



Repeat Issues that undermine the integrity of the Portal:

Not using Portal as primary means of communication regarding referrals.

- ✓ If you are communicating with a proponent regarding a particular referral there should be a record of that communication submitted to the Portal.
- ✓ Email correspondence, records of phone calls, reports, analysis, final reports, field notes etc all need to be uploaded!
- ✓ Try to use adequate grammar and sentences in responses.

Not checking / adding Permissions for the licensee's user group when submitting amendments.

- ✓ Ensure you review permissions prior to submitting a child submission to ensure all relevant users and user groups are checked on. Use the Buttons! And **SAVE** if you make changes
- ✓ Ensure permissions for government and licensees, industry user groups are *unselected* when submitting confidential documents, maps and analysis referencing Traditional Use Data.



Repeat Issues (cont.):

Not notifying the appropriate users with Email notifications:

- ✓ Consider who needs to see this amendment, remembering email notification is different than Permission. You can have Permission but not be notified, or be notified yet not have Permission.
- ✓ Usually if the person needs to be notified, he/she should have permission too.
- ✓ Click on the **Add Parent Submission Notifications**, and **Add Other Amendment Submission Notifications**.
- ✓ Ensure you review the email notifications to ensure all necessary users are listed.

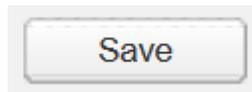


Repeat Issues (cont.):

Improper Submission Naming

- ✓ Ensure you name your submissions with enough information to quickly identify what it contains. For example “**Final Recommendations**”, “**TUS Analysis Report**”, “**Field Visit Summary**” etc..

Not Clicking **SAVE**:



- ✓ Very important to click the **SAVE** button in Content Node and Permissions Node.
- ✓ Must do this after any changes you make. Can resave multiple times.
- ✓ This action writes any edits you have done to the database, so they are there for you to retrieve in draft, or as a submitted record of your communication.



Repeat Issues (cont.):

Not linking your child submission to the Parent ID:

- ✓ When responding to a referral make sure you have properly linked your submission to the correct Parent ID.

1. Type in ID #

2. Click Validate

3. Check Name

4. Click Set Parent Submission ID Button

A screenshot of a web form titled "DRAFT SUBMISSION ID: 6412 - TFA Engagement Request 2011-Sept-15 - SarahGash". The form has a "Parent Submission ID" dropdown menu. Below it is a "Parent Submission ID" field containing the number "2498". To the right of this field is a "Validate" button, which is circled in red. Further right, the text "ID: 2498 - Forestry Referral - GraemeMcIntosh" is displayed. At the bottom right of the form is a "Set Parent Submission ID" button, also indicated by a red arrow.



Repeat Issues (cont.):

Not updating status of Parent Submissions.

- ✓ If you submit a final report, or recommendations, update the Parent ID's status to **"Under Monitor"**
- ✓ When you start work on a **"New"** Referral, update the referral to **"In Progress"**

The screenshot shows a web form titled "ID: 8352 - EL3 Sale of fractional area chilcotin river". The form has a section for "Submission Attributes" with a collapsed "Instructions" dropdown. Below this, there are three input fields: "Submission Name" with the value "EL3 Sale of fractional area chilcotin river", "Submission Status" with a dropdown menu currently showing "In Progress", and "Assigned To" with a dropdown menu showing "Loretta Williams". A "Save" button is located at the bottom right. A red arrow points from the text "In Progress" in the list above to the "Submission Status" dropdown menu in the form.



Repeat Issues (cont.):

Not Deleting Draft submissions that are no longer needed.

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: 5480 - TFA Engagement Request-2011-Sept-15 - admin

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.**

Periodically review the list of DRAFT submissions for submissions you started but never submitted and delete these.

- Do this by opening the submission in the Resume Draft Submissions section on the Fill a Form page. Scroll down to the end of the form and click the “Delete this Draft” button.

The 'Submission Control' panel has a dropdown menu for 'Instructions'. Below it are three buttons: 'Delete this Draft' (highlighted with a red arrow), 'Hold as Draft', and 'Submit to Stewardship Portal'.



Where to get help?:

- In addition to Instructions on each node, reference materials are readily available for download from the Document Downloads page.

Stewardship Home	<h3>Document Downloads</h3> <p>The documents below are available for download.</p> <ol style="list-style-type: none">1. Comprehensive Training Material<ol style="list-style-type: none">TNG Stewardship Portal New Users Training Material for TNG Staff<p>Click on the link above to download a powerpoint presentation from the TNG Stewardship staff Portal training held September 6th, 2012.</p>TNG Stewardship Portal New Users Training Material<p>Click on the link above to download a powerpoint presentation from the Portal training held July 2011.</p>Existing User Training to Introduce Revisions from Sept 15, 2011<p>Click on the link above to download a PDF document from the training conducted October 4th and 5th for Existing User, following implimentation of revisions to the Portal, September 15, 2011.</p>TNG Stewardship Portal Existing Users Training Material<p>Click on the link above to download a PDF document of the most current Existing User Training Material. Last updated July 2011</p>
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