



TSILHQOT'IN NATIONAL GOVERNMENT
Stewardship Portal

Tsilhqot'in National Government

Forest Licensee

Stewardship Planning Portal Training

November 2013



TSILHQOT'IN NATIONAL GOVERNMENT
Stewardship Portal

Portal Training Terminology

Glossary of Key Terms

Proponent, Form, Node, Parent Submission, Child Submission, User Group, User, etc. Please see handout.



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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, Sally, Carla, Luke 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.



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- ✓ **Industry** users (WestFraser, Tolko, Amarc Resources etc.) permissions are set to “None”, which could be translated as “NOTHING SPECIAL”.
- ✓ These users get access when they do the submitting, or when someone else within their user group submits.
- ✓ A user in a different group can manually add an Industry user group or username in the permissions node, but this is rare (South Chilcotin)
- ✓ Portal was originally built for Forestry Proponents, then was enhanced when Government came onboard. So it's simplest for Industry.



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- ✓ **BCGovernment** users are set to “Granted by Default but removable,” as they will eventually review information exchanged between the Proponent and TNG during the Proponent-TNG referral process.
- ✓ TNG Users may remove BCGovernment ‘s permission if uploading confidential TUS submissions (maps, reports, interview documents etc.)



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- ✓ All permissions can be changed when you're making a submission, with the exception of TNG user group users.
- ✓ Uncheck an entire user group's checkbox to remove user group permission.
- ✓ Check an entire user group's checkbox to give all those users access.
- ✓ Uncheck an individual username to remove user permission. ****** Industry needs to stop doing this!!******
- ✓ Unable to remove TNG group-members' permission.



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Why do we want you to leave the permissions alone? What's going wrong?

- ✓ A Tolko User (Let's call him Joe) makes a submission, but removes all other Tolko users' access before he submits.
 - ✓ Frequently, he accidentally removes his own permission from the submission, so has to call Sarah/Mary to fix it
 - ✓ Then Joe goes on holiday and Fred has to field a call about Joe's submission. Fred can't see anything because Joe only gave himself permission, so Fred has to call Mary / Sarah to fix it.
 - ✓ Corporate Tolko switches everyone's operating areas. Mary and Sarah have a HUGE list of permissions to change, and Fred and Joe have to create that list! Yuck all around.
 - ✓ New employee Hugo wants to have Fred or Joe check Hugo's work before it goes out... it just makes sense for everyone working for the same company to accept the default permissions and enable all coworkers to see what you're working on.



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How it should work:

- ✓ Tolko User makes a submission – Default permissions:
 - ✓ All other members of the Tolko group start off with access to that submission. (“None” Permission)
 - ✓ All users with “Granted by Default but Removable” also have permission to see this submission. That would be Government users and the authorized community-level referral workers.
 - ✓ All users from *other user groups* with permissions settings “None” do not have permission to see this submission.
 - ✓ NO ONE can delete anything AFTER a submission has been submitted, all that can be done is to contact a Portal Administrator 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.

How does it look?

- ✓ Some of the community groups have users with “granted but removable” and other “none” permissions. Those groups will have a * indicating some members have access and some do not.
- ✓ It’s not your responsibility to keep track of this, so just accept the defaults and move on.
- ✓ There is an “Add Parent Submission Permissions to this Submission” button for use when submitting a child, so that whomever had access to the parent also has access to the child. Always hit this button as it adds people but doesn’t remove them, so if a change was made to the Parent’s permissions, it will be reflected in child submissions when you hit this button.



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Stewardship Portal

- BCGovernment *
- Alex Masun [AlexMasun]
- Al Mackie [AlMackie]
- Amanda Fouty [AmandaFouty]
- Ann Brunke [AnnBrunke]
- Arthur Knaut [ArthurKnaut]
- Beth Weathers [BethWeathers]
- Bev Atkins [BevAtkins]
- Bev Frittenburg [BevFrittenburg]
- Bill Klopp [BillKlopp]
- Blake Foster [BlakeFoster]
- Brad Powell [BradPowell]
- Brenda Mann [BrendaMann]
- Brian Kelsey [BrianKelsey]
- Brian Rosengren [BrianRosengren]
- Bruce Hupman [BruceHupman]
- Cheryl Gilbert [CherylGilbert]
- Chris Armes [ChrisArmes]
- Chris Armstrong [ChrisArmstrong]
- Christine Galliazzo [ChristineGalliazzo]
- Christine Unghy [ChristineUnghy]
- Colleen Pedrotti [ColleenPedrotti]
- Curtis Ofstie [CurtisOfstie]
- Dasha Durkovicova [DashaDurkovicova]
- Dave Zevick [DaveZevick]
- David McArthur [DavidMcArthur]
- Desi Cheverie [DesiCheverie]
- Devon Lyons [DevonLyons]
- Diane Gibson [DianeGibson]
- Diane Mousseau [DianeMousseau]
- Duncan McColl [DuncanMcColl]
- Dwayne Eastman [DwayneEastman]
- Edna Boston [EdnaBoston]
- Elaine Shibata [ElaineShibata]
- Eric Forgeng [EricForgeng]
- Ewan Anderson [EwanAnderson]
- Francis Iredale [FrancisIredale]
- Frank Besinger [FrankBesinger]
- Gurdeep Khangura [GurdeepKhangura]
- Harry Jennings [HarryJennings]

(Permissions cont.)

- ✓ If you are aware of new employees in a user group expand user group and ensure all individuals are checked on.
- .



Additional Questions on Permissions?

Let's log in and check this out....

Mozilla Firefox... www.tngportal.ca

TNG Stewardship Planning Portal Home Page:



Tsilhqot'in National Government Stewardship Portal

- Stewardship Home
- Find 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](#).

253 4th Avenue North | Williams Lake, BC | V2G 4T4 | Phone:250.392.3918
Copyright 2007 | Tsilhqot'in National Government | [Email Portal Administrator](#)

Stewardship Portal
Version 1.6.8



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.



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/call Mary or Sarah for a reminder if you have forgotten yours.

A screenshot of the login form. It has a title bar 'Stewardship Portal Login'. Below it are two input fields: 'Username:' and 'Password:'. At the bottom is a 'LOGIN' button.



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Stewardship Portal

Review pages:

Click on **Document Downloads** page

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**

Answer these questions on your sheet:

Is there a document for linking a child to a parent?

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: _____)



Review pages:

Click on **Document Downloads** page



What forms and templates are you required to attach to a new Timber Harvesting Referral?

3. **Forms and Worksheet Templates**

- A. [Portal Access Request Form](#)
A user account is needed to log into the Stewardship Portal. Click on the link above, download and complete the word document then email it to the [Portal Administrator](#) to receive access to the portal.
- B. [Forestry Referral - Block Information Worksheet](#)
Please complete and attach this to your main forestry referral submission.
- C. [Photograph & GPS Field Sheet](#)
Print this form and take it to the field to document GPS Waypoints and photo numbers.
- D. [TFA Engagement Request - Template](#)
Please complete and attach this to your main TFA Engagement Request Submission. Revised Sept 26, 2011
- E. [TFA Engagement Response - Template](#)
Please complete and attach this to TFA Engagement Response Submission. Revised Oct 6, 2011
- F. [TFA Engagement Best Practises - Example](#)
Please review the attached sample TFA Engagement Request and Response for an example of how to fill in the TFA Engagement Request and what is expected in a TFA Response. Revised Sept 15, 2011
- G. [TNG Forestry Planning Additional Questions - November 2013](#) ****NEW November 2013****
Please review the attached document template for additional questions to be answered regarding Forestry Planning Referrals.

Take a minute to review the documents.



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Stewardship Portal

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”?



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Assignment 2: Find Submission

Keyword Search

Find All submissions with “Gene Cooper” in it.

- Click on Keyword Search
 1. Type Gene Cooper 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): Gene Cooper

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



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Assignment 2: Find Submission

Keyword Search – Narrow the search criteria

Find All submissions submitted by “Gene Cooper” and only Parent Submissions.

1. Type Gene Cooper 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): Gene Cooper

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: **6558** Click Search button.

The screenshot shows a web interface titled "Submission Search Engine". It has a dropdown menu for "Instructions" and a section for "Submission ID Search". Inside this section, there is a text input field labeled "Submission ID:" and a "Search" button. A red arrow points from the text "Click Search button." in the instructions above to the "Search" button.

Submission Search Engine

▼ Instructions

▲ Submission ID Search

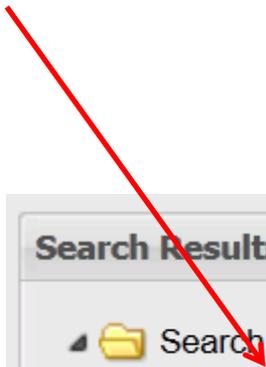
Submission ID:

Search



Assignment 3: Navigation of a Submission

Expand the contents of Submission ID **6558**.
Click on the arrow adjacent to the blue "S" symbol.



Search Results

- Search Results (1 item)
 - ▶  ID: 6558 - South Chilcotin Stewardship Planning Area - TNG Engagement [[Modify](#)]



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Stewardship Portal

Search Results

Search Results (1 item)

ID: 6558 - South Chilcotin Stewardship Planning Area - TNG Engagement [[Modify](#)]

Form: **TFA Engagement Request 2011-Sept-15** (Form ID: 24)

Name: **South Chilcotin Stewardship Planning Area - TNG Engagement**

Title: **ID: 6558 - TFA Engagement Request 2011-Sept-15 - SharmonAlphonse**

Status: **New**

State: **SUBMITTED (04/26/2012 04:07 PM)**

Submitter: **Sharmon Alphonse**

Assigned to: **Not Assigned**

Due Date Calculator: **Tsilhqot'in Engagement - Any Zone(s)** [[Modify](#)]

Actions

Amendments

Attachments



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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 including on amendments? _____

When was the South Chilcotin Project first entered into the TNG Portal?



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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 extension (*.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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Assignment 4: Reviewing a submission

Review Form Content

Which expandable element in the submission tree contains the form content?

Who is the Engagement Contact? _____

What is the Engagement Level? _____



Assignment 5: Making a PDF of Portal Activity for YOUR electronic files

ID 6558

Actions → Export to PDF

Where does the PDF go?

What does the Blue text do within the PDF?

What's another way you could Print out a Portal's activity?

Search Results

- Search Results (1 item)
 - ID: 6558 - South Chilcotin Stewardship Planning Area - TNG Engagement [[Modify](#)]
 - Form: TFA Engagement Request 2011-Sept-15 (Form ID: 24)
 - Name: South Chilcotin Stewardship Planning Area - TNG Engagement
 - Title: ID: 6558 - TFA Engagement Request 2011-Sept-15 - SharmonAlphonse
 - Status: **New**
 - State: **SUBMITTED (04/26/2012 04:07 PM)**
 - Submitter: **Sharmon Alphonse**
 - Assigned to: **Not Assigned**
 - Due Date Calculator: **Tsilhqot'in Engagement - Any Zone(s)** [[Modify](#)]
 - Actions
 - [View Form Data](#)
 - [Export to PDF](#)
 - [Preview as WebPage](#)
 - [View or Set Submission Attributes](#)
 - [View History](#)
 - Amendments
 - ID: 6768 - Contains project boundary shapefile and overview map as PDF [[Modify](#)]
 - ID: 6823 - Amendment to ID: 6558 - General Communication Form 2011-Sept-15 - Sus...
 - ID: 7191 - Additional shapefile attached... No Harvest Area by itself. [[Modify](#)]
 - ID: 8572 - GC_Additional Deferred area in SCSP_FLNR_Tolko_Hungry Valley [[Modify](#)]
 - ID: 8956 - Licensee Connectivity Corridor Shapefiles Attached. Corridors from Dec 20...

Export Results to CSV (Excel)



Assignment 6: Making an Amendment or Child Submission

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

Fill A Form

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

A screenshot of a dropdown menu. The menu is open, showing a list of options. The option "General Communication Form 2011-Sept-15" is highlighted in blue. Other options include "Forestry Referral", "TUS Data Loading", "TFA Engagement Request 2011-Sept-15", "TFA Level 1 Notification 2011-Sept-15", "Forestry Referrals 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", and "TFA Engagement Request Form".

Click on Fill Form.

Form will open for edit .

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

A screenshot of a web form titled "Parent Submission". The form has a "Instructions" dropdown menu. Below it is a text input field labeled "Parent Submission ID" and a "Validate" button. The input field and the "Validate" button are circled in red and blue respectively. At the bottom right of the form is a "Set Parent Submission ID" button, which is circled in green.



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?

Naming your Child Submission:

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

A screenshot of a web application dialog box titled "Submission Name". It has a close button in the top right corner. Below the title is a dropdown menu labeled "Instructions". Below that is a text input field with the label "Submission Name:". At the bottom right of the dialog is a "Save" button.

What happens to the title/name of the submission?



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Stewardship Portal

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? _____

Where can you find a help document dedicated to submission NAMES?

***** no apostrophe's in submission names please... they behave badly. *****



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.

Comments or Notes.: **B** *I* U ^A _A



Assignment 6: Making an Amendment or Child Submission **What's not working?**

Sometimes people get a little crazy with what they try to enter into these text boxes.

A general rule – if it doesn't display nicely in this space, then put it in a Word Document and attach the document to your submission.

Don't cut and paste from WORD as Microsoft has funky formatting coding that screws up the Portal.

If you want to pre-type elsewhere, use Notepad.

ALWAYS HIT SAVE BEFORE YOU MOVE ON!

A screenshot of a web form titled 'Comments or Notes:'. The form has a dropdown menu set to 'Tahoma' and a rich text editor toolbar with icons for bold (B), italic (I), underline (U), text color (A with a color swatch), background color (A with a color swatch), and a link icon. Below the toolbar is a large empty text area. At the bottom right of the form is a 'Save' button.



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

Submission Control ** Required **

Instructions

Delete this Draft Hold as Draft Submit to Stewardship Portal

A screenshot of a web form titled "Submission Control ** Required **". Below the title is a dropdown menu labeled "Instructions". At the bottom of the form are three buttons: "Delete this Draft" (red text), "Hold as Draft" (blue text), and "Submit to Stewardship Portal" (green text). A red arrow points from the text "Click on Hold as Draft" above to the "Hold as Draft" button.



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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**.

The screenshot shows a web form titled 'Attachments'. It includes a 'Instructions' dropdown menu, a section for 'Files attached to this submission' with a 'Delete Selected' button and a table with columns 'Link', 'File Name', and 'Meta Data'. Below this is a 'File Uploader (DO NOT USE FOR SHAPEFILES)' section. It contains a text input field with the placeholder 'Click browse to select a file...' and a 'Browse' button. Underneath is a 'File Meta Data:' section with a text input field containing the placeholder 'Add file description here (optional)'. At the bottom right of the form is an 'Upload File' button. Red arrows from the text on the left point to the 'Browse' button, the 'File Meta Data' input field, and the 'Upload File' button.



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



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Assignment 6: Making an Amendment or Child Submission

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

Generally, what are you going to do on the Permissions Node?



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Assignment 6: Making an Amendment or Child Submission

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

Do not forget to **Save**

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

Add Parent Submission Permissions to this Submission

Save



Assignment 6: Making an Amendment or Child Submission

Email Notification:

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

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

How many letters does it take?

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 your amendment**

A screenshot of a web interface titled "Submission Control ** Required **". It features a dropdown menu labeled "Instructions" and three buttons: "Delete this Draft" (red text), "Hold as Draft" (blue text), and "Submit to Stewardship Portal" (green text). A red arrow points from the top right towards the "Submit to Stewardship Portal" button.

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.



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Assignment 7: Preparing Portal Information to update your boss, co-worker, or remind yourself of what's been going on.

Return to the Main Portal

Let's create a nice letter-size printout of all activity on the referrals we have been reviewing so far (SID:8933 and SID:6558)

1. Advanced Search operators:
 1. OR
 2. AND
 3. IN

[Submission ID] = 8933 OR [Submission ID] = 6558

[Submission ID] IN (8933,6558)

To get the amendments of above... [Parent ID] = 8933 OR [Parent ID] = 6558



Search Results

- Search Results (2 items)
 - ID: 6558 - South Chilcotin Stewardship Planning Area - TNG Engagement [[Modify](#)]
 - ID: 8933 - Training Submission - TFA Engagement [[Modify](#)]

[Export Results to CSV \(Excel\)](#)

search_results_export_152570b9194e30.csv - Microsoft Excel

File Home Insert Page Layout Formulas Data Review View Add-Ins

Clipboard Font New Group Alignment Number Styles

A1 Submission ID

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Submission	Parent ID	Title	Name	Submittor	Submissio	Assigned	Status	Attached	Attached	Notificatio	Schedulin	Schedulec	Scheduled	Completion	Date
2	6747	-1	ID: 6747 -	EL 3 - Mine	Harry Jenr	#####	Trina Seta	Insufficient	162099620	SID:6747 [Harry.Jenr	Level 3 - Z	6/4/2012	8/1/2012		
3	8933	-1	ID: 8933 -	Training S	tng portal	#####		New	Copy TFA_	SID:8933 [sarah@tsi	Level 2 - Z	#####	#####		



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Assignment 7: Preparing Portal Information to update your boss, co-worker, or remind yourself of what's been going on.

How about the amendments and the parents at the same time?

To get the amendments of above... [Parent ID] = 8933 OR [Parent ID] = 6558



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A	B	C	D	E	F
Submission ID	Parent ID	Title	Name	Submittor	Submission Date / Time
6558	-1	ID: 6558 - TFA Engagement Request 2011-Sept-15 - SharmonAlphonse	South Chilcotin Stewardship Planning Area - TNG Engagement	Sharmon Alphonse	04/26/2012 04:07 PM
6768	6558	ID: 6768 - Amendment to ID: 6558 - General Communication Form 2011-Sept-15 - MaryThurow	Contains project boundary shapefile and overview map as PDF	Mary Thurow	06/05/2012 13:46
6823	6558	ID: 6823 - Amendment to ID: 6558 - General Communication Form 2011-Sept-15 - SusanOSullivan		Susan O'Sullivan	06/15/2012 02:24 PM
7191	6558	ID: 7191 - Amendment to ID: 6558 - General Communication Form 2011-Sept-15 - MaryThurow	Additional shapefile attached... No Harvest Area by itself.	Mary Thurow	10/15/2012 09:09 AM
8572	6558	ID: 8572 - Amendment to ID: 6558 - General Communication Form 2011-Sept-15 - JasonKerley	GC_Additional Deferred area in SCSP_FLNR_Tolko_Hungry Valley	Jason Kerley	07/24/2013 11:46 AM
8933	-1	ID: 8933 - TFA Engagement Request 2011-Sept-15 - SarahGash	Training Submission - TFA Engagement	tng portal admin	10/09/2013 11:41
8956	6558	ID: 8956 - Amendment to ID:	Licensee Connectivity Corridor Shapefiles Attached. Corridors	Mary Thurow	10/15/2013 01:41 PM



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Assignment 7: Advanced Search

1- Write down the query you would use to find all Submissions you submitted:

2- Write down the query you would use to find all Amendments submitted since August 1st 2013:

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 😊.



Questions?:

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!**

The screenshot shows a web form titled "Parent Submission". The "Instructions" section is expanded, indicated by a red circle around the "Instructions" header. The instructions text reads: "If you wish to 'make a child' and link this submission with a previously made submission, follow these steps: 1. Enter the ID of the 'parent' submission you wish to link this submission to. 2. Click on the Validate button. A result will appear to the right of the validate button. 3. When you have found the correct parent submission to link to, click Set Parent Submission ID. Alternatively, if you are starting a new submission and therefore DO NOT wish to link this submission to a previously made submission, leave the Parent Submission ID field blank." Below the instructions, there is a "Parent Submission ID:" label, a text input field containing "8933", a "Validate" button, and a red text result: "ID: 8933 - TFA Engagement Request 2011-Sept-15 - SarahGash". At the bottom right, there is a "Set Parent Submission ID" button.

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

Questions?