



Background Information on the  
TNG Stewardship Planning Portal  
Compiled April 2014



# TNG Stewardship Planning Portal

Originally developed with funding from CGDI & BCCI  
(Started in 2006)

Maintained with funding from BCCI (BC Capacity  
Initiative),

The TFA (Tsilhqot'in Framework Agreement) and  
ongoing Fee for Service arrangements with  
licensees/proponents/industry.



## History of the TNG Stewardship Planning Portal

- The new “Blue” version of the Portal was released in February 2011, after almost 3.5 years of working with the red version since the fall of 2007.
- Conversion to node based code structure was implemented.
- Despite significant structural revisions and extensive changes in the portal’s code, Portal 2.0 functions similarly to the original Portal.



## History of the TNG Stewardship Planning Portal

- Improvements were required to support the increased and more extensive use the Portal was seeing.
- The Portal is now able to handle referral responses submitted by Community members as well as by TNG staff.
- Can handle non-referral information as well for individual communities.
- Ability to hold submissions in Draft added.



## History of the TNG Stewardship Planning Portal

- Addition of improved search capability:
  - Submission ID
  - Keyword Search
  - Advanced Search
- Search result display improved to tree format
  - Nested output of search results



## History of the TNG Stewardship Planning Portal

- In September 2011 revisions were made to accommodate TFA amendments:
  - Due Date calculation node added
  - Revision of active forms with new form wizard and node structure.



## History of the TNG Stewardship Planning Portal

Portal Improvements since 2011:

- Instruction node updates and improvements;
- Ability to make email and username changes were introduced to accommodate name changes due to marriage, divorce and reassigning;
- Maplayer structure and base data improvements;
- User/Group management improvements.

# **What is the Stewardship Portal?**

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## **☐ Interactive web-based land-use information management and planning support system**

- simplifies processes of filing, tracking, and storing data for more effective retrieval, review and communication of referral data

## **☐ Interactive display of map data**

- Makes power of GIS accessible to assist in planning and decision making



# What is the Stewardship Portal?

## Web interface enables the ability to:

- Upload/download, view, query, store, and print spatial and non-spatial content from any internet-connected computer

## Permanent Record

- The Portal acts as a permanent record of all communication & information relating to referrals, outliving changes in staff, email accounts, and varying personal filing systems.

# **What is unique about the Portal?**

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- ❑ Proponent is responsible for data entry**
  - Removes the administrative responsibility of data entry from the First Nations staff
  - Reduces the FN's data management costs
  - Significantly decreases the potential for data entry error.
- ❑ Is accessible over the internet**
  - Makes reviewing spatial and non-spatial data possible from remote locations (where internet is available).
- ❑ Based on open source technology.... so it's "FREE"!**
- ❑ Is flexible/customizable to meet the need of a variety of First Nation users**
  - Technology can be implemented more broadly to other neighboring nations





## **Tsilhqot'in Stewardship Planning Portal Statistics:**

- [www.tngportal.ca](http://www.tngportal.ca)
- First referral received October 17, 2007
- 1664 Referrals submitted to the Portal (not including amendments) since 2007.
- TNG has phased out spreadsheet for referral tracking where we'd been keeping track of the new referrals.

## Tsilhqot'in Stewardship Planning Portal Statistics:

	2007 (since Oct 17 <sup>th</sup> )	2008	2009	2010	2011	2012	2013
# of Referrals Received <sup>1</sup>	22	174	249	309	286	308	316
# of Users Added	18	53	27	83	37	35	24
Total # of Users <sup>2</sup>	18	71	98	181	218	253	175
Forms in use: <sup>3</sup>	- Forestry - General Communication	- Forestry - General Communication - Range & Misc projects in Chilcotin Forest District	- Forestry - General Communication - ILMB Land Act - MOR Minor Timber Harvesting - MOF Range - ILMB Water License	- Forestry - General Communication - ILMB Land Act - MOR Minor Timber Harvesting - MOF Range - ILMB Water License - Changes in and about a Stream - TFA Engagement Request	- Forestry - General Communication - TFA Engagement Request - TFA Level 1 Notification - Mining Form for Industry - TFA Level Change Form	- Forestry - General Communication - TFA Engagement Request - Mining Form for Industry - TFA Level 1 Notification - TFA Level Change Form	- Forestry - General Communication - TFA Engagement Request - Mining Form for Industry - TFA Level 1 Notification - TFA Level Change Form - Forest Management Form

- Only Parent Submissions have been counted, not child submissions aka amendments. The “garbage” and “cancelled” and “test” submissions have also not been counted, so these are real numbers.

2 - All these users might not be active in this calendar year however, as some users are deactivated but we’ve not accounted for that here.

3 – Note how new forms have been developed and tested and then either kept or replaced by other forms over time. At first the Portal just handled Forestry Referrals, then one Forest District got involved, then Front Counter BC (ILMB for 2 disciplines), then the entire provincial government came on board with the signing of the TFA (Tsilhqot'in Framework Agreement) and the customized forms were replaced by an all-encompassing form. In 2013 a Forestry Management Form was also created to handle non-cutblock harvesting referrals like FSP's, pest management plans etc.



## Portal Training Terminology

### Glossary of Key Terms

#### **Proponent**

- ✓ Company, government or individual who puts forward a proposal for land use. Examples are forestry licensee, BC government (TFA), or mining industry companies.



## Glossary of Key Terms (cont.)

### Forms

- ✓ Forms are used to enter data into the portal.
- ✓ TFA Engagement Request Form is used by Government
- ✓ Forestry Referral Form is used by West Fraser, Tolko and other licensees
  - ✓ BCTS switched to the TFA form once the TFA came into effect.
- ✓ Custom forms can be built for other portal uses.
  - ✓ The Mining Form for Industry created June 2011
- ✓ Each Form consist of a series of NODES.



Screen shot of a portion of the main TFA Form.

- ✓ Users enter basic “who / what / where / when / why” questions

A screenshot of a web form titled "Content". It features a dropdown menu for "Instructions" and several text input fields. The fields are: "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:", and "Other Comments:". A "Save" button is located at the bottom right of the form.





## Glossary of Key Terms (cont.)

### Nodes

- ✓ Nodes perform separate, independent functions. Each node is an independent block of code.

Parent Submission ID node

Content node

- ✓ Nodes have collapsible instructions, and the nodes themselves are collapsible.
- ✓ If you need help, look for a triangle near the top of a node for instructions.



- ✓ There are drop-down instructions for each node. This keeps the manual at your fingertips at all times, and always on the right page!

This red arrow indicates how to collapse the Node's instructions.

A screenshot of a web form titled "DRAFT SUBMISSION [Page 1 of 2] ~ ID: 3879 - TFA Engagement Request Form - admin". The form has a section for "Parent Submission ID" which is currently collapsed. A red arrow points to the small upward-pointing triangle icon next to the "Instructions" header, which is used to collapse the instructions. The instructions text reads: "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". Below the instructions is a "Parent Submission ID:" label, a text input field, and a "Validate" button. At the bottom are two buttons: "Copy Parent Submission Permissions to this Submission" and "Set Parent Submission ID".

This blue arrow indicates how to collapse the Node itself.



## Glossary of Key Terms (cont.)

### Parent Submission

- ✓ the first submission on a particular referral/engagement.  
Usually submitted by the proponent

### Child Submission

- ✓ Any subsequent submissions that are linked to a parent.  
Also called an “amendment”
- ✓ You can not make a “**child submission**” or “**amendment**”  
to a child submission.



## Glossary of Key Terms (cont.)

### Draft Submission

- ✓ A **Child Submission** or **Parent Submission** that has not been submitted yet.
  - ✓ As soon as you hit “Fill a Form” – a submission is created.
  - ✓ If you hit “Back” in the browser or close the browser down, your submission is automatically stored as a draft.
  - ✓ You can get back to a draft submission by clicking **Resume DRAFT** on Fill a Form page.



- ✓ Options for every submission:
  - Delete this Draft
  - Hold as Draft
  - Submit to Stewardship Portal
- ✓ Only Draft submissions can be deleted.
- ✓ While something is in draft format, it can only be seen by fellow members of the submitter's group.

Submission Control

Instructions

[Delete this Draft](#) [Hold as Draft](#) [Submit to Stewardship Portal](#)



- ✓ As soon as you hit the “**FILL A FORM**” button, a **Submission ID** is generated. The Submission ID will display at the very top of the form page you’re filling in.
- ✓ Even if you only start to fill in a form and later decide NOT to submit it, you have still created a draft submission and a Submission ID has been generated. Periodically you should clean up (delete) any draft submissions. More on how to do that later.



## Glossary of Key Terms (cont.)

### **User Group**

- ✓ a collection of users that usually work for the same company/group.
- ✓ Belonging to a particular user group has some influence on your ability to access submissions.
  - TNG user group members have access to TUS submissions.
- ✓ We now have 6 TNG Community Groups. SOME of these users have access to the TUS, not all.
- ✓ Members of a user group have default access to other group member submissions (submitted and draft).





## Examples of Portal User Groups:

- **1\_TNG**
- **Tolko**
- **West Fraser**
- **BC Government - largest group**
- **Amarc Resources**
- **Community User Groups (Alexandria, Anaham, Nemiah, Toosey, Stone, Alexis Creek)**





## Glossary of Key Terms (cont.)

### Permissions

- ✓ Permissions give a user access to view, download, and respond to Portal submissions.
- ✓ User Permissions are linked to the Groups, but are more complex than just the Group.
- ✓ There are 3 types of permissions that are set when a username is created:
  - Always Granted
  - Granted by Default but removable
  - None – which means “nothing special”



## Relationship between User Group and Permissions explained (Always granted, Granted by default, None):

- ✓ **TNG Group** is the “Super User” group:
  - Administrator, Gene, JP, Mary, Sarah, Tammy, Sally, Carla, Luke, Ursal, etc..
- ✓ People within this group have their permissions set to “Always Granted.”
- ✓ Nothing entered into the portal can be “hidden from” these users. Permission can not be checked off.



- ✓ **Industry** users (WestFraser, Tolko, Amarc Resources etc..) permissions are set to “None”. They only get access when they do the submitting, or when someone else within their user group submits or if another user, in another group, manually checks their user group or username in the permissions node. Because of this whenever you’re submitting a reply, be sure to verify that the proponent has permission to see what you’re submitting!
- ✓ **BCGovernment** users are set to “Granted by Default but removable”, as they may review information exchanged between proponent and TNG during their referral process.
  - ✓ Can be checked off to remove permission to view confidential TUS submissions by TNG staff (maps, reports, interview documents etc..)



- ✓ With the exception of TNG users, all permissions are editable (add or remove access) before a submission is submitted.
  - Uncheck an entire user group's checkbox to remove user group permission.
  - Uncheck an individual username to remove user permission.
  - ✓ Unable to remove TNG group-members' permission.
- ✓ If an error is made, contact the Portal Administrator who can manually add/remove permissions even after something's submitted.



## Example:

- ✓ A member of the **Tolko group** makes a submission – Default permissions:
  - ✓ All other members of the Tolko group start off with access to that submission. (“None” Permission)
  - ✓ All users from ANY group who has either “Always Granted” or “Granted by Default but Removable” also has permission to see this submission. (All BC Government staff, TNG, community referral workers, certain community members)
  - ✓ All users from user groups with permissions settings “None” do not have permission to see this submission. (no one from WF can see it)
  - ✓ The Tolko user has to verify the permissions are accurate BEFORE hitting “SUBMIT”.... all that can be done is to contact Portal Administration at TNG and ask her to hide it if there’s been a permission error.



Permissions

Instructions

- 1\_TNG
- Ainsworth
- Alexandria
- Alexis Creek \*
- Amarc Resources
- Anaham \*
- Archaeology
- Aspell
- BCGovernment \*
- BioMassFeasibility
- CC Wood
- Colorado Resources
- Coppercap Claims
- Esdliagh FN Licensee
- ForestsTomorrow
- Nazko Band
- Nemiah
- Pioneer
- Porcupine
- Public
- RedBluff
- Sigurdson
- Stone
- Tolko
- Toosey
- Transition Metals
- Tsi Del Del Enterprises Limited
- West Fraser
- Woodlots

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

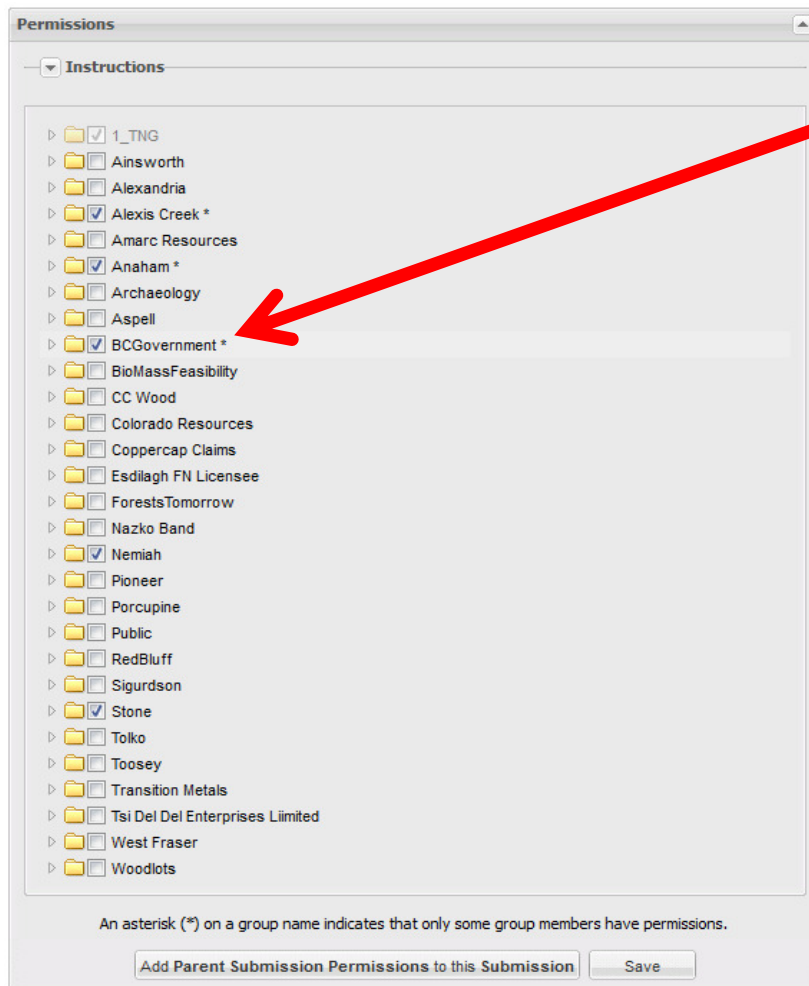
(Permissions cont.)

- ✓ Some of the community groups have users with default permission – those groups may have a \* indicating some members have access and some do not.
- ✓ If submitting a Child, simply click the “Add Parent Submission Permissions to this Submission” button so that whomever had access to the parent also has access to the child.
- ✓ Then hit SAVE!





(Permissions cont.)



- ✓ If you're from TNG or a community and are submitting something confidential, UNCHECK the BCGovernment group and the Proponent's group(s).
- ✓ It is very important to review the permissions in relation to what it is you are submitting to ensure all proponents that need to see your submission are checked on, and especially to confirm those that should not be able to see your submission are checked off. This is particularly important when submitting confidential TUS information as you proceed through the review of a referral.



(Permissions cont.)

- ✓ Remember that the \* symbol means only some people within this group have permission to see your submission.
- ✓ If you are aware of new employees in a user group expand user group and ensure all individuals are checked on.



Searching in  
the TNG  
Portal...



Find Submissions

## Find Submissions:

A screenshot of a web application window titled 'Submission Search Engine'. It features a search interface with three main sections: 'Instructions' (collapsed), 'Submission ID Search' (expanded), and 'Keyword Search' (collapsed). The 'Submission ID Search' section contains a text input field labeled 'Submission ID:' and a 'Search' button. The 'Advanced Search' section is also collapsed.

### Ways to search submissions:

- Search by Submission ID number (DBID)
- Keyword Search
- Advanced Search



Find Submissions

## Find Submissions:

A screenshot of a web application window titled "Submission Search Engine". It contains four search options, each with a dropdown arrow: "Instructions", "Submission ID Search", "Keyword Search", and "Advanced Search". The "Submission ID Search" option is expanded, showing a text input field labeled "Submission ID:" and a "Search" button to its right.

Search by Submission ID number (DBID)

This search only looks for EXACTLY the number you entered.



**Find Submissions**

## Keyword Search:

Customize search criteria as broadly or narrowly as you wish.

- ✓ Enter keyword(s) including users and click fields to search for keywords.
- ✓ Specify Submission status to search by.
- ✓ Specify type of (Parent or Child) submission to search .

**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



**Find Submissions**

## Advanced Search:

Create more complex search criteria with SQL code.

- ✓ Built in operator and database field selection.
- ✓ Data entry field.
- ✓ Save Search for later user
- ✓ Access of Saved Searches.

**Submission Search Engine**

- Instructions
- Submission ID Search
- Keyword Search
- Advanced Search**

Fields	Operators	Values
[Submission Name]	>	%
[Submission ID]	<	(
[Submission Title]	=	)
[Submission Date]	>=	AND
[Submitter Name]	<=	OR
	<>	LIKE
	.	NOT

Clear Search Save Search Search

Saved Searches



## More Searching Ideas

- ✓ Can now search dates - particularly in TFA Engagement Request Submissions.
  - Due dates exist as attributes in a database field, so they can be searched (and date ranges searched too).
- ✓ Engagement Level can be searched more easily.
  - Used to have to rely on the submitter to put Engagement Level in the submission "NAME".
- ✓ Engagement Zone can now be searched from within multiple places: [Submission Content] LIKE '%Zone%D%'
- ✓ See Document Download page "**How to create an Advanced Search Query**" for more examples of code.





## How to Navigate the Results of your Search:

- ✓ “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”

Search Results

Search Results (71 items)

- ▶ ID: 1019 - Amendment to ID: 1003 - General Communication Form - LorettaWilliams [ [Modify](#) ]
- ▶ ID: 1545 - 5407510DekaLakePowerLine [ [Modify](#) ]
- ▶ ID: 1788 - Trap Tree Removal - Anaham Flats IR#1 [ [Modify](#) ]
- ▶ ID: 2181 - EL2 and EL4-IP/drilling-AMARC Newton [ [Modify](#) ]
- ▶ ID: 2842 - TNG Engagement Form [ [Modify](#) ]
- ▶ ID: 3333 - Amendment to ID: 2954 - General Communication Form - RyanPGrady [ [Modify](#) ]
- ▶ ID: 3560 - FieldTrip Pictures [ [Modify](#) ]
- ▶ ID: 3770 - note from TNG re child 3734. Parent ID 2181 [ [Modify](#) ]
- ▶ ID: 4032 - AIA [ [Modify](#) ]
- ▶ ID: 4304 - Amendment to ID: 3747 - General Communication Form - ChadStump [ [Modify](#) ]
- ▶ ID: 4643 - GMZ 2012-2016 Moose Allocations EL4 [ [Modify](#) ]
- ▶ ID: 4686 - EL3\_FLNRO\_SonaResourcesCorp\_NOW\_Elizabeth\_Blackdome [ [Modify](#) ]
- ▶ ID: 4780 - informing Murray of our new Mining, Oil & Gas Coordinator [ [Modify](#) ]
- ▶ ID: 4817 - Initial Referral Report attached on behalf of JP [ [Modify](#) ]
- ▶ ID: 4862 - EL1 Spanish Mountain [ [Modify](#) ]
- ▶ ID: 4891 - EL1 MoEMPR IP Surveys - Pyper Lake - Colorado Resources Ltd. [ [Modify](#) ]
- ▶ ID: 4826 - Coppercap NOW Gaspard Lake [ [Modify](#) ]
- ▶ ID: 4832 - Colorado Resources - Mining Referral [ [Modify](#) ]
- ▶ ID: 4978 - update to Murray [ [Modify](#) ]
- ▶ ID: 4580 - EL3 Discovery Consultants Tasco Mineral Exploration [ [Modify](#) ]
- ▶ ID: 5044 - EL3 Coppercap [ [Modify](#) ]

Export Results to CSV (Excel)



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

✓ Expanded Search Results “Tree”

✓ Display of Submission Details:

Name  
Actions  
Amendments  
Attachments

The screenshot shows a 'Search Results' window with a tree view. The root node is 'Search Results (1 item)'. Underneath is a folder icon for 'ID: 2181 - EL2 and EL4-IP/drilling-AMARC Newton [Modify]'. This folder is expanded to show several items: 'Form: General Communication Form (Form ID: 12)', 'Name: EL2 and EL4-IP/drilling-AMARC Newton', 'Title: ID: 2181 - General Communication Form - JasonKerley', 'Status: In Progress', 'State: SUBMITTED (02/08/2010 03:43 PM)', 'Submitter: Jason Kerley', and 'Assigned to: JP Laplante'. Below these are three expandable sections: 'Actions', 'Amendments', and 'Attachments'. Red arrows point from the text on the left to these specific elements in the screenshot. At the bottom right of the window is a button labeled 'Export Results to CSV (Excel)'.





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

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

View Form Data  
Export to PDF  
Export to WebPage  
View or Set  
Submission Attributes

Search Results

- Search Results (1 item)
  - ID: 2181 - EL2 and EL4-IP/drilling-AMARC Newton [ [Modify](#) ]
    - Form: General Communication Form (Form ID: 12)
    - Name: EL2 and EL4-IP/drilling-AMARC Newton
    - 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
      - [View Form Data](#)
      - [Export to PDF](#)
      - [Preview as WebPage](#)
      - [View or Set Submission Attributes](#)
      - [View History](#)
    - Amendments
    - Attachments

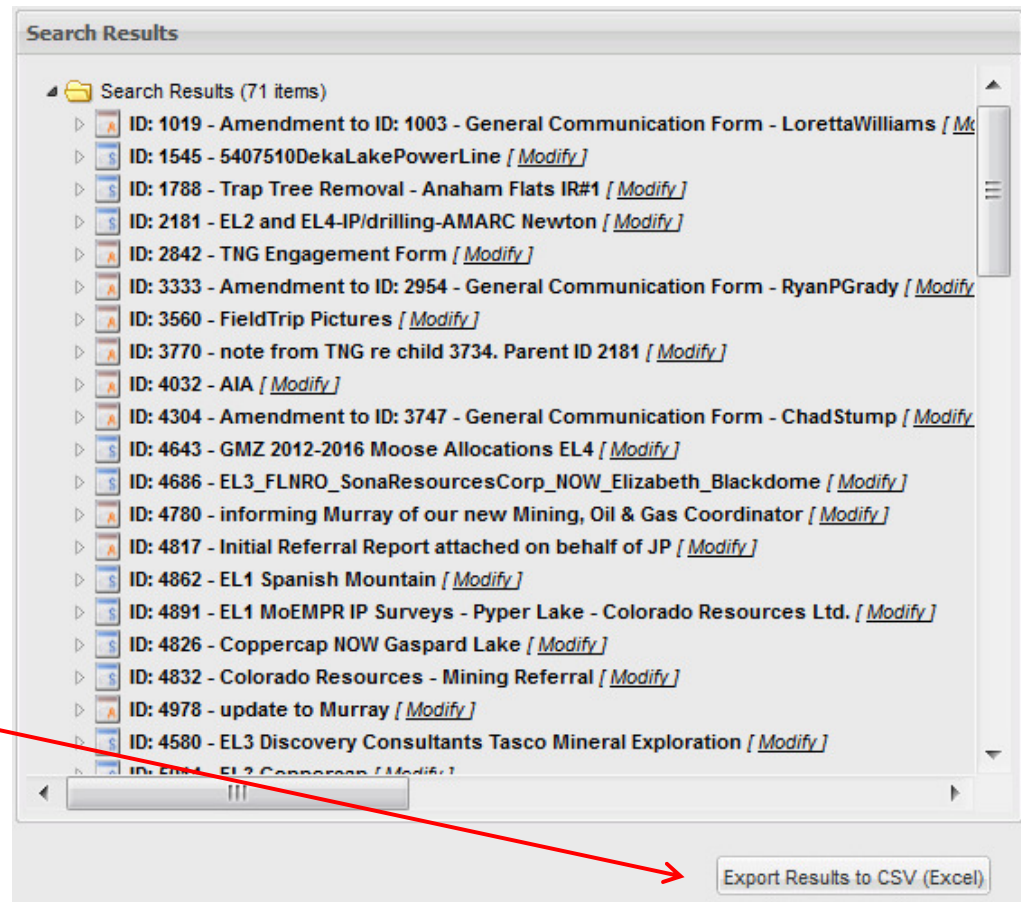
Export Results to CSV (Excel)



## How to Navigate Search Results:

You can export to a spreadsheet in order to manipulate search results further.

Click Export to CSV (Excel)





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

View or Set Submission Attributes:

- ✓ 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”

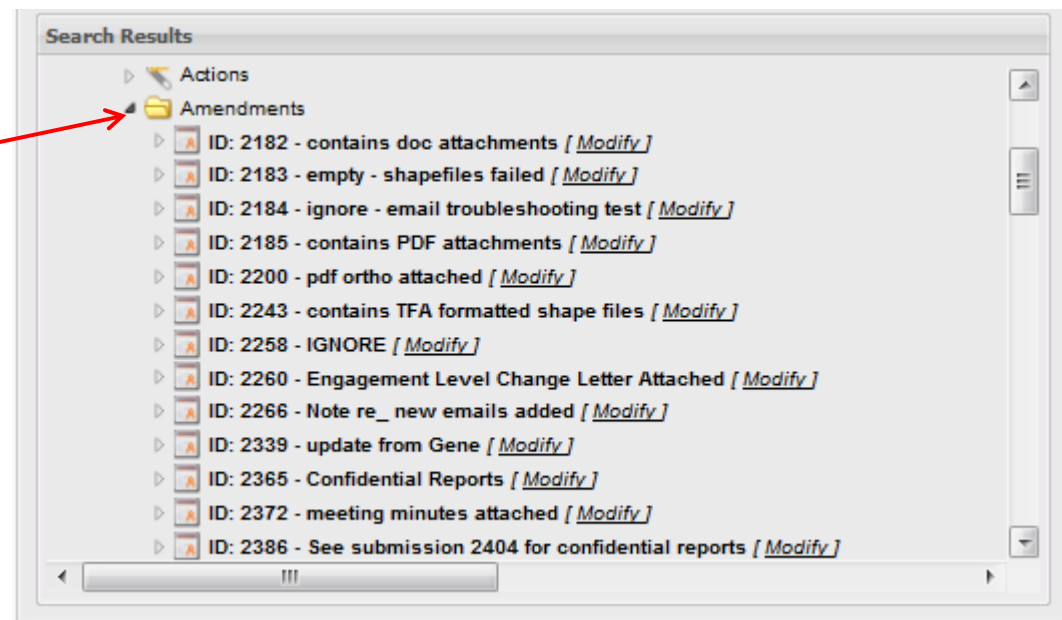
The screenshot displays the 'Search Results' interface. On the left, a tree view shows 'Search Results (1 item)' expanded to 'ID: 2181 - EL2 and EL'. Below this, details for the submission are listed: 'Form: General Co', 'Name: EL2 and EL', 'Title: ID: 2181 - Gei', 'Status: In Progres', 'State: SUBMITTED', 'Submitter: Jason K', and 'Assigned to: JP La'. An 'Actions' section includes links for 'View Form Data', 'Export to PDF', 'Preview as WebPage', 'View or Set Submission Attributes', and 'View History'. A red arrow points from the 'View or Set Submission Attributes' link to a modal window titled 'ID: 2181 - EL2 adn EL4-IP/drilling-AMARC Newton'. This modal window has a 'Submission Attributes' section with fields for 'Submission Name' (EL2 adn EL4-IP/drilling-AMARC Newton), 'Submission Status' (In Progress), and 'Assigned To' (JP Laplante). A 'Save' button is circled in red. Another red arrow points from the 'Save' button back to the 'View or Set Submission Attributes' link in the search results. At the bottom right of the search results area, there is a button labeled 'Export Results to CSV (Excel)'.



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

Amendments:

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

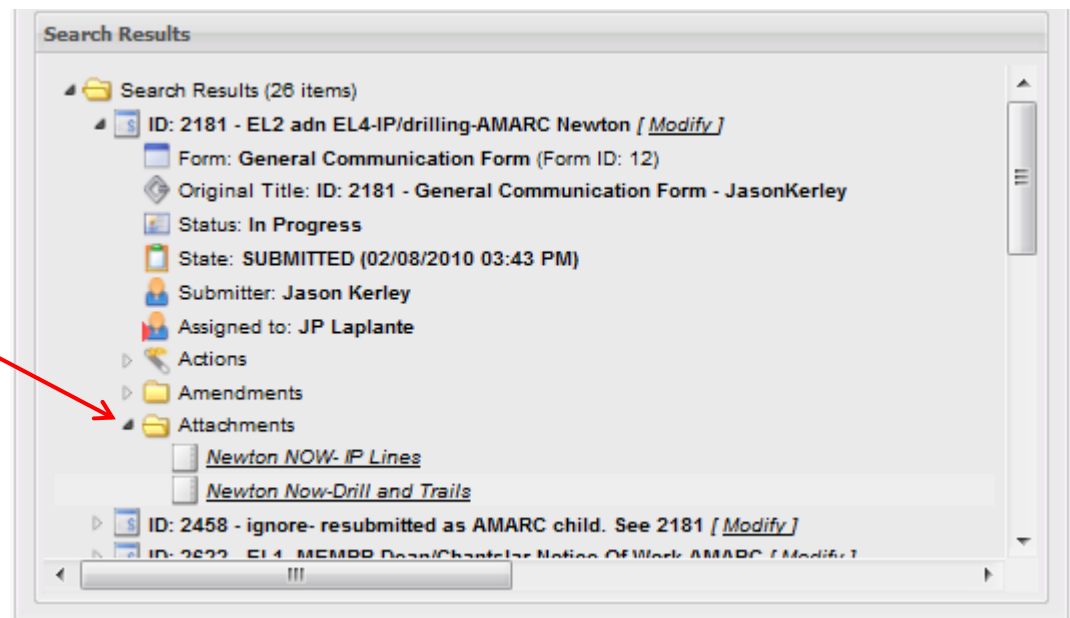




## How to Navigate Search Results (cont.):

### 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 open.







## 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.

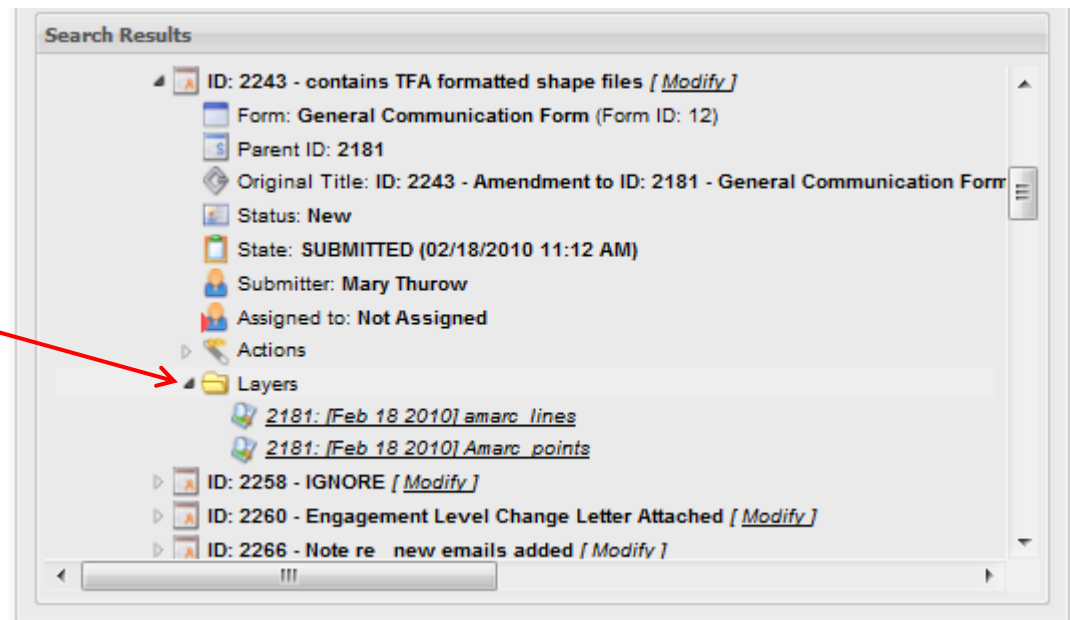
The screenshot shows a "Search Results" window with a list of items. Each item has a small icon and a title followed by a "[ Modify ]" link. The item "ID: 4658 - Amendment to ID: 2181 - General Communication Form - LarryHenry [ Modify ]" is selected and expanded. Below the title, there are several fields: "Form: General Communication Form (Form ID: 12)", "Parent ID: 2181", "Name: No name specified", "Title: ID: 4658 - Amendment to ID: 2181 - General Communication Form - LarryH", "Status: New", "State: SUBMITTED (04/18/2011 03:43 PM)", "Submitter: Edna Boston", and "Assigned to: Not Assigned". There are also expandable sections for "Actions" and "Attachments". A red arrow points from the text in the previous block to the arrow icon next to the selected item in the search results.



## 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.





## Viewing an existing Submission:

- A great way to view a referral is to start with the “**Export to PDF**” or “**Preview as WebPage**” viewing options, available under the “**Actions**” arrow.

Search Results

- Search Results (1 item)
  - ID: 6075 - WFT A20005 CP 90U Blks 1 and 2 - Forestry Referral [[Modify](#)]
    - Form: Forestry Referrals 2011-Sept-15 (Form ID: 26)
    - Name: WFT A20005 CP 90U Blks 1 and 2 - Forestry Referral
    - Title: ID: 6075 - Forestry Referrals 2011-Sept-15 - MattSear
    - Status: In Progress
    - State: SUBMITTED (01/30/2012 04:13 PM)
    - Submitter: Matt Sear
    - Assigned to: Chad Stump
    - Actions
      - [View Form Data](#)
      - [Export to PDF](#)
      - [Preview as WebPage](#)
      - [View or Set Submission Attributes](#)
      - [View History](#)
    - Amendments
    - Attachments
    - Layers



export-submission.php (application/pdf Object) - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Stewardship Portal - Submission Sear... x export-submission.php (application/... x Explore Music - Popular - Grooveshark x +

www.tngportal.ca/export-submission.php?format=PDF&SubID=6075

Most Visited Getting Started Latest Headlines

1 / 2 100%



## ««« SUBMISSION »»»»

### SUMMARY

Submission ID	6075
Name	WFT A20005 CP 90U Blks 1 and 2 - Forestry Referral
Title	ID: 6075 - Forestry Referrals 2011-Sept-15 - MattSear
Submission State	SUBMITTED
Submission Date (MM/DD/YYYY)	01/30/2012 04:13 PM
Submittor	Matt Sear ( <a href="mailto:matt.sear@westfraser.com">matt.sear@westfraser.com</a> )
Assigned To	Chad Stump ( <a href="mailto:chad@tsilhqotin.ca">chad@tsilhqotin.ca</a> )
Status	In Progress

### CONTENT

Please remember to attach shape files WITH THE DBID FILLED IN, as well as a complete block info sheet, overview map, and site plan map when available.

## ATTACHMENTS

Attachment Name	Attachment Description
<a href="#">90U,91U,92U,93U 100000 FN.pdf</a>	1:100,000 Overview -- Shows Other Permits 90U-93U.
<a href="#">90U Referral.pdf</a>	1:20000 Block Map

Submission ID 6075

Page 1 of 2

09/04/2012 09:36 AM

<a href="#">ID6075_90U_MSear.doc</a>	Block-By-Block Information Supplemental
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## LAYERS

Layer Name	Layer Schema
SID:6075 [Jan 30 2012] WFM_Blocks_Referral	forestry_blocks
SID:6075 [Jan 30 2012] WFM_Roads_Referral	forestry_rds

## EMAIL NOTIFICATIONS

Email Recipient	Email Timestamp (MM/DD/YYYY)
<a href="mailto:Edna.Boston@gov.bc.ca">Edna.Boston@gov.bc.ca</a>	01/30/2012 04:13 PM
<a href="mailto:matt.sear@westfraser.com">matt.sear@westfraser.com</a>	01/30/2012 04:13 PM
<a href="mailto:portaladmin@tsilhqotin.ca">portaladmin@tsilhqotin.ca</a>	01/30/2012 04:13 PM

export-submission.pdf (SECURED) - Adobe Reader

File Edit View Window Help

2 / 2 102%

Comment Share

## AMENDMENTS

Amendment ID	6111
Name	Amendment with form filled in and maps re attached.
Title	ID: 6111 - Amendment to ID: 6075 - Forestry Referrals 2011-Sept-15 - MattSear
Amendment Date (MM/DD/YYYY)	02/06/2012 03:11 PM

Amendment ID	7024
Name	Decision Pending..WFM CP 90U
Title	ID: 7024 - Amendment to ID: 6075 - General Communication Form 2011-Sept-15 - NicoleStrand
Amendment Date (MM/DD/YYYY)	08/22/2012 03:22 PM

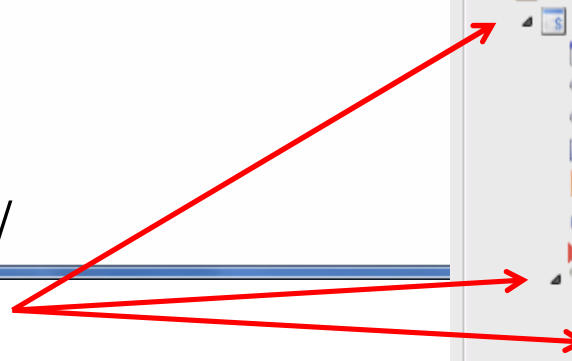
  

Amendment ID	7042
Name	PDFs attached showing modified block boundary due to lithic scatter located. Waiting for shapefiles. MT
Title	ID: 7042 - Amendment to ID: 6075 - General Communication Form 2011-Sept-15 - MattSear
Amendment Date (MM/DD/YYYY)	08/31/2012 03:52 PM

Search Results

- Search Results (1 item)
  - ID: 6075 - WFT A20005 CP 90U Blks 1 and 2 - Forestry Referral [Modify]
    - Form: Forestry Referrals 2011-Sept-15 (Form ID: 26)
    - Name: WFT A20005 CP 90U Blks 1 and 2 - Forestry Referral
    - Title: ID: 6075 - Forestry Referrals 2011-Sept-15 - MattSear
    - Status: In Progress
    - State: SUBMITTED (01/30/2012 04:13 PM)
    - Submitter: Matt Sear
    - Assigned to: Chad Stump
  - Actions
    - View Form Data
    - Export to PDF
    - Preview as WebPage

PDF summaries /  
Webpages:





## What is in a NAME?:

- ✓ A submission name is a custom-entered quick summary of the submission.
- ✓ A Submission name is one of only a few attributes that can be entered on the form AND / OR edited after a form is submitted.
- ✓ **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.





## How to Name your Submission:

*As of April 2013, the Submission Name field is available on all Portal Forms.*

The screenshot shows a web form with two sections. The top section is titled "Parent Submission" and contains a "Submission Name" field with the value "name not set" and a "Submission Title" field with the value "ID: 8250 - General Communication Form 2011-Sept-15 - MaryThurrow". Below this is a "Parent Submission ID" field with a "Validate" button and a "Set Parent Submission ID" button. The bottom section is titled "Submission Name" and contains a "Submission Name" field. A red starburst graphic with the word "NEW" in red is placed over the "Submission Name" field label. A red arrow points from the text "New Naming Node: Enter Submission Name" to the "Submission Name" input field.

A new Naming Node has been added to the Portal's forms, and it looks like this when you're first filling the form:

New Naming Node:  
Enter Submission Name

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



## How to Name your Submission:

For TFA Engagements, please include the Engagement Level, the company / proponent, and a location keyword. Here are examples:

**EL4 Amarc Resources Drilling by Scum Lake**

**EL3 BCTS MPB Salvage - Gaspard - A90185 Blks 1-4 A91346 Blk 1**

**EL2\_HoweMeadowFenceReplacement or EL2 Howe Meadow Fence Replacement – Crazy Creek** (Spaces are allowed in the submission name)

For Forestry Referrals, where relevant, please use Licensee, License, CP, Blocks and Geographic Location to describe the submission:

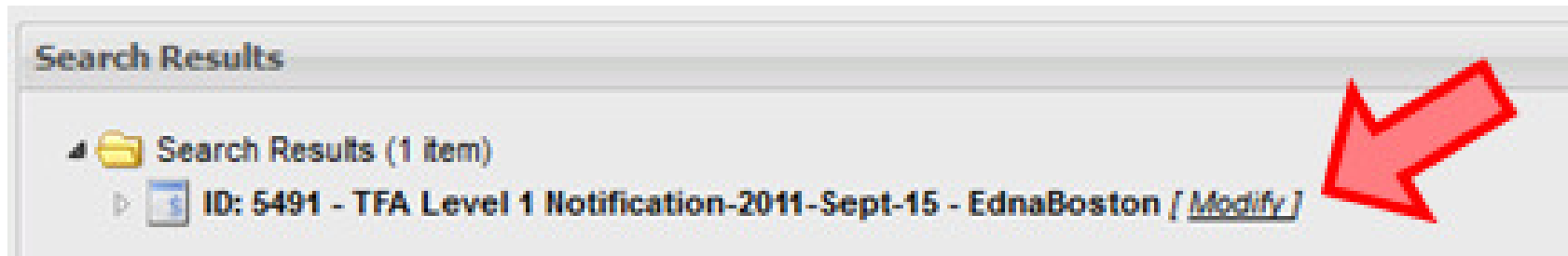
**WFT - A20020 CP 899 Blks 1-9 Scum Lake**

**Tolko Q – A20010 CP 10 Blk Q0381 – Tingley Creek**



## What if you need to **CHANGE** a Submission's Name?

1. Locate the Submission via one of the Searching methods.
2. View search results and click on the (*modify*) text next to current name.



3. In the Submission Attributes box that pops up, enter appropriate name and click "**Save**".
4. You will be notified that your Save was successful.
5. You can also access "Submission Attributes" from within "Actions"
6. Close the Submission Attributes box. Refresh and re-navigate to Submission ID to view changes to name.

**Remember, each submission needs to be named, including Child submissions!**



## Why would you change a submission's name?

1. Perhaps you forgot to hit "Save" on the Naming Node on the Portal Form.
2. Perhaps you accidentally entered a special character in the Name (the apostrophe is the most common special character used in error)
3. Perhaps the submitter forgot to link the submission properly to its parent. Whoever notices it would rename the submission to something like "Ignore – should have been a child" and the submitter would be emailed and asked to resubmit.
4. **Remember, each submission needs to be named, including Child submissions!** This helps all users visualize the progress on each referral / engagement.





## Understanding the defaults & parameters of other nodes

Permissions, Email Notifications, Due Date Calculator nodes

- ✓ Always accept defaults first before making customizations.
- ✓ Portal has been programmed with defaults in MOST situations.

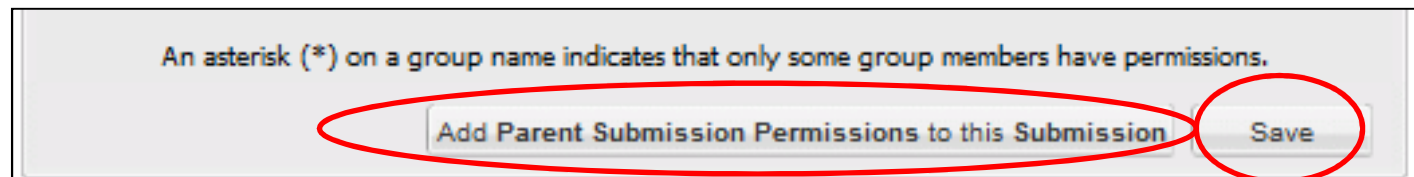
Permissions:

- ✓ Default permissions are based on the circumstances under which the username was created by the Portal Administrator. (Always Granted, Granted by Default but Removable, None).
- ✓ Your group's other members can see your submission by default.
- ✓ The Province of BC's group members can see all submissions by default as they are often reviewing correspondence on referrals



## Permissions:

- ✓ When making an amendment (Child) Submission, always click the **“Add Parent Submission Permissions to this Submission”** button. This gives everyone who was initially involved access to your reply.
- ✓ Review the list and think about who else might need permission and add them, or uncheck (deny) groups or users as required.
- ✓ Unless circumstances dictate, accept permissions for the entire group (do not uncheck individual users in a group)
- ✓ TNG & Community users – do not forget to remove all proponent and government groups when submitting confidential information (TUS Reports, TUS Maps and internal comments).
- ✓ **SAVE** before moving on to the next node.





## Email Notification Node:

- ✓ By default (for troubleshooting help because of the TFA) Edna Boston gets cc'd on EVERY SINGLE portal email – even if she doesn't have access to the submission.
- ✓ TNG's Portal Administrator (Mary) also gets cc'd on all portal emails. These are only used to gauge Portal activity and assist with troubleshooting – be aware that Mary & Sarah do not read every single portal submission!
- ✓ As with permissions, there are buttons that pull previously-involved people onto the email list. Always click on **BOTH** these buttons:

A screenshot of a web form titled 'Add Recipients from:'. Below the title are two buttons: 'Parent Submission' and 'Other Amendments'. The buttons are light gray with a slight shadow and are positioned side-by-side within a larger light gray rectangular frame.

- ✓ Then, if needed manually type in email addresses that aren't already on the list, using the auto-complete functionality provided.



## Email Notification (cont.):

Adding new emails:

- ✓ The portal also can help ensure you spell new email address properly.
- ✓ Once you've entered 3 letters of the name or address, a list of all the matches appears.

A screenshot of the "Add Recipients Manually:" form. The search input field contains "gas". Below the input, a list of search results is displayed:

- Michael Gash**  
Michael.Gash@gov.bc.ca
- Sarah Gash**  
sarah@tsilhqotin.ca

At the bottom of the list, there are navigation controls: "Page 1 of 1" with arrows for navigation and a refresh icon.

A screenshot of the "Add Recipients Manually:" form. The search input field contains "sarah@tsilhqotin.ca". Below the input, there is a button labeled "Add Recipient" which is circled in red.


- ✓ Select from the list to avoid typos in email addresses, and hit "Add Recipient"



## The Final Step – SUBMITTING

- As with all nodes, there are Instructions available to help you decide whether to Delete, Hold in Draft, or Submit to the Portal.

**Submission Control \*\* Required \*\***

 **Instructions**

If you wish to abandon this submission, click the **Delete this Draft** button located below.

If you wish to hold this submission in a draft state so you can continue work on it another day, click the **Hold as Draft** button located below.

When you have completed filling in all of this submission's content, and are certain the information contained within is accurate, you can post this submission to the Stewardship Portal by clicking the **Submit to TNG Portal** button located below. Once you post this submission to the TNG Portal, you can no longer make any changes to it.

**Delete this Draft**      **Hold as Draft**      **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.

<b>Stewardship Home</b>	<h3>Document Downloads</h3> <p>The documents below are available for download.</p> <ol style="list-style-type: none"><li><b>1. Comprehensive Training Material</b><ol style="list-style-type: none"><li><a href="#">TNG Stewardship Portal New Users Training Material for TNG Staff</a><p>Click on the link above to download a powerpoint presentation from the TNG Stewardship staff Portal training held September 6th, 2012.</p></li><li><a href="#">TNG Stewardship Portal New Users Training Material</a><p>Click on the link above to download a powerpoint presentation from the Portal training held July 2011.</p></li><li><a href="#">Existing User Training to Introduce Revisions from Sept 15, 2011</a><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></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></ol></li></ol>
<b>Find Submissions</b>	
<b>Fill A Form</b>	
<b>Map Layers</b>	
<b>View Available Schemas</b>	
<b>View Form Fields</b>	
<b>Document Downloads</b>	
<b>Logout</b>	





## Which help document do I start with?

A few suggestions for download from the Document Download Page:

### **TFA Quick Reference Document:**

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

### **How to Name your Portal Submissions:**

- ✓ Step by step guide to properly naming your submission.

### **TNG Stewardship Portal Training Materials**

- ✓ PowerPoint documents are available for download, including speaking notes.





## **Repeat Offenses 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!

### **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!
- ✓ Ensure permissions for government and licensees, industry user groups are *unselected* when submitting confidential documents, maps and analysis referencing Traditional Use Data.



## Repeat Offenses (cont.):

### Not notifying the appropriate users with Email notifications:

- ✓ Ensure you review the email notifications to ensure all necessary users are listed.
- ✓ 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.

### 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..



## Repeat Offenses (cont.):

### Not updating status of Parent Submissions.

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

The screenshot shows a web form titled "ID: 8352 - EL3 Sale of fractional area chilcotin river". The form has a section titled "Submission Attributes" with a collapsed "Instructions" dropdown. Below this, there are three input fields: "Submission Name" containing "EL3 Sale of fractional area chilcotin river", "Submission Status" set to "In Progress", and "Assigned To" set to "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 Name" field.

ID: 8352 - EL3 Sale of fractional area chilcotin river	
Submission Attributes	
- Instructions	
Submission Name:	EL3 Sale of fractional area chilcotin river
Submission Status:	In Progress
Assigned To:	Loretta Williams
Save	



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

### Portal Administration Contacts:

Mary Thurow, Tsilhqot'in National Government  
[mary@tsilhqotin.ca](mailto:mary@tsilhqotin.ca)

Sarah Gash, Tsilhqot'in National Government  
[sarah@tsilhqotin.ca](mailto:sarah@tsilhqotin.ca)

250-392-3918