



TSILHQOT'IN NATIONAL GOVERNMENT
Stewardship Portal

TNG Stewardship Planning Portal 2.0

Introductory Training
for Existing Users



TSILHQOT'IN NATIONAL GOVERNMENT

Stewardship Portal

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Stewardship Portal

The Stewardship Department of Tsilhqot'in National Government is developing an interactive land and resource "Stewardship Planning Portal." The Stewardship Portal is a web-based, land-use information management and planning support system.

One of the Stewardship Portal's primary functions is to improve the efficiency and quality of the referral process. Many of the tedious steps of the referral process like filing, tracking, and the dependence on the TNG office are simplified through the automated functions of our spatial database, which is accessible online and therefore accessible in any community with internet access. This database stores any type of land and resource information from reports to photos to proposed cut block locations in relation to the area of land for which they are relevant.

The Portal makes the power of Geographic Information Systems (GIS) accessible by being cost-effective and user-friendly for remote communities, and therefore minimizes paper handling time. The Portal is a significant step toward empowering First Nations communities to be directly involved in land and resource stewardship.

Portal Access

A user account is needed to log into the Stewardship Portal. Click on the link below, download and complete the word document then email it to the portal administrator to receive access to the portal.

1. Download [Access Form](#)
2. Email Completed Access Form as attachment to [Portal Administrator](#)

Tsilhqot'in Photos



Portal Assistance

If you have questions or comments regarding the Stewardship Portal please email the [Portal Administrator](#).



Portal 2.0 Revisions:

1. Revisions to the appearance:

- ✓ The entire site has a new look.

Portal Home	<h2 style="text-align: center;">Stewardship Portal</h2> <p>The Stewardship Department of Tsilhqot'in National Government is developing an interactive land and resource "Stewardship Planning Portal." The Stewardship Portal is a web-based, land-use information management and planning support system.</p> <p>One of the Stewardship Portal's primary functions is to improve the efficiency and quality of the referral process. Many of the tedious steps of the referral process like filing, tracking, and the dependence on the TNG office are simplified through the automated functions of our spatial database, which is accessible online and therefore accessible in any community with internet access. This database stores any type of land and resource information from reports to photos to proposed cut block locations in relation to the area of land for which they are relevant.</p> <p>The Portal makes the power of Geographic Information Systems (GIS) accessible by being cost-effective and user-friendly for remote communities, and therefore minimizes paper handling time. The Portal is a significant step toward empowering First Nations communities to be directly involved in land and resource stewardship.</p>
TNG Website Home	
Portal Login	
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Portal Access	
<p>Portal Access</p> <p>A user account is needed to log into the Stewardship Portal. Click on the link below, download and complete the word document then email it to the portal administrator to receive access to the portal.</p> <ol style="list-style-type: none"> 1. Download Access Form 2. Email Completed Access Form as attachment to Portal Administrator 	



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Stewardship Portal

Portal 2.0 Revisions:





2. Portal Version 2.0 is Internet Explorer Compliant!



Portal 2.0 Revisions (appearance cont.):

3. The forms and web pages have been formatted more clearly and more attractively.

Content 

Instructions 

Brief overview of project:

Location:

Proponent:

Legal Description of application area:

Size in hectares:

Engagement Contact - no email here please:

Lead Agency:

Government File Number:

Other Comments:

Portal 2.0 Revisions (cont.)

- ✓ Nodes perform separate independent functions

Parent Submission ID node

Content node

Each node is an independent block of code.

- ✓ This new SAVE button saves what you've entered in Draft form in case you encounter an error with future steps

Parent Submission ID

Instructions

Parent Submission ID:

Content

Instructions

Brief overview of project:

Location:

Proponent:

Legal Description of application area:

Size in hectares:

Engagement Contact - no email here please:

Lead Agency:

Government File Number:

Other Comments:



Portal 2.0 Revisions (cont.):

4. Hold as Draft Feature

- ✓ Along with the **SUBMIT** button there will be a **DELETE THIS DRAFT** or a **HOLD as Draft** button.

A screenshot of a web interface titled 'Submission Control'. It features a dropdown menu labeled 'Instructions'. Below the dropdown are three buttons: 'Delete this Draft' (red text), 'Hold as Draft' (blue text), and 'Submit to Stewardship Portal' (green text).

- ✓ The user should note that the Submission ID will be identified as soon as a submission is started, not once it is submitted.



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Portal 2.0 Revisions (Hold as Draft cont.):

- ✓ Allow for multiple users, within the same user group, to work on the same submission until it's ready to be submitted.
- ✓ Allow users to pause and resume submissions, allowing for more flexibility for the users.

DRAFT SAVED



This form was successfully saved in a DRAFT state. You, or any other member of your user group, can return to it at any time to continue working on it. To resume work on this submission navigate to the 'Fill a Form' page, select Submission ID 3911 under the 'Resume Work on a DRAFT Submission' section, and click 'Resume DRAFT'.

OK

- ✓ See that the Submission ID is displayed within the notification box, so it's very easy to know how to continue working on it later.



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Portal 2.0 Revisions (“Hold as Draft” cont.):

- ✓ Allow users to submit fully attributed shapefiles with the first submission, as the DBID is known immediately.
- ✓ Allow attached letters and formal documents to contain the Submission ID for purposes of user file management (paper and digital).
- ✓ If they wish, allow users to incorporate the Submission ID into filing protocol as it is made available before a submission is made.
- ✓ Ensures that a submission can be complete (contain all necessary elements) when it is submitted. This will minimize the number of child submissions and will ensure that all components of a referral or engagement request are present before the referral is viewable by TNG and its communities.
- ✓ New goal = “Don’t send us *ANYTHING* until you send us **EVERYTHING!**”



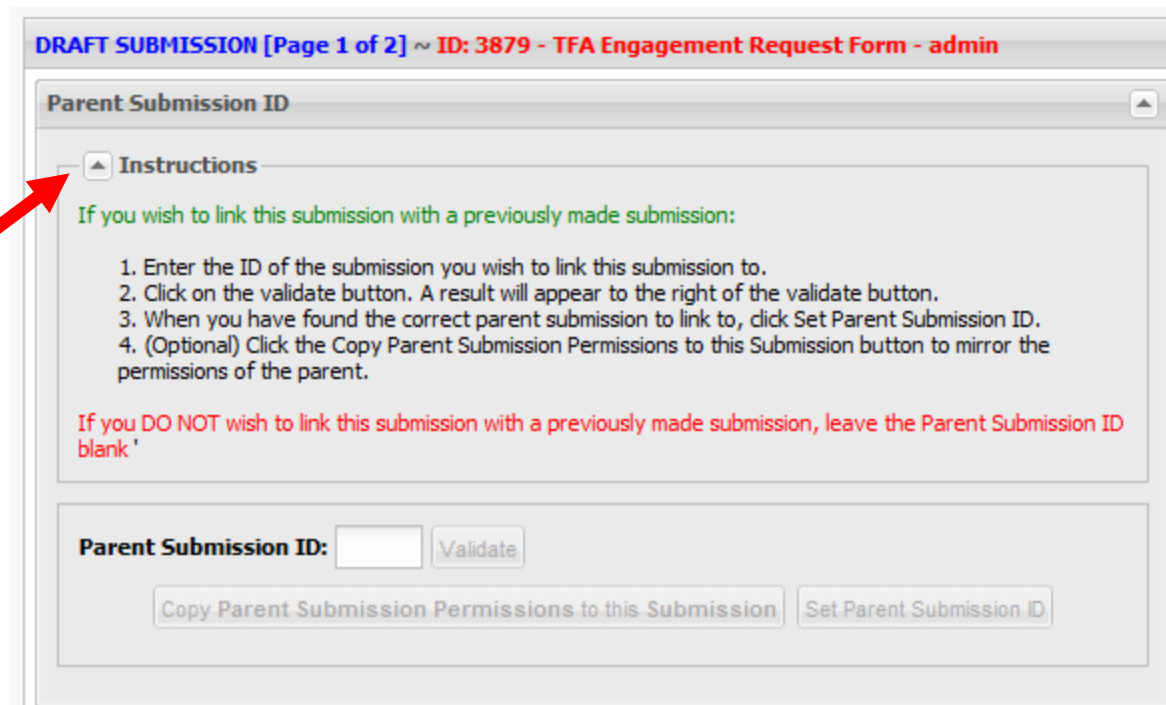
TSILHQOT'IN NATIONAL GOVERNMENT *Stewardship Portal*

Portal 2.0 Revisions (“Hold as Draft” cont.):


- ✓ Users are still able to make child/amendment submissions to Parent submissions.
- ✓ Only Draft submissions can be deleted. Once information is submitted to Portal 2.0 it will not be able to be deleted.
- ✓ The TNG group will not be able to view submissions held in draft (unless they were put there by members of the TNG user group).
 - This is important as it is essential for users to be clear on whether a form has actually been submitted, or has simply been started and is held in draft.
- ✓ A draft submission cannot be found through the “Search Submissions” page as it has not yet been submitted.
- ✓ Draft submissions can be found on the Fill A Form page in the “Resume Work on a Draft Submission” section.


Portal 2.0 Revisions (cont.):

5. There are drop-down help topics for each page section.



DRAFT SUBMISSION [Page 1 of 2] ~ ID: 3879 - TFA Engagement Request Form - admin

Parent Submission ID 



 **Instructions**

If you wish to link this submission with a previously made submission:

1. Enter the ID of the submission you wish to link this submission to.
2. Click on the validate button. A result will appear to the right of the validate button.
3. When you have found the correct parent submission to link to, click Set Parent Submission ID.
4. (Optional) Click the Copy Parent Submission Permissions to this Submission button to mirror the permissions of the parent.

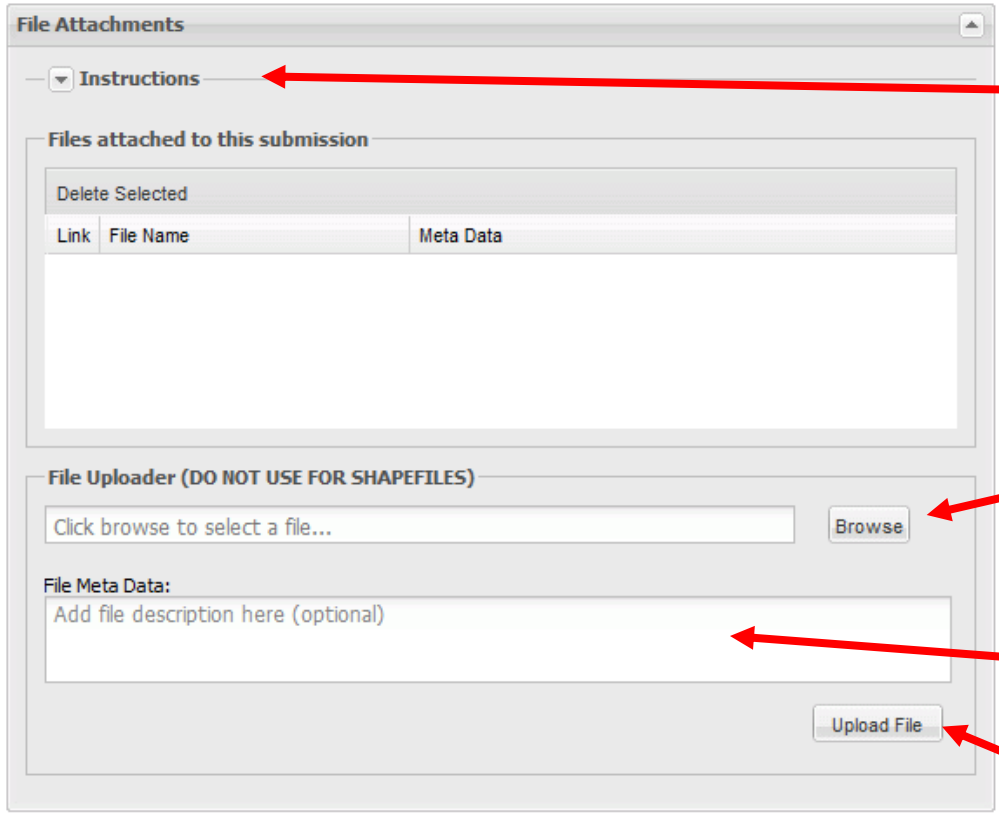
If you DO NOT wish to link this submission with a previously made submission, leave the Parent Submission ID blank'

Parent Submission ID:

Portal 2.0 Revisions (cont.):

6. There are improved document and shapefile upload wizards:



The screenshot shows a web form titled "File Attachments" with several sections:

- Instructions:** A dropdown menu at the top left, currently expanded to show "Instructions".
- Files attached to this submission:** A table with columns "Link", "File Name", and "Meta Data". The table is currently empty.
- File Uploader (DO NOT USE FOR SHAPEFILES):** A section containing a text input field with the placeholder "Click browse to select a file...", a "Browse" button, a "File Meta Data:" label, a text input field with the placeholder "Add file description here (optional)", and an "Upload File" button.

Red arrows point from the following text labels to the corresponding elements in the screenshot:

- Instructions – can collapse or expand
- List of files that are attached (blank so far)
- File Uploader
- File metadata entry field
- Upload File button



Portal 2.0 Revisions (Document Uploader cont.):

File Attachments

Instructions

Files attached to this submission

Delete Selected

Link	File Name	Meta Data
	SampleDocForDemos.docx	Sample file for Demonstrations
	Testing_123.doc	Different metadata for this document.

File Uploader (DO NOT USE FOR SHAPEFILES)

Click browse to select a file...

File Meta Data:

More than one attachment can be uploaded

Metadata can be unique for each file, or leave it out completely

The "Download" button is active once a file is present



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Portal 2.0 Revisions (Document Uploader cont.):

- ✓ File Naming Rules: Similar rules that applied to the previous version of the Portal still apply to Version 2.0:
 - No non-alphanumeric characters
 - No & % \$ @ ! + = ; etc.
 - No spaces
 - Files will upload, but will not easily download
 - Maximum of 36 characters in filename
 - If you exceed this filename length, the system will “hang” and you will have to press the web browser back button and resume the draft. Please note if this happens and you have not saved your form edits by pressing the SAVE button at the bottom of the content node, you will have to re-enter your data.



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Portal 2.0 Revisions (Document Uploader cont.):

- ✓ New Rule
 - Dashes are now accepted in filenames.
- ✓ Documents and shapefiles are uploaded in two different sections
- ✓ Each uploader has its own instructions.



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Load Shape Files

Instructions

Spatial Schema Defintions

Spatial files attached to this submission

Layer

Shapefile Uploader

DBF:

SHP:

SHX:

Portal 2.0 Revisions (cont.)

Shapefile loader node

✓ Instruction tab

✓ Spatial Schema Definitions tab

✓ List of layers attached

✓ Shapefile Uploader – individual fields for the dbf, shp, and shx that must be attached for each shapefile.

✓ Upload Shapefile button



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Stewardship Portal

Load Shape Files

Instructions

Spatial Schema Definitions

Shapefiles uploaded using this form ****must**** meet the minimum requirements of a schema listed below. Shapefiles that fail to match a schema will be rejected. The order of the attributes and/or the existence of additional attributes in a shapefile will not result in an error. Additional attributes will not be loaded into the portal.

Schema Name: forestry_blocks
Geometry Type: polygon
Attributes: dbid (integer), lic_code (varchar), licensenum (varchar), amendnum (varchar), cp_num (varchar), block_num (varchar), year (integer)

Schema Name: forestry_roads
Geometry Type: linestring
Attributes: dbid (integer), identifier (varchar), length (varchar)

Portal 2.0 Revisions (Shapefiles cont.):

- ✓ Spatial Schema Definitions provided in the Shapefile loader node is unique for each form.
- ✓ Attribute name and type listed for the two shapefile schemas associated with the Forestry Referral Form.



Portal 2.0 Revisions (cont.):

7. Users will be able to toggle between pages when completing a form.





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Stewardship Portal

Portal 2.0 Revisions (cont.):

8. Email notifications are now more flexible
 - ✓ Initiators are automatically added to the email notifications.
 - ✓ Email addresses can still be added to the notification list at any time, but now a draft-resuming user can also decide whether or not he wants to be included on the list. Resumers are not automatically added to the list.
 - ✓ This will prevent non-key players from having their inboxes fill up with irrelevant notification emails.
 - ✓ All submissions will now start out with the mandatory email addresses included in the list.
 - ✓ Users can select all email addresses previously involved in a submission in one click, or can select only a portion of the list.
 - ✓ The next screen shot shows the revised email notification

Email Revisions:

Government's FNID rep , Edna Boston, now receives an email for all submissions so that she can better assist government users with trouble-shooting. Mary's portaladmin account also receives a copy still.

The user who starts a submission is automatically added to the list.

All recipients listed on Parent or Child Submission can be added with the simple click of a button.

Send Notification Emails

▼ **Instructions**

Delete Selected

Recipient	Comment
Edna.Boston@gov.bc.ca	Required by Stewardship Portal
portaladmin@tsilhqotin.ca	Required by Stewardship Portal
mary@tsilhqotin.ca	Defined by this Submission

Add Recipient (e-mail address) to Notification List

Enter a name or email address

Add Recipient

Copy **Parent Submission Recipients** to this **Submission**

Email Revisions continued:

See that Elaine and Reagan are now part of the list, as they were involved in the submission previously.

Once previous recipients have been added, the user can manually add anyone else he deems necessary.

Send Notification Emails

Instructions

Delete Selected

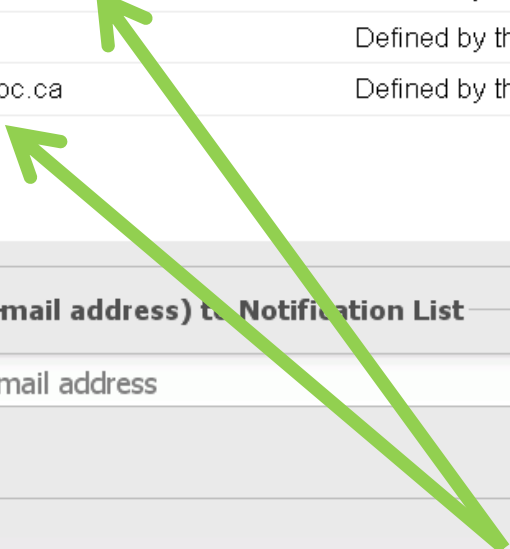
Recipient	Comment
Edna.Boston@gov.bc.ca	Required by Stewardship Portal
portaladmin@tsilhqotin.ca	Required by Stewardship Portal
Elaine.Shibata@gov.bc.ca	Defined by this Submission
mary@tsilhqotin.ca	Defined by this Submission
Reagan.Day@gov.bc.ca	Defined by this Submission

Add Recipient (e-mail address) to Notification List

Enter a name or email address

Add Recipient

Copy **Parent Submission Recipients** to this **Submission**



Email Revisions:

The portal will search its user database to auto-complete email addresses for you.

The portal won't let you enter an invalid address (sarah # tsilhqotin.ca will NOT upload)

Send Notification Emails

Instructions

Delete Selected

Recipient	Comment
Edna.Boston@gov.bc.ca	Required by Stewardship Portal
portaladmin@tsilhqotin.ca	Required by Stewardship Portal
Elaine.Shibata@gov.bc.ca	Defined by this Submission
mary@tsilhqotin.ca	Defined by this Submission
Reagan.Day@gov.bc.ca	Defined by this Submission

Add Recipient (e-mail address) to Notification List

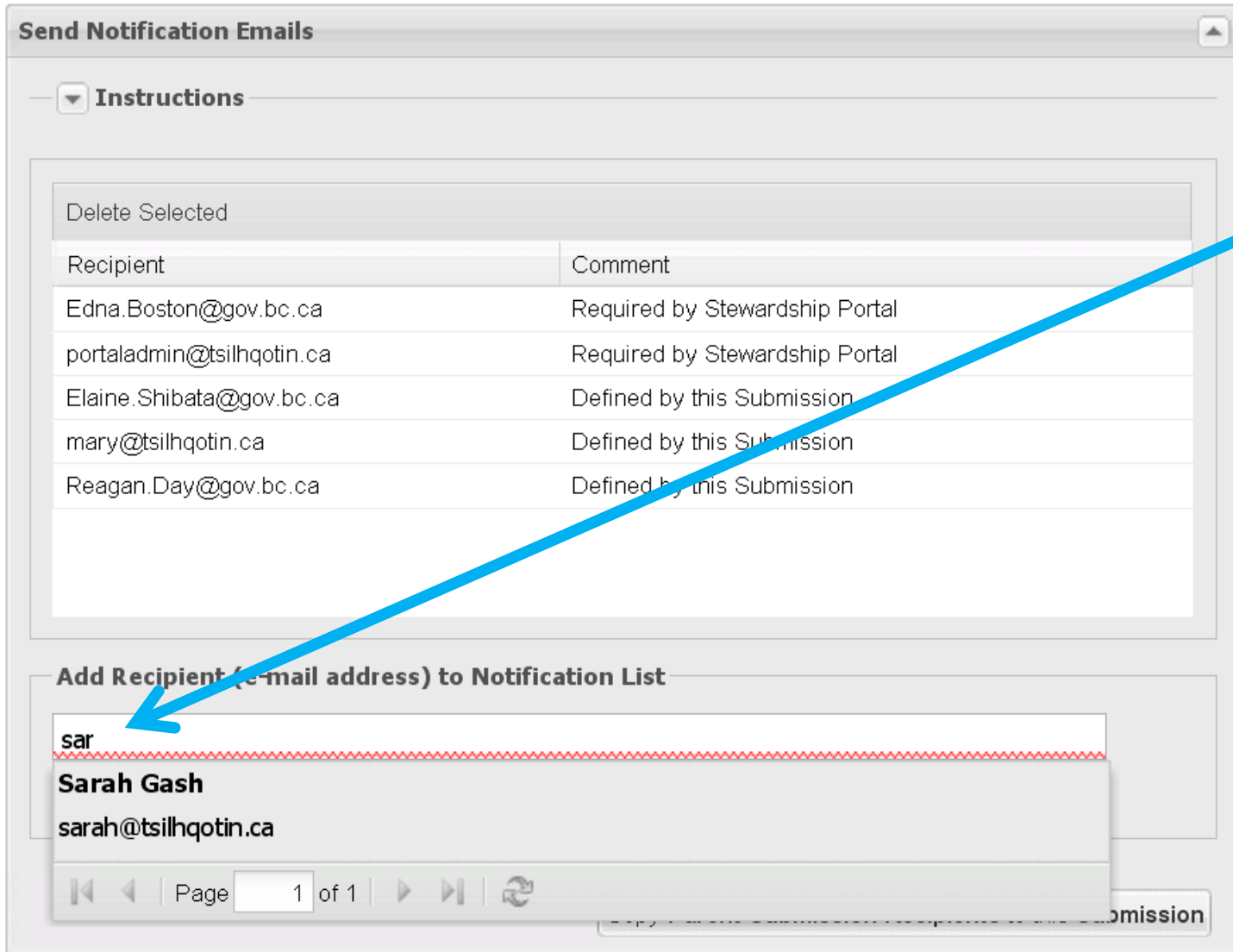
sar

Sarah Gash

sarah@tsilhqotin.ca

Page 1 of 1

Submission



Email Revisions:

Then select the email address and click on **Add Recipient**, and this new user appears on the list.

The screenshot shows a web interface for managing notification emails. At the top, there is a title bar 'Send Notification Emails' and a dropdown menu for 'Instructions'. Below this is a table with two columns: 'Recipient' and 'Comment'. The table contains several rows of email addresses and their associated comments. A modal dialog box is overlaid on the table, displaying the message 'Notification recipient successfully added!' with an 'OK' button. At the bottom of the interface, there is a section titled 'Add Recipient (e-mail address) to Notification List' which includes a text input field and an 'Add Recipient' button. A blue arrow points from the text on the right to the 'Add Recipient' button, which is also enclosed in a blue rectangular box. At the very bottom, there is a button labeled 'Copy Parent Submission Recipients to this Submission'.

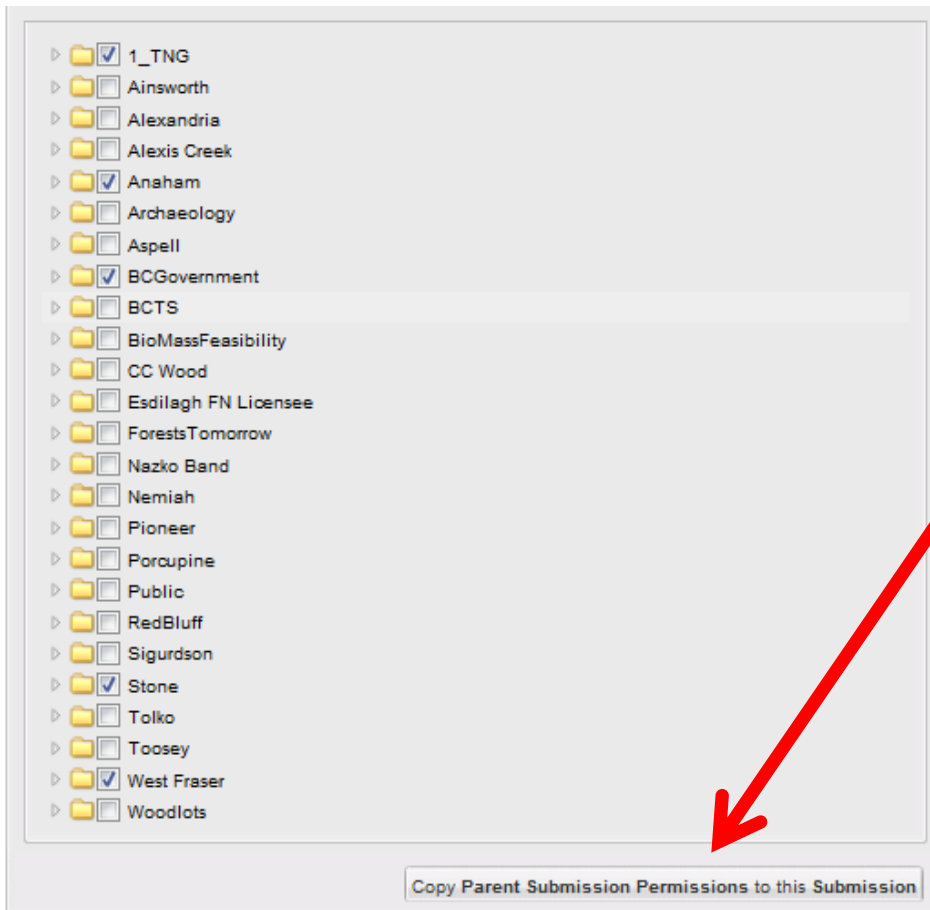
Recipient	Comment
Edna.Boston@gov.bc.ca	Required by Stewardship Portal
portaladmin@tsilhqotin.ca	Required by Stewardship Portal
Elaine.Shibata@gov.bc.ca	Defined by this Submission
mary@tsilhqotin.ca	Defined by this Submission
Reagan.Day@gov.	mission
sarah@tsilhqotin.c	mission



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Portal 2.0 Revisions (cont.):

9. Permission controls have been enhanced, to allow for the creation of Community groups with different types of users.
 - ✓ There are 6 new Tsilhqot'in Community Groups – Alexandria, Alexis Creek, Anaham, Nemiah, Stone, and Toosey.
 - ✓ One or more members of each of these groups has default permissions to all portal submissions, depending on his/her job description.
 - ✓ The permission model has been built to sustain current use and while adding flexibility to enable expanded use in the future.
 - ✓ Use by TNG communities will be managed by Portal Administration. Government and Industry can accept the default permissions.
 - ✓ Other TNG dept. or community entities can use the Portal to meet their non-referral needs without having to develop their own system.



Portal 2.0 Revisions

(Permissions continued)

- ✓ More groups will be defaulted on to accommodate community-level portal use
- ✓ Click the “Copy Parent Submission Permissions to this Submission” button if submitting a child.
- ✓ If you’re aware of new employees, expand that groups’ list and ensure everyone is on.
- ✓ When reviewing existing submissions, users can now view the permissions tree to identify any new users that are younger than the parent and therefore require access.



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Stewardship Portal

Questions so far?



Portal 2.0 Workflow:

Sample 1 – BC Government

- A Clerk would initiate a referral by clicking on the Fill a Form page on the Portal and select the TFA Engagement Request Form from the drop down menu. The Clerk would then click on the “Fill Form” button.


Fill A Form

In this section, you can select a Form to be filled for submitting various types of data. For example, to initiate a Forestry Referral, please select the Referral form from the list below. Upon completing the form, please click the Submit button.

Please select a form to fill in from the drop-down list below and click 'Display Form'.

TFA Engagement Request Form ▼

Fill Form





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Portal 2.0 Workflow (cont.):

Sample 1 – BC Government – Starting a new Engagement Request.

- The clerk would fill in the relevant fields of the TFA Engagement Request form.
- Click the Content Node's "Save" button. (This is not the same as "Submit.")
- He or She would edit the TFA Engagement Template document in MS Word and add the Submission ID to that file, so that printed copies contain the Submission ID. He or She would then Save, Close and Upload this document to the Portal.
 - Note that the Portal will time out if left inactive for too long.
- Clerk would Click on HOLD as DRAFT button and inform GIS specialist that form is ready to accept shapefiles.

As previously noted it is important to know that a referral that is held in draft is not yet submitted and not accessible by anyone other than the user and their user group. TNG cannot see it if it is DRAFT!)



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Portal 2.0 Workflow (cont.):

Sample 1 – BC Government – Form Held in Draft while work is prepared

- The GIS Specialist can then create the shapefile as per the associated TFA schema.
- The shapefile can be fully attributed with the proper DBID (Submission ID) eventhough the engagement request has not been submitted to the Portal because the DBID was assigned when the submission was started.
- The GIS Specialist may also need to create an overview map with the DBID noted in the title.



Portal 2.0 Workflow (cont.):

Sample 1 – BC Government – Attaching Spatial Data

- On the Portal, on the Fill a Form page the GIS Specialist would then select the draft submission based on Submission ID and click the RESUME DRAFT button, and scroll down the form to the Shapefile uploader node.

Resume Work on a DRAFT Submission

In this section, you can continue work on a previously started Submission that was saved as a DRAFT.

To resume work on a DRAFT submission, select a DRAFT submission from the drop-down box below and click 'Resume DRAFT'.

ID: 3869 - TFA Engagement Request Form - MaryThurow

Resume DRAFT

**** Users that share common permissions groups can edit and submit each others DRAFT submissions. For example: If 'Sally Sawyer' and 'Louie Lumberjack' are both members of the 'ABC Mills' permissions group, they will be able to edit and submit each others DRAFT submissions.**



Load Shape Files

Instructions

Spatial Schema Defintions

Spatial files attached to this submission

Link	Layer

Shapefile Uploader

DBF:

SHP:

SHX:

- ✓ The portal specifies which file type goes where.
- ✓ If you select the wrong file, an error describing your problem will display next to the Browse button.
- ✓ The Upload Shapefile button only available once the proper 3 shapefile components have been selected.



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Portal 2.0 Workflow (cont.):

Sample 1 – BC Government – Attaching Spatial Data.

- Being satisfied that the shapefiles have uploaded successfully, the GIS specialist might then attach a PDF for the overview map.
- The GIS specialist would then click HOLD as DRAFT and inform the clerk of the completed work.
- The clerk may now need to include her supervisor in the email notifications, preview the permissions to ensure everyone in their user group who needs to be able to view this submission are checked, and review the form content once more from start to finish. They could then click on HOLD as Draft again.



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Stewardship Portal

Portal 2.0 Workflow (cont.):

Sample 1 – BC Government – Completing the process

- A supervisor could then locate the Submission ID in the RESUME DRAFT section of the Fill A Form page, review the submission in its entirety, including downloading the attached documents and maps. He or She might add a letter and then once satisfied that all requirements are met, click the SUBMIT button to finalize the submission process. This submission will now appear in the portal, an email notification will be sent and this referral is viewable by TNG, and searchable on the Find Submissions page.
- Alternatively the supervisor could review the submission, decide that the referral was not appropriate and click on the DELETE THIS DRAFT button to end this submission process. This submission no longer exists in the database and cannot be accessed by anyone.



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Portal 2.0 Workflow (cont.):

Sample 1 – BC Government – Comparison

- In the “RED” portal a submission would be made first when only the form content was completed.
- A child submission (amendment) would be made to attach ER template.
- A child submission would be made to attach shapefiles (this may take several tries (and therefore several child submissions) as the user might encounter problems due to mismatched schema, filename issues etc.
- These submission may occur over a matter of a couple of hours or over the course of several days.
- This delayed completion of a submission serves to introduced inefficiencies into our office and blurs the actual “submission date”, which has made it inappropriate to use the start time to calculate deadlines.
- The HOLD as DRAFT functionality has been developed to accommodate multiple inputs from government or industry, so that proponents can get everything together before we see it.



TSILHQOT'IN NATIONAL GOVERNMENT *Stewardship Portal*

Stewardship Home

Find Submissions

Fill A Form

Map Layers

View Available
Schemas

View Form Fields

Document
Downloads

Logout

LOADING FORM



PLEASE WAIT

There are known speed issues with this new version of the portal. We anticipate to be able to improve performance once the new portal is fully implemented. Please be patient and do NOT proceed to submit too early especially on the permissions page!!!



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Stewardship Portal

Portal 2.0 Workflow (cont.):

Sample 1 – BC Government – Making amendments

Note:

Setting the Parent Submission ID has one extra step now – before you simply entered the number. Now you can validate that the Parent Submission ID you selected exists, and then set it as Parent ID. Steps are as follows:

- ✓ Enter the parent ID
- ✓ Validate that it's the right one, by clicking Validate, then
- ✓ Set Parent Submission ID, by clicking Set Parent Submission ID.

That way if you go away and come back, the Parent Submission ID will remain set.



Parent Submission ID Functionality

Parent Submission ID ▲

— Instructions —

Parent Submission ID: **Not a valid Parent Submission ID!**

Parent Submission ID ▲

— Instructions —

Parent Submission ID: **ID: 2498 - Forestry Referral - GraemeMcIntosh**



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Stewardship Portal

Launch information

Expect to launch this weekend (Jan 16th 2011)

- ✓ Improvements to the mapping agent are incomplete, so have delayed the launch
 - ✓ We've decided to launch without the mapping agent's improvements, and then add the mapping agent as soon as we can.
- ✓ We will be re-writing the TFA quicksteps document to reflect the new functionality
- ✓ The portal manual has not yet been edited – refer to the instructions for each node.

Are there other features you would like to suggest?