




## Steps for Submitting a New Engagement Request to the NStQ Portal

### Filling a Form

How to select a form

1. Once you have successfully logged on to the NSTQ Portal, click the **Fill a Form** button on the left sidebar to access the Fill a Form webpage. Click on the drop down menu under the **Fill a Form** heading to display a list of available forms.
2. Select **NStQ Form** and click the **Fill Form** button. You will be directed to a new **NStQ Form**. The system will automatically assign a **Submission ID**.
3. The form contains a number of sections known as nodes. Each node has a title (e.g. **Parent Submission**) followed by an **Instructions** section (click the  symbol to the left of "Instructions" to expand the instructions).
4. Fill in the fields in each node as completely as possible. If needed, please refer to the **Instructions** sections for guidance. **Tip: Always SAVE each node before moving on to the next one just in case you have a problem that causes the portal to hang up. If you have not SAVED the node and you do encounter an error, the information you have entered may be lost.**

### Nodes

How to fill in specific nodes in the **NStQ Form**.

#### Parent Submission Node

1. Leave the **Parent Submission ID** field **BLANK** if this is a new **Submission** unrelated to a previously made **Submission**.
2. If this **Submission** is related to a previously made **Submission** (e.g. notification of changes to the original **Submission**), you will need to link this **Submission** (known as a **Child Submission**) to the original **Submission** (known as the **Parent Submission**). To do this:
  - a. Enter the ID number of the **Parent Submission** to which you wish to link this **Submission**. **Tip: If you are unsure of the Parent Submission ID number, you may click on the Find Submission button on the left sidebar to search for the Parent Submission.**
  - b. Click the **Validate** button. If the ID number matches a **Submission** in the system, the **Submission Title** will appear in red to the right of the validate button.
  - c. Once you have verified that the validated **Parent Submission** is correct, click the **Set Parent Submission ID** button on the bottom right corner of the node. **Note:**



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while there is no **Save** button for this node, the **Set Parent Submission ID** button will save your work for you.

## Submission Name Node

A Stewardship Portal Submission has both a title and a name. The **Submission Title** is system-generated and contains a **Submission ID** number as well as the form type (e.g. **NStQ Form**). Titles cannot be changed. However, the **Submission Name** can be changed and allows users to provide a more meaningful description of the **Submission**. To create or change the name of a **Submission**, follow these steps:

1. Fill in the **Submission Name** field.
2. Click the **Save** button.
3. The page will refresh and your **Submission Name** will appear at the top of the form.

## Content Node

The **Content Node** contains a number of fields and allows you to provide a summary of project information.

Fields:

1. **Brief overview of the project**: this field allows you to provide a brief (typically 1-2 sentences) description of the project. Descriptions should enable readers to quickly gain an understanding of the purpose of the project (e.g. Cutting and road permit application for blocks XXXXX, XXXXX, and XXXXX within TFL XX).
2. **Location**: identify the project location using an address or readily understood landmarks (e.g. Quesnel Forest District: XX Road).
3. **Proponent**: identify the proponent undertaking the project (e.g. XX Mining Company, Inc.).
4. **Legal Description**: if necessary for greater clarity, provide a description of the physical location of the project that expands upon the information entered in the **Location** field (e.g. boundary lines, etc.). If this information is already contained in documents or shapefiles attached to the **Submission**, please refer to the applicable files.
5. **Hectares**: indicate the area of the project in hectares.
6. **Engagement Contact**: provide the name and contact information of the person who will be facilitating engagement for the project.
7. **Lead Agency**: provide the name of the organization primarily responsible for this project.
8. **File Number**: provide the project file number assigned by the lead agency. This allows referrals staff to easily identify the project when contacting the organization.
9. **Calendar**: provide the date on which engagement was initiated for this **Submission**.
10. **Affected Communities** check the appropriate boxes to indicate which of the 4 NStQ communities this project affects.
11. **Comments**: provide any additional comments you deem necessary.




# Northern Secwepemc te Qelmu'cw Stewardship Portal



## Attachments Node

Use this node to attach supporting documents or other files that provide additional information on the [Submission](#).

1. Click the **Browse** button and select the file you wish to attach.
2. Please be sure that the file meets the Portal's rules for attachment filenames:
  - a) Must be less than 32 characters long.
  - b) Filename must NOT contain any special characters like <space>, &, \*, % - or #.
  - c) The Portal can support "\_" and "-" or "underbars and hyphens".
3. If you wish, you can enter a description of the file into the File Meta Data box. This is especially useful if you're uploading several files with the same [Submission](#) and your filenames are similar.
4. When you have selected the file to be uploaded, select **OPEN** on the dialog box or hit **ENTER** on your keyboard to continue. The file will now be displayed to the left of the **Browse** button.
5. Select the **Upload File** button. You should see a progress bar dialog box pop up that says **Please Wait...Uploading File**.
6. Once the dialog box disappears note that your file is now displayed in the [Files attached to this Submission](#) section.
7. Repeat with additional documents, maps, photos or other files.
8. To delete an attached file, highlight the file in the [Files attached to this Submission](#) section and click the **Delete Selected** button.
9. To download an attached file, click on the blue circle with arrow () on left-hand side of filename.

**Note: please do not use this node to attach shapefiles. Use the [Shapefiles](#) node below.**

## Shapefiles Node

Use this node to attach shapefiles to the [Submission](#).

**Note: You should now be ready to upload shape files to this [Submission](#), having already created the shape files with the associated NSTQ schema, and populated the DBID attribute with the [Submission ID](#) given to you when you initiated the [Submission](#). If the DBID attribute of your shapefiles has not been populated with the [Submission ID](#), please press the **Hold as Draft** button at the bottom of the form to save the form as a draft while you populate the DBID attribute. The [Submission ID](#) may be found at the top of the form in the [Submission Title](#) and is also noted in the DRAFT SAVED notice you will see when you press the **Hold as Draft** button. Once you have populated the DBID attribute of your shapefiles with the [Submission ID](#), you may return to complete the form. To access your saved form, click the **Fill a Form** button on the left sidebar and select your form from the [Resume Work on a DRAFT Submission](#) drop-down menu. Press the **Resume Draft** button to open your form.**



# Northern Secwepemc te Qelmu'cw Stewardship Portal



1. The Shapefile Uploader allows you to upload the three mandatory files that make up a shapefile (i.e. .dbf, .shp, and .shx files). For each file, click the **Browse** button and select the file you wish to attach.
2. Please be sure that the file meets the Portal's rules for attachment filenames:
  - a. Must be less than 32 characters long.
  - b. Filename must NOT contain any special characters like <space>, &, \*, % - or #.
  - c. The Portal can support "\_" and "-" or "underbars and hyphens".
3. When you have selected the file to be uploaded, select **OPEN** on the dialog box or hit **ENTER** on your keyboard to continue. The file will now be displayed to the left of the **Browse** button.
4. Once you have selected all three of the mandatory files, press the **Upload Shapefile** button on the bottom right of the Shapefiles Node. You will see a progress bar dialog box that says **Please Wait...Validating and Uploading Shapefile**. During this process the Portal will attempt to validate your shapefile's schema against those required by the Portal. Shapefiles must have a specific structure or "schema" in order to upload into the Portal. Each column in the attribute table of the file you want to upload must match both the name and field type of the schemas that are listed in the **Spatial Schema Definitions** tab (an expandable tab found below the **Instructions** tab for the **Shapefiles Node**). The portal will only accept shapefiles that match one of the schema listed in the **Spatial Schema Definitions** tab. You will see a warning (**Error: Shapefile did not validate against form's spatial schema(s)!**) if your file does not match the schema. If this happens, Hold your **Submission** in Draft, reformat your shapefiles properly in a GIS program, then resume the draft and attach the repaired shapefiles.
5. Once the dialog box disappears note that your shapefile is now displayed in the **Files attached to this Submission** section.

## Permissions Node

The Permissions Node allows you to set the permissions for the form. Only users with permission may access form information and any attached files. You may grant permission either automatically or manually.

1. Granting Permissions Automatically:
  - a. If this submission has a defined parent submission, the **Add Parent Submission Permissions to this Submission** button will be enabled. Clicking this button will automatically match the permissions of your form to those of the **Parent Submission**. Doing this will not revoke any permissions you have already set, but may grant permissions to additional users/groups based on the Parent Submission permissions. Manual permission changes can still be made after using the **Add Parent Submission Permissions to this Submission** function. If you are submitting a child submission we recommend that you click this button first and then make any required permission change manually.
2. Granting Permissions Manually:



# Northern Secwepemc te Qelmu'cw Stewardship Portal



- a. The Permissions Node contains an expandable list of user groups. Expanding any of these groups will display a list of user within that group.
- b. Checking the box next to a user group will grant permission to all users within that group.
- c. You may also check or un-check the boxes next to individual users to grant or remove permission.
- d. In the list below, select the users and/or groups to whom you want to grant permissions once this form has been submitted.
- e. Once a submission is submitted only the Portal Administrator can modify permission. Please contact the Portal Administrator to revise permissions on submitted referrals (you will need to provide the **Portal ID**).
- f. If you click permissions off for a user, that user cannot access your submission. Therefore, please ensure that all necessary users in your group are granted permission prior to submitting the form.

**Note: the Portal automatically grants the Portal Administrator permission to all Submissions. You are unable to modify this permission setting.**

## Email Notification Node

The Email Notification Node allows you to define those who will receive email notifications regarding this submission. If you add an email recipient using the add email function below, the recipient will receive notifications regarding this submission, but will not be able to view the submission contents if they do not have permissions to it or if they do not have an account for the Stewardship Portal.

1. The Email Notification Node displays a list of recipients who will receive email notifications. You may add new email recipients by typing an email address into the **Add Recipients Manually** field. The portal will auto-complete the email address if the address exists in the database. The Portal will also check for incorrect email format.
2. If this **Submission** is linked to a **Parent Submission**, you may use either of the two buttons found within the **Add Recipients from** box to add additional recipients. The **Parent Submission** button will copy the parent's recipients to this submission. The **Other Amendments** button will allow you to select an **Amendment** attached to the same **Parent Submission** from which to copy recipients.

## Submission Control Node

At any point while you are filling the form, The Submission Control Node provides you with three options.

1. If you wish to abandon this submission, click the **Delete this Draft** button.
2. If you wish to hold this submission in a draft state so you can continue work on it another day, click the **Hold as Draft** button.



# Northern Secwepemc te Qelmu'cw Stewardship Portal



- When you have completed filling in all of this submission's content, and are certain the information contained within is accurate, you can post this submission to the Stewardship Portal by clicking the **Submit to Stewardship Portal** button. Once you post this submission to the Portal, you can no longer make any changes to it.

## Things to remember when attaching files to a form

- Do not submit **anything** unless you have **everything**: for example, are all supporting documents uploaded, are all shapefiles uploaded?
- Only draft Submissions can be deleted; once a Submission is made into the portal it can't be deleted.
- Once you delete a **draft** Submission that ID number will not be reassigned.
- Instructions on each page can be collapsed or expanded.
- File naming conventions:
  - No spaces
  - No non-alphanumeric characters (\$#%&! ) etc.
  - When naming your document/shapefile please use ***under-scores***
  - Please keep your file name as short as possible, for example: cp\_1234.docx or cp\_1234.shp. This will ensure that you can upload documents, shapefiles without issue.
- If you exceed the filename length, the system will “hang” and you will have to press the web browser back button and resume your draft. Unsaved work may be lost.
- When submitting shape files, be sure to include the individual .shp, .shx, and .dbf. Do not compress them into a zip file and attach as one file to the document upload wizard. Ensure that you have populated the DBID attribute with the Parent Submission ID before you submit the shapefiles.
- No multipart shapefiles (ask your GIS staff or contact the [Portal Administrator](#) if in doubt).
- Shape files need to be in Albers projection (although you do not need to submit the .prj file.)
- Maximum 20 megabytes **TOTAL** attachment file size per Submission. If you need to attach additional documents that add up to more than 20 megabytes, please attach them separately in a child Submission.

If you have any problems or questions please first refer to the Instruction section for each node. If you still have questions please contact:

NStQ Stewardship Portal Administrator:

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