

Tsilhqot'in Stewardship Planning Portal Training / Practicing Workshop:

Topics:

- Submitting
- Searching
- Viewing



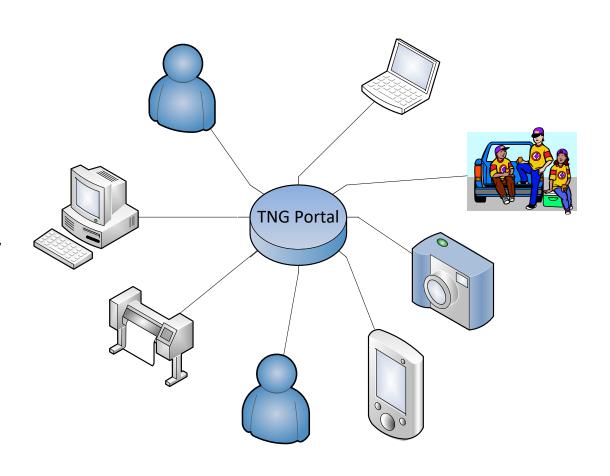
Tsilhoot'in National Government Stewardship Portal

Tsilhqot'in Stewardship Planning Portal Training

October 11, 2017

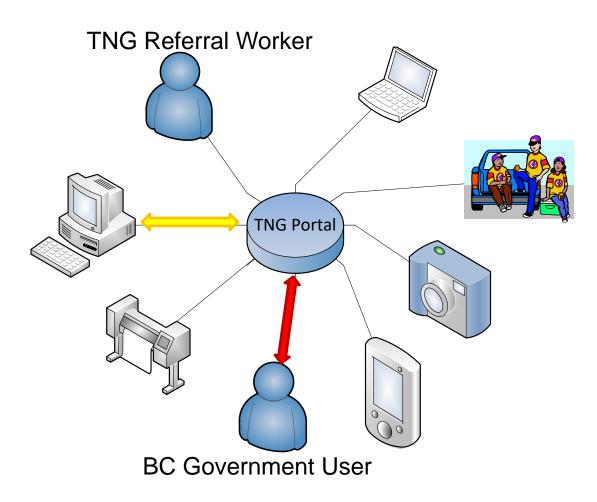


The TNG Portal is the permanent record for all things related to Referrals for Tsilhqot'in **National** Government.



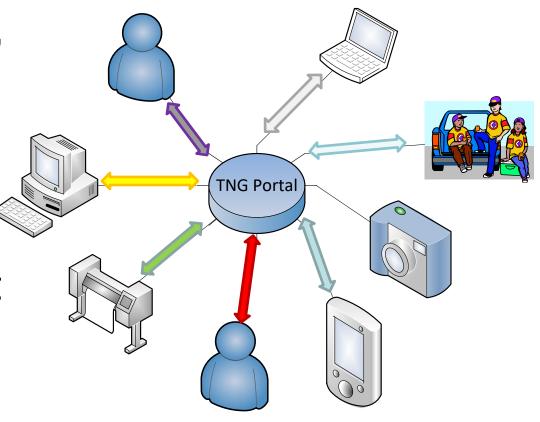


Information is posted to the Portal. We call these packages of information a **Portal** Submission.





Every submission and all its content, attachments, shapefiles, permissions and email notification settings represent a record in a database



View of DATABASE

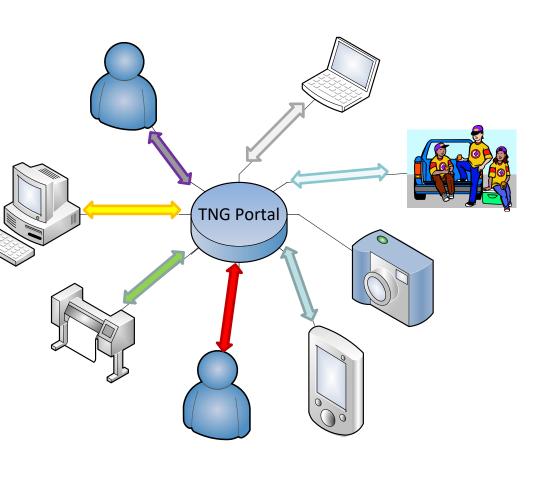
Submission ID	Parent ID Title	Name	Submittor	Submission Date / Time	Assigned To	Status	Attached Files (Delimited by ' ')
13271	-1 ID: 13271 - TFA Engagement Request 2011-Sept-15 - MurraySpeed	EL2_A20019_CP55W	Murray Speed	08/09/2016 02:50 PM	Sally Sellars	Under Monitor	cp55w_app.pdf AOA_A20019 CP 5
13272	-1 '0: 13272 - TFA Engagement Request 2011-Sept-15 - RogerRitsema	EL3 Eberding Timber Narcosli A78603 CP5	Roger Ritsema	08/17/2016 04:26 PM	Gene Cooper	Under Monitor	TNG_A78603_CP5_Referral_Letter.p
13273	-1 ID: 132.2 - TFA Level 1 Notification 2011-Sept-15 - RogerRitsema	EL1 West Fraser MillIs Alexandria Road Per	Roger Ritsema	08/10/2016 02:21 PM	Gene Cooper		No files attached
13274	-1 ID: 13274 - Gen. val Communication Form 2011-Sept-15 - JaniceSapp	Forest Enhancement Program	Janice Sapp	08/10/2016 04:43 PM	Sarah Gash	New	Toosey.pdf Alexis Creek.pdf Esd
13275	-1 ID: 13275 - TFA Engage Submission ID Parent II	Title					df MPlanMaps.pdf
13277 13278	-1 ID: 132// - IFA Engagem	1 ID: 13271 - TFA Engag	ement Re	guest 2011-Se	ot-15 - M	urravSpe	df SignedTNGTSAer
13279				•	•		
13281	-1 ID: 13279 - TFA Engagem 13272 -1 ID: 13281 - TFA Level 1 N	1 ID: 13272 - TFA Engag	gement ke	quest 2011-56	ърт-15 - ко	gerkitse	ema ed
13282	-1 ID: 13282 - TFA Engagem 13273 -	1 ID: 13273 - TFA Level	1 Notificat	tion 2011-Sep	t-15 - Rog	erRitsen	na Ilgold_Placer_TNG.p
13298		1 ID: 13274 - General C	ommunica	tion Form 20	11-Sept-1	5 - Janice	
13300	-1 ID: 13300 - TFA Level 1 N				•		ed
13308	-1 ID: 13308 - Forestry Refe 13275 -	1 ID: 13275 - TFA Engag	gement ke	quest 2011-Se	ърт-12 - ве	evvvasse	naar TNG NOI.pdf A2001
13309		1 ID: 13277 - TFA Engag	gement Re	quest 2011-Se	ept-15 - Be	evWasse	
13312	-1 ID: 13312 - TFA Engagem	1 ID: 13278 - TFA Engag	rement Re	nuest 2011-Se	nt-15 - M	urraySne	49_TNG_Eng_Reque:
13313	-1 ID: 13313 - 1FA Engagem		•	•	•		oo_mo_mg_neque:
13317		1 ID: 13279 - TFA Engag	gement Re	quest 2011-Se	ept-15 - Ro	ogerRitse	
13336 13337	-1 ID: 13336 - TFA Engagem	1 ID: 13281 - TFA Level	1 Notificat	tion 2011-Sep	t-15 - Rog	erRitsen	uise Map.pdf CP013
13350	-1 ID. 15557 - POIESTLY REIE	1 ID: 13282 - TFA Engag					on initiation tetter.p
13351	-1 ID: 13351 - TFA Level 1 N		sement ne	94031201130	. pt 15 m		ed
13353	-1 ID: 13353 - Forestry Referrals 2011-Sept-15 - ShammaCawston	A20010 U11 New Road - should be a child to	Shamma Cawston	08/30/2016 05:10 PM	Sally Sellars	Under Monitor	A20010CPU11RoadReferralAnaham.
13358	-1 ID: 13358 - TFA Engagement Request 2011-Sept-15 - JonathanPatterson	5002670 Engagement Request	Janice Sapp	09/28/2016 03:48 PM	Gene Cooper	Under Monitor	ZnB_EL2_5002670_TNG_Eng_Reque:
13359	-1 ID: 13359 - TFA Engagement Request 2011-Sept-15 - EmilyWatson	Gibraltar Notice of Work 090004201601 - 6	Emily Watson	09/01/2016 02:24 PM	JP Laplante	New	0900004201601_NOW & Maps.pdf
13360	-1 ID: 13360 - TFA Engagement Request 2011-Sept-15 - IanHannah	EL3_FTA_ER_BCTS_Tibbles_A61585	Ian Hannah	09/01/2016 03:41 PM	Lennon Solomon	Under Monitor	A61585 Location Map.pdf A61585 I
13363	-1 ID: 13363 - General Communication Form 2011-Sept-15 - NonitaJohnny		Nonita Johnny	09/02/2016 09:25 AM		New	No files attached
13367	-1 ID: 13367 - TFA Engagement Request 2011-Sept-15 - JonathanPatterson	Water File 5002678_Change Approval	Janice Sapp		Gene Cooper	Under Monitor	ZnB_EL2_5002678_TNG_Eng_Reque:
13368	-1 ID: 13368 - TFA Engagement Request 2011-Sept-15 - EmilyWatson	EL2 Twilight Fence 46X on road right of way	•	09/07/2016 09:37 AM	Lennon Solomon		Puhallo_Tolko 46W.pdf RAAD AO/
13371	-1 ID: 13371 - TFA Engagement Request 2011-Sept-15 - RogerRitsema	EL2 MFLNRO Narcosli Creek Grazing Licence	_	09/07/2016 01:48 PM	Gene Cooper		EL2_RAN077759_Narcosli_TNG_fina
13372	, ,	NOI A20019 CP 013 Blocks C0509, C4002-C40	•	02/01/2017 02:26 PM	Gene Cooper	_	ConnectivityReplacementMap.pdf
13382	-1 ID: 13382 - TFA Level 1 Notification 2011-Sept-15 - RogerRitsema	EL1 West Fraser Mills Twan Lake Road Tran	-		Gene Cooper		No files attached
13385	-1 ID: 13385 - Forestry Referrals 2011-Sept-15 - NicoleLarson	A76729-CP14T-Aneko-RPP	Nicole Larson		Sally Sellars		14T_InformationSharingProcess.do
13386	-1 ID: 13386 - Forestry Referrals 2011-Sept-15 - MichaelTomlinson	•	Michael Tomlinson				ECF Unit R3 FBIW.doc ECF Unit R3
13390	-1 ID: 13390 - Forestry Referrals 2011-Sept-15 - NicoleLarson	A76729_CP15U_Aneko_RPP	Nicole Larson		Sally Sellars		15U_FNReferral.pdf 15U_Referral
13391	-1 ID: 13391 - Forestry Referrals 2011-Sept-15 - NicoleLarson	A76729_CP16U_Aneko_RPP	Nicole Larson		Sally Sellars		16U_1_MooseMap.pdf 16U_2_Moi
13400	-1 ID: 13400 - TFA Engagement Request 2011-Sept-15 - JasonKerlev	Moose Management Plan-Non-Status Road	iason Kerlev	09/21/2016 07:55 PM	Luke Doxtator	New	moose management plan.pdf



The TFA Engagement Form:

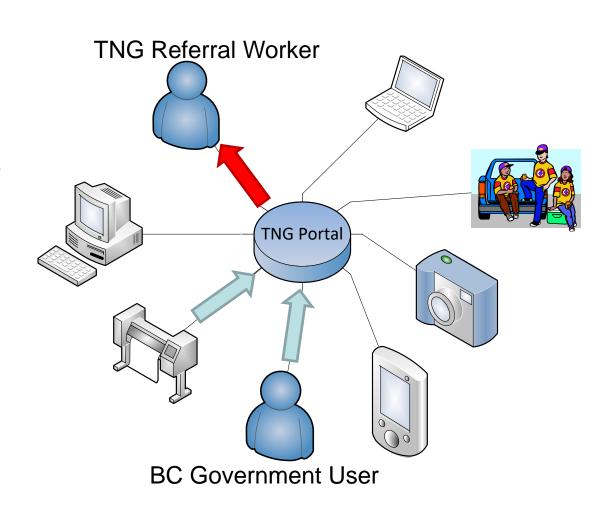
"TFA Engagement Request 2011-Sept-

15" is the form BC Government Portal users use to make an entry to the database and initiate a new TSA Engagement.





Every week each new TSA **Engagement** is assigned to a Referral Worker at TNG during our Monday afternoon Referral Group meetings.





MAKING A PORTAL SUBMISSION

MAKING A PORTAL SUBMISSION



TSILHOOT'IN NATIONAL GOVERNMENT Stewardship Portal

Stewardship Home

ina submissions

Fill A Form

Map Layers

View Available Schemas

View Form Fields

Document Downloads

Logout

Welcome to The Stewardship Portal

You have successfully logged in to The Stewardship Portal. The list below outlines the functions that are accessible from the menu on the left.

Find Submissions

This function allows you to search through the Submissions in the Portal. Use this function to identify the appropriate submission to which you should add an attachment/addendum. Note that you will not see submissions from other users unless you the appropriate have permissions.

Fill A Form

Information is submitted to the Stewardship Portal by filling in a form.

For example, to initiate a Forestry Referral, click on **Fill A Form** and select the **Forestry Referral**Form from the list.

Map Layers

To view the spatial layers that you are permitted to see, click on the **Map Layers** link. You will be able to search through the list of layers by name and select which layers you would like to see in the Map Viewer, and then you can launch the Map Viewer from here.

View Available Schemas

The Stewardship Portal requires that all shapefiles submitted meet specific formatting requirements, known as schemas, which have already been established. If you are having trouble uploading shapefiles to the portal, please view the schema requirements for the data-type you are trying to upload.

View Form Fields

Click on **View Form Fields** to see all the fields on each form. It is a good idea to ensure you have all the relevant information ready to enter into the portal so you don't make an incomplete submission.

Document Downloads

Download shapefile templates and blank forms from the **Document Downloads** page. A user ID is not required for access to this page.

Logout

Please ensure you end your Stewardship Portal Session by logging out.

Tsilhqot'in Photos



Portal Assistance

If you have questions or comments regarding the Stewardship Portal please email the Portal Administrator.



To initiate a NEW
TSA Engagement
select the TFA
Engagement
Request 2011Sept-15 form and
click

Fill Form

Fill A Form

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

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

TFA Engagement Request 2011-Sept-15

Fill Form

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: 11484 - General Communication Form 2011-Sept-15 - SallyMASellars

Ť

Resume DRAFT



To Reopen and work on a submission you have already initiated and held in **Draft**, select it in the drop down menu under **Resume Work on Draft Submission** and click

Fill A Form

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

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TFA Engagement Request 2011-Sept-15

Fill Form

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ID: 11484 - General Communication Form 2011-Sept-15 - SallyMASellars

Resume DRAFT

Resume DRAFT.



Note:

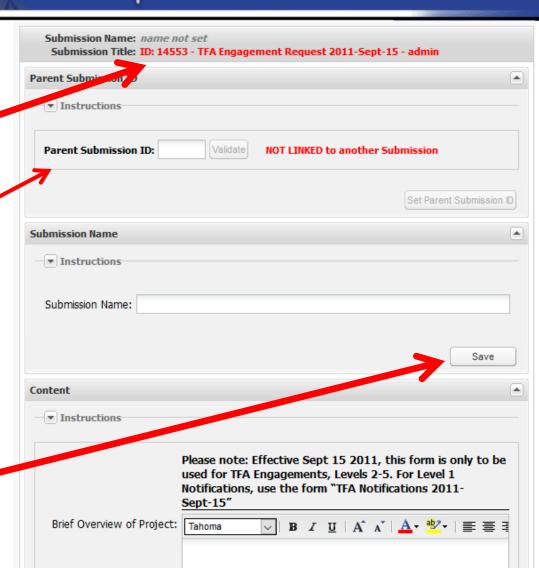
The Submisison ID has already been generated.

This is a **Parent Submission** no need to link it to another submission.

Name your submission in this format:

EL2 Fence Replacement Crazy Creek

Click **Save** – or else edits will be lost!





Brief Overview of Project:

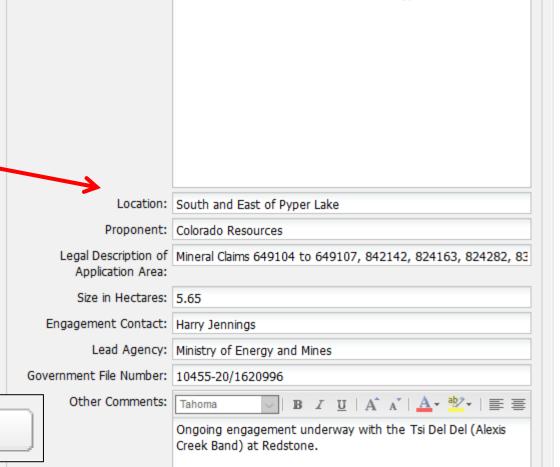
Tahoma

Fill in the field of the Content Node with details.

(See example)

At the bottom of the node click the **Save** button

Save



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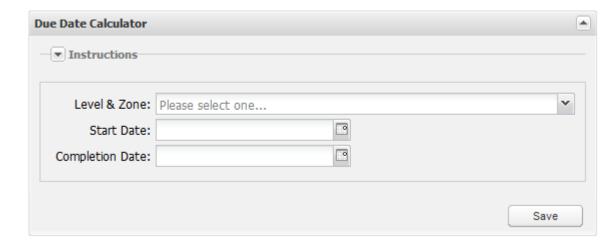
Mineral Exploration IP/Drilling/Trail Construction - Red Sky -Colorado Resources - south and east of Pyper Lake



Due Date Calculator:

Select the Level and Zone for your Engagement.

The Start Date and Completion Date will automatically be calculated based on the TSA Guidelines.

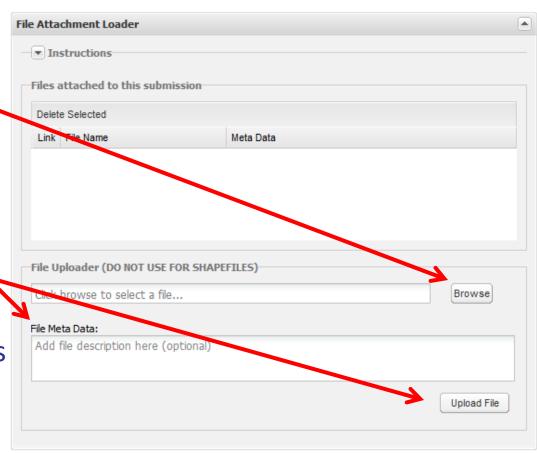


TSA Level and Zone	Working Days		
Any Level - Zone D Exclusively	No Time Limit Set		
Level 2 - Zone A, Level 4 Criteria	20		
Level 2 - Zone B and/or C	20		
Level 3 - Zone B and/or C	40		
Level 4 - Zone B and/or C	60		
Level 5 - Any Zone	No Time Limit Set		
Tsilhqot'in Engagement - Any Zone	30		



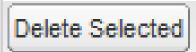
File Attachment Loader:

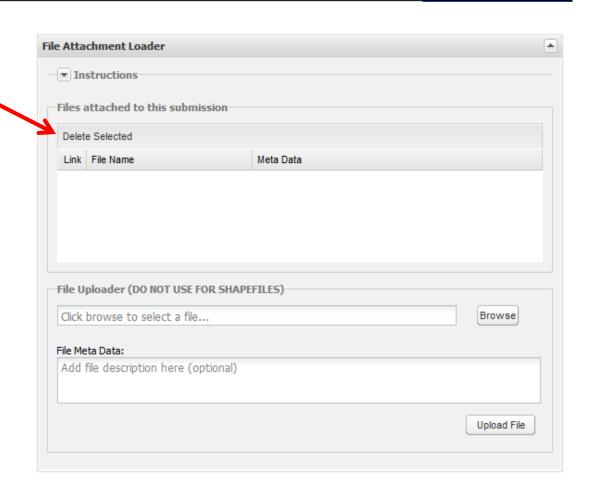
- 1. Browse to file you wish to load
- 2. Add Meta Data
- 3. Upload File -
- *NO SPACES in filenames
- *Maximum of 30 characters
- *NO non-alphanumeric characters





You can **DELETE** a file attachment if you realize you attached the wrong file or want to edit it and reattach.



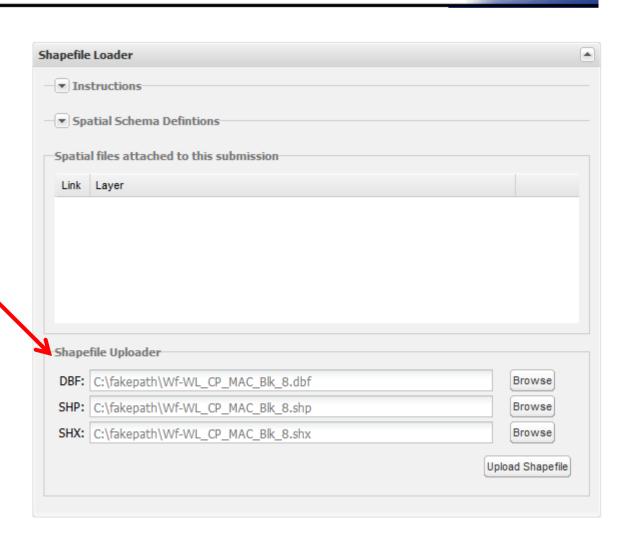




Shapefile Loader:

Browse to the DBF, SHP, and SHX files to complete your shapefile submission.

A successful shapefile load will appear in the list.





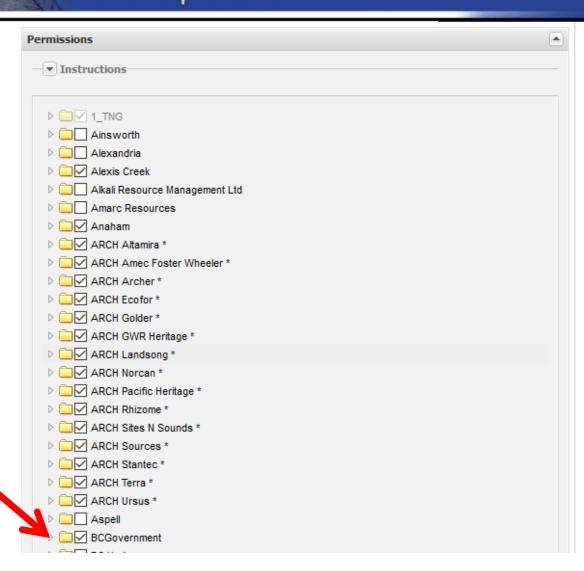
Permissions:

For the most part you accept the default permission.

You are part of the

BCGovernment

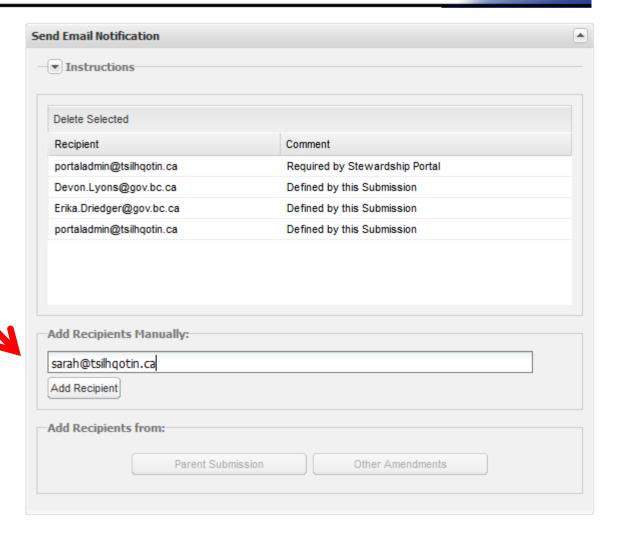
User Group

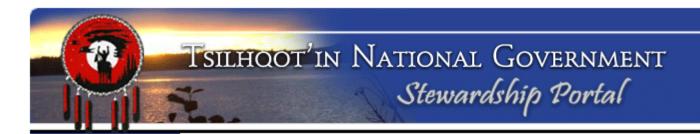




Email Notifications:

Autocompletes when you start typing





The Submisison Control:



Delete this Draft

Hold as Draft

Submit to Stewardship Portal

SEARCHING and RETRIEVAL

SEARCHING and RETRIEVAL



TSILHOOT'IN NATIONAL GOVERNMENT Stewardship Portal

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Tsilhqot'in Photos



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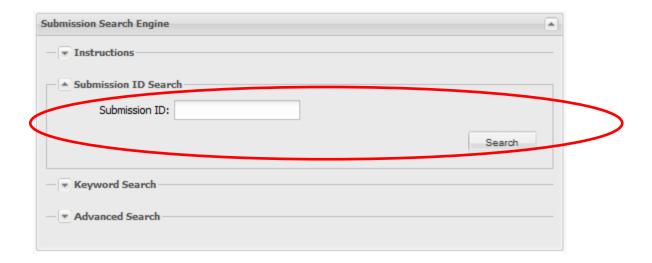


Find Submissions





Find Submissions: Submission ID Search

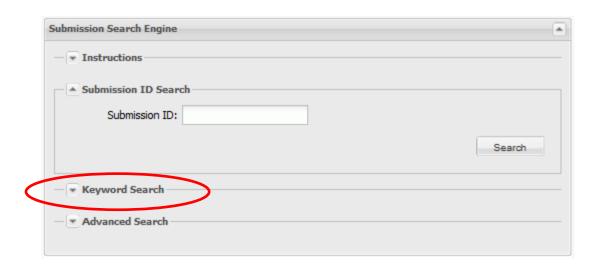


Do you know the exact number (Submission ID) of the Portal Submission you are looking for?

If you do, type it into the Submission ID field and click Search.



Find Submissions: Keyword Search



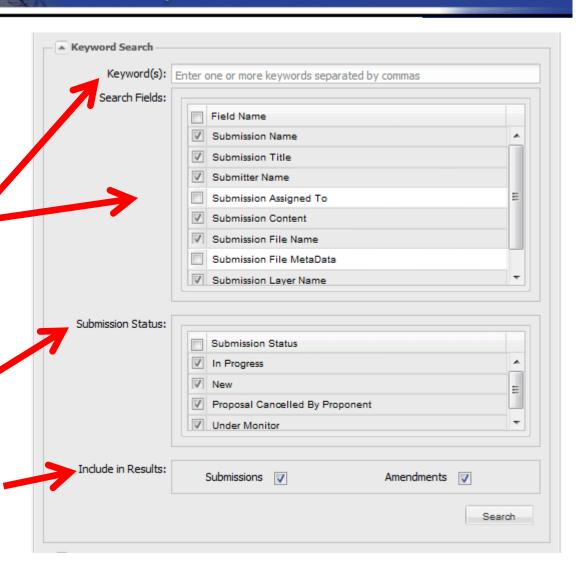
Now expand the Keyword Search option by clicking on the arrow next to Keyword Search.



Keyword Search:

Customize search criteria as broadly or narrowly as you wish.

- ✓ Enter keyword(s) and click the fields to look within for those fields.
- ✓ Specify Submission status to search by.
- ✓ Specify type of submission (Parent or Child (amendment) to search .

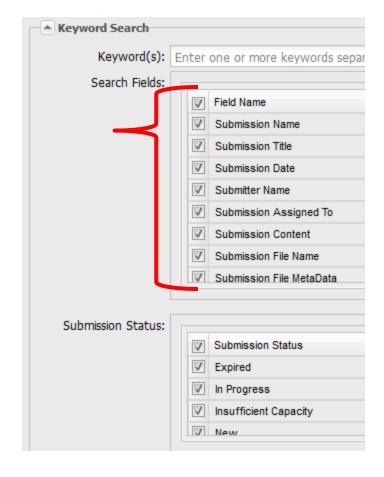




Experiment with a variety of Keyword Searches.

Toggle on and off the searching criteria.

Find submissions based on WHO submitted it, then WHO it is assigned to, or a word in the Subm.ission Name

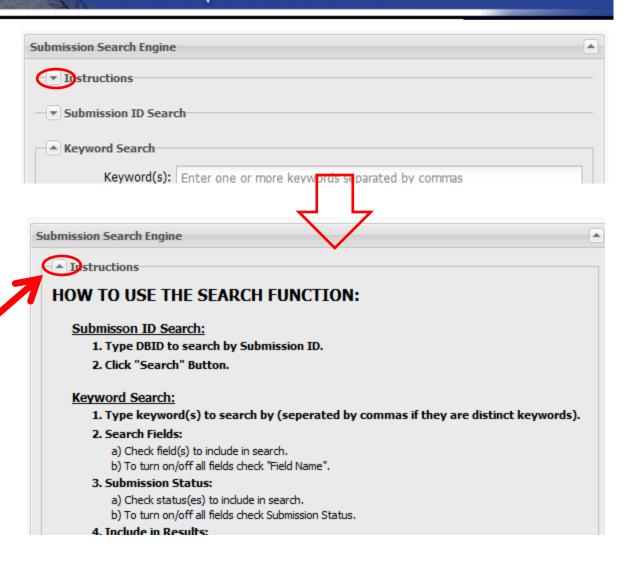




What if you want help AFTER this training session?

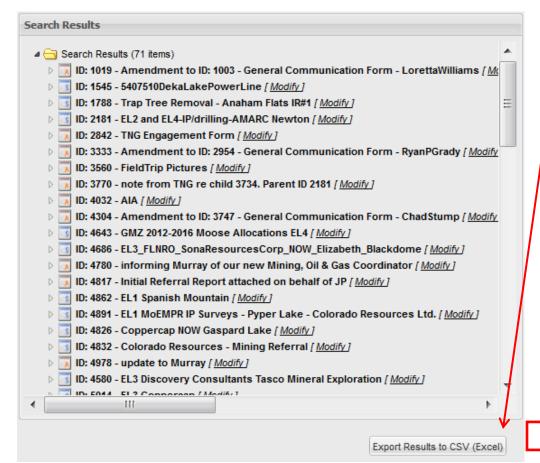
Instructions are available for each type of search.

Simply expand the **Instructions** Tab.

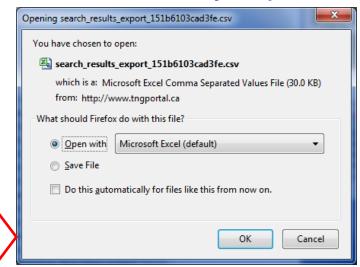




Reporting on Multiple Search Results



 Search results can also be exported to
 Excel (csv format) and manipulated in Excel to create a tidy report.



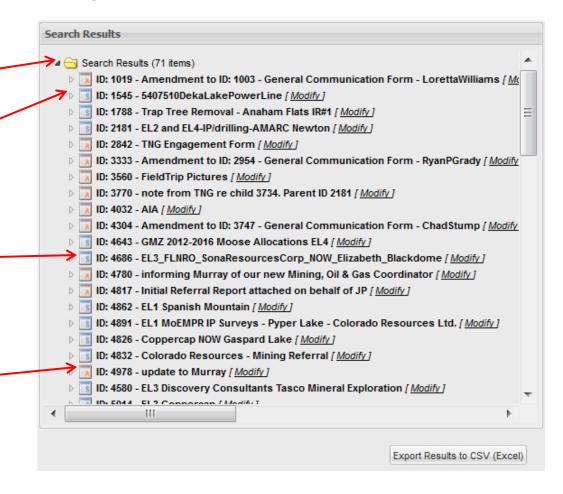


SUBMISSION VIEWING



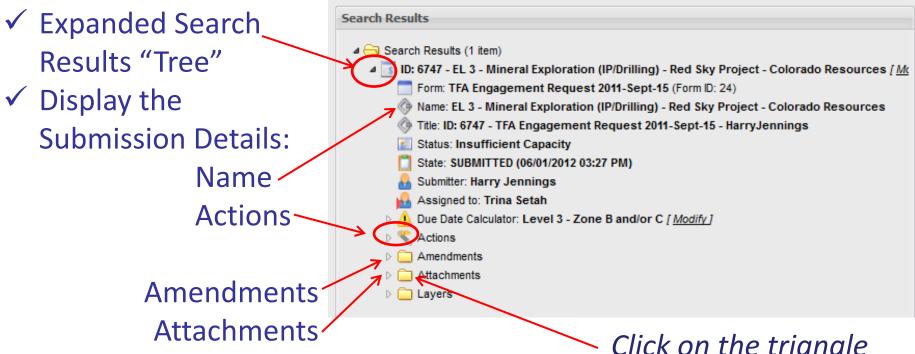
What to do with the Results of your Search:

- ✓ Search Results display in "Tree" format:
- ✓ Click on arrow beside submissions to expand or collapse details
- ✓ Blue "S" in icon denotes Parent "Submission"
- ✓ Red "A" in icon denotes Child or "Amendment".





How to Navigate Search Results (cont.):



 Click on the triangle beside the Attachments icon, and open up documents.



Tsilhoot'in National Government 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]
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
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



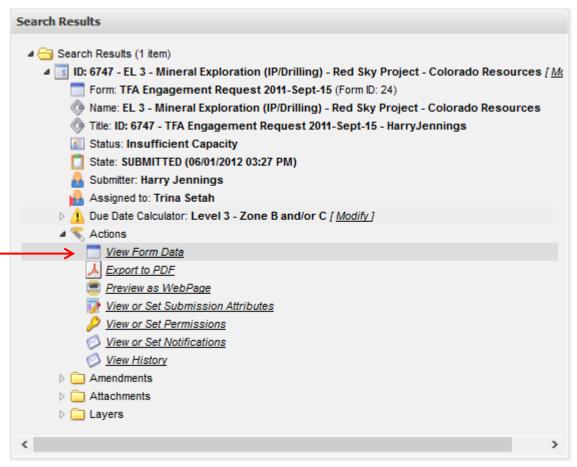
VIEWING CONTENT



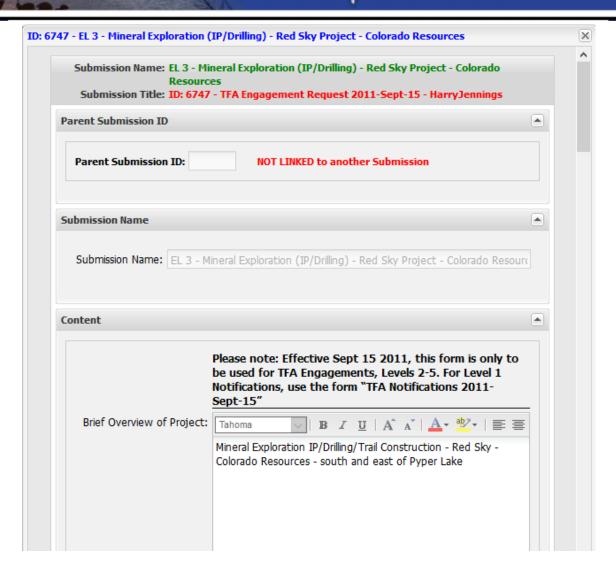
In Actions click on

View Form Data

to view content of Submission.



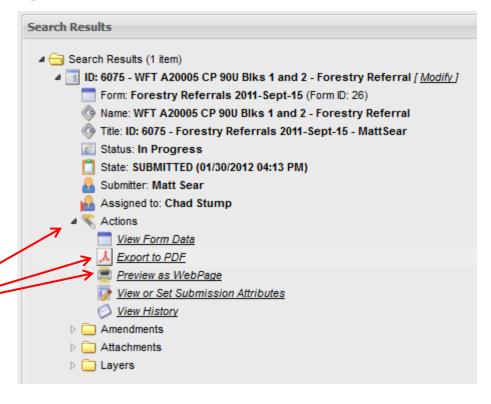


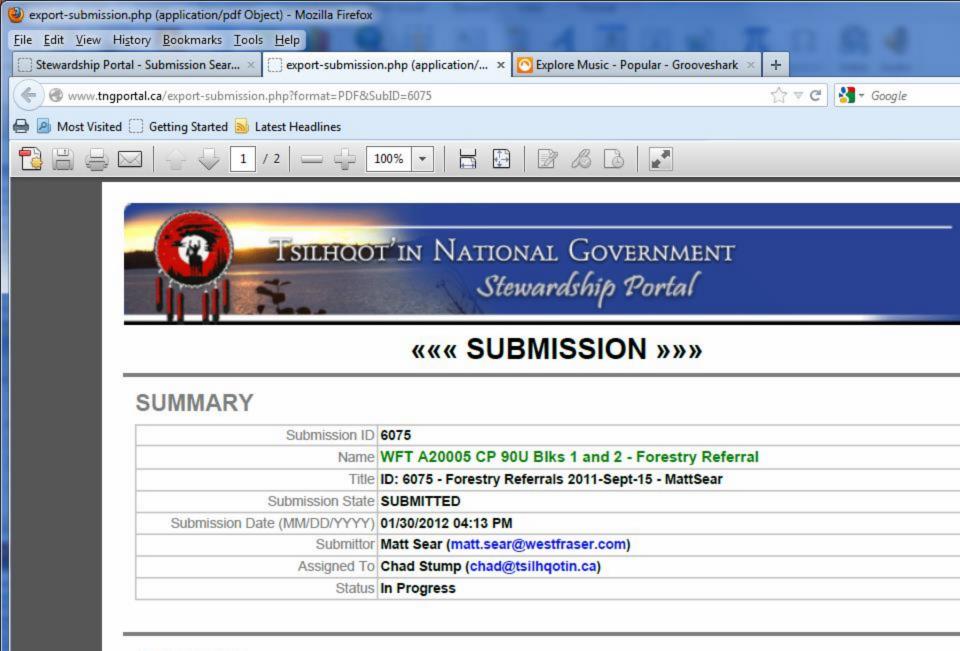




Viewing an entire existing Submission:

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





CONTENT

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



What's the deal with Submission NAMES anyway? (Green Text)

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 PendingWFM 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 - MattSea
Amendment Date (MM/DD/YYYY)		08/31/2012 03:52 PM



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.



We have covered:

- ✓ Making a TSA Engagement
- ✓ Searching to find a submission
- ✓ Where to find the Instructions
- ✓ Viewing details of a submission
- ✓ Viewing attachments

.Questions?