

Instructions for BC Government TNG Stewardship Planning Portal Users for Submitting TSA Engagement Requests



Submitting an Engagement Request to the TNG Stewardship Planning Portal

BEFORE initiating a Portal Submission identify what **TSA Zone** your activity falls within. Please refer to the TSA Zone Map (Appendix A), and refer to the TSA Agreement (TSA) 2017-2020 Extension document for details on how to assess the Level of TSA Engagement.

If an Application overlaps with more than one Engagement Zone, the majority of the Application area will determine which Engagement Zone applies, and the Engagement level will be determined accordingly.

For questions and inquiries:

Please contact TNG Portal Administration at portaladmin@tsilhqotin.ca or 250-392-3918 (Sarah Gash or Jodie Jim); or BC Government Portal Contact, Resource Coordination Officer, Ministry of Aboriginal Relations and Reconciliation, Cariboo Region, Lynn Rankin, Lynn.Rankin@gov.bc.ca or (250) 302-3580.

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* to ensure that you are following the latest version, it is recommended that you **do not print** these instructions

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[Instructions for completing most of these steps are now available in the Portal itself – just click the arrow button to the left of “Instructions” in any of the form nodes.] 

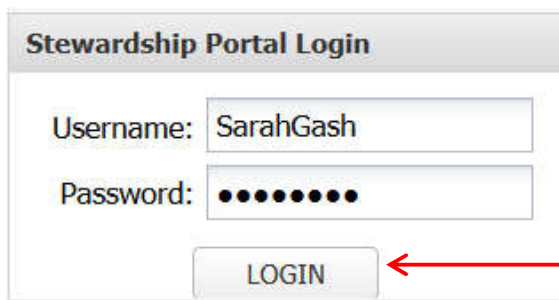


1. Log onto the TNG Stewardship Planning Portal:

Open Mozilla Firefox  (While mostly compatible with Internet Explorer  the Portal works best in Mozilla Firefox)

Click the link [TNG Portal Site](http://www.tngportal.ca) to the www.tngportal.ca

Click  and log in using your Portal username (e.g., **LynnRankin**) and password (you chose a password over the phone. Please call TNG Portal Administration at 250-392-3918 if you require a reminder).



Stewardship Portal Login

Username: SarahGash

Password: ●●●●●●●●

LOGIN

Usernames and passwords
are case sensitive.

Click LOGIN 

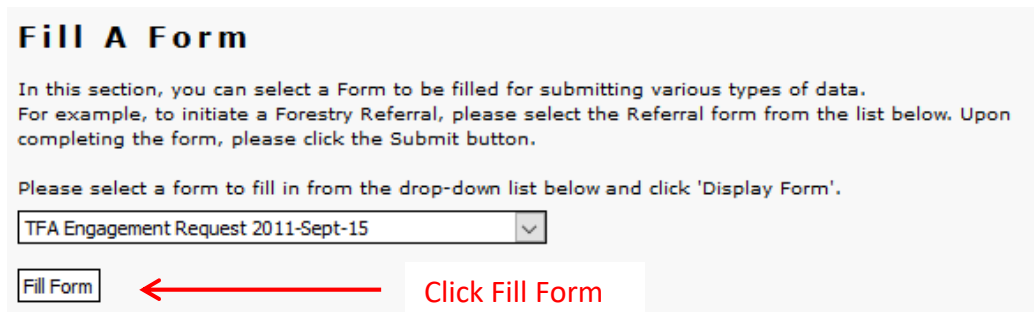
If you are NOT registered with the TNG Portal please download access form from here:
<http://www.tngportal.ca/themes/tng/documents/Templates/PortalUserLoginForm.doc>

Email completed form to portaladmin@tsilhqotin.ca .

2. Initiate a Submission:

Click  .

From the Drop-Down list, choose **TFA Engagement Request Form 2011-Sept-15** 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

Click Fill Form 

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Following is an example of a TSA Level 2 Engagement Request for a Fence Replacement.

Since this is your first submission for this file (This is a TSA Engagement Request, and you are initiating the consultation) *ignore* the **Parent Submission ID** field at the top of the page . We will come back to making a Child or Amendment Submission later.

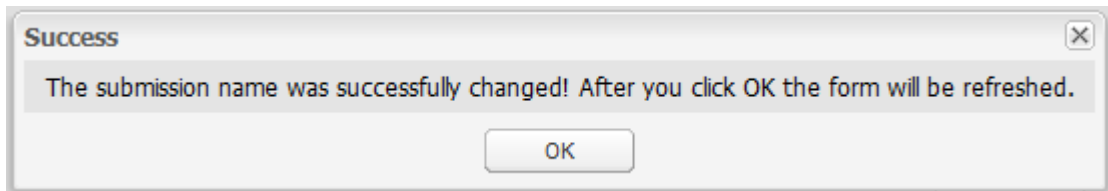
3. Submission Name Node:

Rename your submission with Engagement Level, Location, and Name or Description of Project and Company/Proponent. You will notice the text at the top of your Submission Form Changes to reflect your name.



The screenshot shows a 'Submission Name' dialog box. It has a title bar, a close button, and a section labeled 'Instructions'. Below this is a text input field containing 'EL2_Hwy20 Fence Replacement MOTI'. To the right of the input field, a red arrow points to it with the text 'Include Engagement Level, Name or Description, and location of Project'. Below the input field is a 'Save' button, with a red arrow pointing to it and the text 'Click Save'.

You must click the **SAVE** button before moving on. When you SAVE, you will be notified of a successful Name change:



The screenshot shows a 'Success' dialog box with a close button. The message inside reads: 'The submission name was successfully changed! After you click OK the form will be refreshed.' Below the message is an 'OK' button.

When you click OK, the page will refresh and your new name will be in the title bar of your submission:



The screenshot shows two examples of submission title bars. The top one shows 'Submission Name: name not set' and 'Submission Title: ID: 14553 - TFA Engagement Request 2011-Sept-15 - admin'. The bottom one shows 'Submission Name: EL2_Hwy20_Fence Recovery' and 'Submission Title: ID: 14553 - TFA Engagement Request 2011-Sept-15 - admin'. A red arrow points from the 'ID: 14553' in the bottom title bar to the 'Submission Name' field in the screenshot above.

Make a note of the Submission ID (for example 14553). This is the number you can search for after holding your Submission in Draft, or after you have submitted.

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4. Engagement Form Content node: Complete data entry into Content Node fields and Click **SAVE**.

Content

Instructions

Please note: Effective Sept 15 2011, this form is only to be used for TFA Engagements, Levels 2-5. For Level 1 Notifications, use the form "TFA Notifications 2011-Sept-15"

Brief Overview of Project: **B** *I* U **A** **A** **A** **ab**

MOT will be replacing several sections of hwy fence along Hwy 20 over the next couple of years. For the safe operation of Highway 20.

Location: Highway 20

Proponent: Ministry of Transportation and Infrastructure

Legal Description of Application Area:

Size in Hectares:

Engagement Contact: Murray Speed

Lead Agency: FLNRORD

Government File Number: 154740-20/various

Other Comments: **B** *I* U **A** **A** **A** **ab**

Bald Mtn., Becher Prairie, Alexis Lakes.

Save

Provide details about what land-use is being done, and for what reasons it is being done. Any additional details not covered in other fields of the Content Node. (See below for where to include Government file number).

Where is the work being done? Please provide more than a mapsheet number.

Who is the proponent conducting the work? (Which Agency, Licensee? Etc.)

Numeric Field – more specific for areas.

Your name – the Engagement Contact

If available, please include Portal Parent ID of Proponent submitted referral. For example, if Tolko has already referred a CP, and now BC is reviewing for CP approval, include the ID of that submission here. Including this ID here makes it available to be searched in the

Click the **SAVE** button.

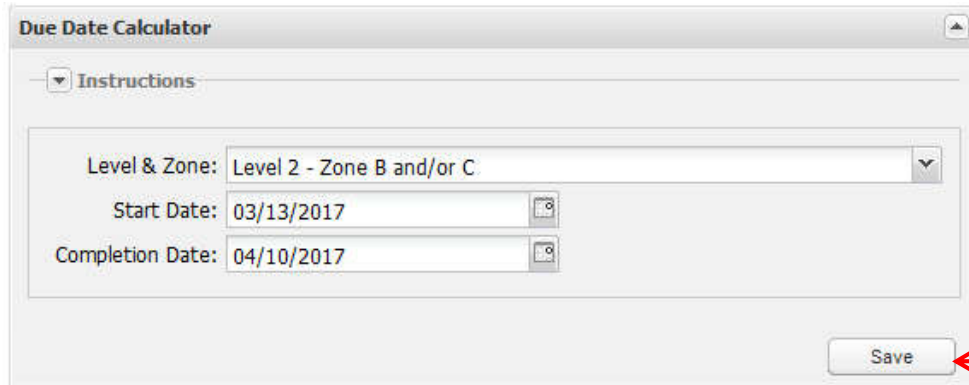
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5. Due Date Calculator:

Select the Level & Zone from the dropdown menu.

Please see the TSA document for deciding what Level and Zone your Engagement should fall under.

The due date (for TNG comments) will be calculated automatically. Make sure that this matches your Expected Consultation deadlines. Please accept the defaults unless you have extenuating circumstances and permission to customize the dates. Click **SAVE**.



Click the **SAVE** button.

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

Table of TSA Engagement Levels and Zones with Corresponding
Number of Working Days allotted for consultation.

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6. File Attachement Loader:

This is where you upload your TSA Engagement Letter

You are required to attach a minimum of 1 file, the TSA Engagement Letter document that **MUST** accompany any TSA Engagement. If you wish, you are able to upload as many as you would like to compliment your submission. You must upload documents one at a time:

(The Portal accepts a number of different formats (*.pdf, *.doc, *.xlsx, *.txt, *.jpeg and so on))

- a. An Engagement Letter Template filled out is required for a completed Engagement Request.

Download template here:

http://www.tngportal.ca/themes/tng/documents/Templates/ER_Template_2011_Sept%2026.docx

Other files you might consider submitting:

- b. Background information on a project including PDFs of overview maps, relevant documents and reports.
- c. If this is an Arch Branch submission you must include the **Application**. It is suggested that you name your Arch Permit Application file in this manner: Arch_Permit[YY]A[ArchPermitNumber] (e.g., Arch_Permit17A0119.pdf).
- d. You may enter a description of the file under **File Meta Data**, if you wish.
- e. Click Upload and the file should appear in the **Files Attached to this Submission** window.
- f. To delete an uploaded file from your draft submission highlight the file in the list, and click **Delete Selected**.

File Attachment Loader

Instructions

Delete Selected

Link	File Name	Meta Data
------	-----------	-----------

File Uploader (DO NOT USE FOR SHAPEFILES)

Click browse to select a file...

File Meta Data:
Add file description here (optional)

*****PLEASE NOTE*****

Filename should be:

- contains **NO** spaces and
- less than 32 characters long,
- **NO** non-alphanumeric characters.
(underscores work well to separate words)

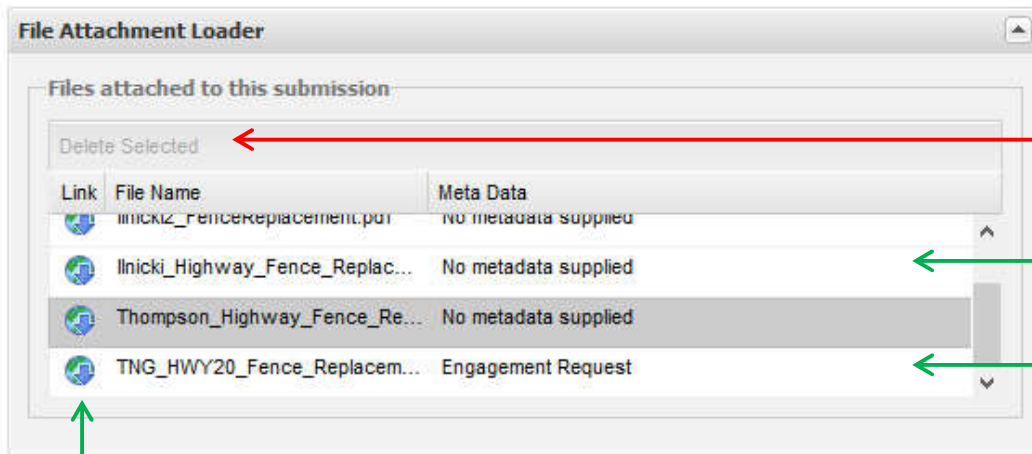
Click Browse to select the file you wish to attach in Widows Explorer.

Add file description to the File Meta Data field.

Click Upload File to attach.

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This is what the File Attachment Loader Node looks like with document uploaded and ready for submission:



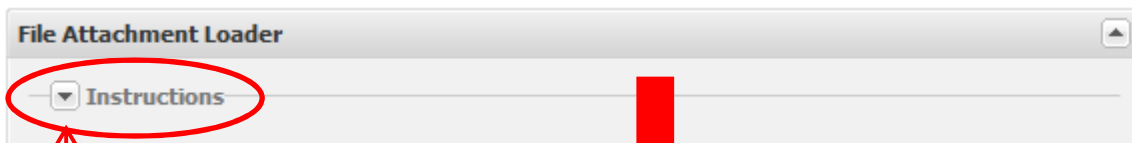
Highlight file, and click **Delete Selected** to remove a file you wish to edit/rename and re-post. Deletions must be done prior to submitting.

Maps are useful information to attach for referencing.

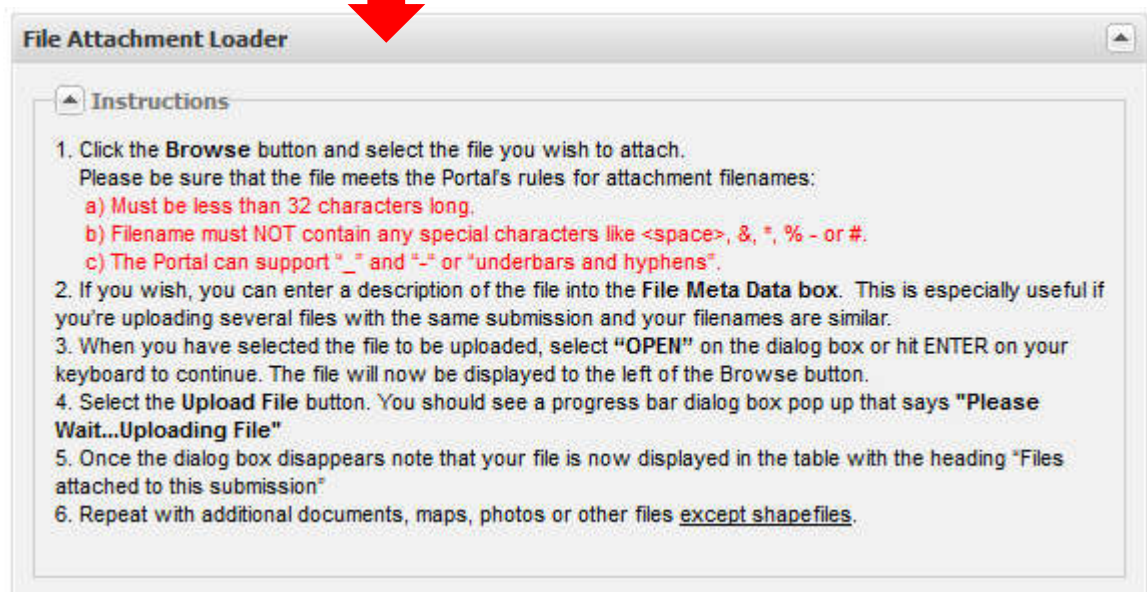
Signed Engagement Letter

To download the file, click on the **BLUE** arrow on left-hand side of the filename.

7. Instructions – Where to get Help in the forms:

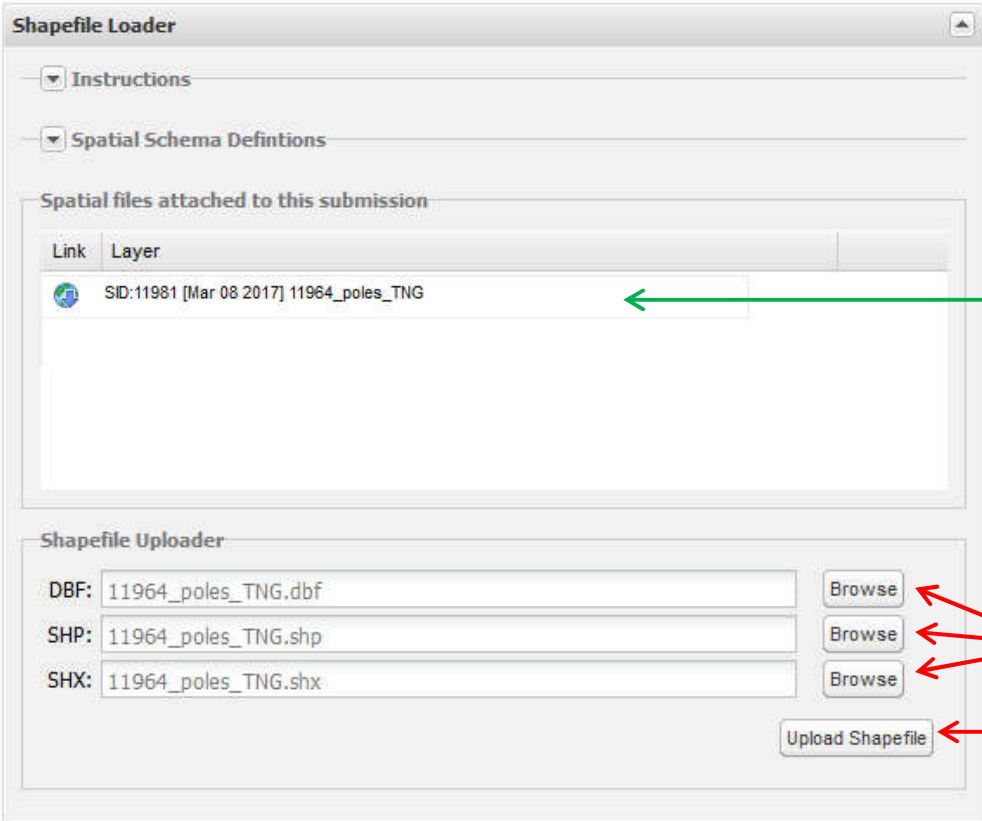


Click on the arrow beside the **Instructions** text to expand the in FORM Help. These instructions are available for all form nodes. Look for the **Instructions** text at the top of the section.



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8. Shapefile Loader:



The screenshot shows the 'Shapefile Loader' interface. It has two expandable sections: 'Instructions' and 'Spatial Schema Definitions'. Below these is a table titled 'Spatial files attached to this submission' with columns 'Link' and 'Layer'. One row is visible with a globe icon in the 'Link' column and the text 'SID:11981 [Mar 08 2017] 11964_poles_TNG' in the 'Layer' column. A green arrow points from the text 'Once a shapefile has successfully loaded it will show up in list.' to this row. Below the table is the 'Shapefile Uploader' section, which contains three input fields for 'DBF:', 'SHP:', and 'SHX:', each with a 'Browse' button to its right. The input fields contain the filename '11964_poles_TNG'. Three red arrows point from the text 'Shapefile DBF, SHP, SHX filenames must match.' to the three 'Browse' buttons. Below these is an 'Upload Shapefile' button, with a red arrow pointing from the text 'Click Upload Shapefile once all 3 files are selected.' to it.

Shapefiles must validate against a specific list of attributes. Please use sample shapefiles found on the document download page here:

http://www.tngportal.ca/themes/tng/documents/Shapefiles/Sample_TFA_Engagement_Request_Shapefiles.zip

Shapefiles must have:

- **Singlepart** geometry;
- must be in **BC Albers** NAD83 projection; and
- filenames must contain **NO spaces**, or **not exceed 32 characters**, or **not contain non-alpha-numeric characters** (%\$#+ etc.).
- Filenames must all be the same for all three file types that make up a valid shapefile (*.DBF, *.SHP, *.SHX)

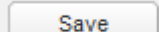
TNG has built a Python Tool for making Portal Compatible Shapefiles. Please see the following link for the User Help document for using the TSA Engagement Shapefile Conversion Tool:

<http://www.tngportal.ca/themes/tng/documents/UserHelpDocuments/TSAEngagementShapefileConversionToolInstructions.pdf>

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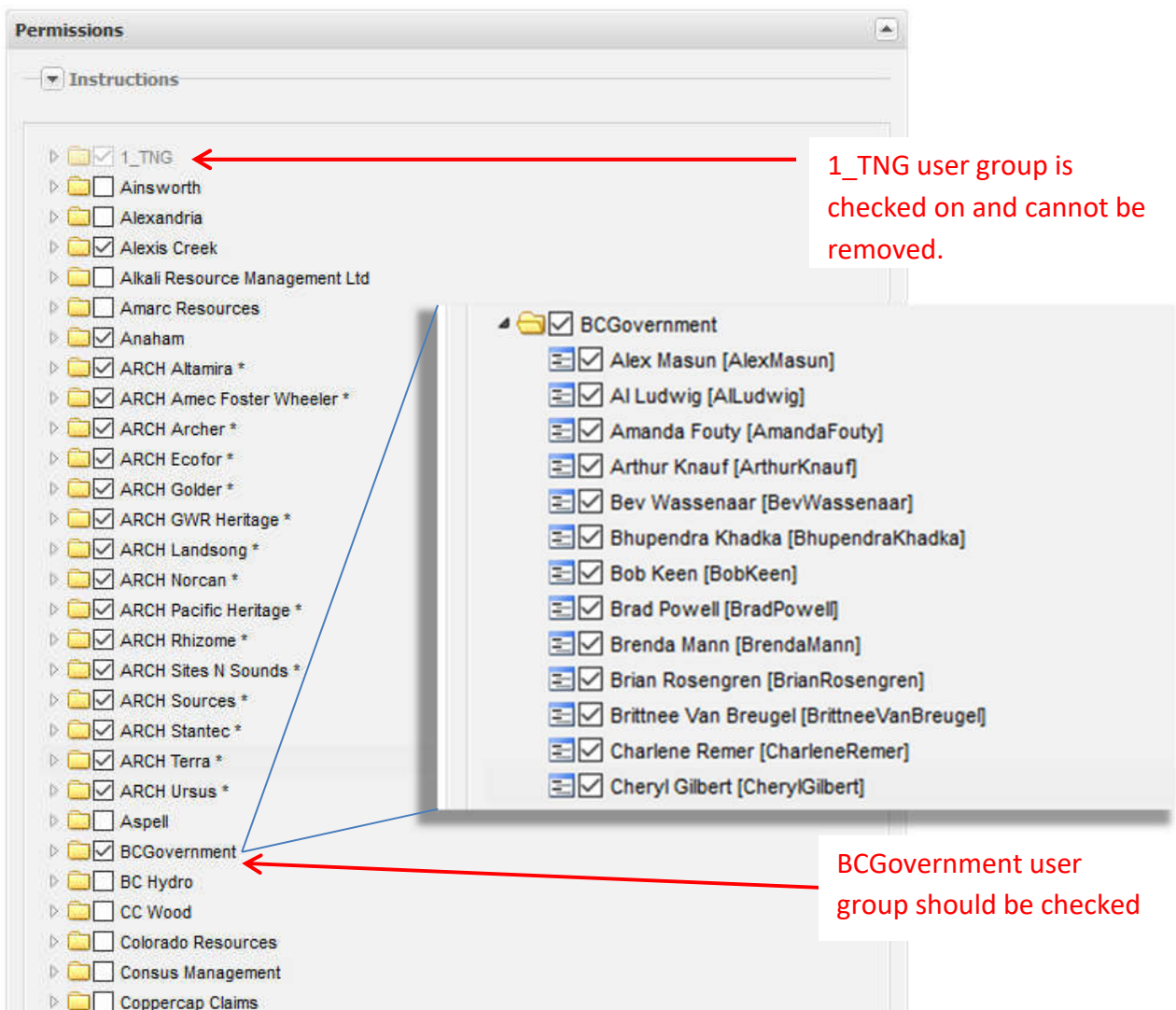
9. Permissions:

Accept the default permissions:

- **1_TNG** user group is checked, and cannot be removed
- A number of community user groups will be checked
- **BCGovernment**, box should be checked. Permissions are on by default but can be checked off
- If you make any changes, click **SAVE**. 

Only edit Permissions if you are aware of a user or user group that needs to be added or deleted. Generally you do not need to modify Permissions. Expand a user group to view all users in that group by clicking on the arrow beside the usergroup. Add or Remove by clicking on the box to the left of the user group or user.

An asterisk next to a user group indicates that not all users in a group have access. All Archaeology Groups (ARCH *) will only have partial access *, as all Arch Branch BC Government users are in each of those groups as well and get permission by default, but Arch Consultants do not.



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10. Send Email Notification:

In the **Send Notification Emails** window, ensure that the list includes:

- (a) Engagement Contact (You) – this should be automatically added by the system since you are the initiator of the Engagement Request;
- (b) Others in your BC Government user group who you wish to be notified of your submission and any subsequent activity on this file.

If you need to add any emails, type address into the field provided. Field will autofill if the email belongs to a registered Portal User. An email address does not have to exist in the system in order for it to be included in the email notification. Click **Add Recipient**.

The screenshot shows a window titled "Send Email Notification" with a "Instructions" dropdown menu. Below it is a "Delete Selected" button with a red arrow pointing to it. A table lists recipients with their email addresses and comments:

Recipient	Comment
portaladmin@tsilhqotin.ca	Required by Stewardship Portal
Erika.Driedger@gov.bc.ca	Defined by this Submission
f.craig@archercrm.ca	Defined by this Submission

Below the table is an "Add Recipients Manually:" section with a text input field "Enter a name or email address" and an "Add Recipient" button. A red arrow points to the "Add Recipient" button from the text "Click Add Recipient to add new email to list". Below this is an "Add Recipients from:" section with two buttons: "Parent Submission" and "Other Amendments". A red arrow points to the "Other Amendments" button from the text "If this were a child or amendment submission click on the Parent Submission and Other Amendments buttons to add any additional emails included in those submissions."

Highlight an email in the list and click **Delete Selected** if you wish to remove a recipient from the list.

Enter extra email to include in email notification sent once Referral is submitted.

If this were a child or amendment submission click on the Parent Submission and Other Amendments buttons to add any additional emails included in those submissions.

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11. Submission Control:

Scroll down to the bottom of the screen. If you have reviewed your submission, and feel it is ready for submitting, click the **Submit to Stewardship Portal** button.



The screenshot shows a 'Submission Control Settings' panel with a dropdown menu for 'Instructions'. Below the menu are three buttons: 'Delete this Draft' (red text), 'Hold as Draft' (blue text), and 'Submit to Stewardship Portal' (green text). A large red arrow points down to the 'Submit to Stewardship Portal' button.

ONCE A SUBMISSION HAS BEEN SUBMITTED YOU CAN NO LONGER EDIT or DELETE IT.

OR if you (or someone else in your user group) needs to come back to this submission for further edits and additions (shapefiles, documents and form content), click **Hold as Draft**. Record the ID number for easy retrieval in the Resume Draft list on the Fill a Form page (see below).



The screenshot shows the same 'Submission Control Settings' panel. A large red arrow points down to the 'Hold as Draft' button.

Fill A Form

To resume work on a DRAFT submission go to the Fill a Form page
Resume Work on a DRAFT Submission on the bottom section of the Page:

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: 5480 - TFA Engagement Request-2011-Sept-15 - admin

Resume DRAFT

Click Resume DRAFT →

**** Users that share common permissions groups can edit and submit each others DRAFT submissions. For example: If 'Sally Sawyer' and 'Louie Lumberjack' are both members of the 'ABC Mills' permissions group, they will be able to edit and submit each others DRAFT submissions.**

Find your Submission in the drop down menu. Draft submissions are listed in chronological order (newest at the bottom), and show ID Number, Form used, and Username of individual who initiated the submission. You would find Drafts that are no longer active, and that you want to delete here as well.

Once you have selected the Submission you wish to Resume work on Click **Resume DRAFT**. Your Draft submission will open and you can begin edits as you would on a new submission.

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OR if you have decided that you started this submission in error, or if you have identified this submission in the list of Draft Submissions as a garbage submission (no longer active or replaced by another submission) click the **Delete this Draft** button.



THANK YOU for using the TNG Stewardship Planning Portal. You are ready for your next submission.

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Appendix A: TSA Boundary Map current to March 31, 2020.

