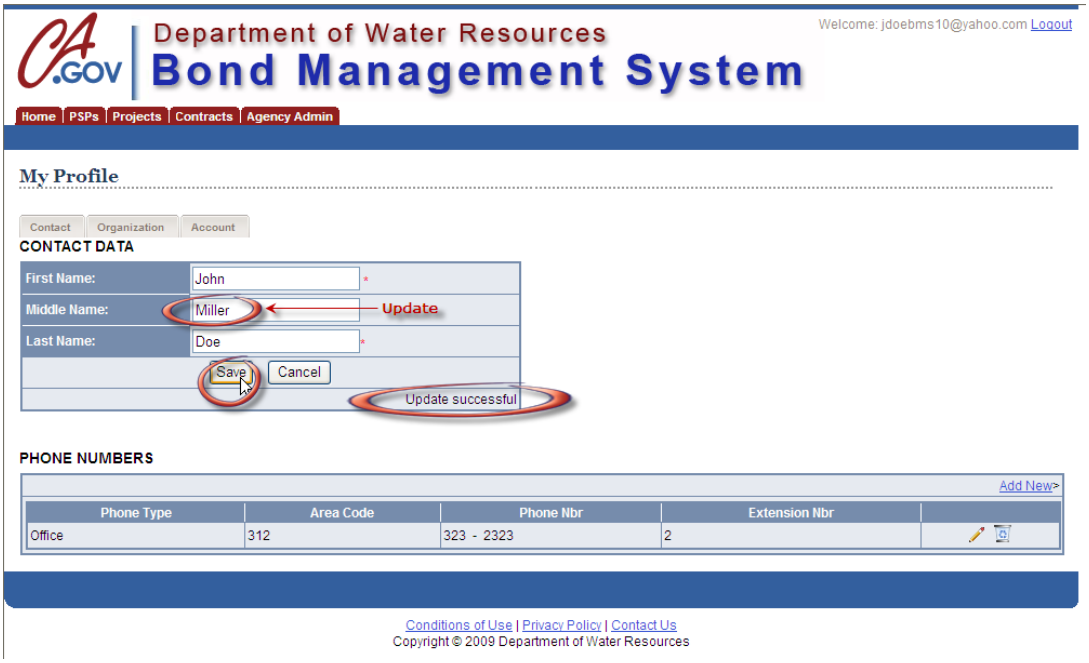
F.	**Procedure to view and edit account Profile Information**
123.	On the Home page of the Organization Administrator, click on the **'My Profile'** sub-menu item displayed under the **'Home'** menu item.
124.	
125.	The **'My Profile' page** will be displayed.
126.	
127.	Edit one or more details on the **Contact** tab (*Contact Data* or *Phone Numbers*) of the **'My Profile'** page. After making changes, click on the *Save* button in order to save the changes/updates. The changes will be confirmed with an *'Update successful'* message displayed on the **'My Profile'** page.

'My Profile' page (Contact tab) before updating the Profile information



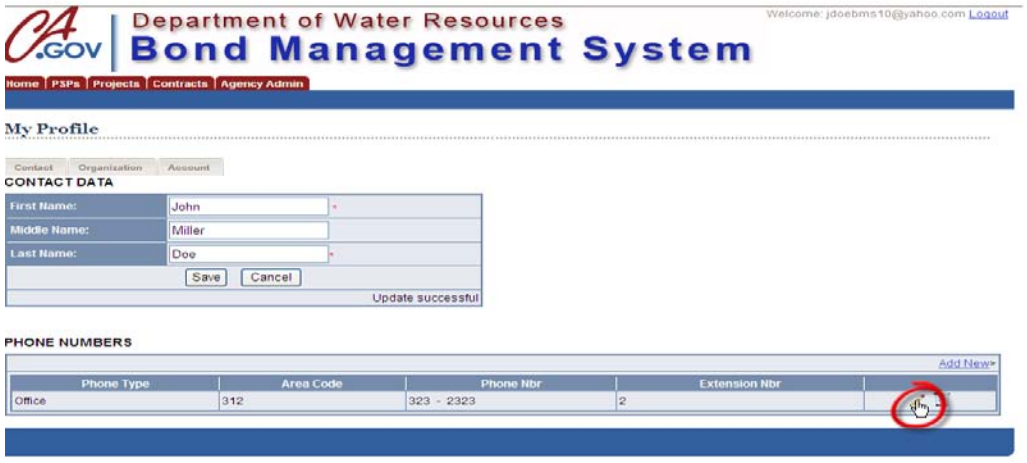
Updating 'Contact Data' on the Contact tab

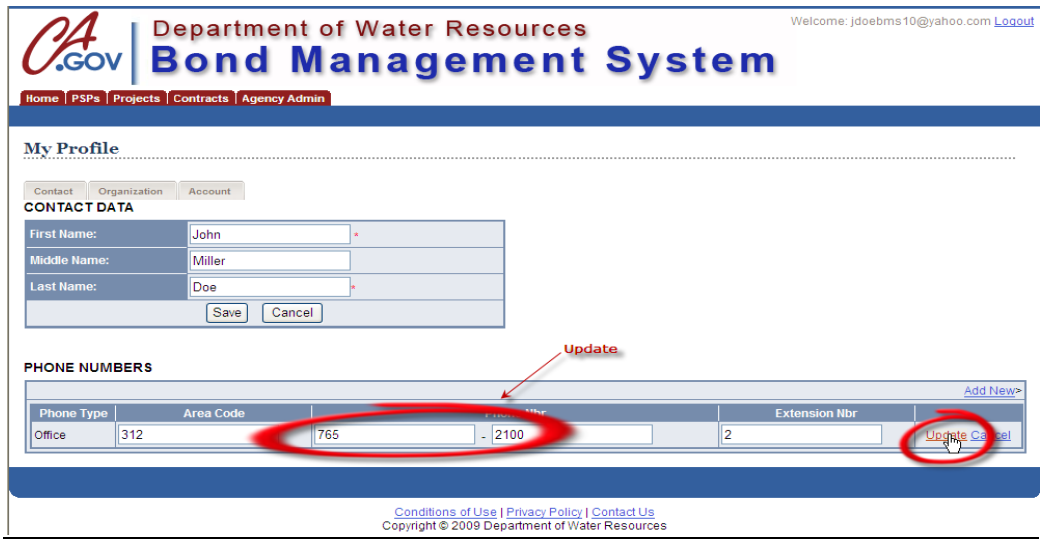
128.

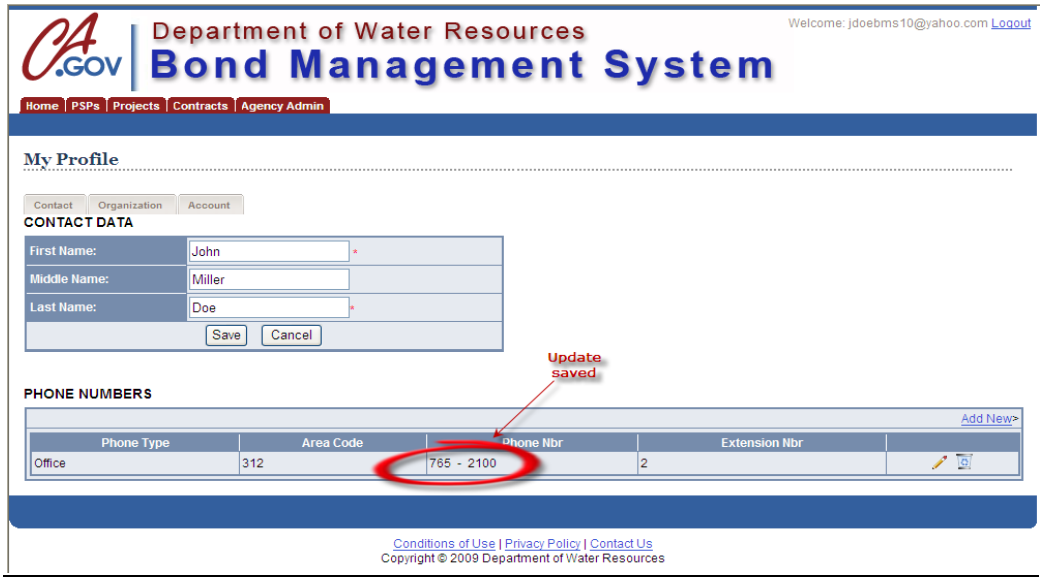


129.

Updating a 'Phone Number' on the Contact tab

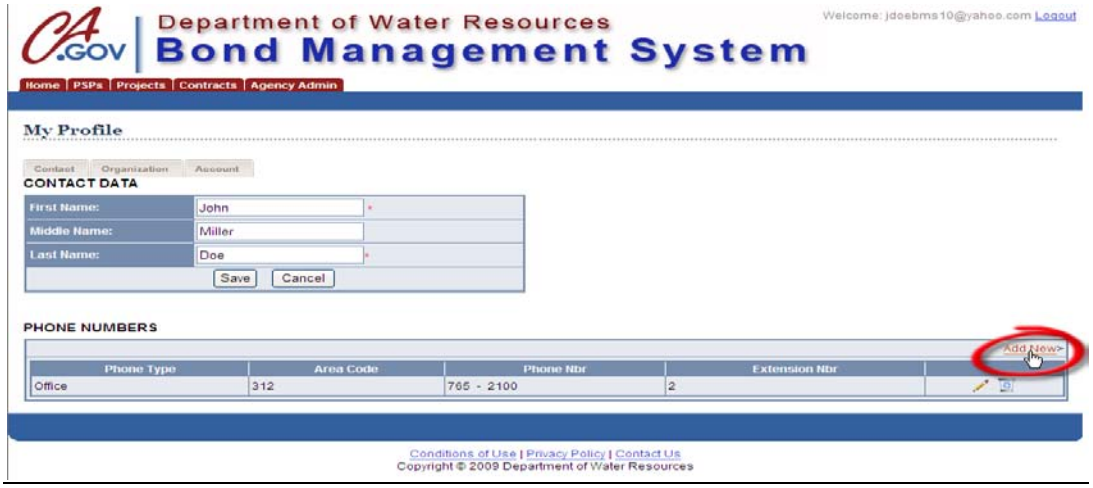


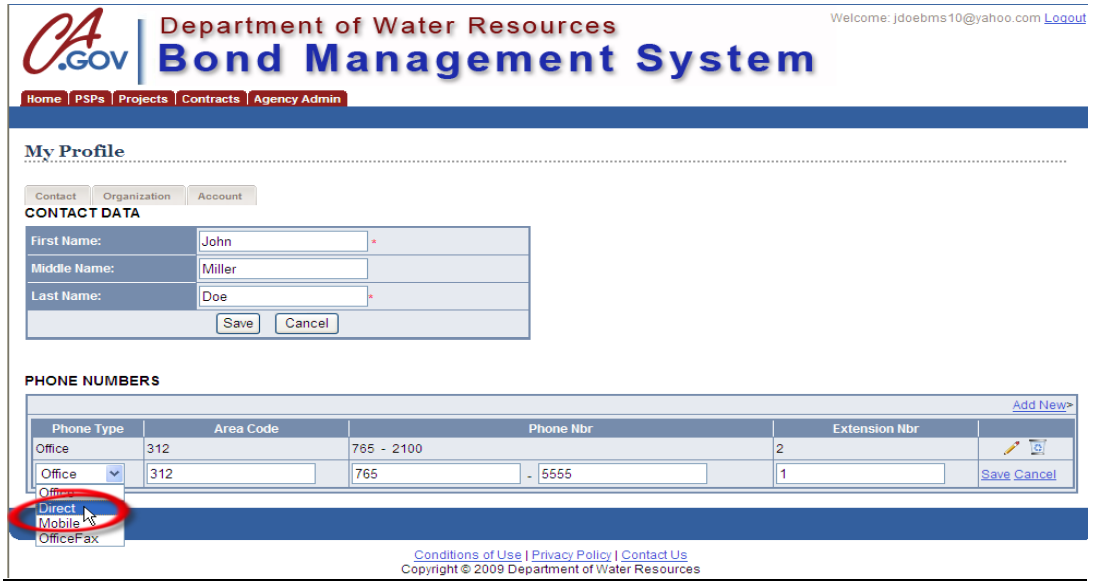


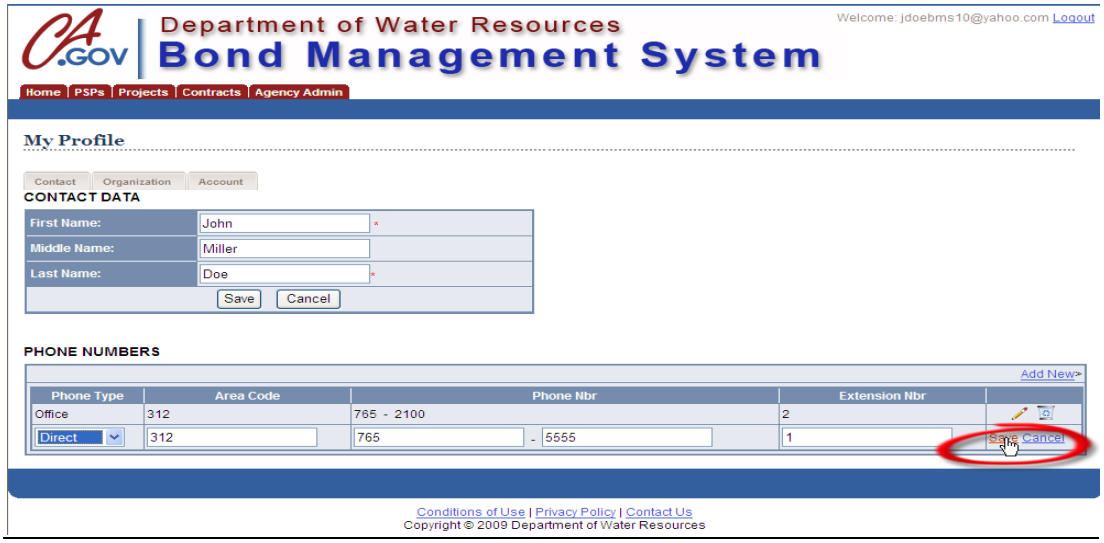


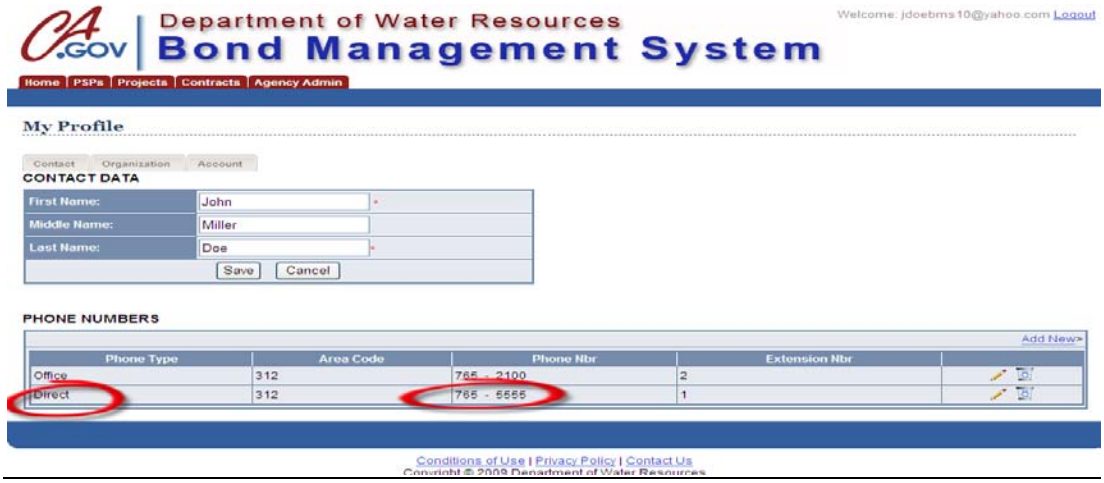
130.

Adding a 'Phone Number' on the Contact tab



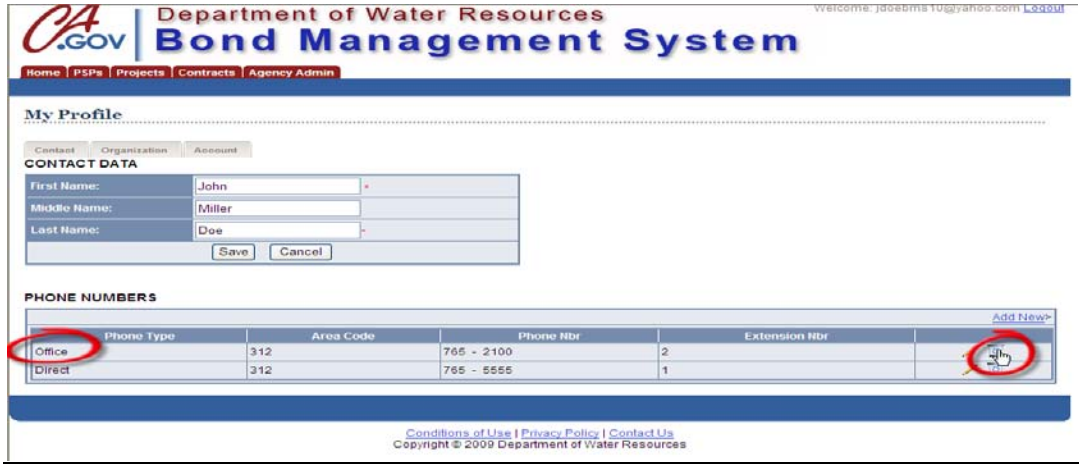


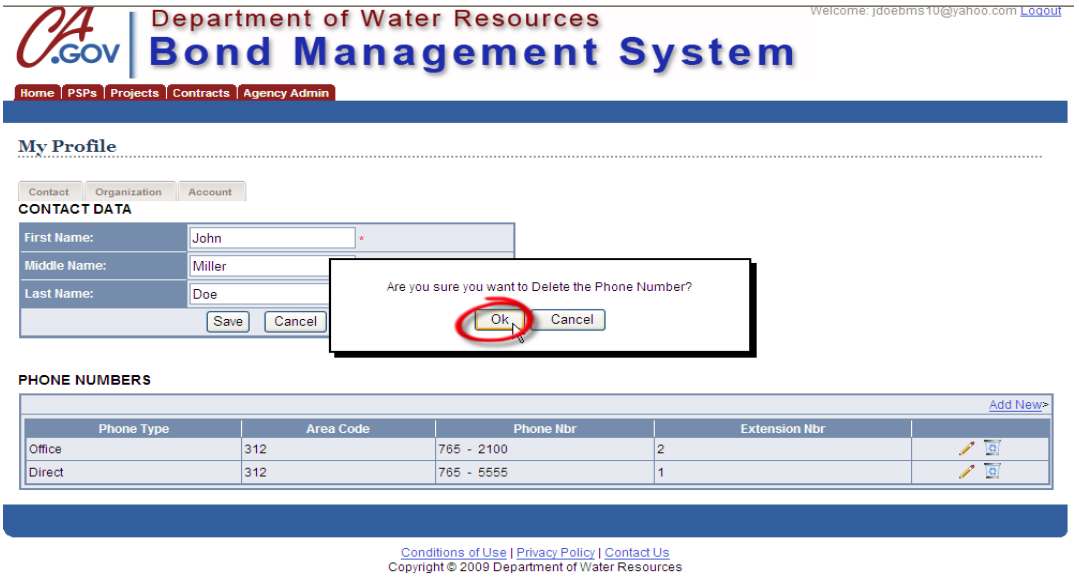


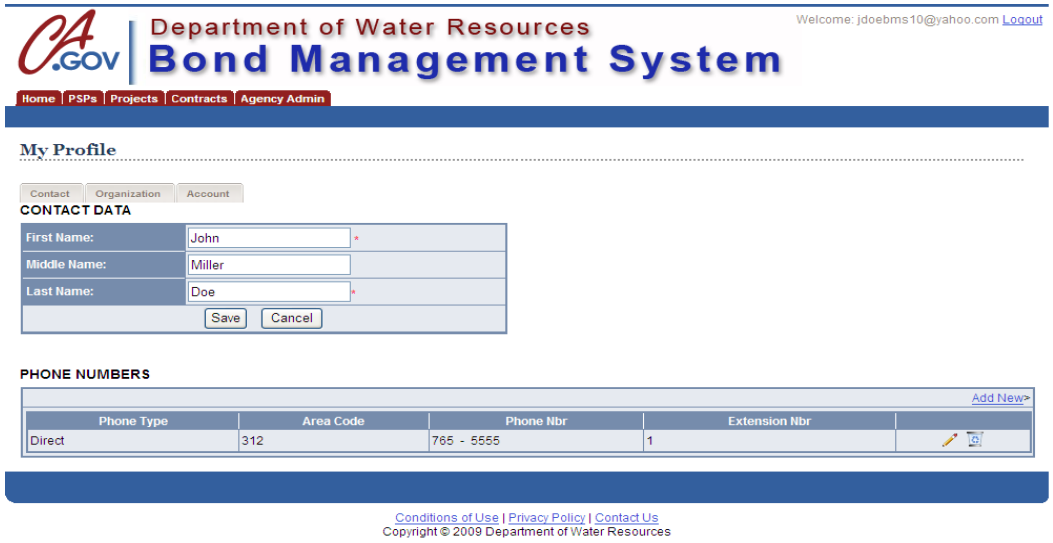


Deleting a 'Phone Number' on the Contact tab

131.

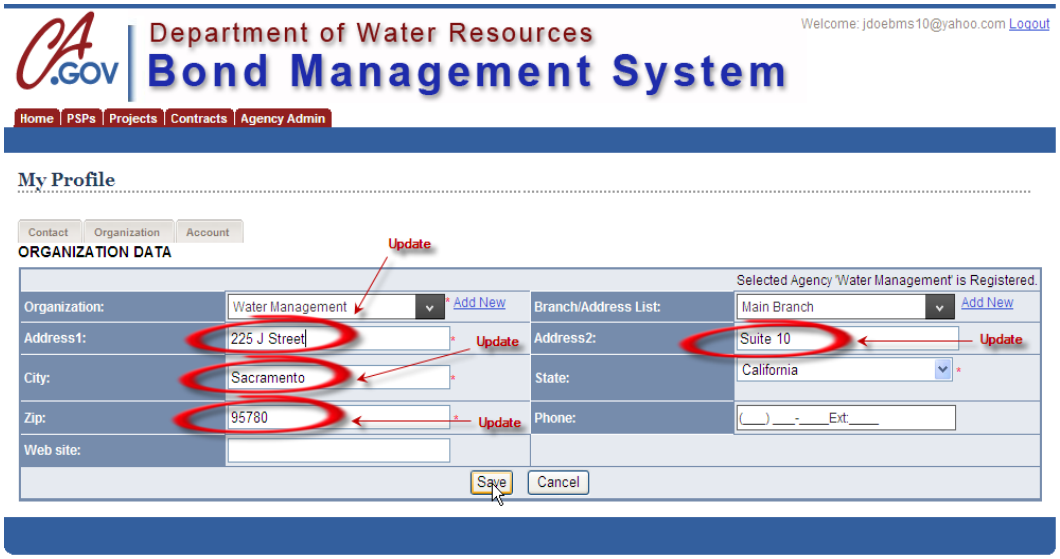


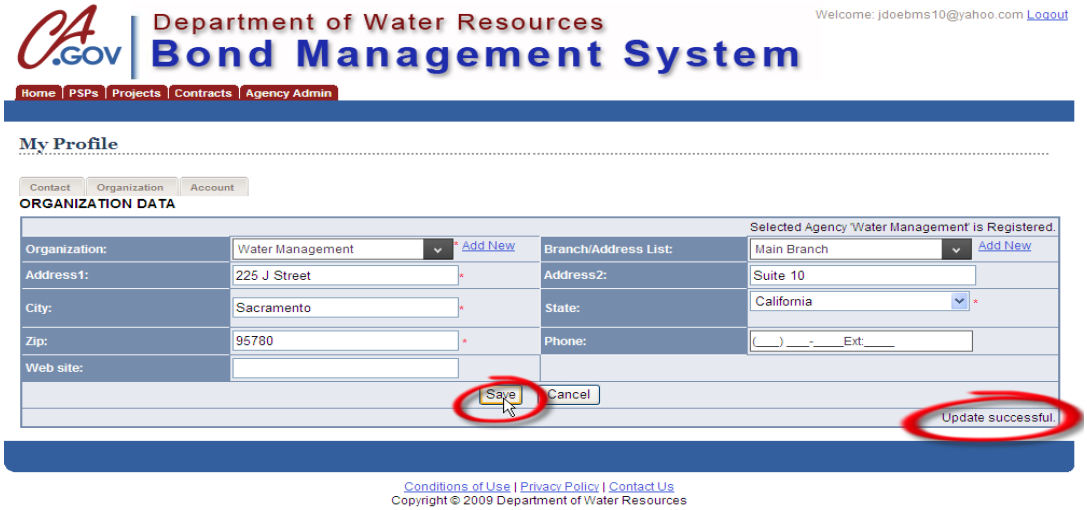


132.	
133.	Edit one or more details on the **Organization** tab of the **'My Profile'** page. After making changes, click on the **Save** button in order to save the changes/updates. The changes will be confirmed with an *'Update successful'* message displayed on the **My Profile** page.
134.	**'My Profile' page (Organization tab) before updating the Profile**

135.

Updating information on the Organization tab



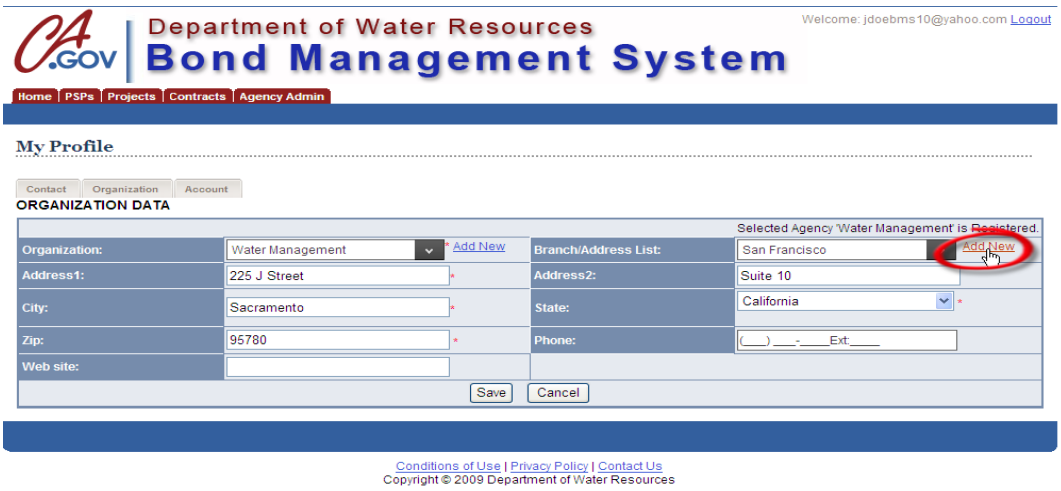


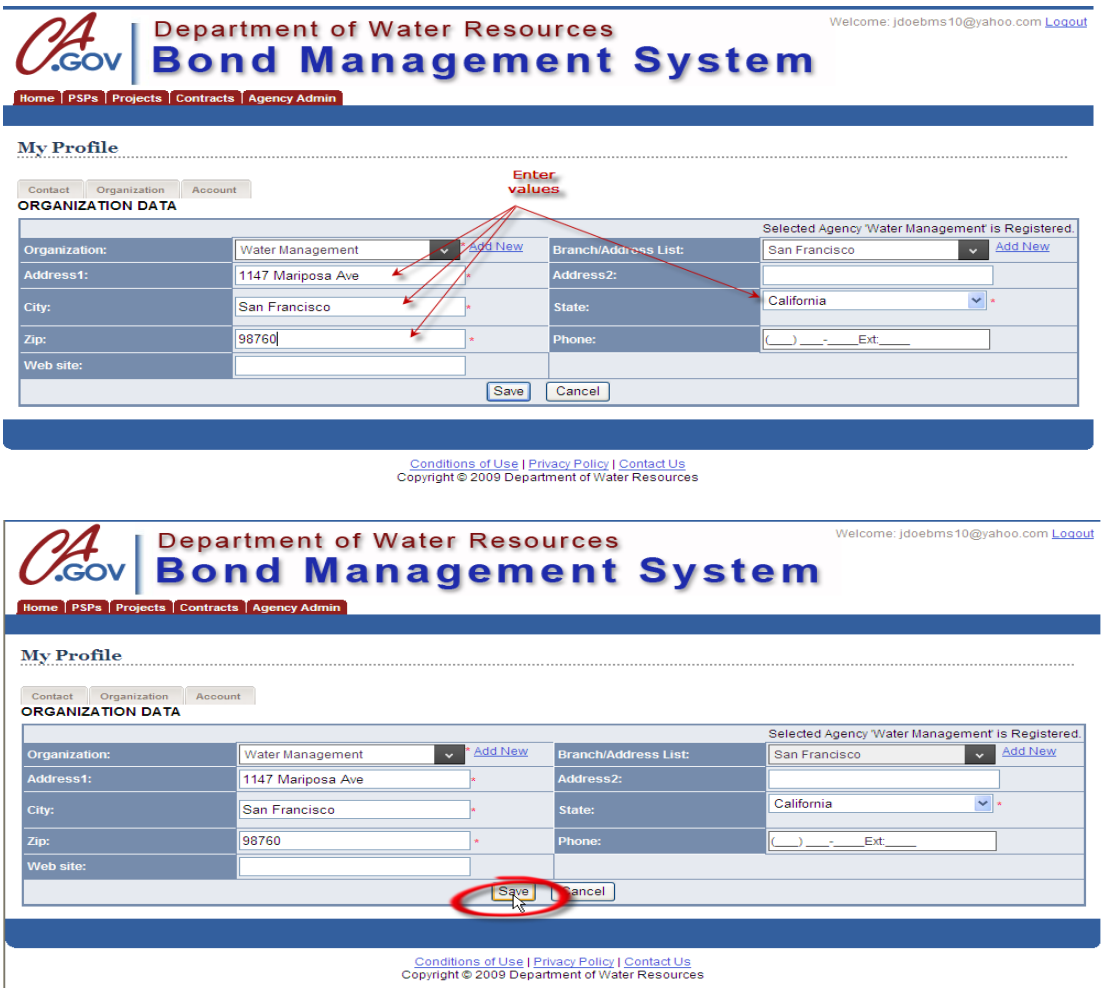
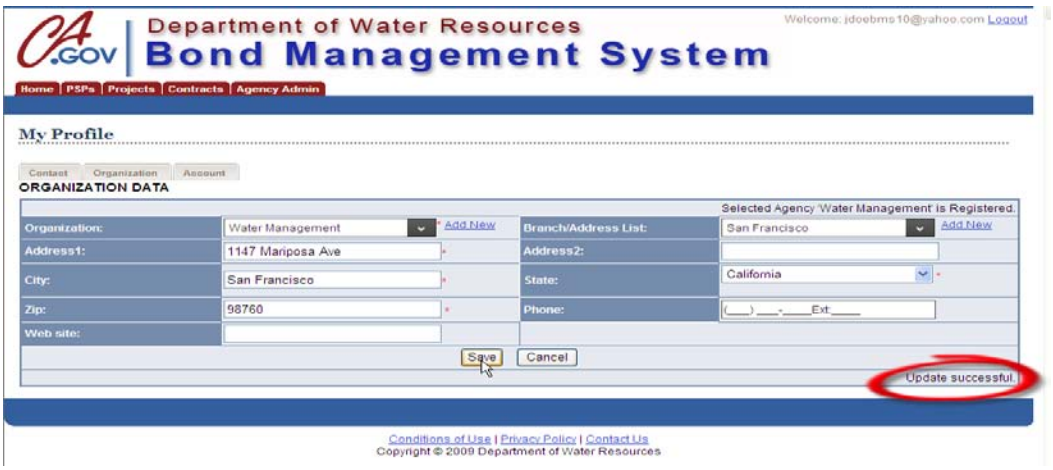
136.

Adding a *new* Branch for an existing Organization

In order to add a *new* Branch (or subdivision) for an existing Organization/Organization –

- first type in the name of the *new* Branch that is to be added in the '*Branch/Address List'* field
- then click on the ***Add New*** hyperlink next to the *'Branch/Address List'* field

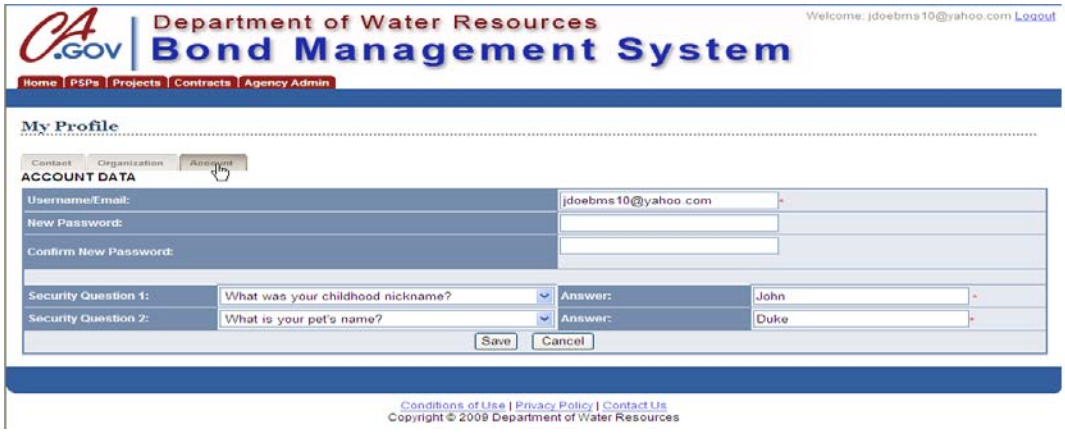
137.	
138.	This will clear out the *Address*, *City*, *Zip*, *Phone* and *Web site* fields.
139.	
140.	Enter values for the *Address*, *City*, *State*, *Zip*, *Phone* (optional) and *Web site* (optional) fields for the *new* Branch. Then click on the *Save* button.

141.	
142.	An *'Update successful'* message will be displayed on the Organization tab.
143.	
144.	It should be noted that the Organization Administrator is now associated with this *new* Branch of the Organization and NOT the original Branch.

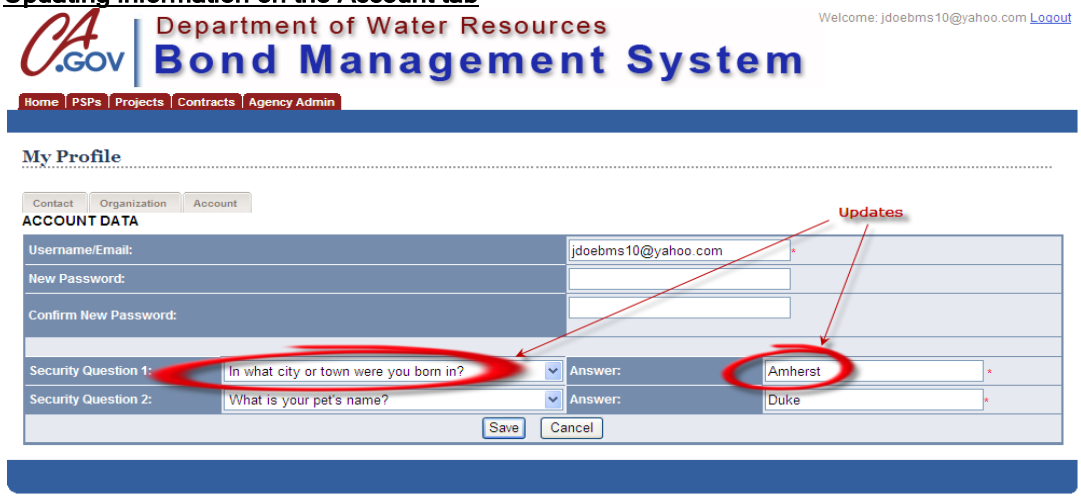
145.	Edit one or more details on the **Account** tab of the **'My Profile'** page. After making changes, click on the **Save** button in order to save the changes/updates. The changes will be confirmed with an *'Update successful'* message displayed on the **My Profile** page.

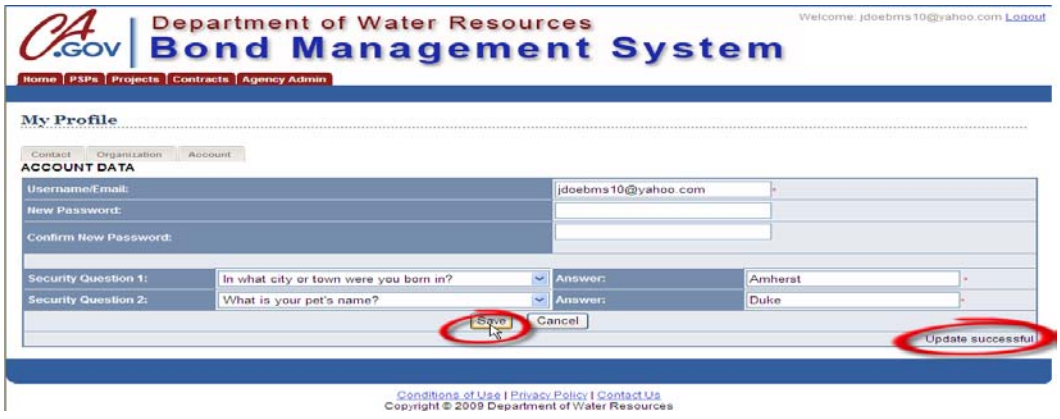
146.

My Profile page (Account tab) before updating the Profile



Updating information on the Account tab



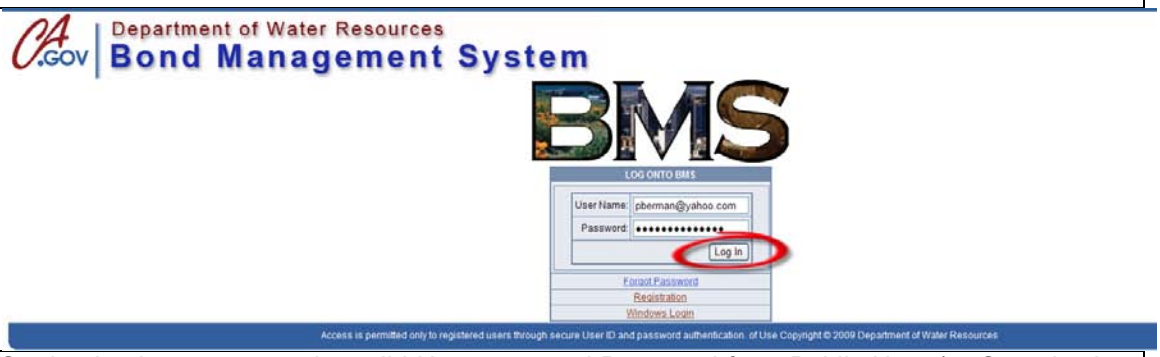


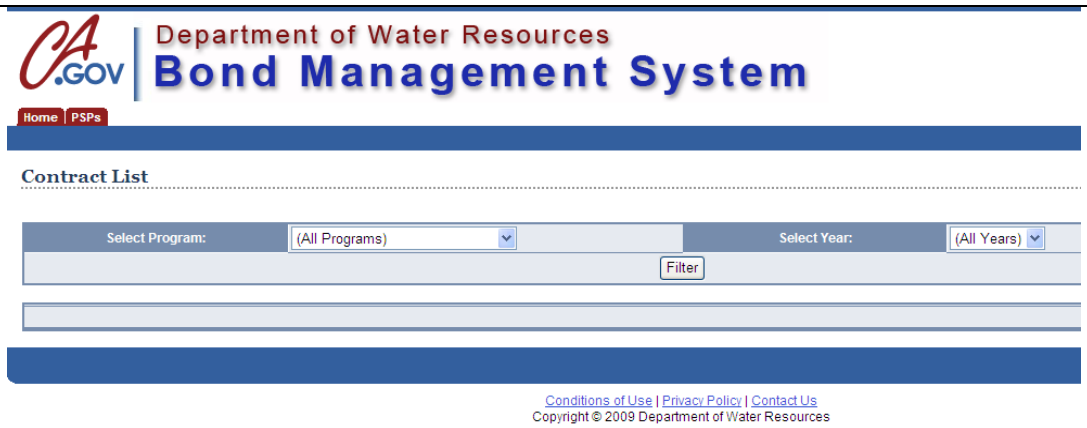
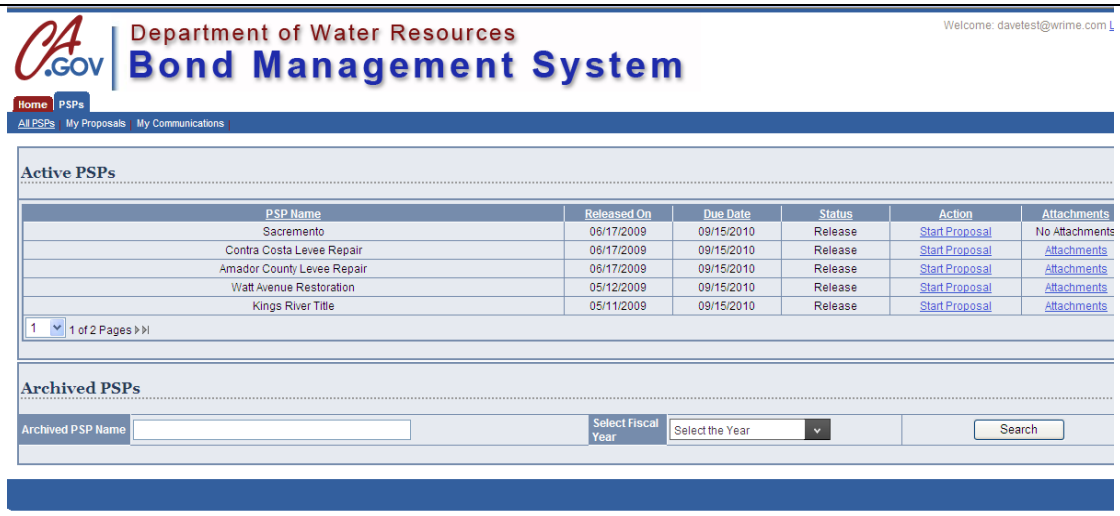
2.4 Prepare Proposal

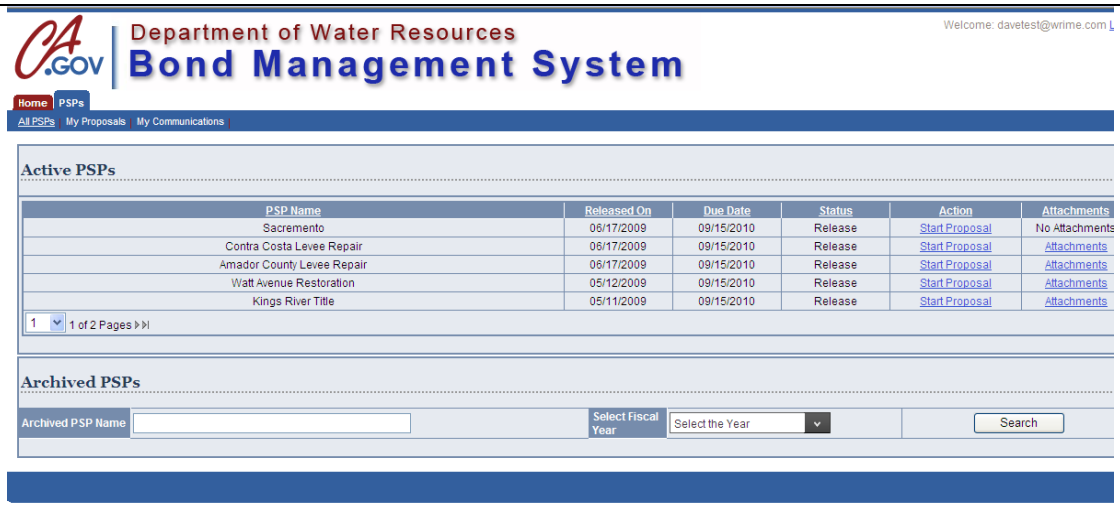
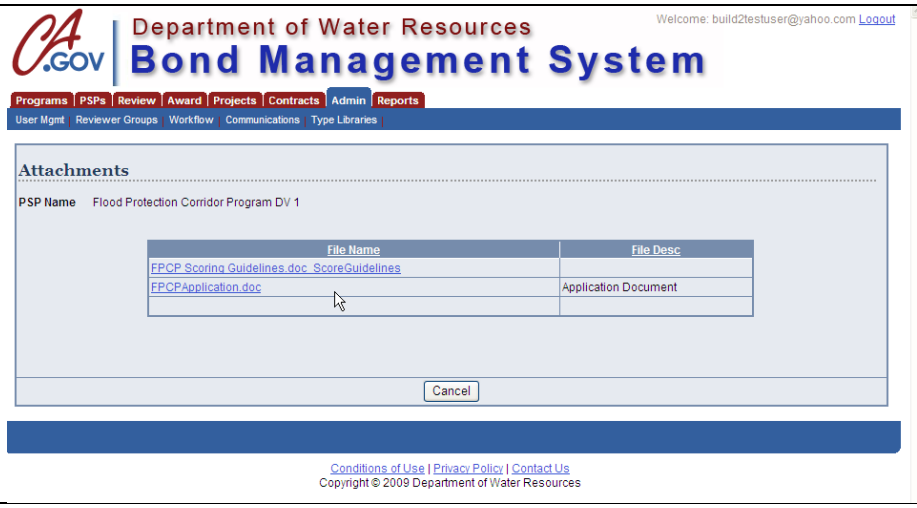
The ***Prepare Proposal*** module allows a *Public User/Organization Administrator* to perform the following operations in BMS:

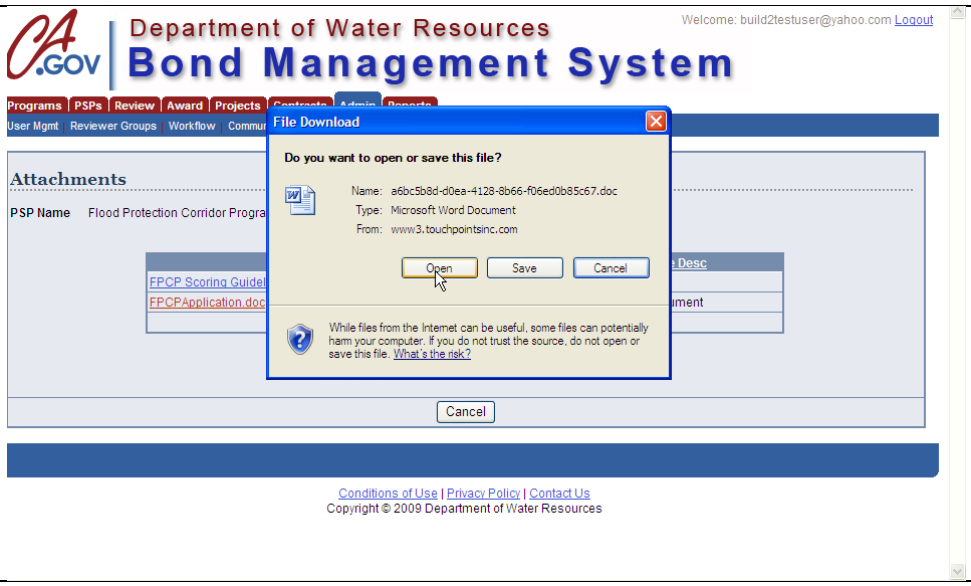
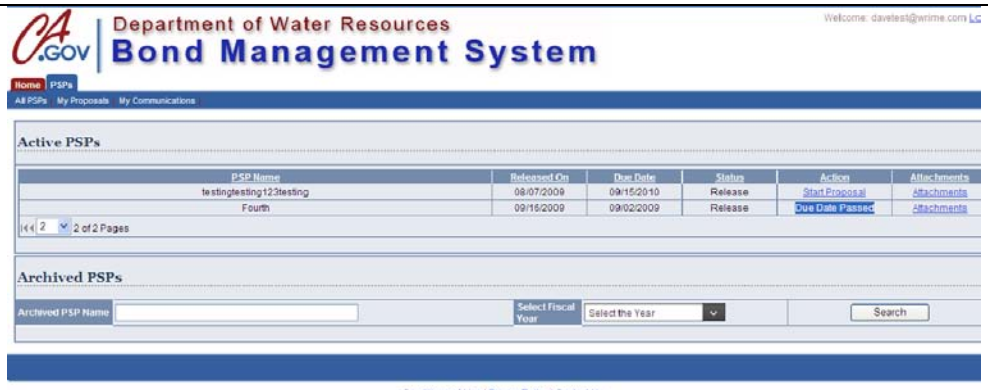
- Prepare a new *Proposal* in response to a *PSP*

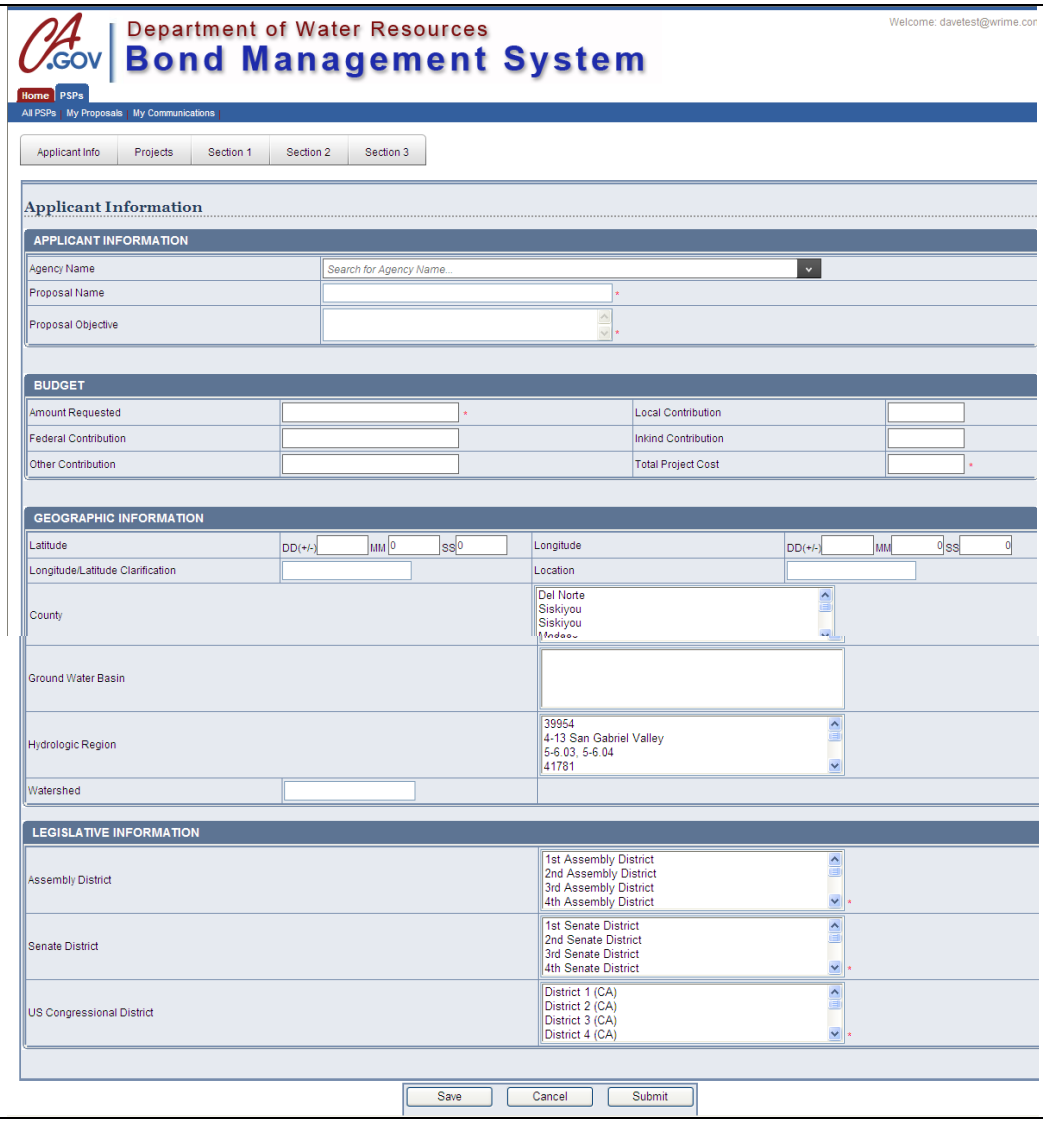
The procedure and steps associated with each of the (above) operations in the ***Prepare Proposal*** process are discussed in this section.

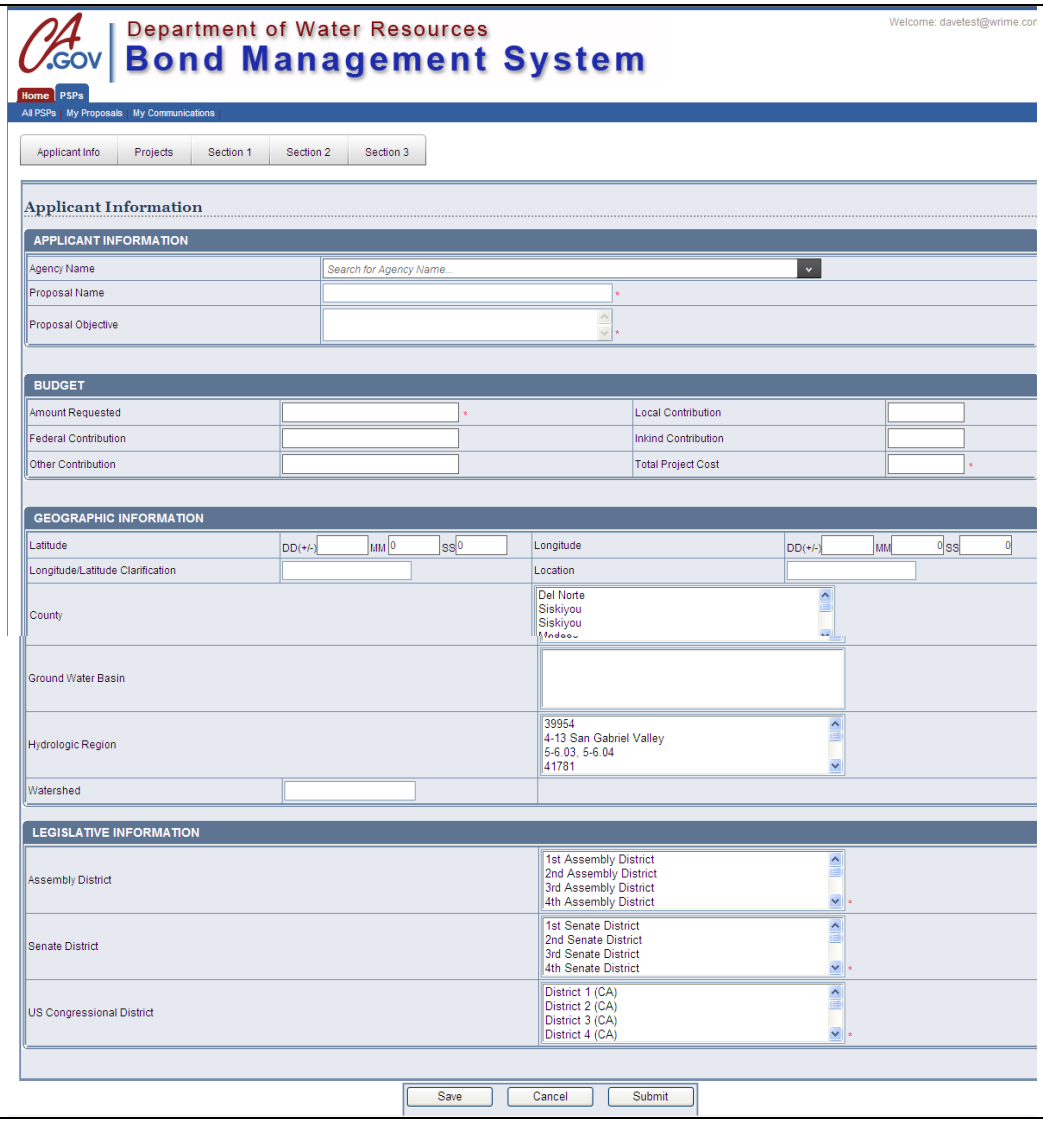
Step #	Process
A.	**Procedure for creating a new *Proposal***
1.	Type in the URL for BMS in Internet Explorer and hit 'Enter'.
2.	The BMS *Login Page* is displayed
3.	
4.	On the *Login* page, enter the valid Username and Password for a Public User (or Organization Administrator) in the *Login* and *Password* fields respectively. Click on the ***Log In*** button.
5.	The Login and Password are validated and the *Home* page for the Public User (or Organization Administrator) is displayed. On the *Home* page the following menu items are visible – ▪ Home ▪ PSPs ▪ Projects *(visible only for the Organization Administrator)* ▪ Contracts *(visible only for the Organization Administrator)* ▪ Organization Admin *(visible only for the Organization Administrator)*

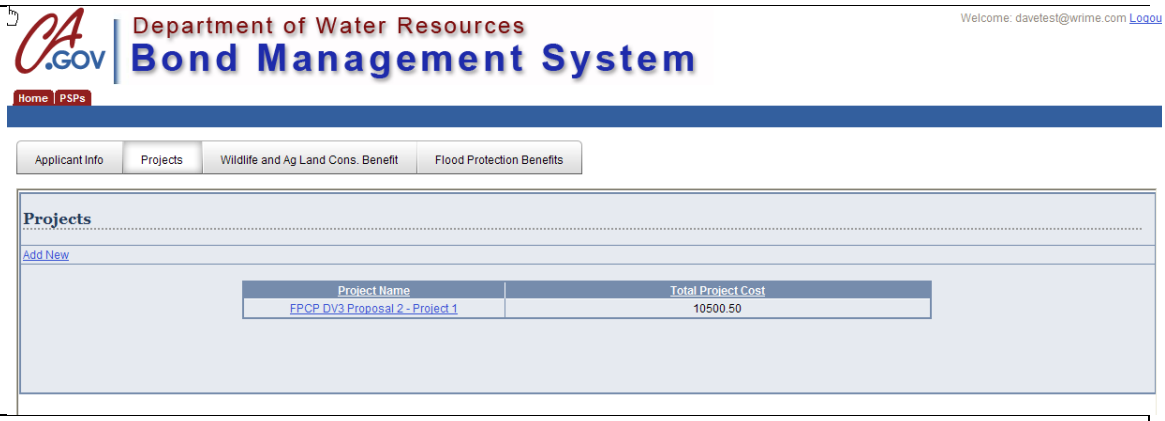
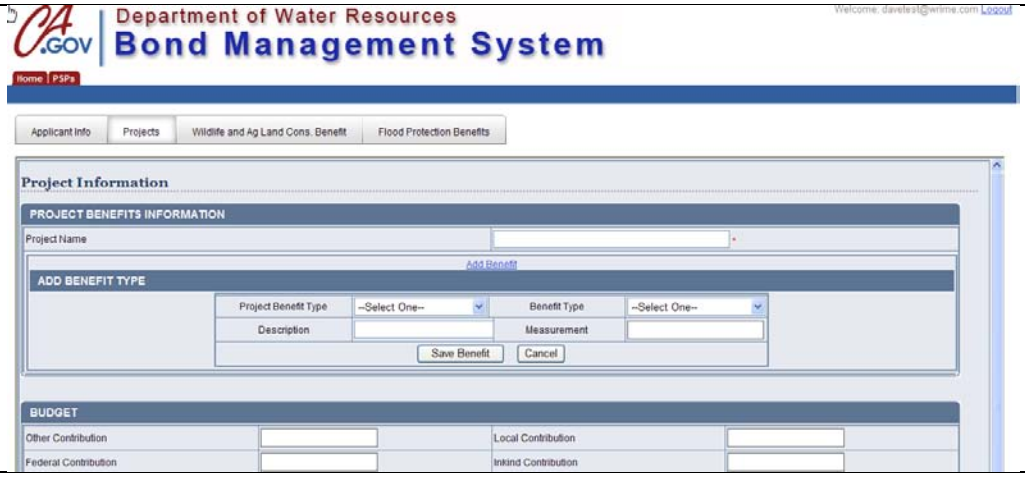
6.	
7.	On the *Home* page, click on the ***PSPs*** menu item.
8.	The following three sub-menu items are visible under '*PSPs*' - ▪ *All PSPs* ▪ *My Proposals* ▪ *My Communications*
9.	
10.	Click on the ***'All PSPs'*** sub-menu item under ***'PSPs'***.
11.	The *All PSPs* page is displayed listing all the *Active* and *Archived* PSPs

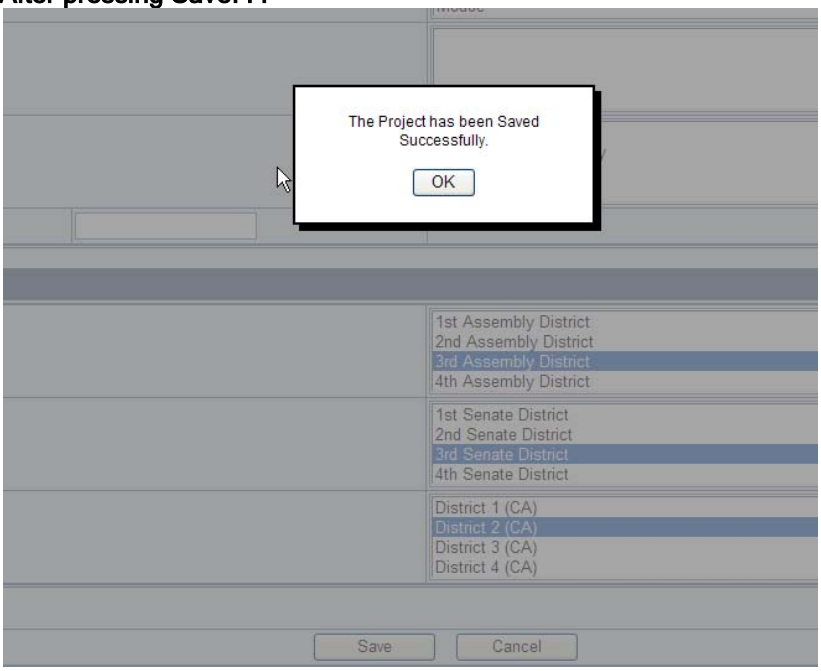
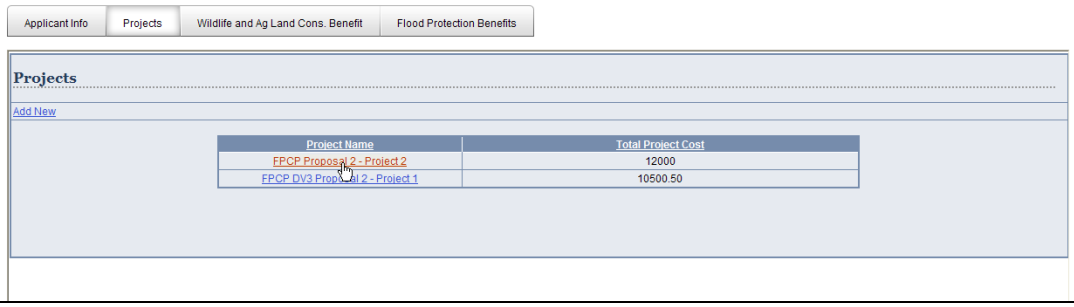
12.	
13.	Click on the ***Attachments*** hyperlink associated with this PSP.
14.	A list of attachments/documents associated with the *PSP* is displayed
15.	
16.	Click on each attachment/document in the list of attachments.
17.	The attachment/document is available to open or save locally.

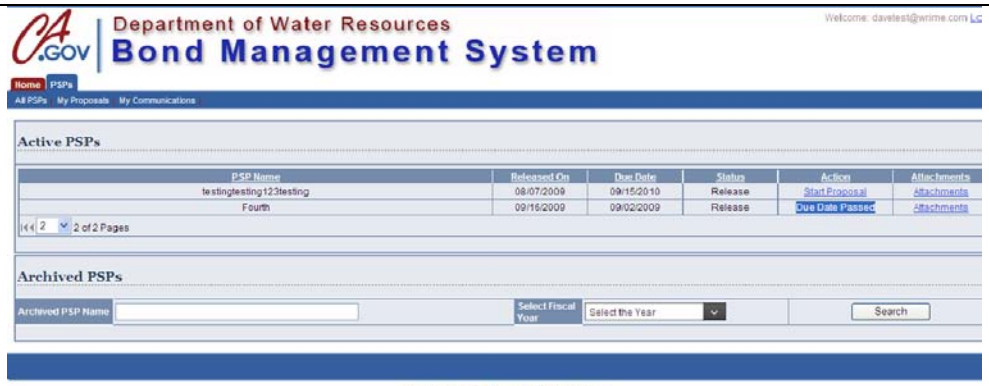
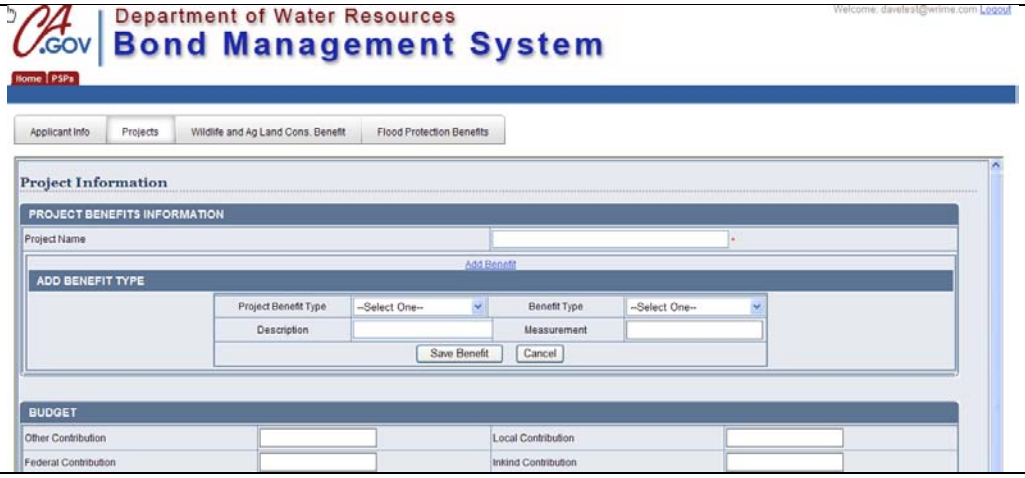
18.	
19.	Identify an *Active* PSP whose Proposal submission *Due Date* has <u>already passed</u>. Proposals cannot be submitted by a public user after the Due Date has passed.
20.	The entry under the *Action* column for this *Active* PSP indicates *'Due Date Passed'* if logged in as a public user
21.	
22.	Click on the '*Start Proposal'* link displayed under the ***Action*** column for an *Active* PSP whose Proposal submission *Due Date* has <u>NOT yet passed</u>.
23.	The PSP web-form is displayed correctly Each tab/page of the web-form corresponds to one section of the Proposal and all the questions associated with this section are displayed in the corresponding tab on the web-form.

24.	
25.	Click on the *Applicant Info* tab on the PSP web-form.
26.	The following *sub-sections* are displayed on the *Applicant Info.* tab – ▪ *Applicant Information* ✓ Organization Name ✓ Proposal Name ✓ Proposal Objective ▪ *Budget* ▪ *Geographic Information* ▪ *Legislative Information*

27.	
B.	**<u>Adding a new *Project* to an existing *Proposal*</u>**
28.	Click on the *Project* tab to add a new *Project* to the *Proposal*.
29.	The Project tab is displayed. The grid view of existing Projects in this Proposal is displayed with an *Add New* hyperlink to add a new Project.

30.	
31.	Click on the *Project Name* of an existing Project or click on the *Add New* hyperlink to open the *Project Information* Page.
32.	
33.	Fill out all required fields and click the ***Save*** button to save this project. Click cancel to discard these changes.
34.	The user is returned to the *Projects* list. If the Project was saved, it appears in the grid view on the *Projects* page. If Cancel was chosen, the *Projects* page does not contain the new project.

35.	**After pressing Save. . .**  **Returned to the grid view. . .** 
36.	Complete all the questions on the remaining tabs of the PSP. Be sure to SAVE before switching tabs.

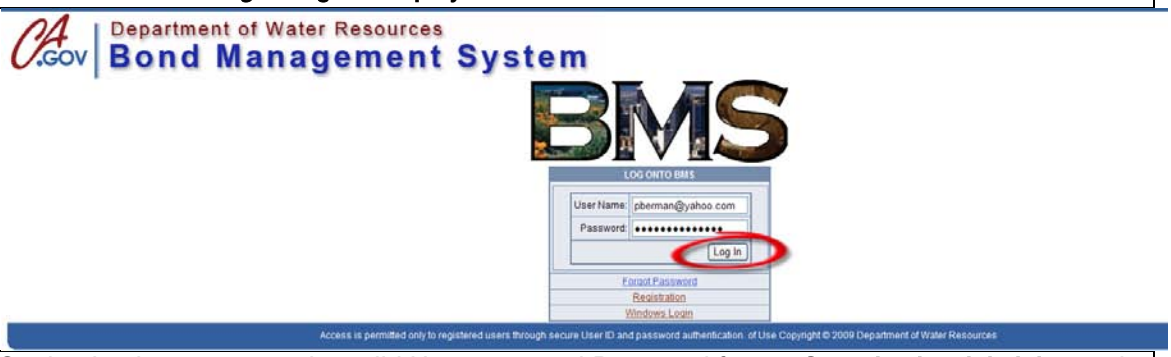
C.	**Procedure for filling out the sections of a *Proposal***
37.	On the *Home* page, click on the ***PSPs*** menu item.
38.	Click on the ***'All PSPs'*** sub-menu item under ***'PSPs'***.
39.	The *All PSPs* page is displayed listing all the *Active* and *Archived* PSPs.
40.	
41.	Click on the '*Start Proposal'* link displayed under the ***Action*** column for an *Active* PSP whose Proposal submission *Due Date* has NOT yet passed.
42.	The PSP web-form is displayed correctly Each tab/page of the web-form corresponds to one section of the Proposal and all the questions associated with this section are displayed in the corresponding tab on the web-form.
43.	
44.	Fill out any sections (other than Applicant Info and Projects detailed earlier in this document) and click *Save* at the bottom of each Section page to save changes or additions.

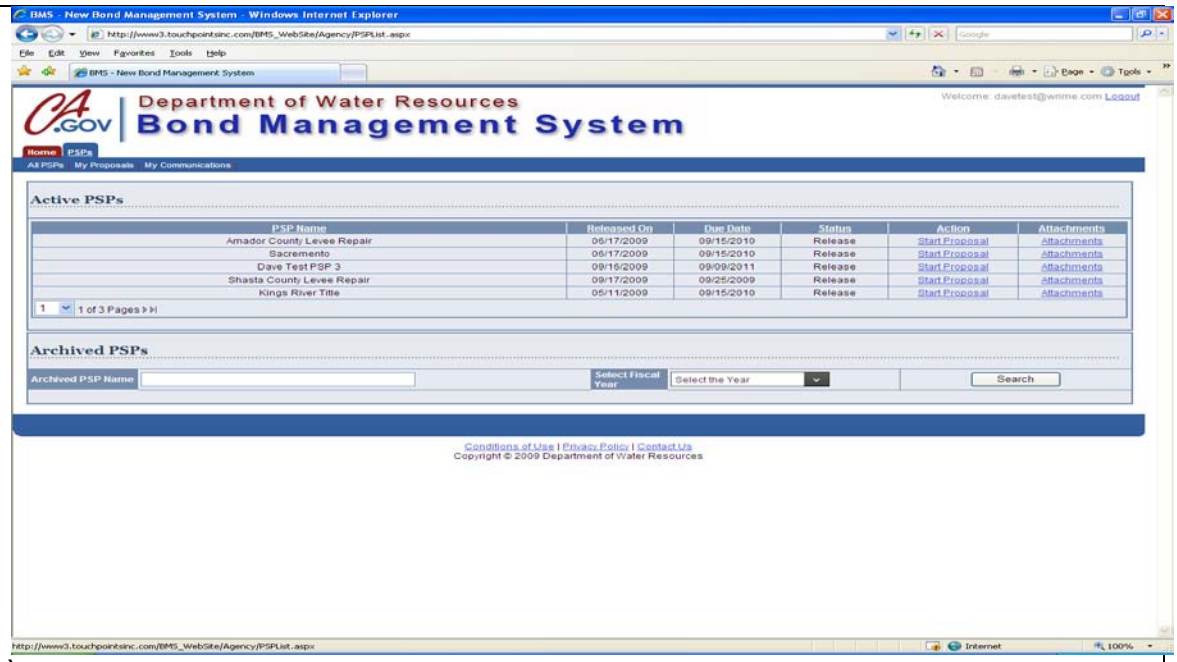
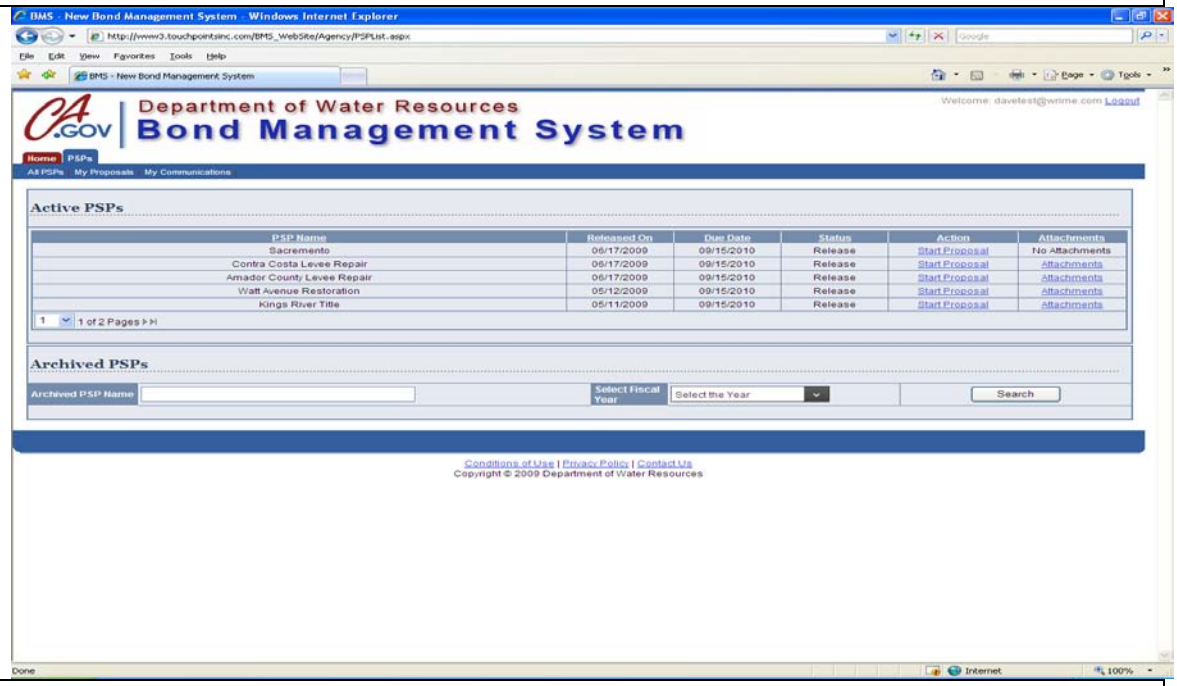
2.5 Submit Proposal

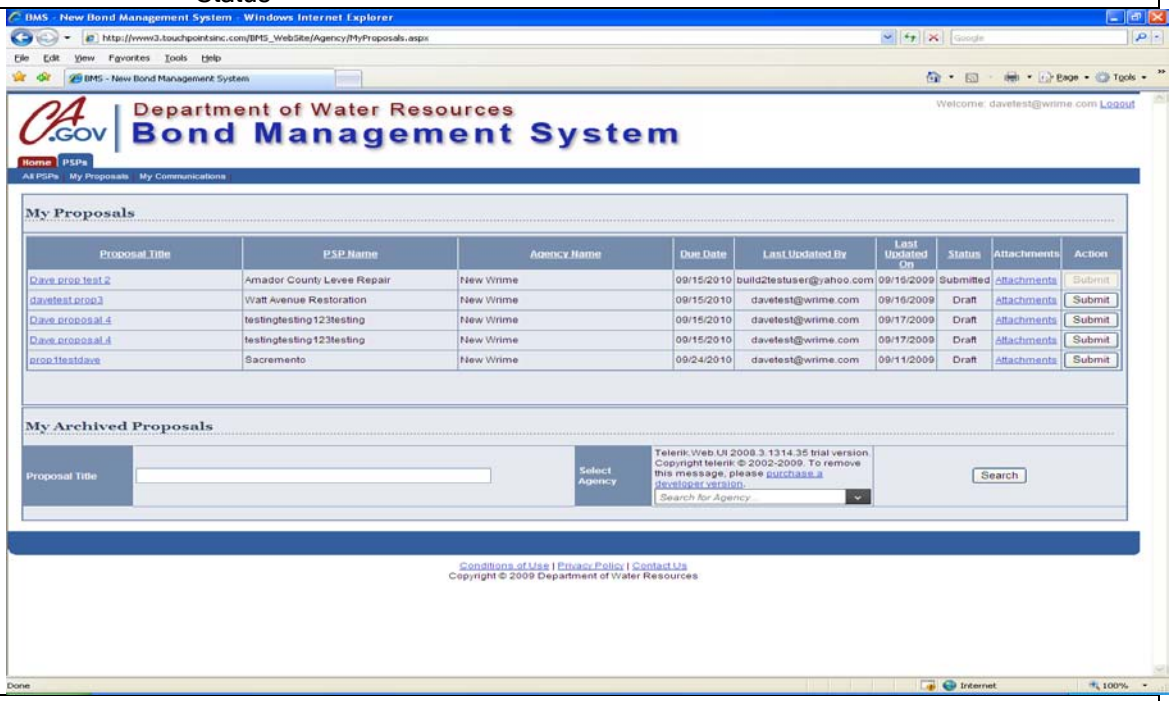
The ***Submit Proposal*** module allows an *Organization Administrator* to perform the following operations in BMS:

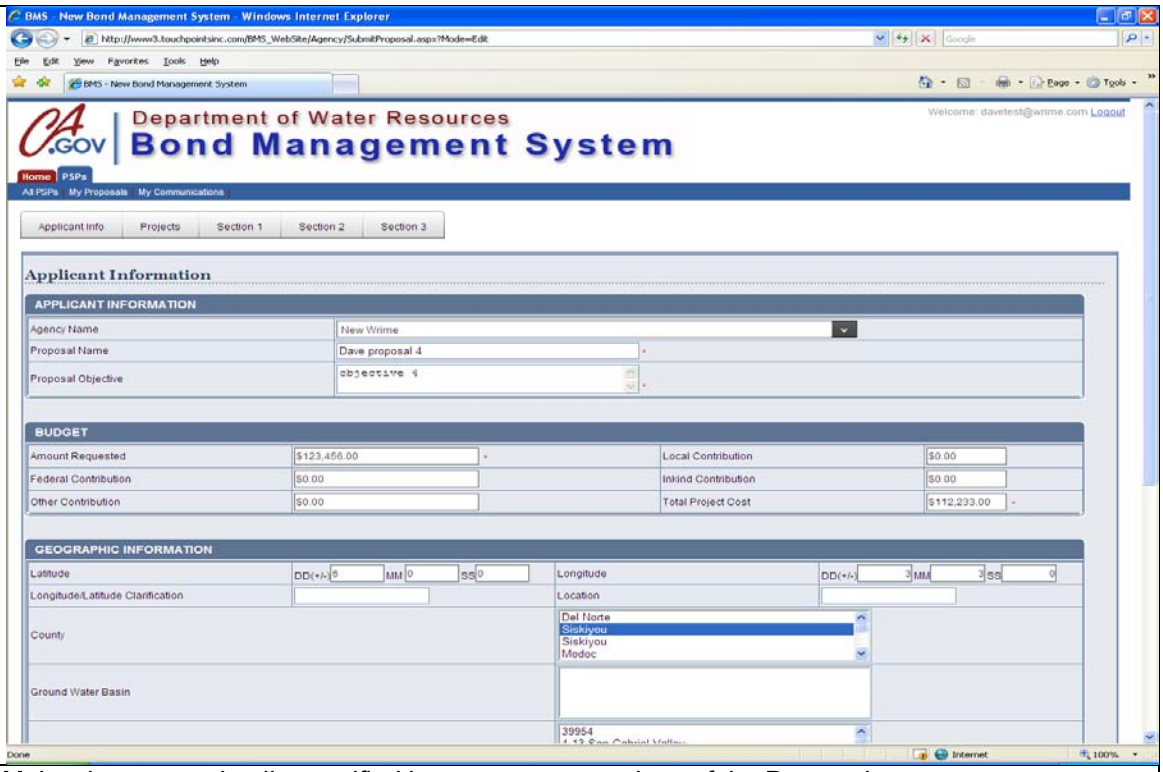
- Submit a *Proposal* in response to a *PSP*

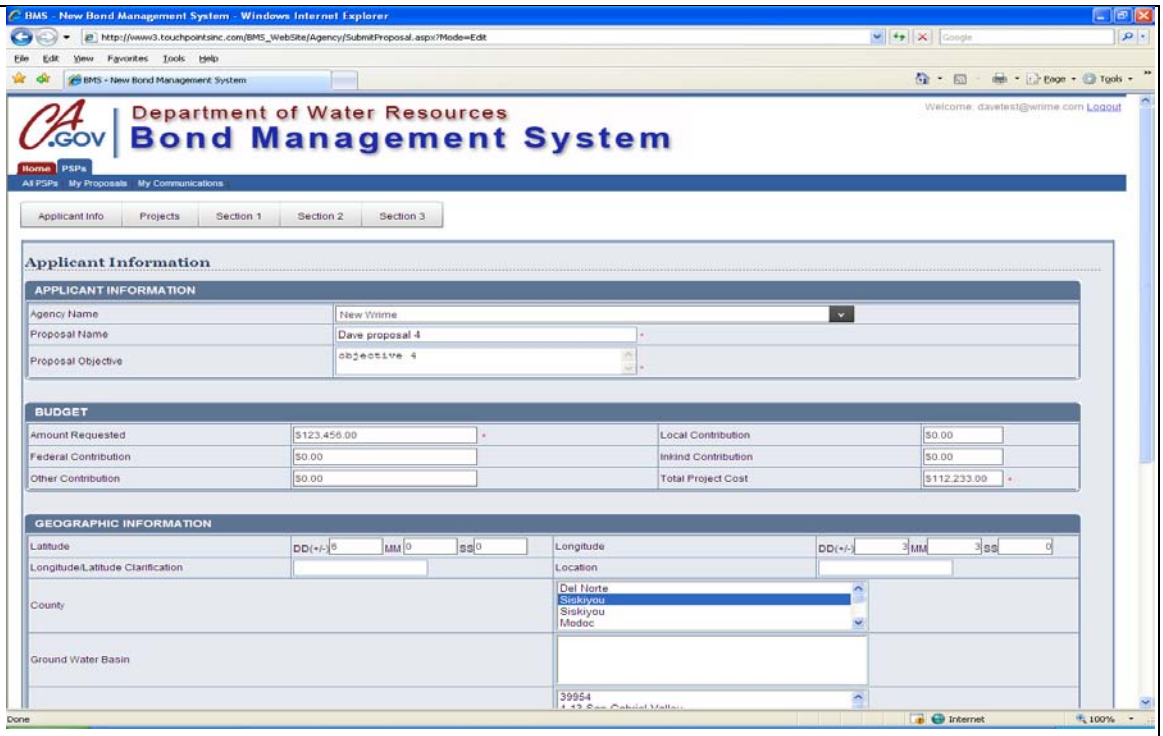
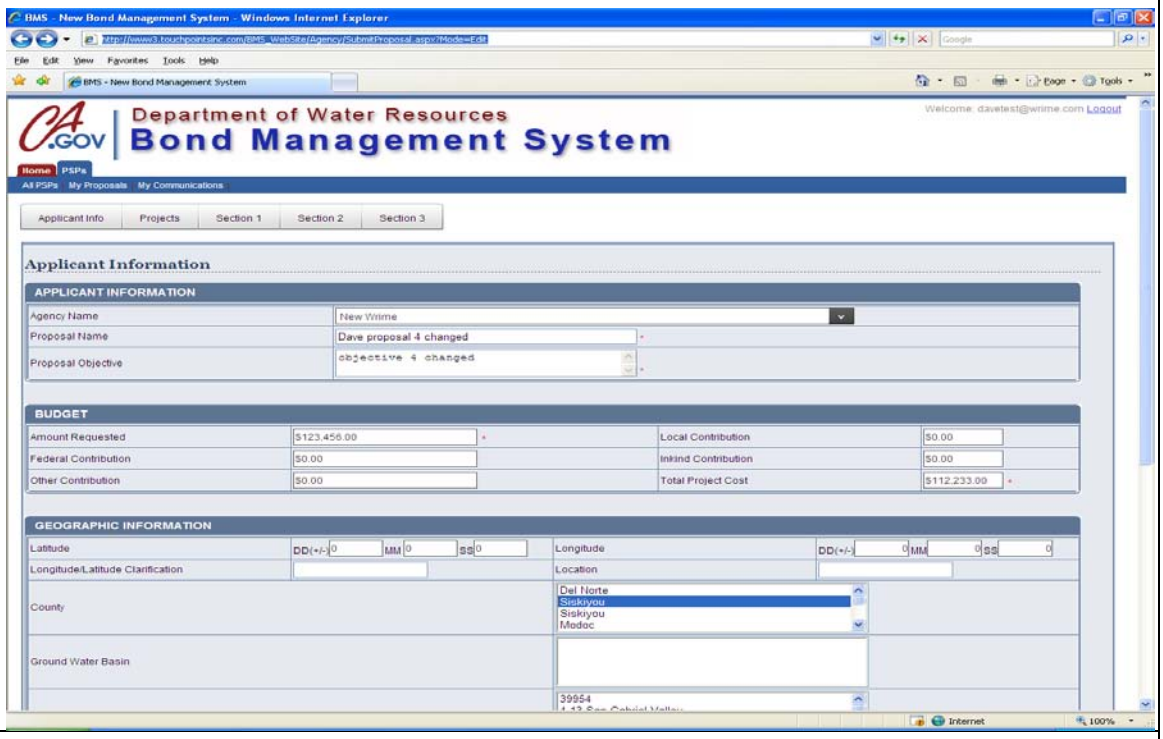
The procedure and steps associated with each of the (above) operations in the ***Submit Proposal*** process are discussed in this section.

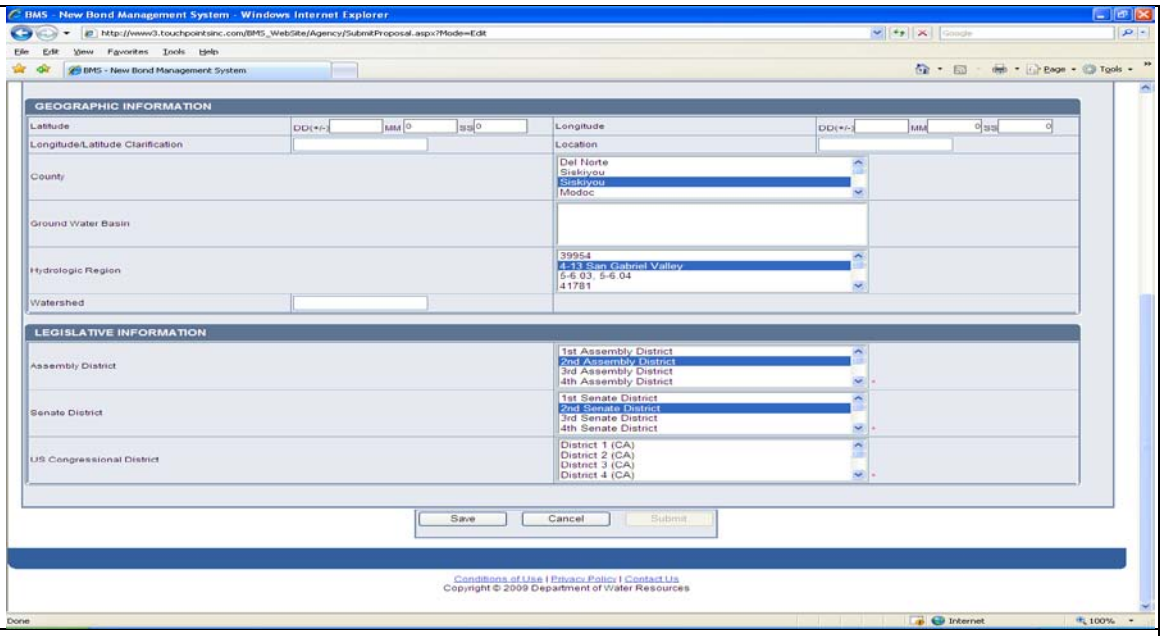
Step #	Process
A.	**Procedure to submit a Proposal**
1.	Type in the URL for BMS in Internet Explorer and hit 'Enter'.
2.	**Verify that :** ➢ **The BMS *Login* Page is displayed**
3.	
4.	On the *Login* page, enter the valid Username and Password for an ***Organization Administrator*** in the *Login* and *Password* fields respectively. Click on the ***Log In*** button.
5.	The Login and Password are validated and the Home page for the Public User (or Organization Administrator) is displayed. On the '*Home* 'page the following menu items are visible – ▪ *Home* ▪ *PSPs* ▪ *Projects* ▪ *Contracts* ▪ *Organization Admin*

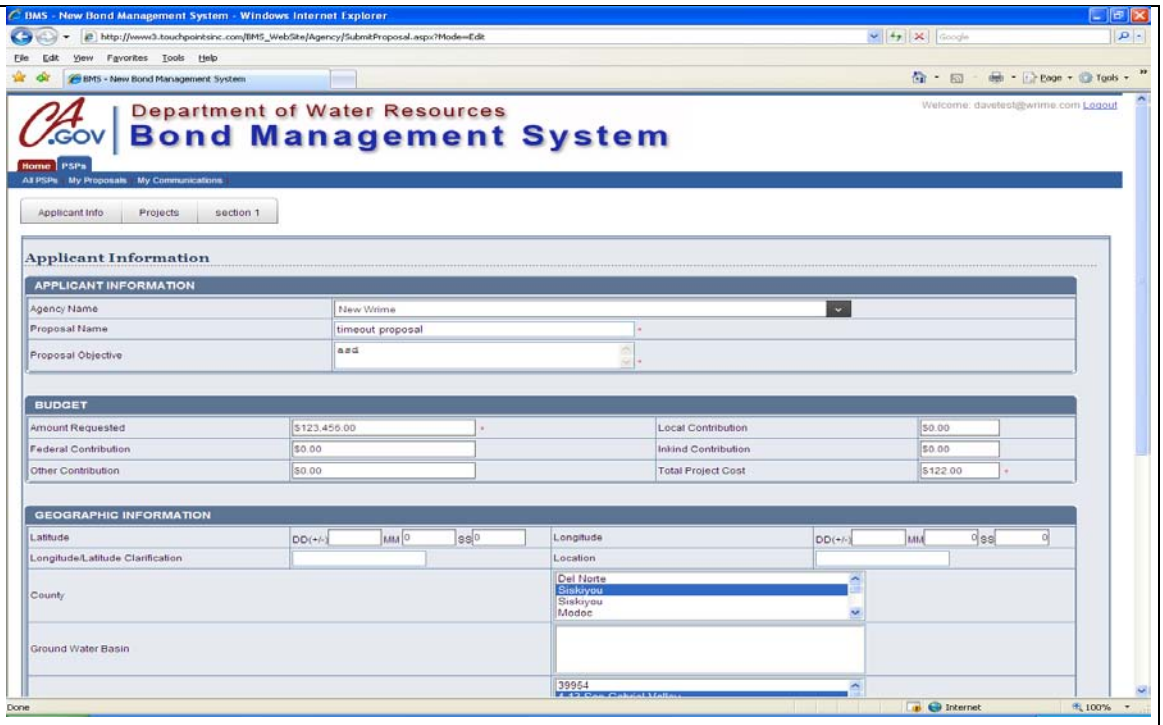
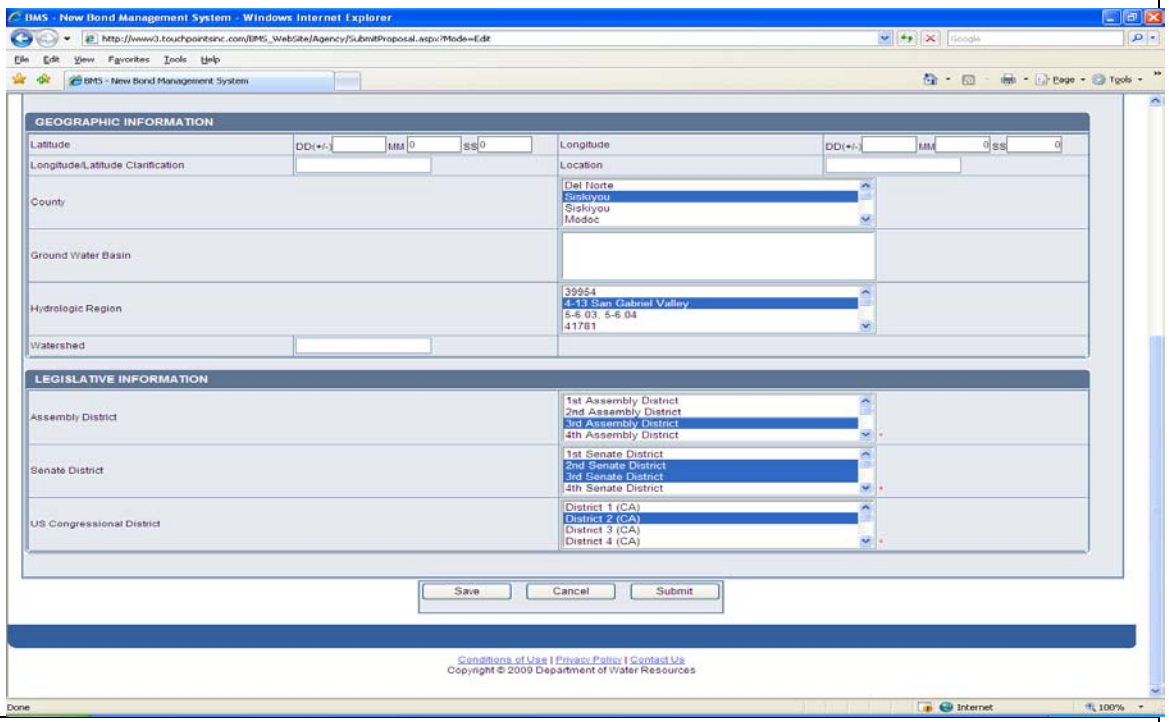
6.	
7.	On the *Home* page, click on the ***PSPs*** menu item.
8.	The following three sub-menu items are visible under '*PSPs'* : ▪ *All PSPs* ▪ *My Proposals* ▪ *My Communications*
9.	
10.	Click on the ***My Proposals*** sub-menu item under ***PSPs.***

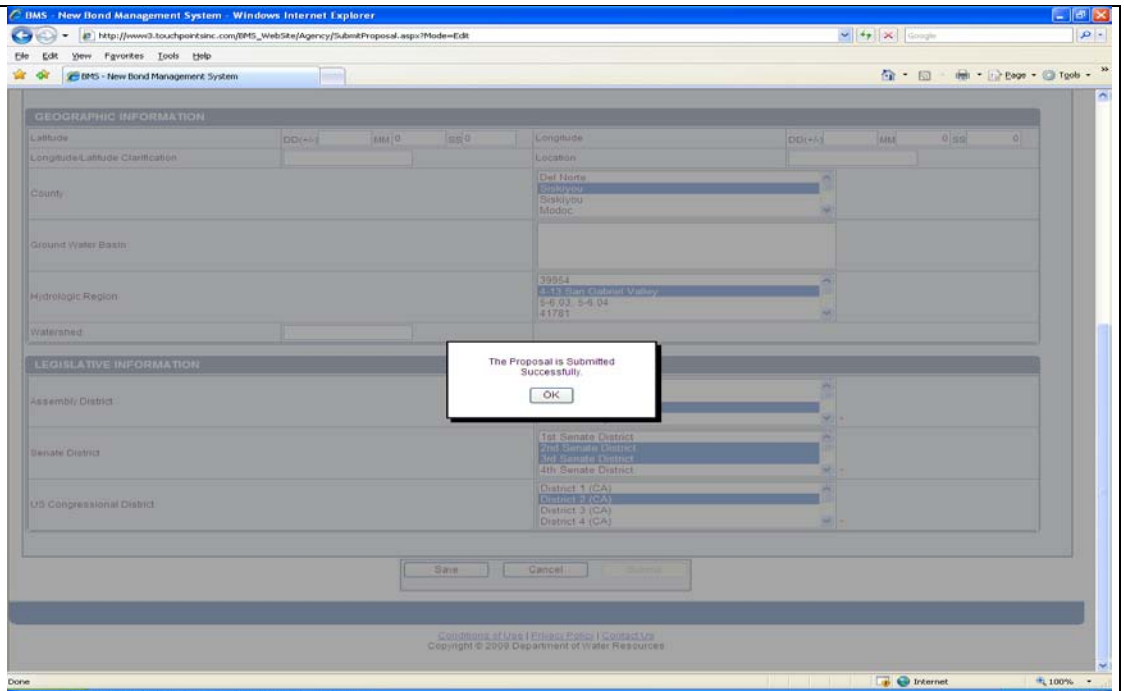
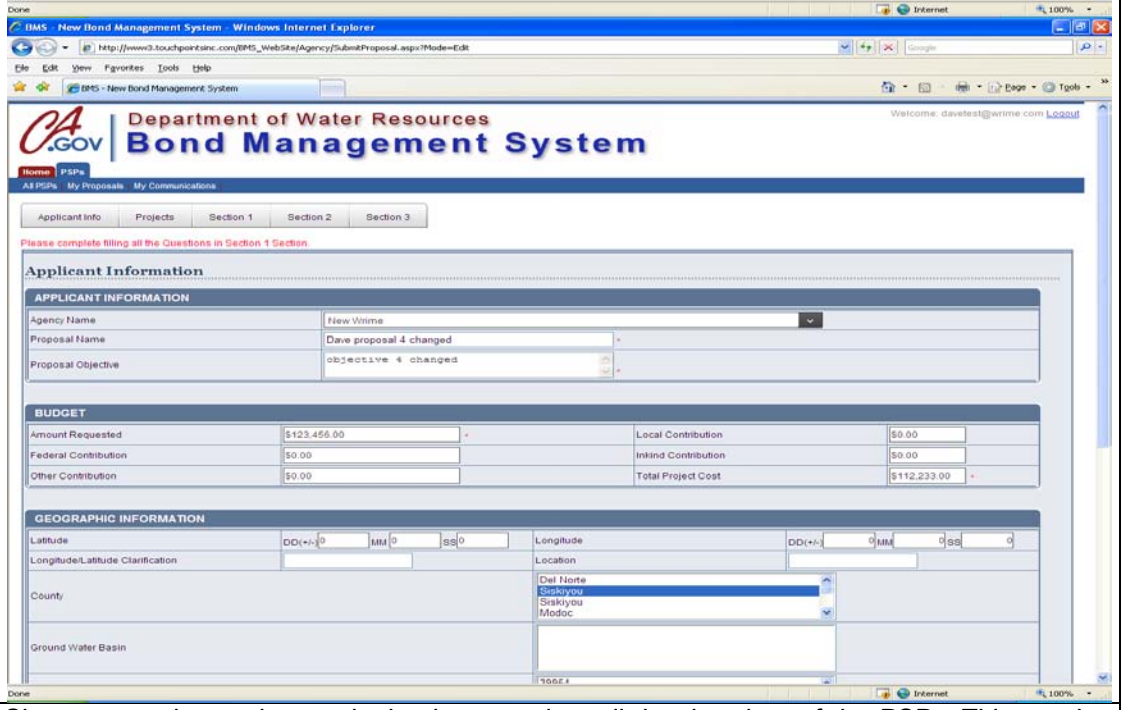
11.	A page listing names of all the *Active* and *Archived* Proposals is displayed. The name of each *Active* Proposal on this page is displayed as a hyperlink. The following details are displayed for each *Active Proposal* – ▪ Due Date ▪ Last Updated By ▪ Last Updated On ▪ Status
12.	
13.	On the ***My Proposals*** page click on the name (hyperlink) of any *Active Proposal.*
14.	The *Proposal* web-form along with details (specified by the Public User preparing the *Proposal*) is displayed.

15.	
16.	Make changes to details specified in one or more sections of the Proposal. Click on the *Save* button.
17.	Changes made to the *Proposal* are saved

18.	 
19.	On the ***My Proposals*** page click on the name (hyperlink) of an *Active Proposal* whose submission Due Date has already passed.
20.	The *Proposal* web-form along with details is displayed. The *Submit* button on the *Proposal* web-form is visible and disabled

21.	
22.	On the ***My Proposals*** page click on the name (hyperlink) of an *Active Proposal* whose submission Due Date has not yet passed.
23.	The *Proposal* web-form along with details is displayed. The *Submit* button on the *Proposal* web-form is visible and enabled.

24.	 
25.	On the ***My Proposals*** page click on the name (hyperlink) of an *Active Proposal* whose submission Due Date has not yet passed. This will display the Proposal web-form. Click on the *Submit* button displayed on the Proposal web-form.
26.	A validation is done to ensure that details for all the required fields on the *Proposal* form have been specified. The Public User/Organization Administrator is prompted to enter any missing values. Upon successful validation, the *Proposal* is submitted for review.

27.		 
28.		Changes can be made to submitted proposals until the due date of the PSP. This can be done by opening the submitted proposal, making necessary changes, and then resubmiting using the same processes described above.