



TSILHQOT'IN NATIONAL GOVERNMENT  
*Stewardship Portal*

# TNG Stewardship Planning Portal 2.0

## Introducing Revisions for Existing Users




# TSILHQOT'IN NATIONAL GOVERNMENT

## Stewardship Portal

### Form Enhancements :

Introduction of new forms with improved functionality for all users

- Old forms have all been deactivated and replaced with revised forms
- Old forms will still be searchable and viewable.
- Each node in each form has instructions.
- Click on the arrow to expand or collapse the instruction details

 Instructions

If you wish to "make a child" and link this submission with a previously made submission, follow these steps:

1. Enter the ID of the "parent" 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.

Alternatively, if you are starting a new submission and therefore **DO NOT** wish to link this submission to a previously made submission, leave the **Parent Submission ID** field blank.



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### **Form Enhancements (cont.):**

- **Mining Form – Mining Industry Users**
  - Now called Mining Industry Form 2011-Sept-15
  - Date picker for choosing formatted dates for date fields
  - HTML (textbox with enhanced text options)
  
- **Forestry Form – Forest Industry Users**
  - Now called Forestry Form 2011-Sept-15
  - Date picker for choosing formatted dates for date fields
  - HTML (textbox with enhanced text options)
  - The Community checkboxes have been removed, as the inputs were very inconsistent and therefore unreliable.



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### Form Enhancements (cont.):

#### ○ TFA Engagement Request – for BC Government Users

- Now called TFA Engagement Request 2011-Sept-15
- ER Level Selection Field – only allowed to select Level 2 to 5. See below for schedule of level/zone/days.

**New**

Level	Zone	Business Days
2	B / C	20
3	B / C	40
4	B / C	60
4	A	20
5	anywhere	Intentionally Blank
Any level	D	Intentionally Blank

- Due Date Calculator Node – Auto populates Start and Completion dates based on above table with the selection of an ER Level.
- Date picker for choosing formatted dates for date fields
- HTML (textbox with enhanced text options)



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### **Form Enhancements (cont.):**

- **TFA Engagement Level Change Form – BC Government Users**
  - Now called TFA Engagement Level Change 2011-Sept-15
  - Checkboxes for defining new and original ER level
  - Due Date Calculator Node – Auto populates Start and Completion dates with the selection of ER Level.
  - Date picker for choosing formatted dates for date fields (Normally accept the defaults – use date picker only in extenuating circumstances that have been approved by your responsible official).
  - HTML (textbox with enhanced text options)



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### Form Enhancements (cont.):

#### ○ TFA Level 1 Notification – BC Government Users

- New form introduced with TFA Amendments called **TFA Level 1 Notification 2011-Sept-15**
- Only for submitting Level 1 referrals – this is for providing information only, not to solicit TNG input.
- Refer to TFA for list of referrals that meet Level 1 criteria
- No shapefiles required
- No attachments required
- Cannot submit as child or amendment – Notifications are independent.
- HTML (textbox with enhanced text options)



**New**



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### **Form Enhancements (cont.):**

- **General Communication Form – All users**
  - Now called General Communication Form 2011-Sept-15
  - More descriptive checkboxes to define what your general communication is about.
  - HTML (textbox with enhanced text options).
  - This is the form that should be used for all Child Submissions! The Industry Forms are only appropriate for starting submissions, or CHANGING a value previously missed.



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### Searching:

- Search format has changed:
  - More options and flexibility in how you search
  - Allows for more comprehensive and thorough searching and reporting.
    - Do not have to do independent searches for each criteria.
- Managers are able to get query results such as:
  - What submissions have each of my staff completed?
  - Has a response been submitted?
  - How many Level 4 Submissions have been made?
  - Used to have to search manually through Child submissions.





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**Keyword Search**

Keyword(s):

Search Fields:

<input type="checkbox"/>	Field Name
<input checked="" type="checkbox"/>	Submission Name
<input checked="" type="checkbox"/>	Submission Title
<input checked="" type="checkbox"/>	Submitter Name
<input type="checkbox"/>	Submission Assigned To
<input checked="" type="checkbox"/>	Submission Content
<input checked="" type="checkbox"/>	Submission File Name
<input type="checkbox"/>	Submission File MetaData
<input checked="" type="checkbox"/>	Submission Layer Name

Submission Status:

<input type="checkbox"/>	Submission Status
<input checked="" type="checkbox"/>	In Progress
<input checked="" type="checkbox"/>	New
<input checked="" type="checkbox"/>	Proposal Cancelled By Proponent
<input checked="" type="checkbox"/>	Under Monitor

Include in Results:

Submissions       Amendments

## Searching (cont.):

- Enhanced searching by Keyword:
- Searching is no longer restricted to field values by form
- Now you can search any word, ANYWHERE or limit the fields by checking fields on or off.
- You can search a combination of fields, and/or a combination of Statuses.
- You can search Parent (Submissions) or Child (Amendments) or both.



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## Searching (cont.):

- Easier to find proponent initiated referrals (to reference proponent Submission IDs in TFA Engagement Requests) and allow for potentially quicker TNG response.
- This feature is a FUNDAMENTAL link from TNG's perspective, and benefits industry and government alike.
  - Government will be able to submit with potentially lower ER levels given they can defer to previously submitted referral and responses in the Portal.
  - Industry will benefit from potentially quicker turn around of Government submitted referrals (as part of application approval process), and quicker response from TNG.
  - TNG will benefit from improved workflow – no futile searching for something that may or may not be there, as Submission ID can be referenced.



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### **Searching (cont.):**

- Can now search dates
  - Due dates exist as attributes in a database field, so they can be searched.
- Engagement Level can be searched.
  - Engagement Level exists as attributes in a database field, so can be searched.
  - Used to have to rely on the submitter to put Engagement Level in the submission name.
- To search all records by a status, type an asterisk (\*) in Keyword(s) field and select fields and statuses , Submissions and/or Amendments to search and click “Search” button.
- Advanced Search Engine is under development.



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### Searching (cont.):

- Still able to search by Submission ID:

Submission Search Engine

— ▾ Instructions —

▴ Submission ID Search

Submission ID:

Search

— ▾ Keyword Search —

— ▾ Advanced Search —

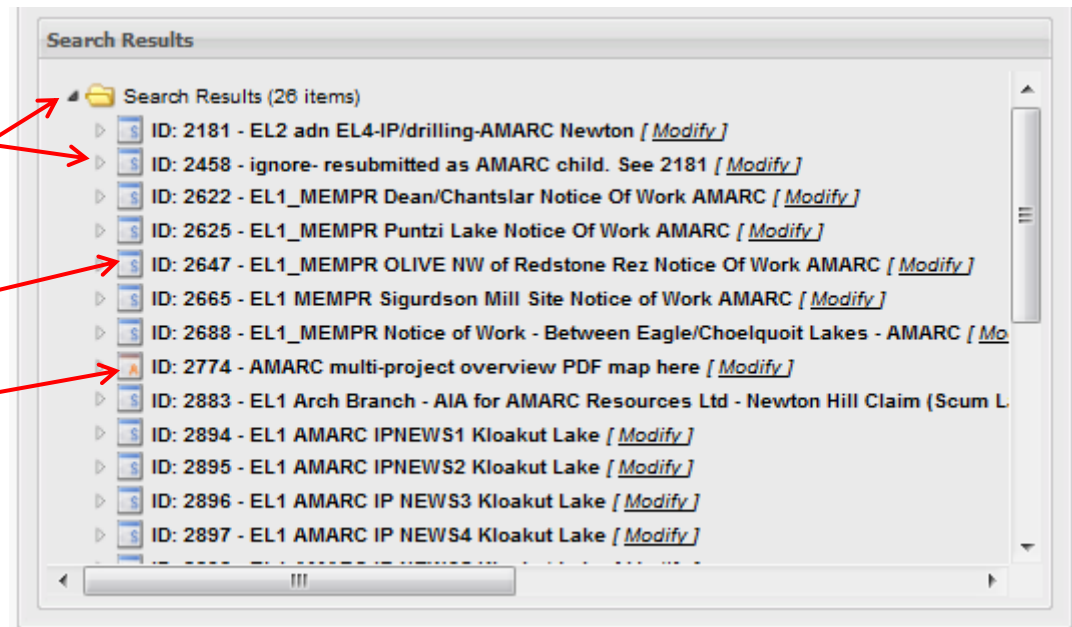


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### How to Navigate Search Results:

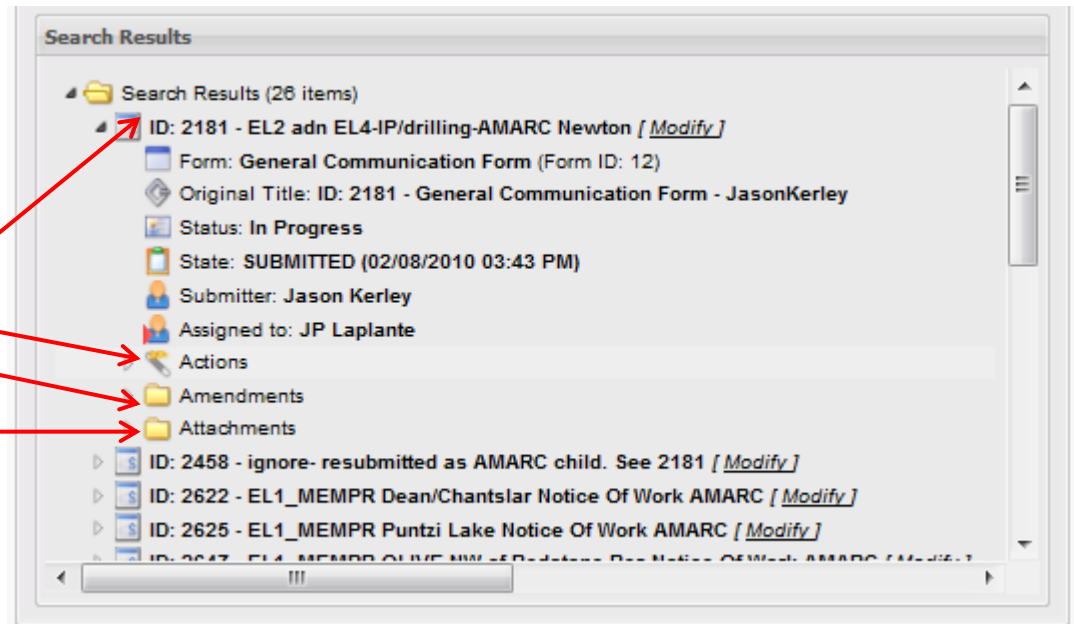
- New “Tree” format for Search Results:
- Click on arrow beside submissions to expand or collapse details
- Blue “S” in icon denotes Parent “Submission”
- Red “A” in icon denotes Child “Amendment”



## How to Navigate Search Results (cont.):

- Expanded Search Results  
“Tree” (click on arrow):
- Display of Submission  
Details:

Name  
Actions  
Amendments  
Attachments



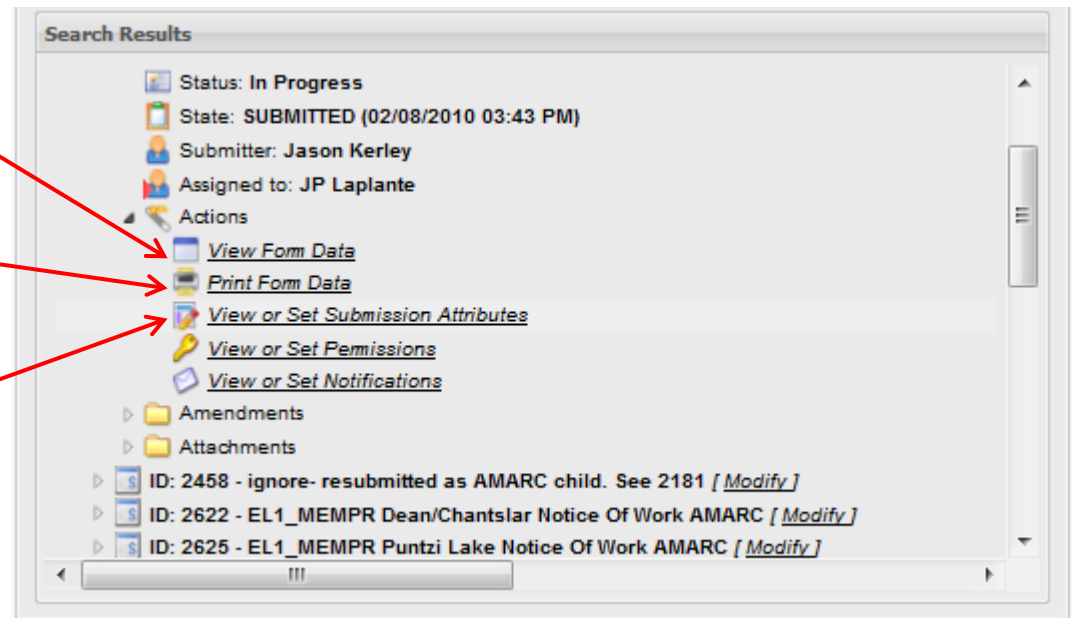
Search Results

- Search Results (26 items)
  - ID: 2181 - EL2 adn EL4-IP/drilling-AMARC Newton [ [Modify](#) ]
    - Form: General Communication Form (Form ID: 12)
    - Original Title: ID: 2181 - General Communication Form - JasonKerley
    - Status: In Progress
    - State: SUBMITTED (02/08/2010 03:43 PM)
    - Submitter: Jason Kerley
    - Assigned to: JP Laplante
    - Actions
    - Amendments
    - Attachments
  - ID: 2458 - ignore- resubmitted as AMARC child. See 2181 [ [Modify](#) ]
  - ID: 2622 - EL1\_MEMPR Dean/Chantslar Notice Of Work AMARC [ [Modify](#) ]
  - ID: 2625 - EL1\_MEMPR Puntzi Lake Notice Of Work AMARC [ [Modify](#) ]
  - ID: 2647 - EL1\_MEMPR OLIVE NW-IP-Drilling-AMARC-Dean-Notice-Of-Work-AMARC [ [Modify](#) ]

## How to Navigate Search Results (cont.):

- Expanded Search Results  
“Tree” with Actions  
Expanded (click on arrow):

View Form Data  
Print Form Data  
View or Set  
Submission Attributes





## How to Navigate Search Results (cont.):

View Form Data:

- Click on “View Form Data” to open Submission content

Search Results

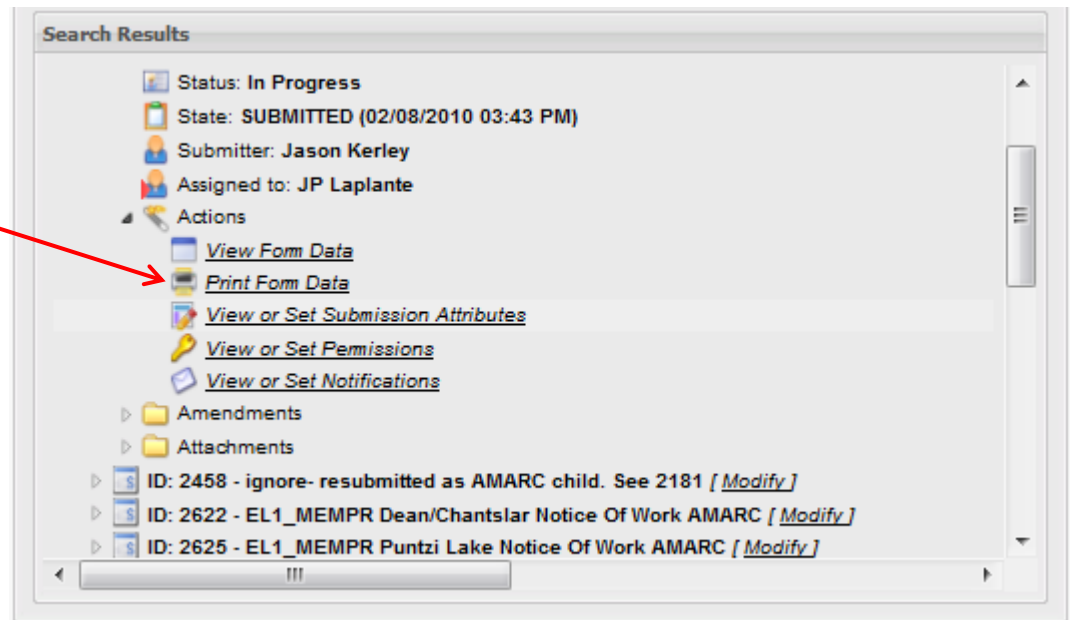
- Status: In Progress
- State: SUBMITTED (02/08/2010 03:43 PM)
- Submitter: Jason Kerley
- Assigned to: JP Laplante
- Actions
  - [View Form Data](#)
  - [Print Form Data](#)
  - [View or Set Submission Attributes](#)
  - [View or Set Permissions](#)
  - [View or Set Notifications](#)
- Amendments
- Attachments
- ID: 2458 - ignore- resubmitted as AMARC child. See 2181 [ [Modify](#) ]
- ID: 2622 - EL1\_MEMPR Dean/Chantslar Notice Of Work AMARC [ [Modify](#) ]
- ID: 2625 - EL1\_MEMPR Puntzi Lake Notice Of Work AMARC [ [Modify](#) ]



## How to Navigate Search Results (cont.):

Print Form Data:

- Click on "Print Form Data" to create hardcopy of submission content for filing.





## How to Navigate Search Results (cont.):

View or Set Submission Attributes:

- Click on “View or Set Submission Attributes” to open window for editing Name, Submission Status, and who the submission is assigned to.
- Click “Save” button to save changes.
- Also accessed from the “modify” next to Submission “Name”

The screenshot displays a search results window titled "Search Results" and a modal window titled "ID: 2181 - EL2 adn EL4-IP/drilling-AMARC Newton".

The search results window shows a list of items with the following details:

- Form: General Communication Form (Form ID: 12)
- Original Title: ID: 2181 - General Communication Form - JasonKerley
- Status: In Progress
- State: SUBMITTED (02/08/2010 03:43 PM)
- Submitter: Jason Kerley
- Assigned to: Kalin Brockhaus
- Actions:
  - [View Form Data](#)
  - [Print Form Data](#)
  - [View or Set Submission Attributes](#)
- Amendments
- Attachments

The modal window "Submission Attributes" contains the following fields:

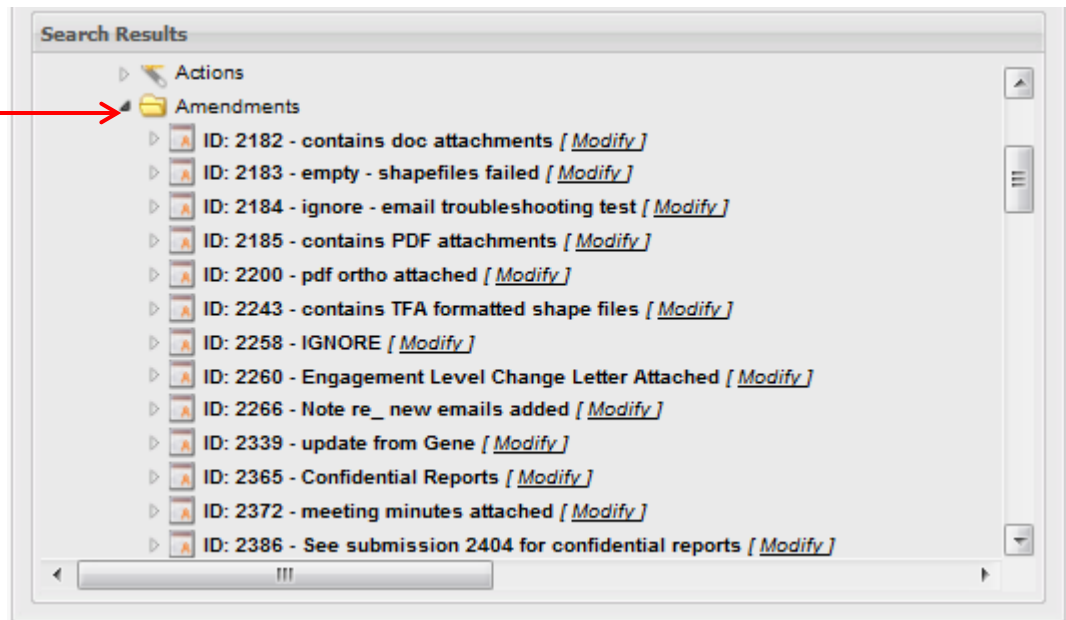
- Submission Name: EL2 adn EL4-IP/drilling-AMARC Newton
- Submission Status: In Progress
- Assigned To: JP Laplante
- Save button

Red arrows indicate the flow from the search results to the modal window and back.

## How to Navigate Search Results (cont.):

Amendments:

- Click on arrow next to Amendments to expand list of all child (amendment) submissions.

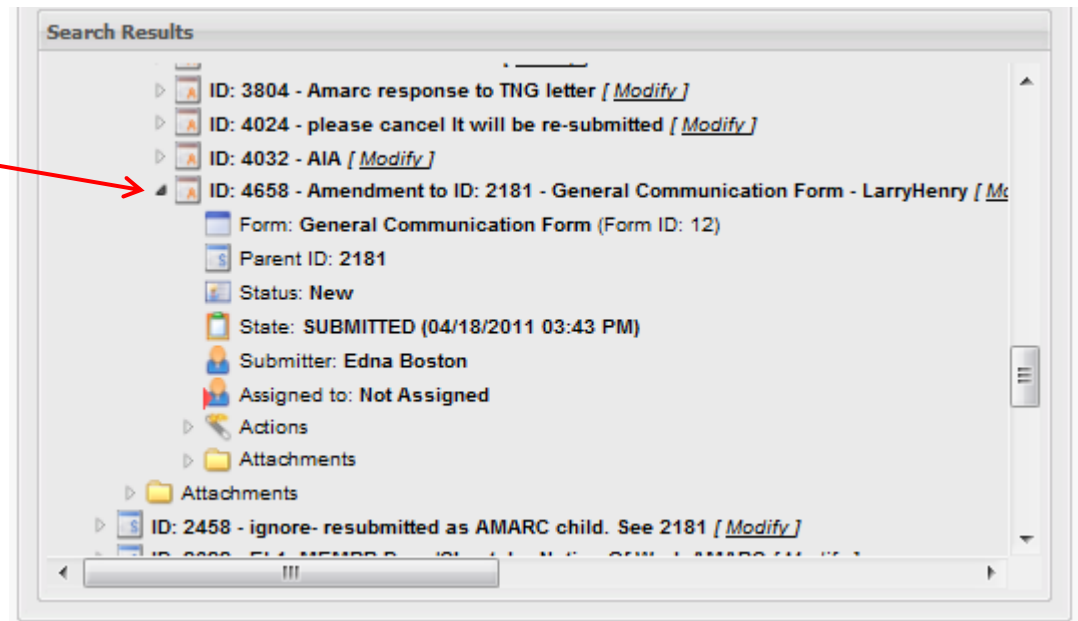




## How to Navigate Search Results (cont.):

### Amendments:

- Click on arrow next to each Amendment to open details of the child (amendment) submission.
- Access amendment submission content and details the same way you would the parent submission.

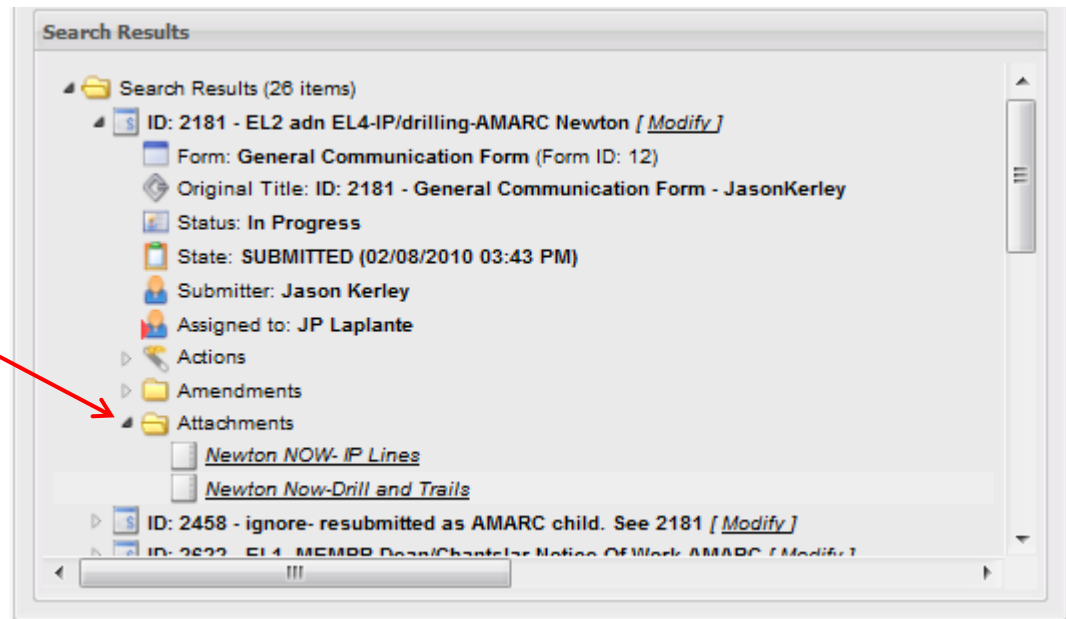




## How to Navigate Search Results (cont.):

### Attachments:

- Click on arrow next to “Attachments” to view list of documents attached.
- Attachment folder only exists if there are documents uploaded.
- Click on each attachment to view contents.



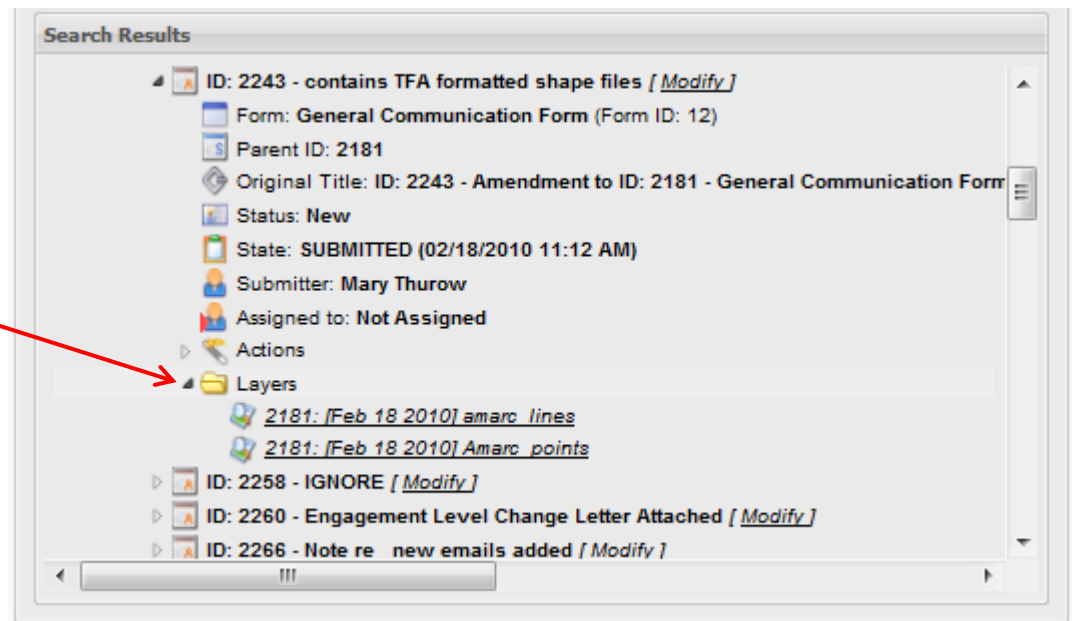


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## How to Navigate Search Results (cont.):

### Layers:

- Click on arrow next to the “Layers” folder to view list of shapefiles attached to submission.
- Layer folder only exists if shapefiles have been uploaded.
- Click on Shapefile to download.
- **Note:** The Search Page will include the ability to export to excel for use in reporting. This feature is under development.





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### How to Name your Submission:

Once you have submitted your Referral Form or Engagement Request (no longer held in draft), Follow these steps to assign a NAME to your submission:

1. Locate the Submission ID in the email you received from the Portal.
2. When logged into the Portal, navigate to the “Find Submission” Page.
3. Enter the Submission ID in the Submission ID Search field, and click “Search”
4. View search results and click on the (*modify*) text next to current name.
5. In the Submission Attributes box that pops up, enter appropriate name and click “**Save**”.
6. You will be notified that your Save was successful.
7. You can also access “Submission Attributes” from within “Actions”
8. Close the Submission Attributes box. Refresh and re-navigate to Submission ID to view changes to name.

**Each Submission needs to be named, including Child submissions!**



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### **How to Name your Submission (cont.):**

Examples of Naming:

1. For TFA Engagements:

Please include Engagment Level and description:

- EL4 Amarc Resources Drilling at Scum Lake
- EL2 Fence Rebuild-Haines Lake

2. For Forestry Referrals:

Please use Licensee, License, CP, Block numbers, and location where relevant

- WFT A20020 CP899 Blks1-9 Scum Lake
- Tolko FLA20018 CP86W Stobart Creek



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### **How to Name your Submission (cont.):**

Examples of Naming Child or Amendment Submissions from TNG (Response):

- Project cancelled – incomplete submission. Please resubmit complete submission as new Parent Submission.
- Aug 26-10 field trip summary attached, with Next steps for review.

Examples of Naming Child or Amendment Submissions from Proponent or Gov't:

- Revised project shapefiles attached
- Manager's Final Decision attached



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### **What is in a NAME?:**

- Proper naming helps locate information quickly – either with the search tool, or by allowing users to quickly scan a list of submissions or child submissions for the particulars of a submission.
- It helps users decide which parent submission, or child submission is most likely to contain the information they are seeking.
- The new tree structure allows users to view the Submission ID and Name, before delving into the details, saving time and effort.
- Without proper naming the user must expand the details of each submission, and potentially open documents, and forms to get a better understanding of what is in the contents, costing time and frustration, before finding the submission they wish to view.



## Accepting Defaults and Parent Submission parameters:

Permissions, Email Notifications, Due date Calculator

- Always accept defaults first before making customizations.

Permissions:

- When making an amendment (Child) Submission always click the “Add Parent Submission Permissions to this Submission button. Review additions, and then customize to add more, or delete groups or users as required.
- Unless circumstances dictate, accept permissions for entire group (do not uncheck individual users in a group)
- TNG users – do not forget to uncheck all other groups when submitting confidential information.

An asterisk (\*) on a group name indicates that only some group members have permissions.

Add Parent Submission Permissions to this Submission

Save



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## Accepting Defaults (cont.):

### Email Notifications:

- When making an amendment (Child) Submission always click the “Parent Submission” button to add recipients from the Parent Submission.
- “Click on Other Amendments” to add additional email contacts from other amendments to the Parent Submission. Review additions, and then customize to add more, or delete recipients as required.

Add Recipients from:



## Accepting Defaults (cont.):

### Due Date Calculator:

- Always accept default Start and Completion Dates that auto-populates when a Level and Zone is selected.
- Only modify Start and Completion Dates when permission is granted by a responsible official. Use date picker to modify.

A screenshot of a web form titled "Due Date Calculator". The form has a title bar with the text "Due Date Calculator" and a close button. Below the title bar is a section labeled "Instructions" with a dropdown arrow. The main form area contains three input fields: "Level & Zone:" with a dropdown menu showing "Any Level - Zone D Exclusively"; "Start Date:" with a text box containing "09/19/2011" and a date picker icon; and "Completion Date:" with an empty text box and a date picker icon. At the bottom right of the form is a "Save" button.



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## Where to get help?:

- Reference materials are readily available for download from the Document Download page

<b>Portal Home</b>	<h3>Document Downloads</h3> <p>The documents below are available for download.</p> <ol style="list-style-type: none"><li><b>User Help Documents</b><ol style="list-style-type: none"><li><a href="#">TFA Quick Reference Document</a><p>Click on the link above to download a PDF document for a quick outline of the steps required to submit an Engagement Request under the Tsilhqot'in Framework Agreement.</p></li><li><a href="#">TFA Engagement Request Checklist Reference Document</a><p>Click on the link above to download a PDF document for a checklist of the required document attachments for a complete Engagement Request under the Tsilhqot'in Framework Agreement.</p></li><li><a href="#">How to Name your Portal Submission</a><p>Click on the link above to download a PDF document outlining how to name your TNG Stewardship Portal Submission.</p></li><li><a href="#">TNG Stewardship Portal New Users Training Material</a><p>Click on the link above to download a PDF document of the most current New User Training Material. Last updated July 2011</p></li><li><a href="#">TNG Stewardship Portal Existing Users Training Material</a><p>Click on the link above to download a PDF document of the most current Existing User Training Material. Last updated July 2011</p></li><li><a href="#">BCGov WMS Defined</a><p>Spreadsheet outlining some of BC Government WMS (Web Map Services) layers available in Maplayers. Click on the link above to download a PDF document for a key to some of layers available from BC Government WMS (Web Map Services) on maplayers</p></li></ol></li></ol>
<b>TNG Website Home</b>	
<b>Portal Login</b>	
<b>Document Downloads</b>	



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### **Where to get help? (cont:**

A few suggestions:

TFA Quick Reference Document:

- Step by step guide to making a TFA Engagement Request, Submission and Amendment including uploading documents and shapefiles.

How to Name your Portal Submissions:

- Step by step guide to properly naming your submission.

TNG Stewardship Portal New or Existing User Training Material

- Powerpoint document from Training associated with Portal version 2.0 release January, 2011.



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## Where to get help? (cont.):

### Contacts:

BC Government Users: Edna Boston, Resource Coordination Officer, MARR  
[Edna.Boston@gov.bc.ca](mailto:Edna.Boston@gov.bc.ca)  
250-398-4422

Portal Administration: Mary Thurow, Tsilhqot'in National Government  
[mary@tsilhqotin.ca](mailto:mary@tsilhqotin.ca) or  
Sarah Gash, Tsilhqotin National Government  
[sarah@tsilhqotin.ca](mailto:sarah@tsilhqotin.ca)  
250-392-3918



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- Questions?
- Workshop to practise searching, navigating, and naming submissions.