



<i>Training Sheet Title:</i>	<i>Canceling a Submission: Changing Submission Attributes</i>
<i>Date Effective:</i>	<i>July 4, 2016</i>
<i>Useful for:</i>	<i>ALL Portal Users</i>

A Submission NAME attribute is the only attribute that can be entered WHILE filling in a form AND ALSO AFTER the form is submitted.

The other attributes, STATUS and ASSIGNED TO, are only accessible once a submission has been submitted, not when a submission is Held in Draft.

Therefore, if there has been an error on something SUBMITTED (not a draft that can be fixed or deleted) and users need to CANCEL a submission, these are the steps to follow:

Step 1:

Modify Submission Attributes To “Proposal Cancelled by Proponent”

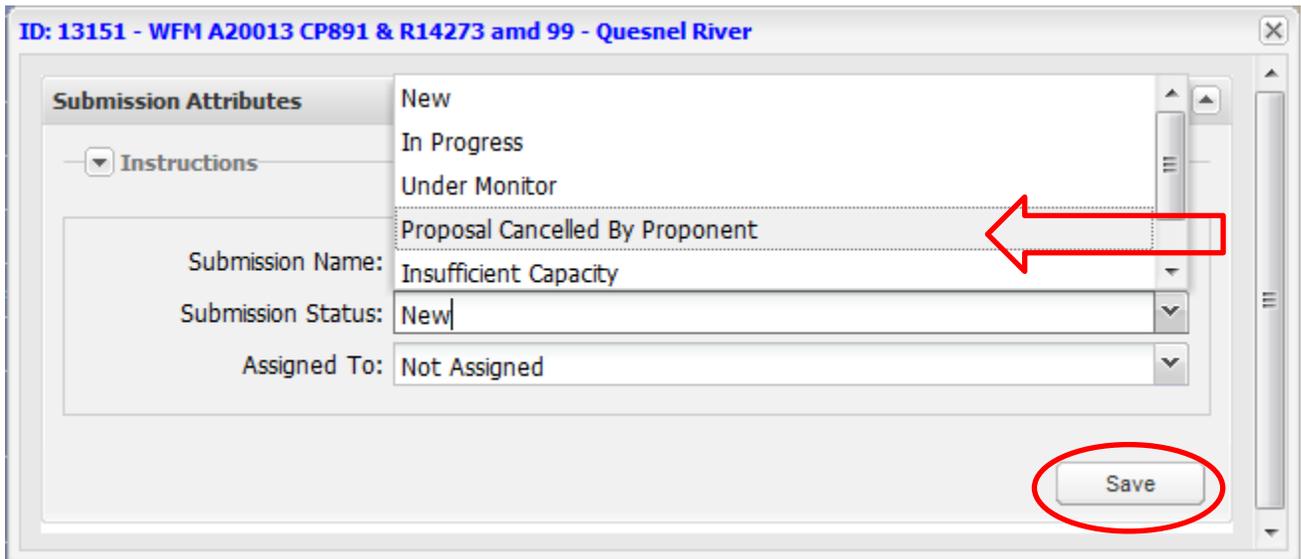
Access Submission Attributes either by:

1. Clicking on the “**Modify**” text next to the Submission Title in the Search Results or by
2. Clicking on the “**View or Set Submission Attributes**” in the Submission

A screenshot of a web application's search results page. The page title is "Search Results". Underneath, there is a folder icon and the text "Search Results (1 item)". Inside this folder, there is a submission entry: "ID: 13151 - WFM A20013 CP891 & R14273 amd 99 - Quesnel River [Modify]". The "[Modify]" link is circled in red with a red number "1" next to it. Below the submission title, there are several details: "Form: TFA Engagement Request 2011-Sept-15 (Form ID: 24)", "Name: WFM A20013 CP891 & R14273 amd 99 - Quesnel River", "Title: ID: 13151 - TFA Engagement Request 2011-Sept-15 - Roger Ritsema", "Status: New", "State: SUBMITTED (06/23/2016 01:10 PM)", "Submitter: Roger Ritsema", and "Assigned to: Lennon Solomon". Below these details, there is a section for "Actions" with several links: "View Form Data", "Export to PDF", "Preview as WebPage", "View or Set Submission Attributes", and "View History". The "View or Set Submission Attributes" link is circled in red with a red number "2" next to it. At the bottom of the search results, there are "Attachments" and "Layers" sections, both currently empty.

A window opens up to display Submission Attributes.

1. Select **Proposal Cancelled By Proponent** from drop down menu next to Submission Status and click the SAVE button:



The screenshot shows a window titled "ID: 13151 - WFM A20013 CP891 & R14273 amd 99 - Quesnel River". The "Submission Attributes" section is expanded to show a dropdown menu for "Submission Status". The menu options are: New, In Progress, Under Monitor, Proposal Cancelled By Proponent (highlighted with a red arrow), and Insufficient Capacity. Below the dropdown, the "Submission Name" is "Insufficient Capacity", "Submission Status" is "New", and "Assigned To" is "Not Assigned". A red circle highlights the "Save" button at the bottom right.

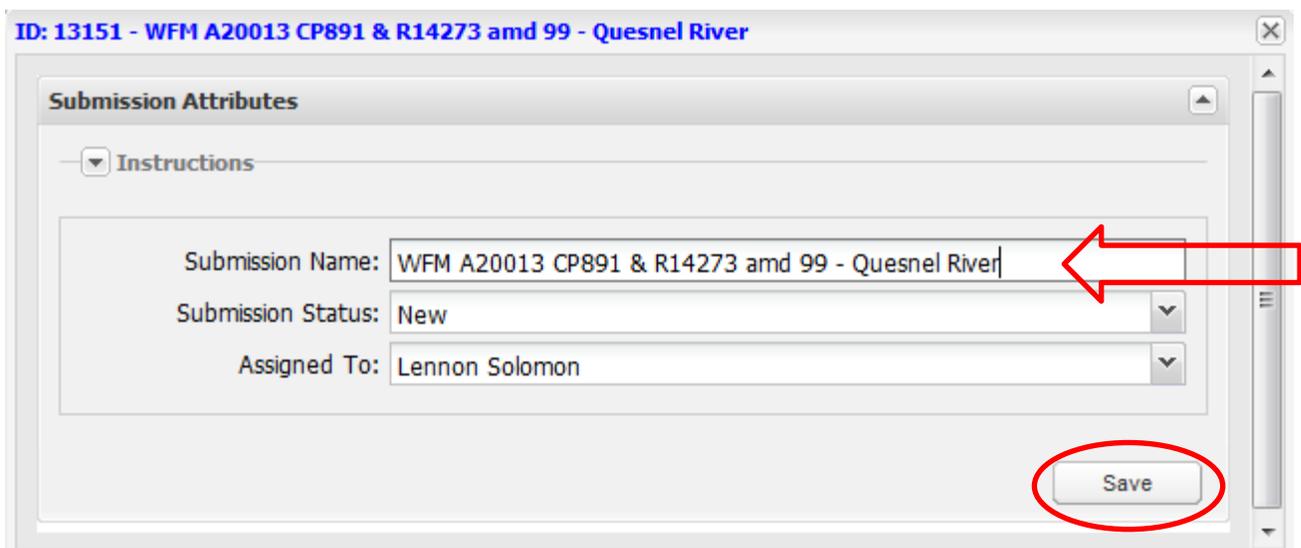
2. **Rename** Parent Submission:

If there has been work done on the Parent ID and numerous child submissions, be sure to change the name of the parent to indicate that this submission has been **CANCELLED** so that future users don't accidentally miss that a referral / engagement is no longer active.

Add "Cancelled" at the start of the Submission Name. For example:

"Cancelled – WFM A20013 CP891"

Click the **SAVE** button.



The screenshot shows the same window as above, but the "Submission Name" field now contains "WFM A20013 CP891 & R14273 amd 99 - Quesnel River" (with a red arrow pointing to the text). The "Submission Status" is still "New" and "Assigned To" is now "Lennon Solomon". The "Save" button remains circled in red.

Step 3:

Submit an Amendment Submission:

Submit an amendment (child) submission (Linked to the Parent ID that you are Cancelling) explaining why this submission is being cancelled by you, the proponent:

- a. Go to the Fill A Form page
- b. Select the **General Communication Form 2011-Sept-15**.
- c. Enter the Parent ID you are cancelling in the Parent Submission ID Node, Validate, and Save to link this new submission to the Submission you are cancelling. For more detailed instructions on how to Link a child submission to a Parent Submission:

http://www.tngportal.ca/themes/tng/documents/UserHelpDocuments/2013-May_LinktoParentSubmission.pdf

- d. In the Submission Name node fill in a name: "**Rationale for Cancelling Parent Submission**". Click **SAVE**. For more detailed instruction on how to Name a Submission:

http://www.tngportal.ca/themes/tng/documents/UserHelpDocuments/2013-May-07_NamingSteps.pdf

- e. Fill in the Content to explain reasons for cancellation, and click the **SAVE** button.
- f. Complete remainder of Form details including email notifications, and permissions, and Submit submission.

If the submission you wish to cancel was submitted in error please email or call TNG Portal Administrators and ask them to "HIDE" the Submissions so that all non-TNG users no longer see the submission.