Tsilhqot'in National Government

Natural Resource Worker

Stewardship Planning Portal Training

May 2015

What is the TNG Stewardship Planning Portal?

Tsilhqot'in National Government — Stewardship Portal

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

- CMS – Content Management System.
- Simplifies processes of filing, tracking, and storing data for more effective retrieval, review and communication.

Interactive display of map data

- Makes power of GIS accessible to assist in planning and decision making for Natural Resource Workers.

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Stewardship Portal

Developed by Geoborealis Spatial Data Management

- Prince George based developer. Scott Emmons with Volker Schunicht

- Other users (Northern Shuswap Tribal Council (NSTC)(new), Carrier Sekani Tribal Council (CSTC), Musqueam (new), and Dawson Creek City Water Services.

Celebrating 10,000 Portal submissions – 2007 to 2014
Devon, Sarah, Scott, Mary and Volker

Web interface enables the ability to:

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

- Makes reviewing spatial and non-spatial data possible from remote locations (where internet is available).

Permanent Record

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

Concerning Referrals, 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: The organization of information origin is responsible for data entry.

Based on open source technology….

- Allowing for complete **customizability**. The Portal has gone through a number of revisions over the years to meet our organizational needs.
- **Quality service** – as this is "our Portal", designed for TNG's use, we have the ability to request revisions that suit our needs.
- **Cost saving** – initial implementation and set up is complete. No annual fees or software upgrades required except where we request. NO ANNUAL FEES!

Website Address: **www.tngportal.ca**

Assignment 1: Log In and Review Features
Click on the **Portal Login** button on the left side of the website homepage.

Portal Login
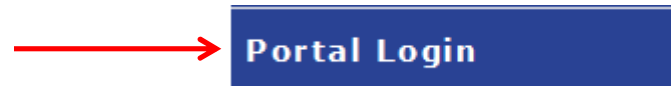
Your **Username** is your first name and your last name, no spaces and is case sensitive:

**Example:** BlaineGrinder, GeneCooper, SallySellars etc.

Passwords are confidential and case sensitive. Please see Mary or Sarah for a reminder if you have forgotten yours.

Stewardship Portal Login

Username: [   ]

Password: [   ]

LOGIN

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Stewardship Portal

Review pages:

Click on **Document Downloads** page

Where you look for help documents

| Document Downloads |
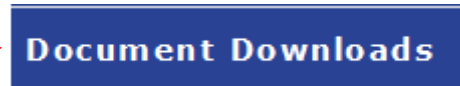
Find: How to Name your Portal Submission **UPDATED May 2013**
Click on link to open pdf document. Review document. (Hint review and remember where this is. You might need it later!)

Click browser back ⬅ button to return to **Document Downloads**

Is there a document for linking a child to a parent? What is it called?
_____
What is the date on the document for Creating an Advanced Search?
_____
What does WMS mean (this acronym is defined in one of the descriptions of the user help documents:_____

Assignment 2: Find Submission

Click on Find Submissions Tab on the right hand side

Click on arrows to expand and collapse options.
Review options for searching.

Assignment 2: Find Submission

Click on **Find Submission** page. ──────────────→ Find Submissions

List the 3 ways to search for submissions.

1. _____
2. _____
3. _____

What happens if you click on the arrow beside "Keyword Search"?
_____
_____

Assignment 2: Find Submission
Keyword Search

Find All submissions with "Harry Jennings" in it.
- Click on Keyword Search
    1. Type <u>Harry Jennings</u> in Keyword Search field
    2. Check all Search fields on
    3. Check all Submission Status' on
    4. Check all Results on
    5. Click Search

How many submissions does it find?_____

▲ Keyword Search

Keyword(s): Harry Jennings

Search Fields:

- ☑ Field Name
- ☑ Submission Name
- ☑ Submission Title
- ☑ Submission Date
- ☑ Submitter Name
- ☑ Submission Assigned To
- ☑ Submission Content
- ☑ Submission File Name
- ☑ Submission File MetaData

Submission Status:

- ☑ Submission Status
- ☑ Expired
- ☑ In Progress
- ☑ Insufficient Capacity
- ☑ New

Include in Results: Submissions ☑   Amendments ☑

Search

Assignment 2: Find Submission
Keyword Search – Narrow the search criteria

Find All submissions <u>submitted</u> by "Harry Jennings" and a Parent Submission.
1.   Type Harry Jennings in Keyword Search field
2.   Narrow the search to only Submitter Name by checking all boxes off except Submitter Name. (Hint: click field name at the top twice to turn on all and all off so you don't have to click each field off).
3.   Check all Submission Status' on
4.   Check Amendments off
5.   Click Search

How many submissions does it find?_____

Keyword Search

Keyword(s): Harry Jennings

Search Fields:

☐	Field Name
☐	Submission Name
☐	Submission Title
☐	Submission Date
☑	Submitter Name
☐	Submission Assigned To
☐	Submission Content
☐	Submission File Name
☐	Submission File MetaData

Submission Status:

☑	Submission Status
☑	Expired
☑	In Progress
☑	Insufficient Capacity
☑	New

Include in Results: Submissions ☑   Amendments ☐

Search

Assignment 2: Find Submission
Keyword Search – Narrow the search criteria further

Find All submissions <u>submitted</u> by "Harry Jennings", Parent Submission, and Status is "Insufficient Capacity".

1.   Type Harry Jennings in Keyword Search field
2.   Narrow the search to only Submitter Name by checking all boxes off except Submitter Name. (Hint: click field name at the top twice to turn on all and all off so you don't have to click each field off)
3.   Check all Submission Status' off except "Insufficient Capacity"
4.   Check Amendments off
5.   Click Search

How many submissions does it find?_____
Write down the Submission ID of last record_____

Keyword Search

Keyword(s): Harry Jennings

Search Fields:

	Field Name
☐	Submission Name
☐	Submission Title
☐	Submission Date
☑	Submitter Name
☐	Submission Assigned To
☐	Submission Content
☐	Submission File Name
☐	Submission File MetaData

Submission Status:

	Submission Status
☐	Expired
☐	In Progress
☑	Insufficient Capacity
☐	New

Include in Results: Submissions ☑   Amendments ☐

Search

Assignment 2: Find Submission

Navigate back to Submission ID Search

Enter Submission ID: 6747 Click Search button.

Submission Search Engine

▾ Instructions

▴ Submission ID Search

Submission ID: [   ]

Search

Assignment 3: Navigation of a Submission
Expand the contents of Submission ID **6747**.
Click on the arrow adjacent to the blue "S"
symbol.
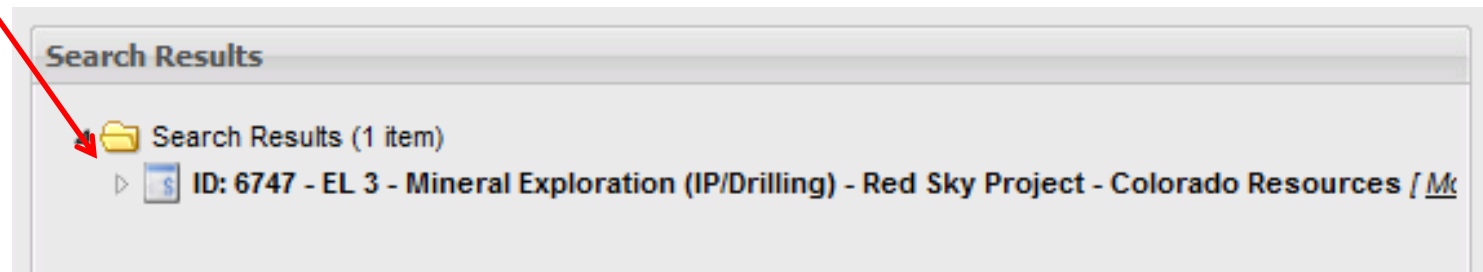
Search Results

📁 Search Results (1 item)
▷ 🅢 ID: 6747 - EL 3 - Mineral Exploration (IP/Drilling) - Red Sky Project - Colorado Resources [M(

Search Results

Search Results (1 item)

- ID: 6747 - EL 3 - Mineral Exploration (IP/Drilling) - Red Sky Project - Colorado Resources [Mc
  - Form: **TFA Engagement Request 2011-Sept-15** (Form ID: 24)
  - Name: **EL 3 - Mineral Exploration (IP/Drilling) - Red Sky Project - Colorado Resources**
  - Title: **ID: 6747 - TFA Engagement Request 2011-Sept-15 - HarryJennings**
  - Status: **Insufficient Capacity**
  - State: **SUBMITTED (06/01/2012 03:27 PM)**
  - Submitter: **Harry Jennings**
  - Assigned to: **Trina Setah**
  - Due Date Calculator: **Level 3 - Zone B and/or C** [Modify]
  - Actions
  - Amendments
  - Attachments
  - Layers

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Stewardship Portal

Search Results

📁 Search Results (1 item)
- 🔷 **ID: 6747 - EL 3 - Mineral Exploration (IP/Drilling) - Red Sky Project - Colorado Resourc**
  - 🟦 Form: **TFA Engagement Request 2011-Sept-15** (Form ID: 24)
  - 🔷 Name: **EL 3 - Mineral Exploration (IP/Drilling) - Red Sky Project - Colorado Resource**
  - 🔷 Title: **ID: 6747 - TFA Engagement Request 2011-Sept-15 - HarryJennings**
  - 📋 Status: **Insufficient Capacity**
  - 📋 State: **SUBMITTED (06/01/2012 03:27 PM)**
  - 👤 Submitter: **Harry Jennings**
  - 👤 Assigned to: **Trina Setah**
  - ⚠️ Due Date Calculator: **Level 3 - Zone B and/or C** *[Modify]*
  - 🔧 Actions
  - 📁 Amendments
    - 📄 **ID: 6763 - Assigned to Christine Tether** *[Modify]*
    - 📄 **ID: 6990 - MEM Notification of Decision - Mine#1620996201202 - Red Sky Project**
  - 📁 Attachments
    - _1620996201202ER_PortalFinal_2012.docx_
    - _1620996201202_NOW.pdf_
    - _1620996201202_coloradoclaimsmap.pdf_
    - _1620996201202_redsky_property.pdf_
    - _1620996201202_RedSky_prop_drilling.pdf_
  - 📁 Layers
    - _SID:6747 [May 31 2012] ProjectB_RedSky_

Search Results

Submitter: **Harry Jennings**

Assigned to: **Trina Setah**

▷ ⚠ Due Date Calculator: **Level 3 - Zone B and/or C** [*Modify*]

▷ 🔧 Actions

▲ 📁 Amendments

    ▷ 📄 **ID: 6763 - Assigned to Christine Tether** [*Modify*]

    ▲ 📄 **ID: 6990 - MEM Notification of Decision - Mine#1620996201202 - Red Sky Project**

        📋 Form: **General Communication Form 2011-Sept-15** (Form ID: 27)

        📄 Parent ID: **6747**

        ◈ Name: **MEM Notification of Decision - Mine#1620996201202 - Red Sky Project**

        ◈ Title: **ID: 6990 - Amendment to ID: 6747 - General Communication Form 2011-S**

        📄 Status: **New**

        📋 State: **SUBMITTED (08/10/2012 09:00 AM)**

        👤 Submitter: **Harry Jennings**

        👤 Assigned to: **Not Assigned**

      ▷ 🔧 Actions

      ▲ 📁 Attachments

          📄 *MEMNoOfDec-RedSky 1620996201202.docx*

▲ 📁 Attachments

    📄 *1620996201202ER_PortalFinal_2012.docx*

    📄 *1620996201202_NOW.pdf*

    📄 *1620996201202_coloradoclaimsmap.pdf*

Assignment 3: Navigation of Submission Tree

What level of engagement is this submission?_____

How many amendments have been made on this submission?_____

How many attachments are there in the parent submission?_____

What is the government file number on this submission? (Hint you need to open and review the form content to get this information)_____
Access the Form in "Actions – View Form data"

Assignment 4: Reviewing a submission

Use skills covered so far to find and review submission ID **8933.**

Try to download both documents. What happens with the one with the space in the name (Copy TFA_QuickSteps_Sept15_2011.pdf)?

_____

_____

_____

Solution:

Save document to folder on your PC, rename it with corrected name (no spaces and the original extention (*.pdf). It will be associated with the right software now and you should be able to open the saved copy properly.

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Search Results

◢ 📂 Search Results (1 item)
  ◢ 🗒️ **ID: 8933 - Training Submission - TFA Engagement** *[Modify]*
      🟦 Form: **TFA Engagement Request 2011-Sept-15** (Form ID: 24)
      ◈ Name: **Training Submission - TFA Engagement**
      ◈ Title: **ID: 8933 - TFA Engagement Request 2011-Sept-15 - SarahGash**
      📋 Status: **New**
      📋 State: **SUBMITTED (10/09/2013 11:41 AM)**
      👤 Submitter: **tng portal admin**
      👤 Assigned to: **Not Assigned**
    ▷ ⚠️ Due Date Calculator: **Level 2 - Zone B and/or C** *[Modify]*
    ▷ 🔧 Actions
    ▷ 📁 Amendments
  ◢ 📂 Attachments
        📄 *Copy TFA_QuickSteps_Sept15_2011.pdf*
        📄 *TFA_QuickSteps_Sept15_2011.pdf*
    ▷ 📁 Layers

Export Results to CSV (Excel)

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Assignment 4: Reviewing a submission

Review Form Content
Which expandable element in the submission tree contains the form content?
_____

Who is the Engagement Contact? _____
Engagement Level? _____

Assignment 5: Review a submission in Maplayers

Click on Maplayers page link

Map Layers

Maplayers opens up with default layers visible.
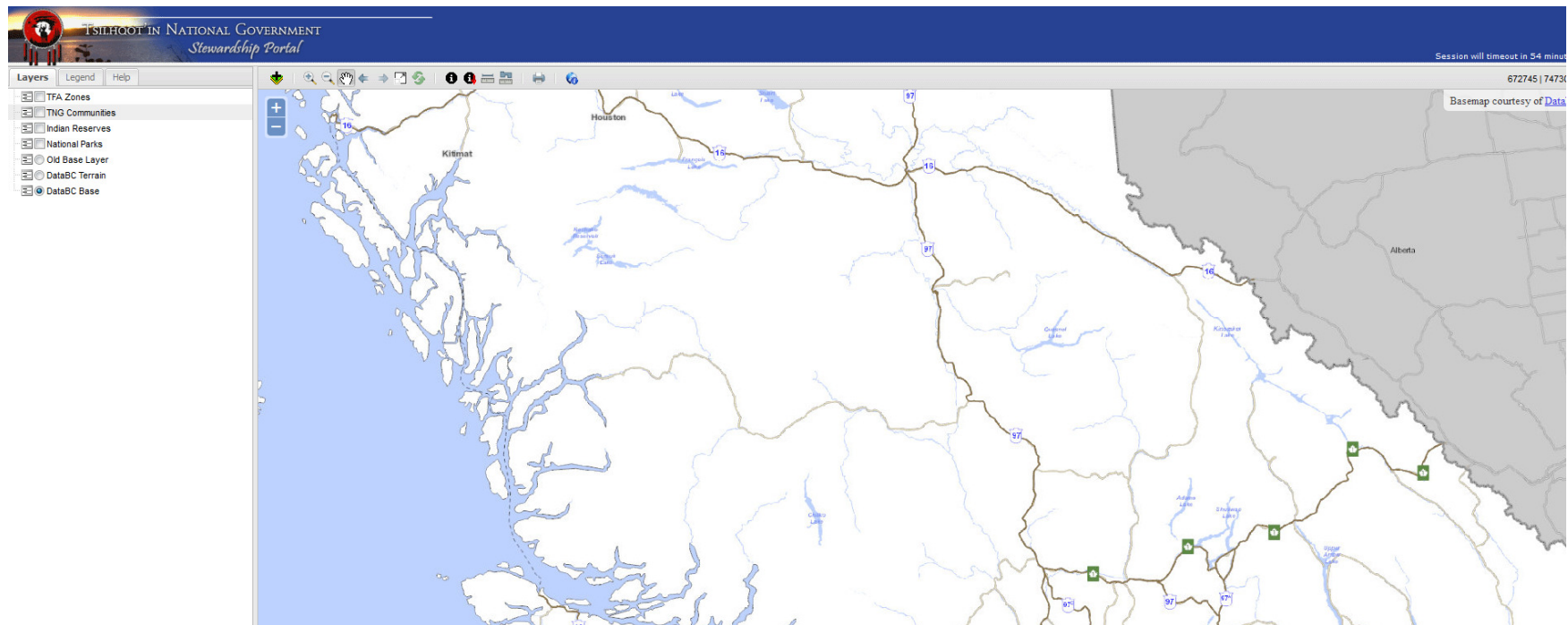
Assignment 5: Review a submission in Maplayers

Review Table of Contents

Default layers listed in order of drawing last to first

Toggle on and off layers by clicking on radio buttons

Drag and drop to new position in list to reorder drawing..

Review Legend

Toggle between tabs to view other information.
Legend is updated as layers are turned on or off.
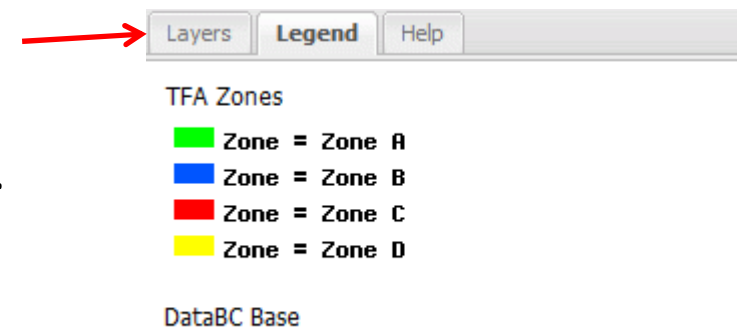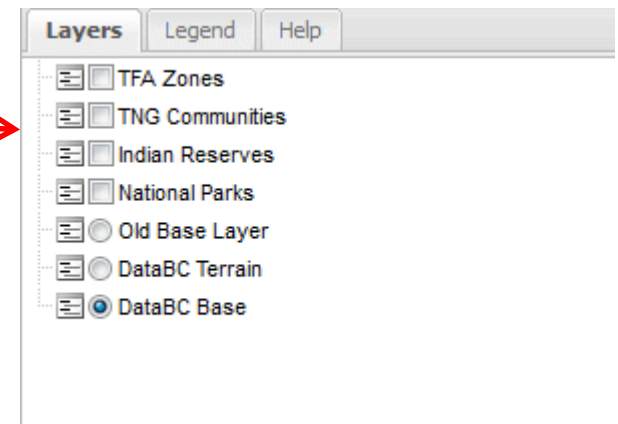
Assignment 5: Review a submission in Maplayers

Review Help Menu:

Help topics on final tab of Table of Contents

| Layers | Legend | **Help** |
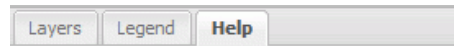
:: Top Toolbar

Use this tool to add layers from a variety of sources including Web Map Services or Stewardship Portal Layers. Highlight data to add and click Add Layers.

Use this tool to zoom in to an area. Click and drag to define area to zoom to.

Use this tool to zoom out from an area. Click and drag to define area to zoom out from

Use this tool to pan around the map. Click and drag to define pan direction.

Use this tool to zoom to previous extent.

Use this tool to zoom to next extent.

Use this tool to zoom to full extent.

Use this tool to refresh all map layers and reset the session timeout.

Use this tool to identify/query active layer. Highlight active layer select identify and click on feature.

Use this tool to drilldown identify/query all visible layers. Click on feature location.

Use this tool to measure distance and length.

Use this toll to measure area.

Use this tool to create a digital file for saving or printing.

Use this tool to source information about OpenMap framework.

:: Bottom Toolbar

To zoom in or out, click on the drop-down menu to select from a list of predefined scales.

Scale: 1 : 6,000,000
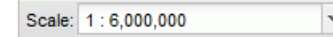
:: Layers Tab

Layers visible in Maplayers are listed on this tab.

Click on the Layers tab to view and manipulate layers added to the spatial viewing pane.

Click and drag layers up and down in the list to modify the drawing order in the spatial viewing pane.

To add layers click

Select from either BC Government Web Map Services or Stewardship Portal Layers

Use filter field menu windows to define search for data.

Once layers are listed on Layers tab, check or uncheck layers to add or remove from spatial viewing pane.

Right click on individual layers to Zoom to Layer Extent, Refresh Layer, or Remove Layer.

:: Legend Tab

Click on the Legend Tab to view symbology for visible layer data.

Review a submission in Maplayers
Tools:

🛡️ Use this tool to add layers from a variety of sources.

🔍 Use this tool to zoom to an area. Click and drag to define area to zoom to.

🔍 Use this tool to zoom out from an area. Click and drag to define area to zoom out from

✋ Use this tool to pan around the map. Click and drag to define pan direction.

⬅️ Use this tool to zoom to previous extent.

➡️ Use this tool to zoom to next extent.

⬜ Use this tool to zoom to full extent.

🔄 Use this tool to refresh all map layers and reset the session timeout

ⓘ Use this tool to identify/query active layer. Highlight active layer select identify and click on feature.

ⓘ Use this tool to drilldown identify/query all visible layers. Click on feature location.

📏 Use this tool to measure length.

📐 Use this toll to measure area.

🖨️ Use this tool to create digital file for saving or printing.

🌐 Use this tool to source information about OpenMap framework.

Assignment 5: Review a submission in Maplayers

Add submission to maplayers :

Click on add submission button

Select **Stewardship Portal Layers** tab
and then the "Add layers by Submission"
drop down menu item.

Select **Layer Name** as filter type.
Type submission ID **8933** in
filter field at the bottom of the
Add Data window, and press Enter.

Highlight layer(s) you wish to add and
Click **Add Layers**.

Assignment 5: Review a submission in Maplayers

Zooming in and out: 🔍⊖
When adding data to Maplayers, to save time refreshing, be mindful of the order you do things.

1. Add Referral Shapefile.
2. Zoom to extent of Referral Shapefile.
3. Add additional layers.

The more data that needs to be drawn the longer it will take to refresh.
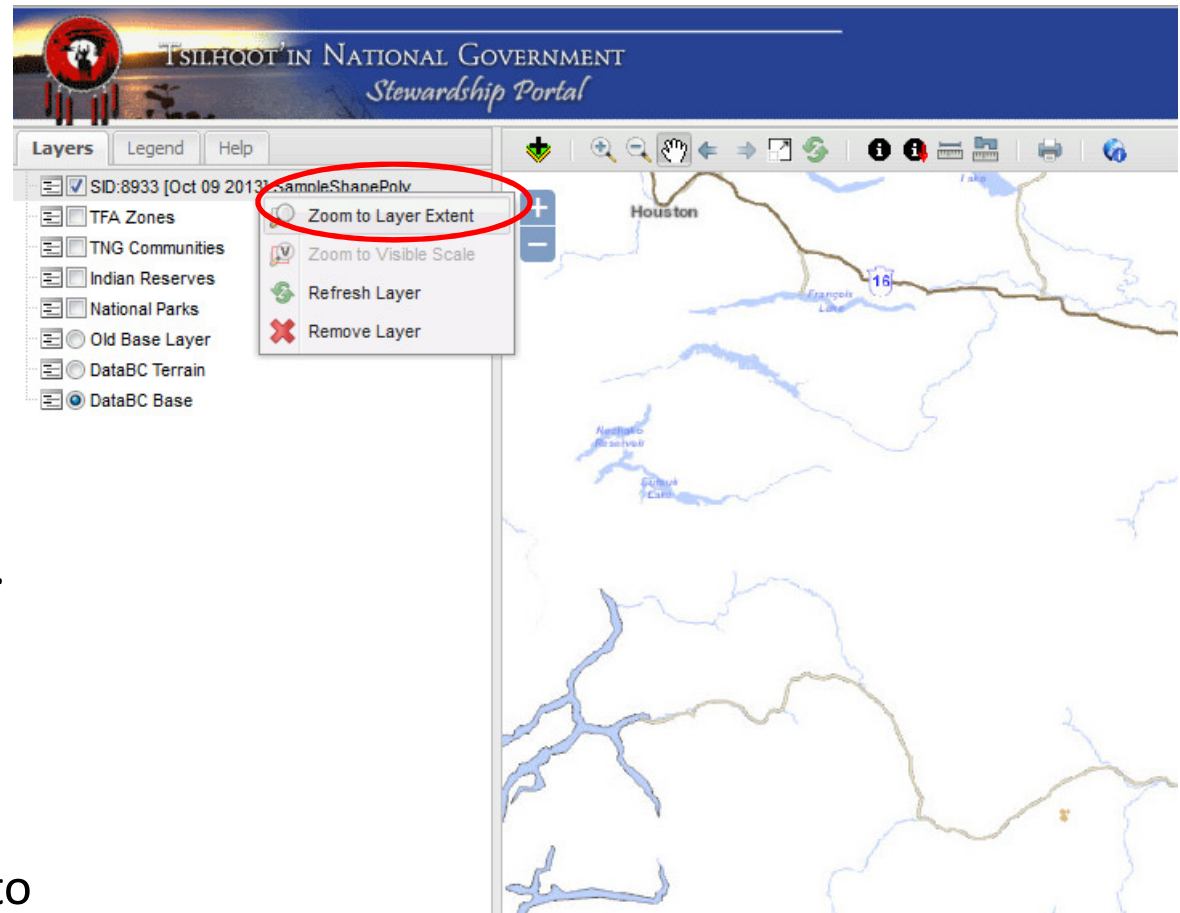
Assignment 5: Review a submission in Maplayers

Zooming in and out:

Right click on submission in Table of Contents, Select Zoom to Layer Extents.

Toggle between the radio button base data (DataBC Terrain, DataBC Base)

Scale can also be modified with the zoom 🔍 🔍 or with the scale bar at the bottom of the Maplayers window.
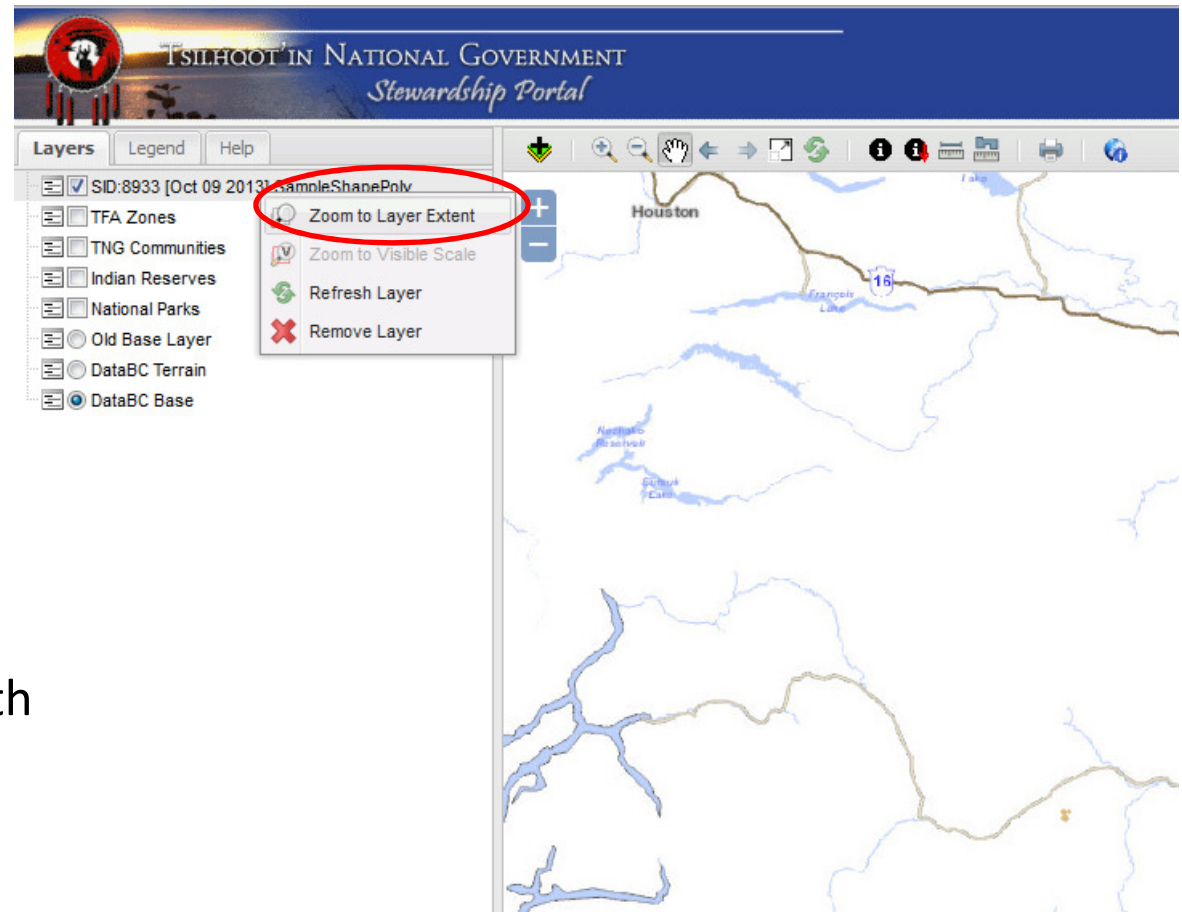
Assignment 5: Review a submission in Maplayers

Zooming in and out:

What happens to the data in DataBC Base when you zoom from 1:20,000 to 1:50,000 and then 1:100,000?

_____

Assignment 5: Review a submission in Maplayers

Options for adding public data – WMS or Web Map Services.

Click Add Data button,
This time select Web Map Services.
Use drop down menu to view options for data categories.
Once you select a category by clicking on it, a menu of that category opens.
To reselect a category just click on category selection.

Add Data

| Web Map Services | Local Spatial File | Stewardship Portal Layers |

Administrative Boundaries (BCGOV)
Administrative Boundaries (BCGOV)
Administrative Forest Boundaries (BCGOV)
Administrative Water Boundaries (BCGOV)
Base Mapping & TRIM (BCGOV)
Forest Grasslands & Wetlands (BCGOV)
Geology & Soils (BCGOV)
Imagery (BCGOV)
Known Fish Observations (BCGOV)
Land Ownership & Status (BCGOV)
Land Use Plans (BCGOV)
Licences & Permits (BCGOV)
Mining & Petroleum (BCGOV)
Parks, Recreation, & Tourism (BCGOV)
Pest Infestation (BCGOV)
Physical Infrastructure (BCGOV)
Provincial Fish Ranges (BCGOV)

Type filter and press <enter>   Add Layers

Assignment 5: Review a submission in Maplayers

Add layers from Webmap Services |TNG Layers.

Click Add Data button,
Select Web Map Services.

Use drop down menu to select TNG Layers (scroll down.)

Select multiple layers at once by holding down the Ctrl key, and highlighting layers.

Add Data

| Web Map Services | Stewardship Portal Layers |

TNGLayers

Title	Name
Anaham Draft Consultative Area	Anaham_CA
Toosey Consultative Area	Toosey_CA
Tsideldel Consultative Area	Tsideldel_CA
Xeni Gwetin Consultative Area	XeniGwetin_CA
Stone Consultative Area	Stone_CA
Rights Area Outlined	RightsAreaOutlined
Rights Area Filled	RightsAreaFilled
Title Area Outlined	TitleAreaOutlined
Title Area Filled	TitleAreaFilled
JRC Dash Creek Boundary	JRCDash_Bndry
Yanah Boundary	Yanah
Forest District	ForDist

| Select filter field... | Type filter and press <enter> | Clear Filter | Add Layers |

Assignment 5: Review a submission in Maplayers

Select

- Logged Blocks Outlined
- Proposed Blocks Outlined
- AOA Chilcotin District

Layer drawing order:

Reorder maplayers by highlighting, in the Table of Contents, the layer you want to move and dragging and dropping it to the order you wish to place it.

Experiment with adding other layers from the different Categories listed in Web Map Services.

Do any of the blocks in ID 8933 overlap with High Potential AOA? (Use legend to define AOA classification) _____
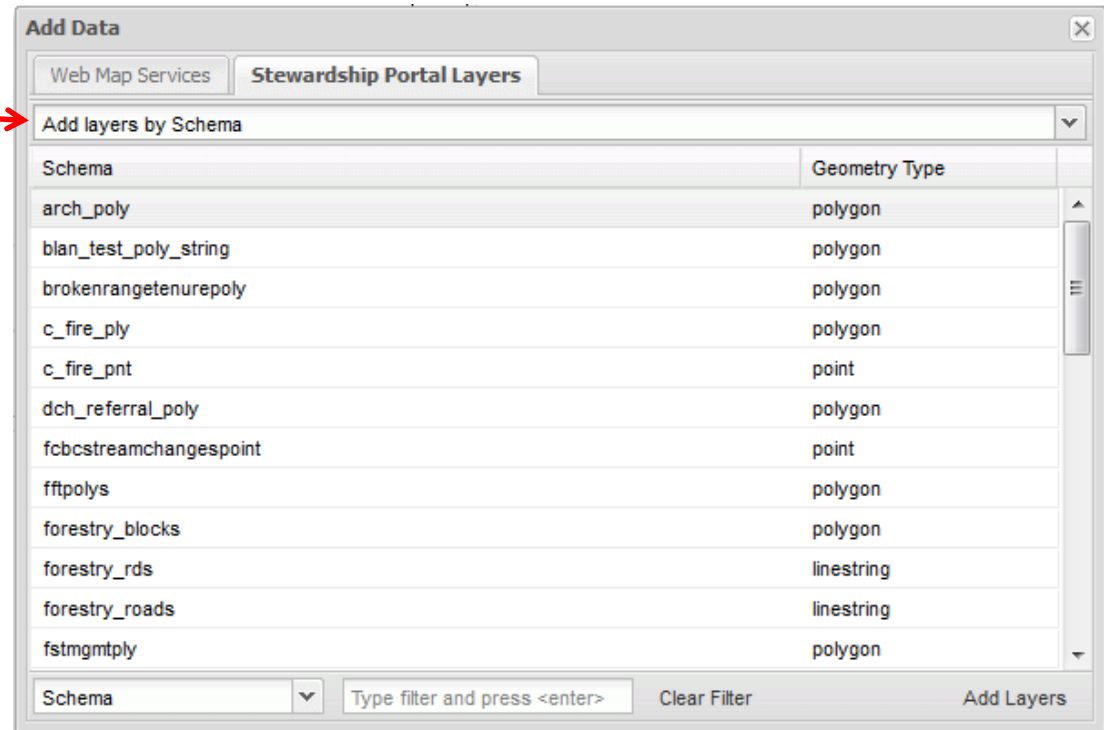
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Assignment 5: Review a submission in Maplayers

Add Stewardship Portal Layers by schema:
Return to Stewardship Portal Layers tab and select. Add layers by Schema from drop down menu.

Select tfa_polyfeb15 schema to see other TSA referrals that have been submitted in the same area.
Note other schema options: Forestry_blocks, mining

Add Data

Web Map Services	Stewardship Portal Layers		

Add layers by Schema

Schema	Geometry Type
arch_poly	polygon
blan_test_poly_string	polygon
brokenrangetenurepoly	polygon
c_fire_ply	polygon
c_fire_pnt	point
dch_referral_poly	polygon
fcbcstreamchangespoint	point
fftpolys	polygon
forestry_blocks	polygon
forestry_rds	linestring
forestry_roads	linestring
fstmgmtply	polygon

Schema   Type filter and press <enter>   Clear Filter   Add Layers

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Assignment 5: Review a submission in Maplayers

Add Consolidated Submission Layers:

Return to Stewardship Portal Layers tab and select Add layers by Submission from drop down menu.

Select Layer Name, and type in 9099 in filter box, and enter. Only shapefiles submitted under 9099 will be visible. Submitted by fiscal year, and grouped by categories

Add Data

| Web Map Services | Local Spatial File | **Stewardship Portal Layers** |

Add layers by Submission

ID	Layer Name	Schema
2879	SID:9099 AID:10710 [Feb 03 2015] 2011-12-Cutblks2	consolidatedpolys
2880	SID:9099 AID:10711 [Feb 03 2015] 2012-13-OtherLines	consolidatedlines
2881	SID:9099 AID:10711 [Feb 03 2015] 2012-13-Pnts	consolidatedpoints
2882	SID:9099 AID:10711 [Feb 03 2015] 2012-13-Roads	consolidatedlines
2883	SID:9099 AID:10712 [Feb 03 2015] 2012-13-OtherPolys	consolidatedpolys
2884	SID:9099 AID:10714 [Feb 03 2015] 2012-13-Cutblk1	consolidatedpolys
2885	SID:9099 AID:10715 [Feb 03 2015] 2012-13-Cutblk2	consolidatedpolys
2886	SID:9099 AID:10717 [Feb 03 2015] 2013-14-OtherLines	consolidatedlines
2887	SID:9099 AID:10717 [Feb 03 2015] 2013-14-Pnts	consolidatedpoints
2888	SID:9099 AID:10717 [Feb 04 2015] 2013-14-Roads	consolidatedlines
2889	SID:9099 AID:10718 [Feb 04 2015] 2013-14-OtherPolys	consolidatedpolys
2891	SID:9099 AID:10720 [Feb 04 2015] 2013-14-Cutblks1	consolidatedpolys
2892	SID:9099 AID:10721 [Feb 04 2015] 2013-14-Cutblks2	consolidatedpolys

| Layer Name | | 9099 | Clear Filter | Add Layer |

Assignment 5: Review a submission in Maplayers

Querying data layers to review proximity:

Use the information button to query layers of data.

- Queries the layer **highlighted** in the Table of Contents
- Drill down query **all** layers checked on in Table of Contents.

Toggle on and off the layers of data.

What happens if you query ⓘ layer not highlighted? _____

Make note of submission ID of the TFA_polyfeb15 submission with Proponent Colorado Resources_____ (must scroll down)

Now add the shapefile for this submission (Hint add Portal Map Layer by submission).

Which block in submission **8933** straddles the boundary of the Colorado Resource, and the TFA_polyfeb15 submission noted above? (Hint block number is in the id_name attribute of TFA_polyfeb15) _____
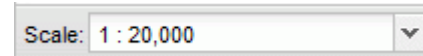
Assignment 5: Review a submission in Maplayers

Printing:

Turn all layers off except DBID **8933**, **6747**.

Zoom to 1:20,000 by clicking on dropdown menu at bottom of Maplayers window.

Scale: 1 : 20,000

Add WMS Layers:

- Imagery, ortho-image: bc_bc_xb1m_bcalb_1995_2003
- Base Mapping & TRIM: Water Bodies – Polygons BCGOV (1:20) and
                                        Water - Lines (1:20)

Click on 🖶 to open window for exporting map to image. Enter title for map, and your name. Select page size and format (png or jpg – either works)

Click **Export Map** to create map, then

Click **Download** to open image of map you created.

Print using Explorer File|Print function or save to harddrive.

Close Maplayers

Assignment 6: Making an Amendment or Child Submission
Initiating a submission

Return to Portal Website tab
Select Fill a Form from Table of Contents.

Select
General Communication Form 2011-Sept-15
from the top dropdown menu.

Click on Fill Form.

Form will open for edit.

Fill A Form

Forestry Referral
Forestry Referral
TUS Data Loading
TFA Engagement Request 2011-Sept-15
TFA Level 1 Notification 2011-Sept-15
Forestry Referrals 2011-Sept-15
General Communication Form 2011-Sept-15
Mining Industry Form 2011-Sept-15
General Communication Form
TFA Engagement Level Change 2011-Sept-15
MOF Range Referral Form
MOF Minor Timber Harvesting Form
ILMB Water License Form
ILMB Land Act Referral Form
Mass Portal Activity Uploading Form
Forests For Tomorrow Referral Form
Changes In and About a Stream
Field Trip Photo Loading
Forest Management 2013-Sept-17
Engagement Level Change
TFA Engagement Request Form

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

General Communication Form 2011-Sept-15

Fill Form

Assignment 6: Making an Amendment or Child Submission
Linking Child Submission to Parent Submission:

Three steps to link:
1. Enter Parent Submission ID
2. Click Validate button (Confirm the correct name is listed)
3. Click Set Parent Submission ID button

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Assignment 6: Making an Amendment or Child Submission
Linking Child Submission to Parent Submission:

Enter Submission ID 8933, Validate, and Set Parent Submission ID.
What happens to the title/name of the submission?

_____
_____

Assignment 6: Making an Amendment or Child Submission

Naming your Child Submission:

Add intuitive name and click **Save**. (Field trip comments, Final recommendations etc.).

What happens to the title/name of the submission?

_____

Assignment 6: Making an Amendment or Child Submission

Linking Child Submission to Parent Submission:

How do you unlink a child submission before it is submitted?

_____

Can you rename a submission before it is submitted? _____

Can you rename a submission after it is submitted? _____

Assignment 6: Making an Amendment or Child Submission

Entering Form Content:

Select the type of content your submission will have

Can you select more than one content type checkboxes? _____

Content

▼ Instructions

Remember to properly validate and set the parent submission when using this form to make a child submission.

My comment describes the attached file or files.: ☐

I am sending in files or shapefiles that were MISSED in the original submission.: ☐

I'm sending in shapefiles or files that REFLECT CHANGES since the parent submission originated.: ☐

Mine is a GENERAL COMMENT.: ☐

I'm sending in a FINAL RESPONSE to close this referral.: ☐

Assignment 6: Making an Amendment or Child Submission

Entering Form Content:

Enter comments or recommendations.

Click the **Save** button.

If you do not **Save** you will lose your content.

Formatting in MicroSoft Word is not compatible. You will get error if you try to do this. Notepad works.

Assignment 6: Making an Amendment or Child Submission

Saving your child submission to Draft

If you get called away or need to confirm some information you can Save your submission to **Draft** so you can further edit at a later date before submitting.

Make note of your Submission ID
Scroll to the bottom of the form, Click on Hold as Draft

Assignment 6: Making an Amendment or Child Submission

Retrieving your draft submission

Return to Fill A Form page and select your amendment submission from the drop down menu. Submissions are listed in chronological order.

Click on **Resume DRAFT**.

Scroll down and review content. Make corrections if necessary.

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: 6216 - Amendment to ID: 8102 - General Communication Form 2011-Sept-15 - GeneCooper ▼

Resume DRAFT

Assignment 6: Making an Amendment or Child Submission

Attaching documents

Scroll down to the Attachment node

Browse to a file you wish to add to the submission

Add Description of File in the **File Meta Data** field.

Click **Upload File**.

Attachments

▼ Instructions

Files attached to this submission

Delete Selected

Link	File Name	Meta Data

File Uploader (DO NOT USE FOR SHAPEFILES)

Click browse to select a file...   Browse

File Meta Data:

Add file description here (optional)

Upload File

Assignment 6: Making an Amendment or Child Submission

Setting Permissions
What happens when you click on the arrows next to the User Groups ──────→

_____

_____

_____

What does the * next to a user group mean?

_____

_____

_____

Permissions

▼ Instructions

▷ 📁☑ 1_TNG
▷ 📁☐ Ainsworth
▷ 📁☑ Alexis Creek *
▷ 📁☐ Amarc Resources
▷ 📁☑ Anaham
▷ 📁☐ Archaeology
▷ 📁☐ Aspell
▷ 📁☑ BCGovernment *
▷ 📁☐ BioMassFeasibility
▷ 📁☐ CC Wood
▷ 📁☐ Colorado Resources
▷ 📁☐ Coppercap Claims
▷ 📁☐ Esdilagh FN Licensee
▷ 📁☐ ForestsTomorrow
▷ 📁☐ Gibraltar Phase 3
▷ 📁☐ Nazko Band
▷ 📁☑ Nemiah *
▷ 📁☐ Pioneer
▷ 📁☐ Public
▷ 📁☐ RedBluff
▷ 📁☐ Sigurdson
▷ 📁☑ Stone *
▷ 📁☐ Tolko
▷ 📁☐ Toosey
▷ 📁☐ Transition Metals

Assignment 6: Making an Amendment or Child Submission

Select any additional users/groups you want to have access your amendment submission

When might you want to remove permission from all groups except TNG and community users?

_____

Assignment 6: Making an Amendment or Child Submission

To quickly assume the permission of the Parent submission, click on **Add Parent Submission Permissions to this Submission**

Do not forget to **Save**

Assignment 6: Making an Amendment or Child Submission

Email Notification:

Add email recipients manually or from **Parent Submission** or **Other Amendments**.

Add sarah@tsilhqotin.ca

If you add an email address manually, what happens when you begin typing?

_____

_____

_____

Email Notification

▼ **Instructions**

Delete Selected

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

Add Recipients Manually:

Enter a name or email address

Add Recipient

Add Recipients from:

Parent Submission   Other Amendments

Assignment 6: Making an Amendment or Child Submission

Quickly review your amendment submission and once you are confident in content, permissions and email notifications click on **Submit to Stewardship Portal**

Congratulations! You are done!

Your Child submission has been submitted, all email notifications have been sent and all those with permission can view your submission.

Assignment 7: Advanced Search

On the Main Portal webpage select Find Submission

Click on **Advanced Search Option**.
This opens the equation builder.

What you need to know about Equation building:

Equations are made up of:
Fields [Submission ID],
Operators (=, OR, AND, IN, etc.),
and Values or Variables (8933)

Equations can be simple or complex.

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Stewardship Portal

Assignment 7: Advanced Search

These expressions return the same results:

[Submission ID] = 8933 OR [Submission ID] = 6747

[Submission ID] IN (8933,6747)

To get only the amendments of above… [Parent Submission ID] = 8933 OR [Parent Submission ID] = 6747

To get amendments and Parent IDs for these submissions…
([Submission ID] = 8933 OR [Parent Submission ID] = 8933) OR ([Submission ID] = 6747 OR [Parent Submission ID] = 6747)

Other ideas for Advanced Searches?

_____

Assignment 7: Advanced Search

Other ideas for Advanced Searches?

_____

Let's create a nice letter-size printout of <u>all activity</u> on the referrals we have been reviewing so far (SID:8933 and SID:6747).

For this we would want to include Parent ID 8933 and 6747, as well as all amendments in our Advanced Search Query.

Assignment 7: Advanced Search

([Submission ID] = 8933 OR [Parent Submission ID] = 8933) OR ([Submission ID] = 6747 OR [Parent Submission ID] = 6747)

Click **Search**.

You can also click **Save Search** if you want to save your search for future use. Prompted for a Saved Search name which will be added to your list. Cannot edit syntax of saved searches, so good idea to have a word document saved with expressions/names for future reference. This way you can modify if required. Saved Searches are only available to the user logged in. Mine will be different than yours.

Assignment 7: Advanced Search

How many Amendments do each of the Parent Submissions have?

Remember:

Parent or Submission is a Blue "S"

Amendment or child submission is a Red "A"

Number of Amendments for 8933?_____
Number of Amendments for 6747?_____

Assignment 8: Preparing an Excel Report on specific submissions

Search Results

Search Results (13 items)

- ID: 6747 - EL 3 - Mineral Exploration (IP/Drilling) - Red Sky Project - Colorado Resources
- ID: 6763 - Assigned to Christine Tether [*Modify*]
- ID: 6990 - MEM Notification of Decision - Mine#1620996201202 - Red Sky Project - Colora
- ID: 8933 - Training Submission - TFA Engagement [*Modify*]
- ID: 8955 - training report [*Modify*]
- ID: 8951 - Joyce response [*Modify*]
- ID: 9117 - Test from Mary [*Modify*]
- ID: 9118 - Amendment to ID: 8933 - Forest Management 2013-Sept-17 - MauroCalabrese [
- ID: 9122 - Hi Mauro [*Modify*]
- ID: 9123 - Test from Rob [*Modify*]
- ID: 9119 - mauro you are so cool [*Modify*]
- ID: 9127 - Amendment to ID: 8933 - Forestry Referrals 2011-Sept-15 - MaryThurow [*Modify*
- ID: 7043 - Super cool [*Modify*]

Export Results to CSV (Excel)

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Submission ID	Parent ID	Title	Name	Submittor	Submission Date / Time	Assigned To	Status
6747	-1	ID: 6747 - TFA Engagement Request 2011-Sept-15 - HarryJennings	EL 3 - Mineral Exploration (IP/Drilling) - Red Sky Project - Colorado Resources	Harry Jennings	6/1/2012 15:27	Trina Setah	Insufficient Capacity
6763	6747	ID: 6763 - Amendment to ID: 6747 - General Communication Form 2011-Sept-15 - SharmonAlphonse	Assigned to Christine Tether	Sharmon Alphonse	6/4/2012 16:43	Christine Tether	Under Monitor
6990	6747	ID: 6990 - Amendment to ID: 6747 - General Communication Form 2011-Sept-15 - HarryJennings	MEM Notification of Decision - Mine#1620996201202 - Red Sky Project - Colorado Resources	Harry Jennings	8/10/2012 9:00		New
8933	-1	ID: 8933 - TFA Engagement Request 2011-Sept-15 - SarahGash	Training Submission - TFA Engagement	tng portal admin	10/9/2013 11:41		New

Assignment 7: Advanced Search

1- Write down the query you would use to find all _Parent Submissions_ assigned to you:

_____

2- Write down the query you would use to find all Amendments submitted since June 1, 2014:

_____

3- What's an easy way to search out EVERYTHING that you have access to:

_____

4- Practice with queries, export to Excel, and see what you can do with the information. Email your xls file to someone ☺.

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Assignment 7: Advanced Search

1- Write down the query you would use to find all _Parent Submissions_ assigned to you:

[Parent Submission ID] = -1 AND [Submission Assigned To] = 'name'

2- Write down the query you would use to find all Amendments submitted since June 1, 2014:

[Parent Submission ID] <> -1 AND [Submission Date] >= '2014-06-01'

3- What's an easy way to search out EVERYTHING that you have access to:

Use Keyword search, everything ticked, enter "*"

4- Practice with queries, export to Excel, and see what you can do with the information. Email your xls file to someone ☺.

Also review Document Download page for How to Create Advanced Search Queries for examples of some useful queries….

Where to find HELP?:

1. Instructions on the form:
    Click on arrow to expand or
    Collapse form node instructions.

2. Document Download Page.
    Lots of helpful documents and
    Quickstep guides to help you
    With common problems.

3. Portal Administration: Mary and Sarah are always happy to help!

Congratulations! You have completed the TNG Stewardship Planning Portal Training.

Questions?