# Niskamoon Information Management System

# User’s Guide

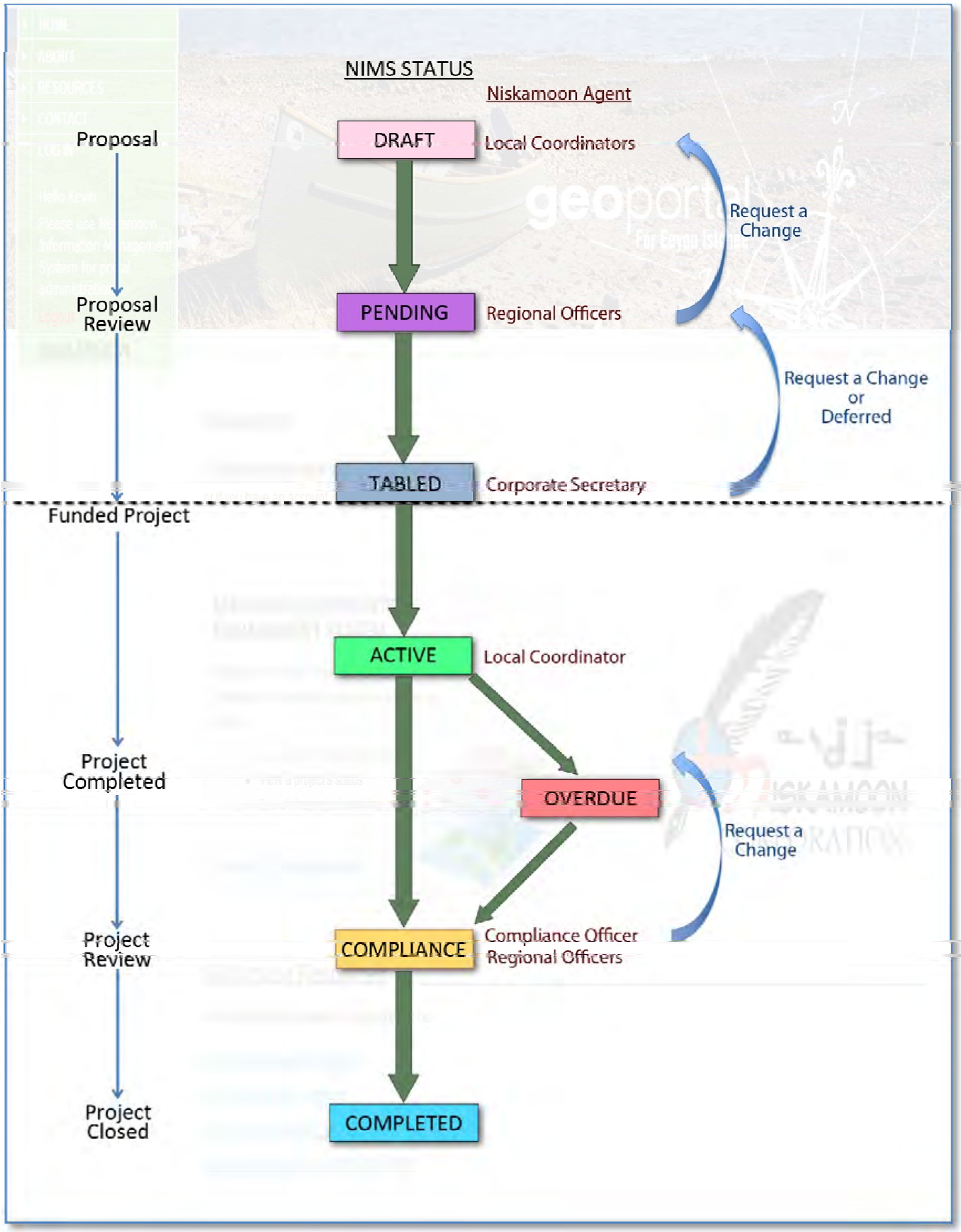
## Local Officers

**August 2017**

## NISKAMOON PROJECT LIFE CYCLE

As project application goes through Niskamoon's management process from the creation of a project proposal to the completion of a project it is overseen by many Niskamoon Agents. These range from Local Coordinators who write and submit the project proposal, to Regional officers who review the project proposal, to the Corporate Secretary who presents the project proposal to the Board of Directors and records their decisions, back to Local Coordinators who oversee active projects and take part in designating the projects complete.

The following chart demonstrates how the Niskamoon Information Management System (NIMS) manages these stages of the projects by assigning different statuses to them, and which Niskamoon Agent oversees each status.




Projects can exist in 2 forms: Proposals or Funded Projects. Funded projects are identified by resolution number/agreement number.

Proposals

- **Draft**: Project application in the process of being filled by the Local Coordinator
- **Pending**: Project application awaiting review by the Regional Director.
- **Tabled**: Project application awaiting review by the Board of Directors.

Funded Projects

- **Active**: Approved by the Board of Directors and marked as active by the Corporate Secretary.
- **Overdue**: Project past end date not marked as complete.
- **Compliance:** Compliance report under review by Regional Director and Compliance Officer
- **Completed**: Project confirmed as completed.

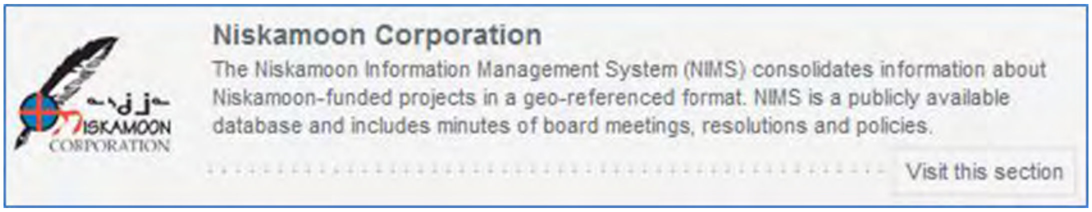
## CREE GEOPORTAL

The entry point to the Niskamoon Information Management System (NIMS) is the Cree GeoPortal (www.creegeoportal.ca)

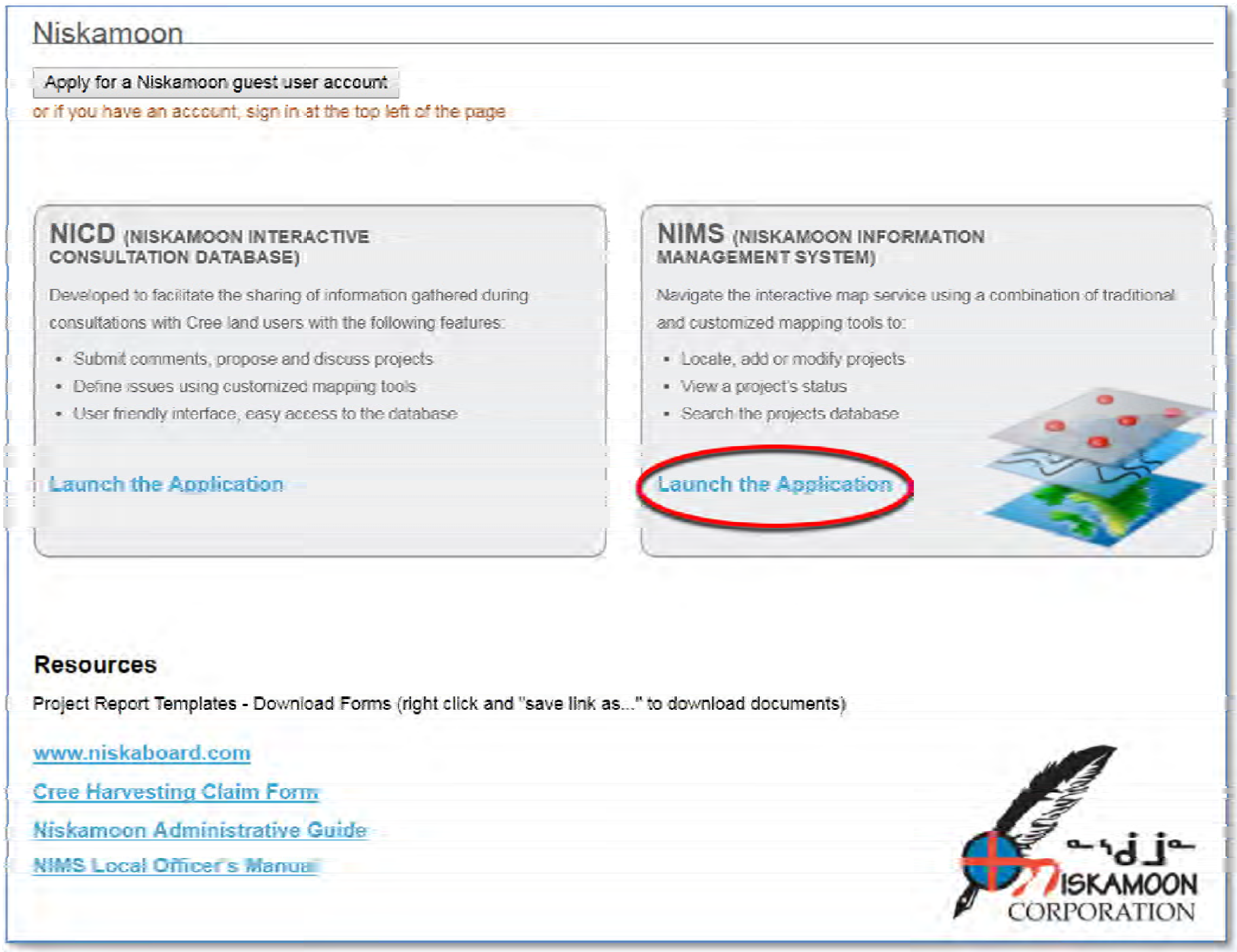
Log in to the system (the green box) with the credentials you have been assigned. Enter your **username** and **password**, and then click Login

The green log-in box will then display **your username**, signaling a successful log in.

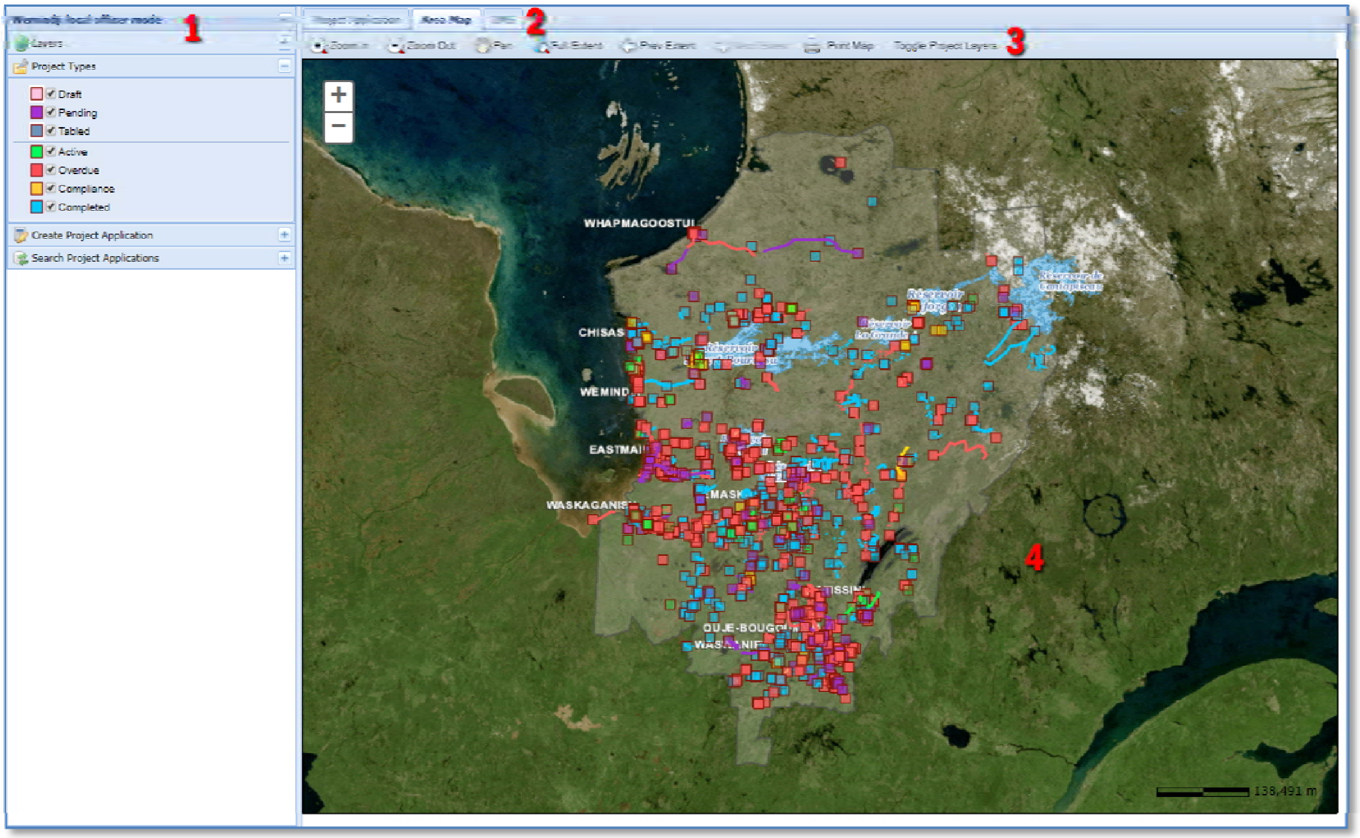
To access the Niskamoon section of the GeoPortal, locate this zone on the page and click **'Visit this section'**




This manual provides instructions for the **Niskamoon Information Management System**. To launch NIMS click on **Launch the Application** in the NIMS section of the Niskamoon page.



## NIMS Project Management Tool – Map and Interface

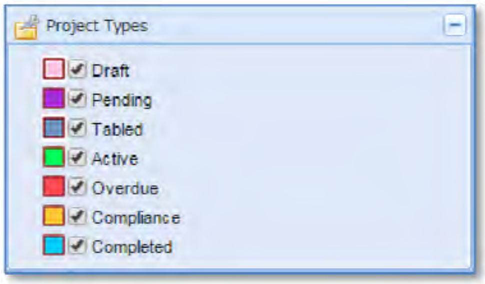



The map and interface has three main components (refer to the image above):

1. Project Details
   - Layers - a set of thematic layers that can be turned on or off.
   - Project Types – indicates the status of individual projects in the Niskamoon Database
   - Search Project Applications – locates individual project applications
2. Project Application Component Tabs
   - Project Application: Displays New Application panel of fields to be filled in to create a project application file.
   - Area Map – displays projects with a geo-spatial component and indicates their status **(4)**
   - Document Management System (DMS – locate or upload project related Documents
3. Map Navigation Tools
   - Standard map navigation tools, Print Map button and Toggle Project Layers button.

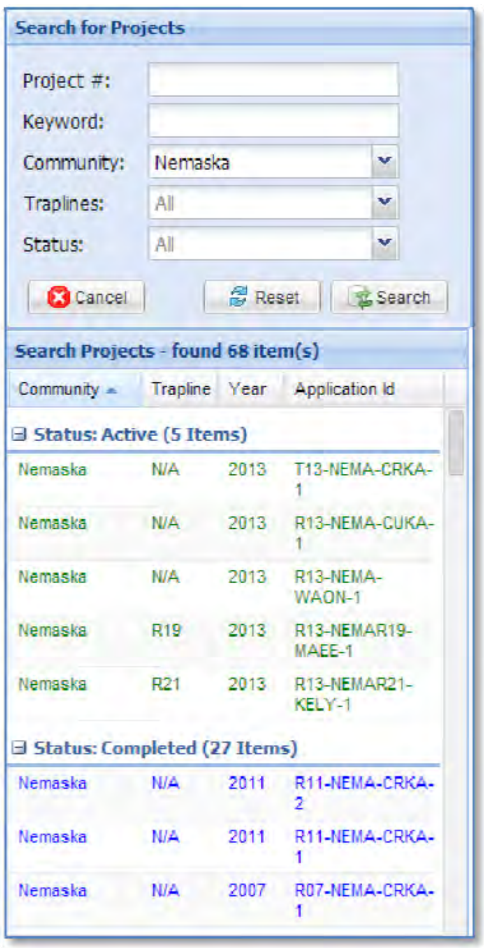

## Map Layers

The Map Layers have been grouped into folders, these layers can be turned on and off as needed, either individually, or by group, by checking or un-checking the box next each layer or group.




## Project Types (Status)

Projects and applications are categorized by their status. They can be displayed by clicking their check boxes on or off. By default all project types are displayed.




## Project Information – Search the Niskamoon Database

To locate a project, enter as much information as you have about that project. In this example, the **Community** field has been filled in, and all projects in Nemaska have been listed. The Project IDs are often included in automatically generated alert emails from NIMS. In this example the project ID for the first project in the results window is: T13-NEMA-CRKA-1. Simply copy and paste the ID from your alert email into the Project # box and press search to locate that project.

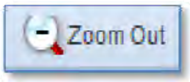
This feature allows any NIMS officer to easily find and track any of the over 1300 projects in the system from Draft through to Completed status. Local Coordinators, for example, can follow their project applications through the Niskamoon approval process by selecting Pending or Tabled in the **Status** field and their community. Local Coordinators can also see all the projects on any given trapline by choosing that trapline from the dropdown menu.

Projects can also be found by keyword. Entering "cabin" in the keyword field will display all projects with the word cabin in their title or general description.

The Year and Trapline fields at the top of the search results are sort-able to make it easier to find a specific project when there are many results: left-click on the field name to sort the results in ascending or descending order.

## Map Navigation Tools

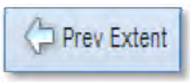

Enlarges the map, focuses on a specific area. Click on the icon to activate the tool, drag the pointer over the area you wish to enlarge.



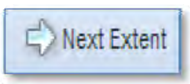

Click the icon then drag your pointer over the map area you wish to reduce.


By default, the Pan tool is active, click on the other icons when you wish to change tools. The pan tool becomes active again once you have completed your operation. To pan move your pointer over the map, click and drag the map in any direction.

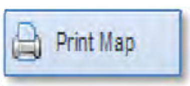

Click this icon to return the map to its initial view.



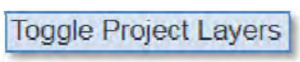

Click this icon to return to the **previous** map view.




Click this icon to cycle back to the other map views you established.



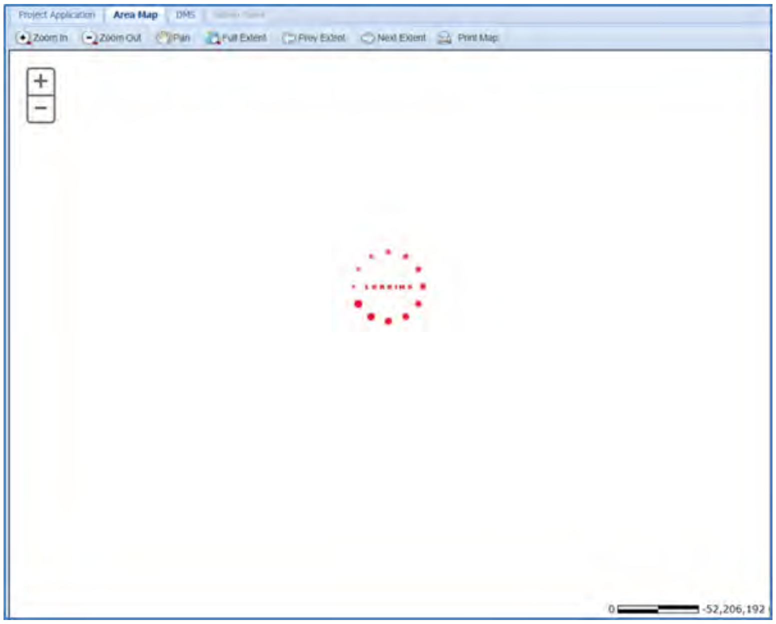

Click this icon to print the map area on the screen. The user will be given the choice of 4 different sizes: Letter, 11" x 17", 17" x 22", and 22" x 34".




Click this icon to toggle the visibility of the projects on the map on or off

## Solving a Loading Error

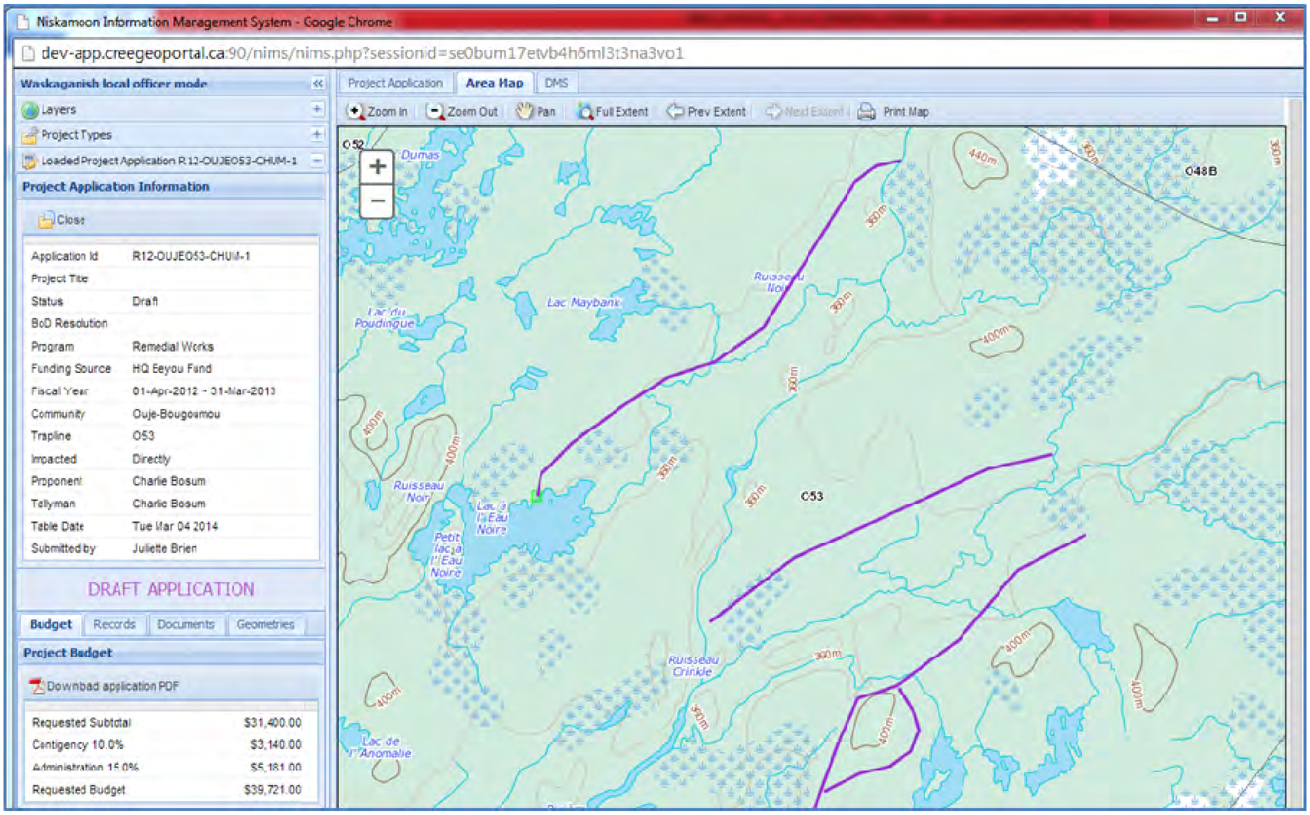
Occasionally, depending on the internet connection, the browser used, and the internet protocols in use at your office,  the map portion of the application may display on a loading loop. The image below displays the appearance of this situation.




Reloading or refreshing the browser will solve this situation. Refreshing instructs the browser to reload the data on the page or application that is open. Be aware that any unsaved project  information will be lost upon refreshing so make sure **to save before refreshing!**

Personal computer browsers can be refreshed by pressing **F5** on your keyboard. Apple computer browsers can be refreshed by pressing the "**Command**" or "⌘"  key and the "**R**" key simultaneously.

## Example Project




This Proposal currently has a **DRAFT APPLICATION** status, which means that the proposal has not been submitted to the Regional Officer for review. Information for the project application #**R12-OUJEO53-CHUM-1** is being displayed. The map has now zoomed to the project location.

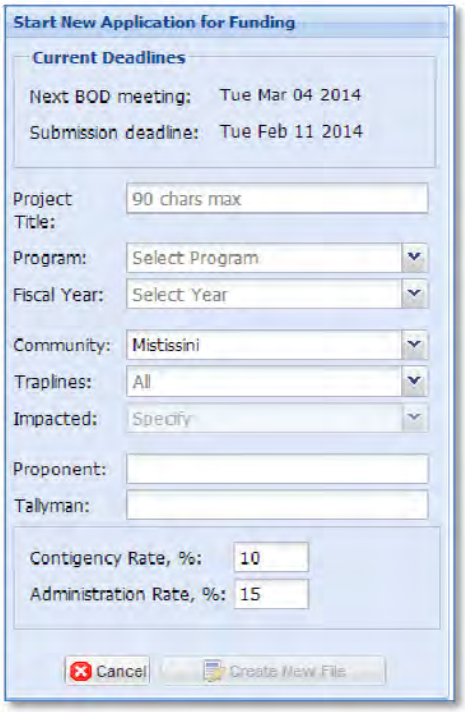
New applications are assigned project ID numbers according to the following:

- **R**- indicates the proponent is requesting funding from the REMEDIAL program
- **12** – indicates the funding year
- **OUJE** – the community where the project will be developed
- **O53** – the trapline where the project will be developed
- **CHUM**-Is a code made up of the first two letters and last two letters of the proponent's name. In this case **CH**arlie Boss**UM**
- **1** – indicates that this is the first project for this trapline and proponent this year

The lower half of this panel includes:

- Proposed Budget tab – these amounts reflect the total requested by the proponent
- Download application PDF button: press this button to get a PDF copy of all the information entered directly into the NIMS interface including maps of the project location. This is very useful for sharing project details outside NIMS by email or print out. **Attached documents such as estimates, traditional authorizations and band council resolutions will have to be downloaded separately from the documents tab.**
- Records tab – this allows users to track all correspondences and any work done on the project from the moment it is created.
- Documents tab - displays a list of documents related to this project. Documents can be added, removed and downloaded from the project here.
- Geometries tab – displays a list of geometric drawings representing the project and its geospatial details, these geometries can be:
  - Point, usually representing a single, specific location
  - Trail (Polyline) usually representing a trail
  - Polygon, usually representing a clearing, goose pond, or other area that requires a perimeter and area.

## Creating a New Project Application




To create a new project application, start by selecting CREATE PROJECT APPLICATION. The panel will display information concerning:

- The NEXT BOD meeting
- Submission Deadline for the upcoming BOD

Fill in ALL the fields (required) to create the new project application. Funding sources are dependent on the selected program. Choose the fiscal year according to the calendar date and pending BOD meeting.

Once all the fields are correctly filled in, click Create New File.

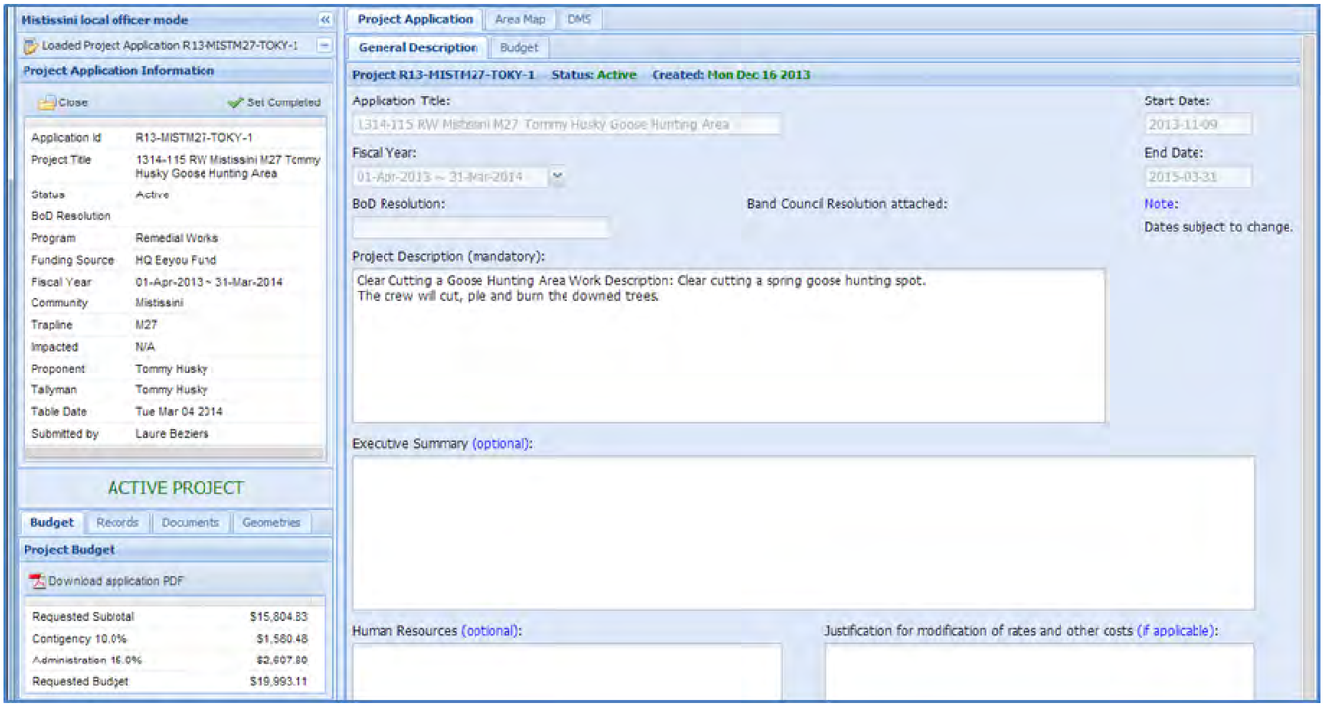
Click CANCEL to discard the application.

**Please Note:** The Contingency Rate and the Administration Rate are filled by default, but these rates are editable by the Local Coordinator. Once the Create New File button has been pressed to create the new project application these rates cannot be changed.

For example: Cultural projects often do not have any contingency fee or administration fee charged to them. When creating a cultural project application you must remember to change the contingency and administration rates from their default values to "0" before pressing "Create a New File". These rates cannot be changed after a project application has been created and entered Draft stage. In practice this means that forgetting to change the rates would necessitate having to delete the draft application and start all over again.

Fill in the GENERAL DESCRIPTION fields on the right as required, not all fields are mandatory. When the summary is complete, click the BUDGET tab to continue with the application process.

## Project Application Summary




Note that the MAP screen has also changed and now displays the GENERAL DESCRIPTION / BUDGET screen. This is the screen where the details of the project are created and input into NIMS.

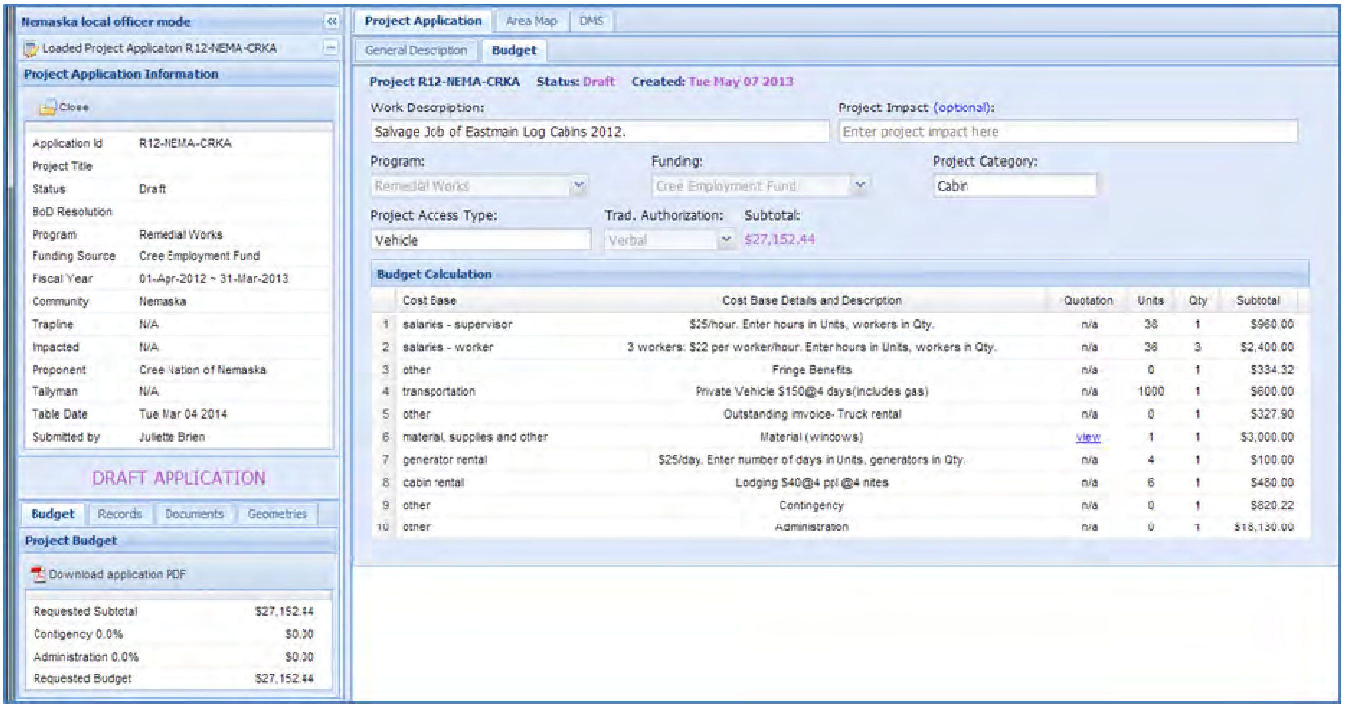
The project application information is displayed in the upper left panel. The lower left displays the running budget total and is updated as the BUDGET is filled in.

### Filling in the Project Description and Budget

*Step 1* – Under the Project Application tab, enter a brief description of the proposed project. This is a 'free text' field, which means that you can type in anything you wish. Briefly describe the project. Fill in any of the optional fields you need to. If the application is for partial funding of a project from Niskamoon enter the full project budget here as well as how much is being sought from Niskamoon.

*Step 2* - Double check the project application title and the fiscal year. These will be filled in automatically by what you entered into these fields when you created the project application but can be changed here at any point before submission.

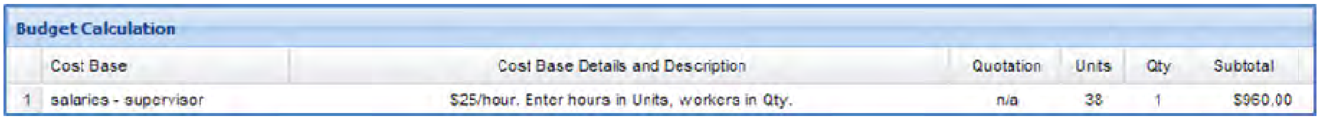
*Step 3* – Fill in the proposed start date and end date of the project.




*Step 4* – Under the **Budget tab**, choose a PROJECT CATEGORY from a drop down lists. Fill in the other fields.NOTE: these lists can only be edited by the Regional Officer, if the category or type describing the project application you are creating does not exist, a request should be made to the **System Administrator** to append the lists or the category "other" can be chosen.

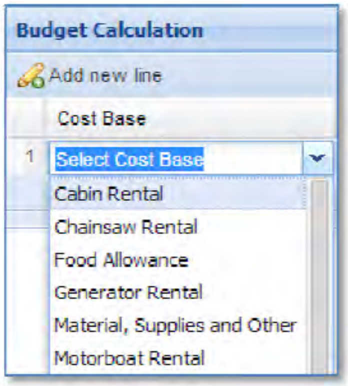
*Step 5* – Create the budget for the project by filling in the BUDGET CALCULATION fields. The budget is created by itemizing the various activities, personnel, materials and other expenses required to complete the project. The fields in the BUDGET CALCULATION table include:

- **Cost Base** – this field identifies the activity, material, personnel, or other expense. It is filled by choosing from a drop down menu;
- **Cost Base Details and Description** – this field is dependent on the COST BASE field and only options that apply to the chosen Cost Base will appear in it.
- **Quotation** – This is required when the Cost Base chosen is "material supplies and other". The selection of this Cost base option causes the field to be filled with the word upload. Clicking this word allows the user to upload a document. The quotation must be either an electronic document, such as a PDF or Word document, or can be a scanned document.
- **Units** – Depending on the Cost Base, these units can be hours, days, dollars per hour, mileage (Km), or units depending on the materials specified. Enter the appropriate amount for each Cost Base.
- **Qty** - Like the units field described above the Qty (Quantity) field stores different units for each Cost Base.
- **Subtotal** – This field is the total cost per item in the budget.



**Budget Calculation**

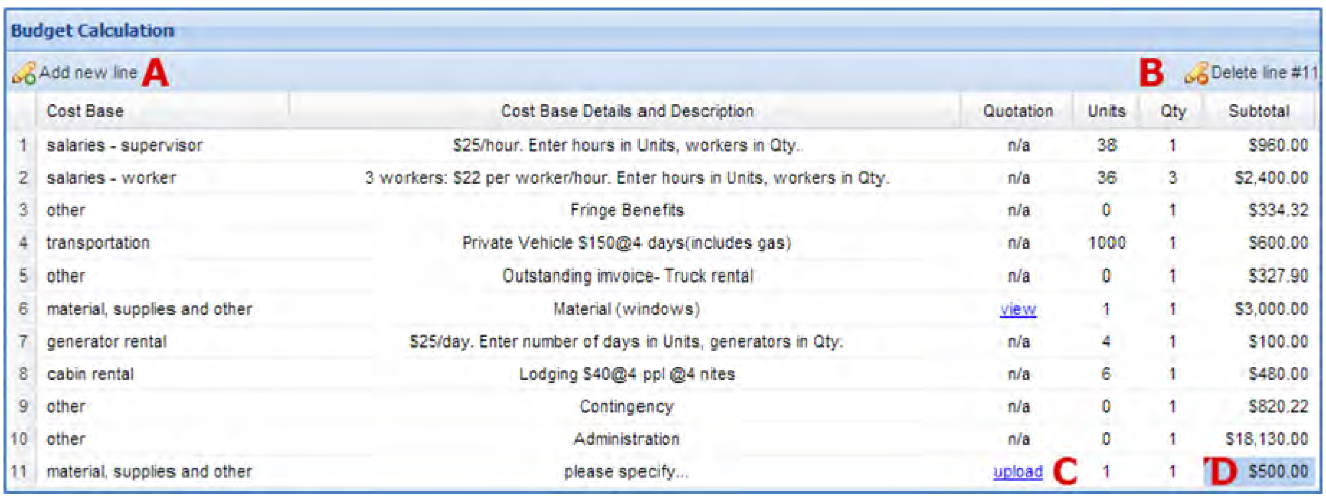
| | Cost Base | Cost Base Details and Description | Quotation | Units | Qty | Subtotal |
|---|---|---|---|---|---|---|
| 1 | salaries - supervisor | $25/hour. Enter hours in Units, workers in Qty. | n/a | 38 | 1 | $960.00 |




To display each of the drop-down lists, click in the empty space directly beneath the heading. When the list appears, make your selection. Only one item can be selected at a time.

IMPORTANT - To correctly fill out a BUDGET CALCULATION, group the entries together. For example, enter all the workers, then allowances such as food and travel, all rentals, and finally materials purchases. The Niskamoon Administrative Guide has in depth descriptions of the proper budget order.

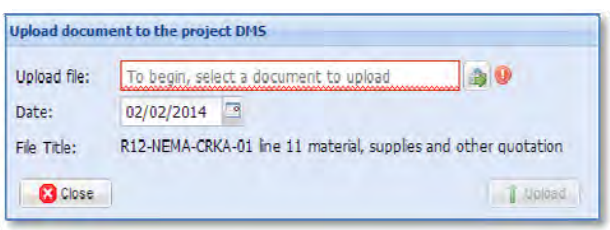
Fill in the fields for each line of the budget. Add lines to the budget by clicking on the ADD NEW LINE **(A)** button. For each line item, enter the number of COST BASE UNITS according to the instructions that appear in the COST BASE DETAILS AND DESCRIPTION column. To delete a line from the budget, select the line to be deleted and click the DELETE LINE # button **(B)**.



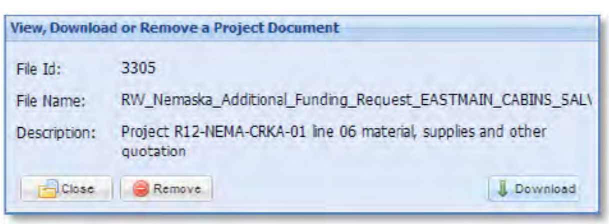
**Budget Calculation**

Add new line **A** — **B** Delete line #11

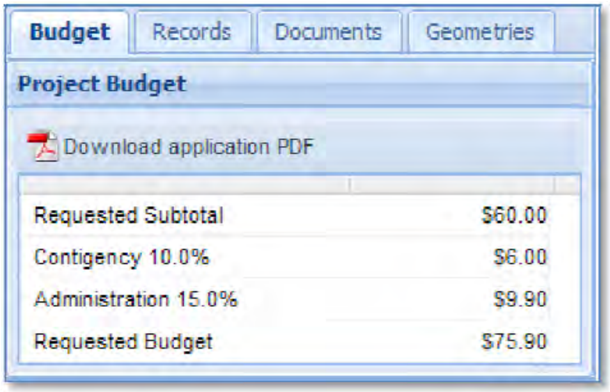
| | Cost Base | Cost Base Details and Description | Quotation | Units | Qty | Subtotal |
|---|---|---|---|---|---|---|
| 1 | salaries - supervisor | $25/hour. Enter hours in Units, workers in Qty. | n/a | 38 | 1 | $960.00 |
| 2 | salaries - worker | 3 workers: $22 per worker/hour. Enter hours in Units, workers in Qty. | n/a | 36 | 3 | $2,400.00 |
| 3 | other | Fringe Benefits | n/a | 0 | 1 | $334.32 |
| 4 | transportation | Private Vehicle $150@4 days(includes gas) | n/a | 1000 | 1 | $600.00 |
| 5 | other | Outstanding invoice- Truck rental | n/a | 0 | 1 | $327.90 |
| 6 | material, supplies and other | Material (windows) | view | 1 | 1 | $3,000.00 |
| 7 | generator rental | $25/day. Enter number of days in Units, generators in Qty. | n/a | 4 | 1 | $100.00 |
| 8 | cabin rental | Lodging $40@4 ppl @4 nites | n/a | 6 | 1 | $480.00 |
| 9 | other | Contingency | n/a | 0 | 1 | $820.22 |
| 10 | other | Administration | n/a | 0 | 1 | $18,130.00 |
| 11 | material, supplies and other | please specify... | upload **C** | 1 | 1 | **D** $500.00 |




For a **material, supplies and other** line item, upload a quote by clicking in the COST BASE and DESCRIPTION field for that line item, then click the UPLOAD link in the line under the QUOTATION column **(C)**. Locate the quotation; select the date (the date the project application is created). Finally, click UPLOAD.




Once you have uploaded the quotation, fill in the total under the SUBTOTAL column **(D)**. To view the quotation, click VIEW, which has replaced UPLOAD in the QUOTATION column. When the window pictured to the left opens, click DOWNLOAD.

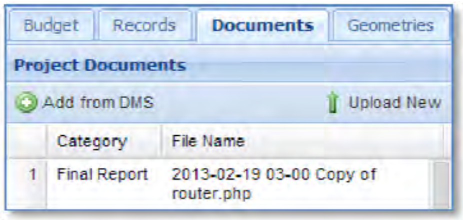



As you add budget lines, the overall budget total is automatically calculated and is displayed in the PROJECT BUDGET window on the lower left side, in the PROJECT Budget panel.

The budget sub-total is displayed at the top of the PROJECT DESCRIPTION / BUDGET screen, but does not include the contingency and administrations fees.

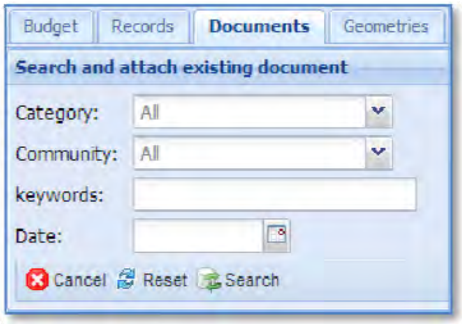
If partial funding for a project is being requested only fill in the amount requested from Niskamoon in the budget section. The total project budget and percentage being requested can be entered under the General Description tab.

## Attaching Documents from the Document Management System

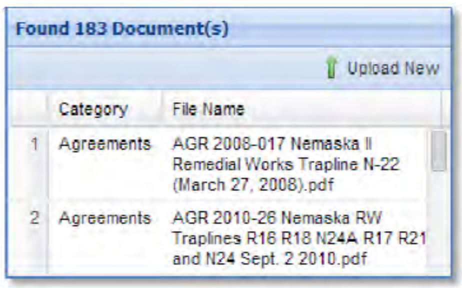



This panel contains a record of documents related to the project.

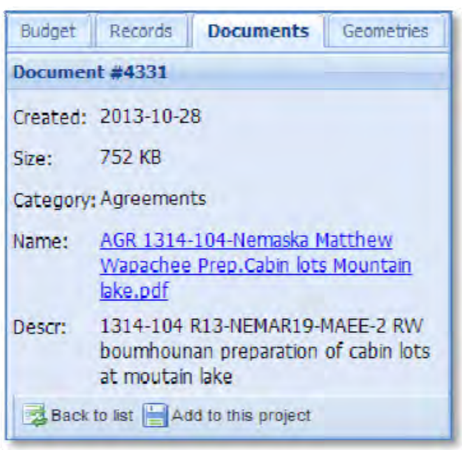
To add additional documents to the project record, click either ADD FROM DMS or UPLOAD NEW.




Use ADD FROM DMS to locate the documents by searching the Document Management System (DMS). Establish the search criteria and click SEARCH.

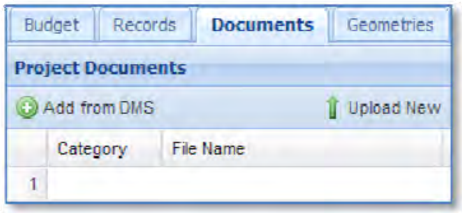



A list of results will replace the search window.



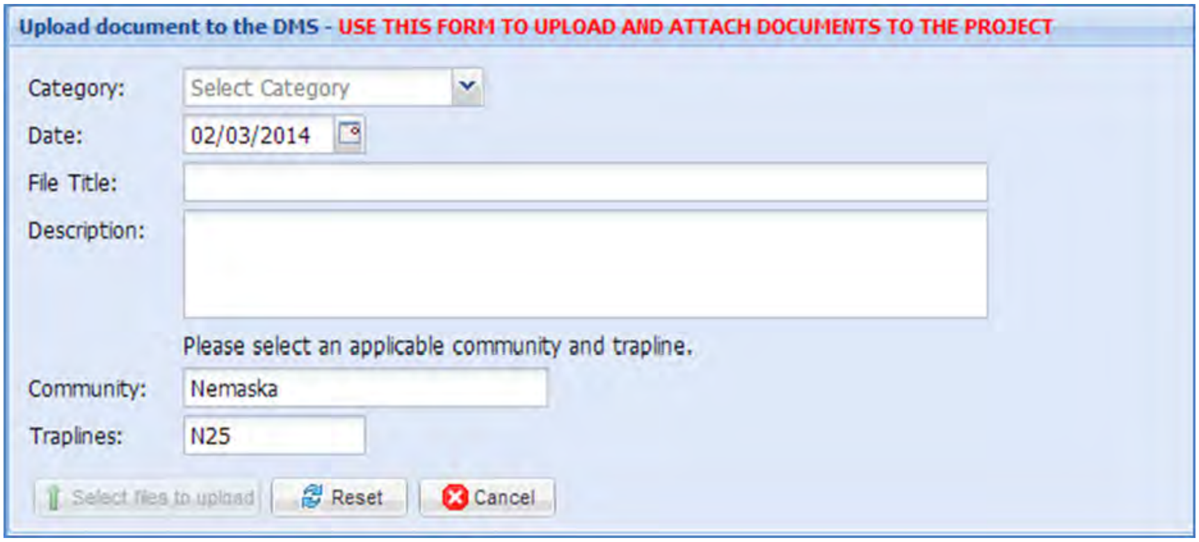

Clicking on a result will display details about the document. It can be added to the project record by clicking ADD TO THIS PROJECT.

To upload another document from the search result list just generated, click BACK TO LIST.

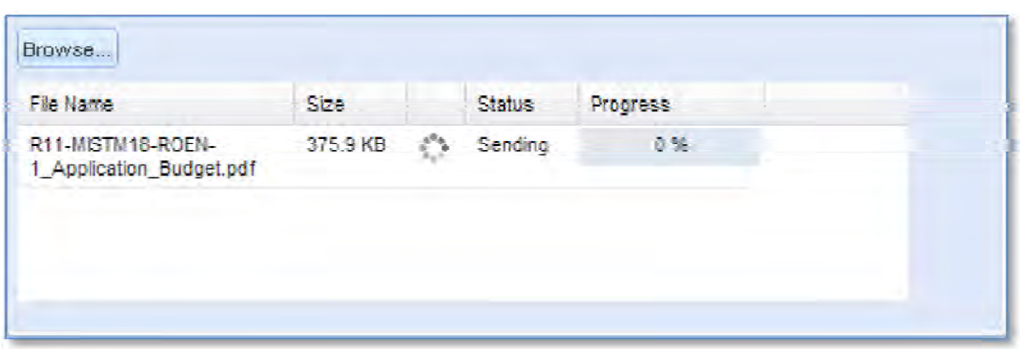



## Uploading a NEW Document to the DMS

Click **Upload New** to simultaneously upload a document to the DMS and attach it to the project application. This will open the DMS in the panel on the right of the screen.

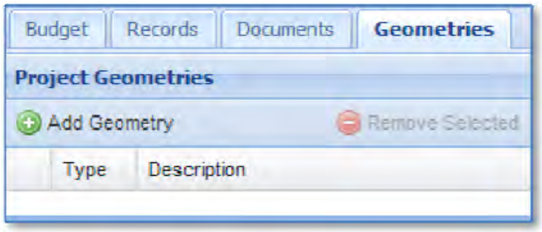


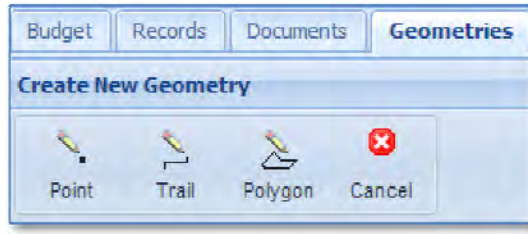

1. Select the appropriate Category.
2. Choose the date (usually today's date)
3. Name the file.
4. Add a brief description of the document
5. The community and trapline will already be selected using the community and trapline of the project.
6. Locate the file on your computer by clicking **Select files to Upload**.
7. Click **Browse** to access the files on your computer. Once you have selected a file to be uploaded, you will see the upload progress (image displayed below). When the upload is complete, the new document will be automatically added to the project and will appear in the 'Documents' tab.



# Creating New Geometry

## Adding a Feature to the Map and Database

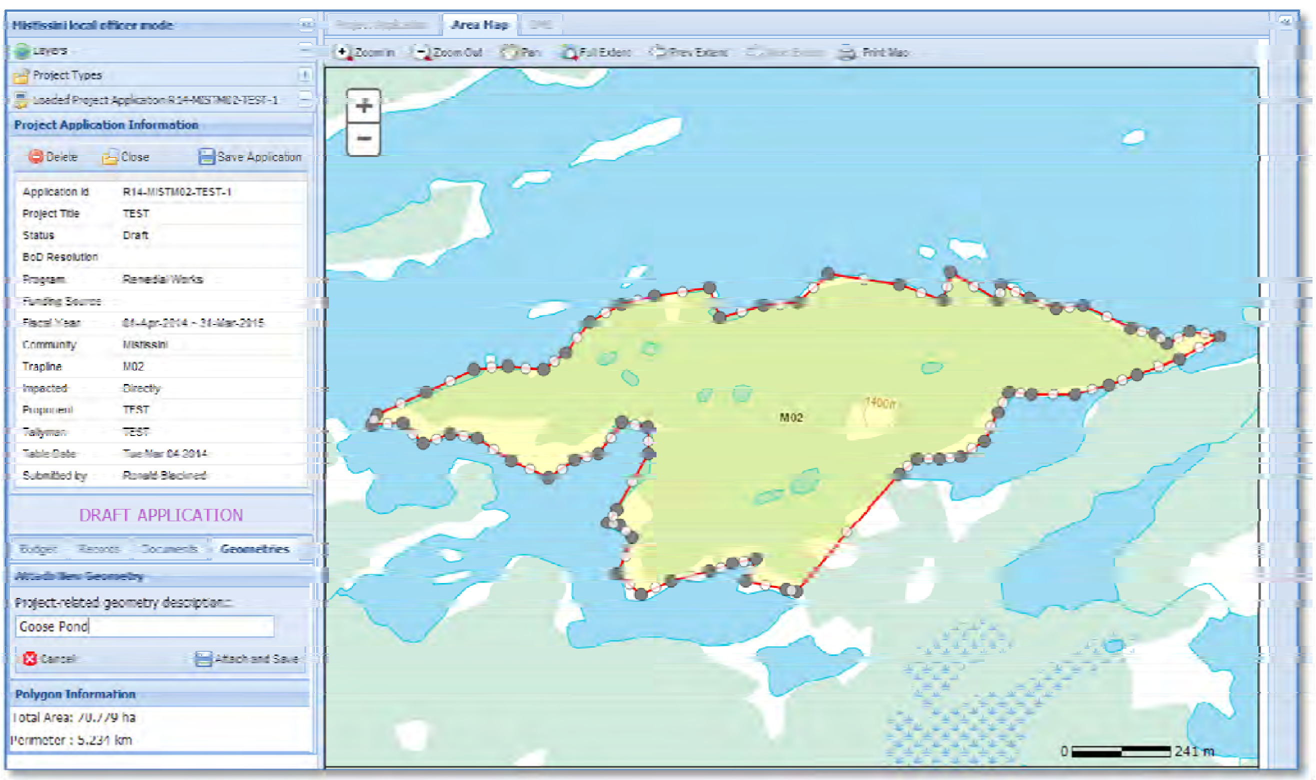


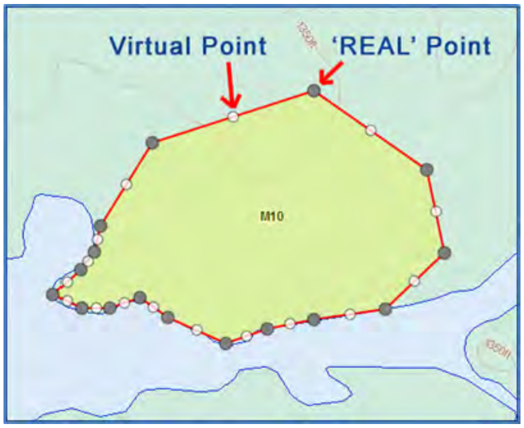

To create a 'geometry' click on the GEOMETRIES tab. The panel will now display the ADD GEOMETRY button. Clicking on this button will display the set of drawing tools available. Choose the drawing tool best suited to the feature you want to add to the map.

1. Point tool – will place a single point where you click on the map, best suited for features such as cabins.
2. Trail tool – best suited for trails or routes.
3. Polygon tool – best suited for features such as a pond or other feature for which a perimeter or area must be defined.

In the example image below, the polygon tool was used to create the feature shown. To complete a polygon, double click the to close the polygon from the first and last points you created. Enter a brief description in the text field provided.



## Editing the Geometry of a Feature



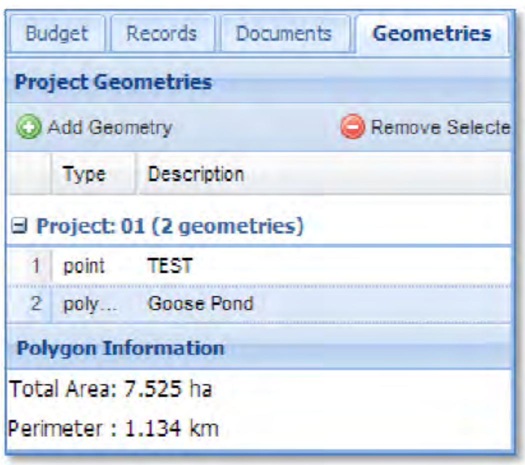


Select the drawing by double clicking it. Edit the drawing as needed by dragging either the REAL (grey) points or VIRTUAL (white) points to their desired location.

Each time you drag a VIRTUAL point it will become a REAL point. Two new VIRTUAL points will be created, bisecting the segments between the existing REAL points. Drawings can be modified with great precision by manipulating these points.

Edit the drawing until you are satisfied, then click ATTACH AND SAVE (or cancel to delete the drawing and start over).

Once saved, the new 'geometry' is added to the PROJECT GEOMETRIES list.



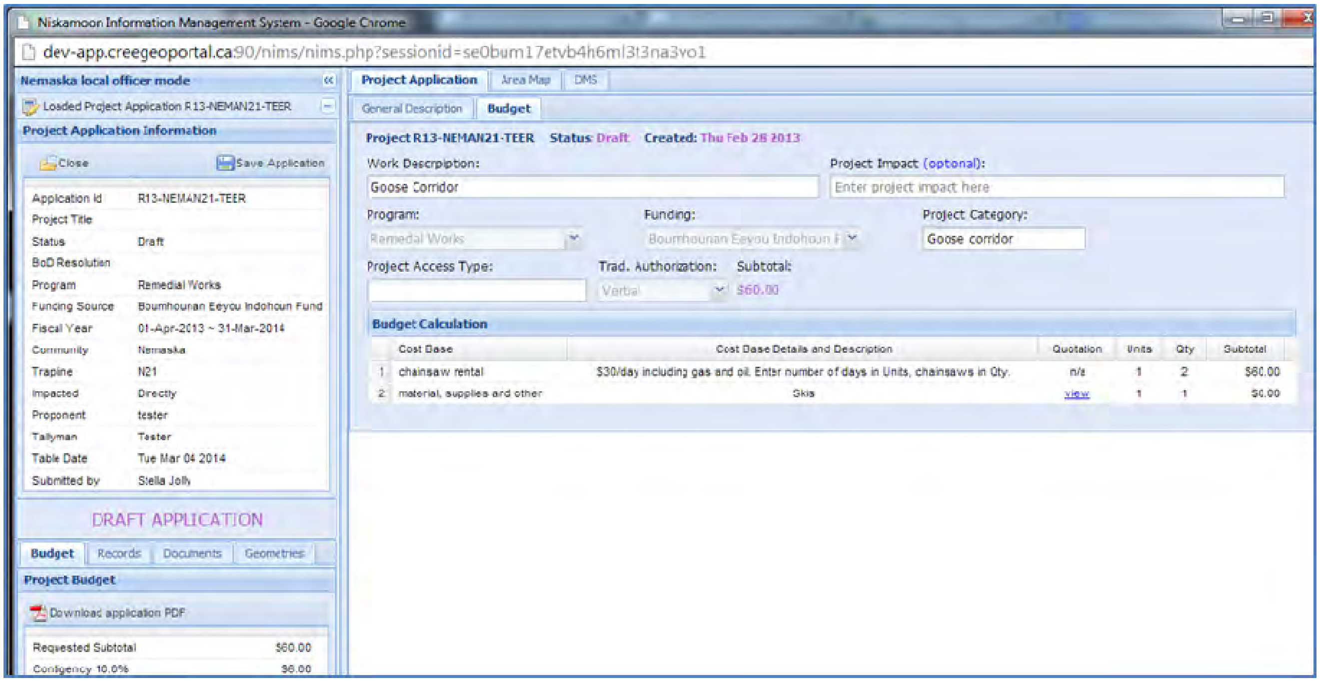

### A Common Problem with an Easy Solution

Browsers allow you to "zoom" in and out on web pages. This great because it allows people to adjust the size of the text on the website so they can read it, for example. However to accurately add geometry to the map your browser must be set to its original zoom level. If not the line appearing on the map will appear in a different place than your mouse pointer.

## Editing a Project Application

To edit the current application, click on the PROJECT APPLICATION TAB above the map. This will display the General Description, and Budget tabs for the project. The application can now be edited as needed.

**NOTE! A local officer can edit only project applications made in his or her community.**

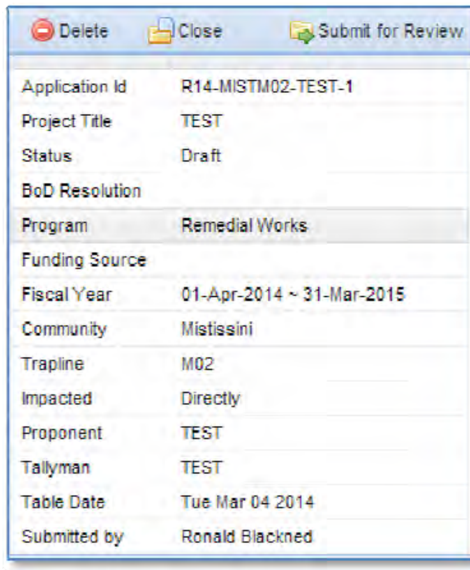



Click SAVE Application when the edits have been completed.

## Submitting a Project Application for Review

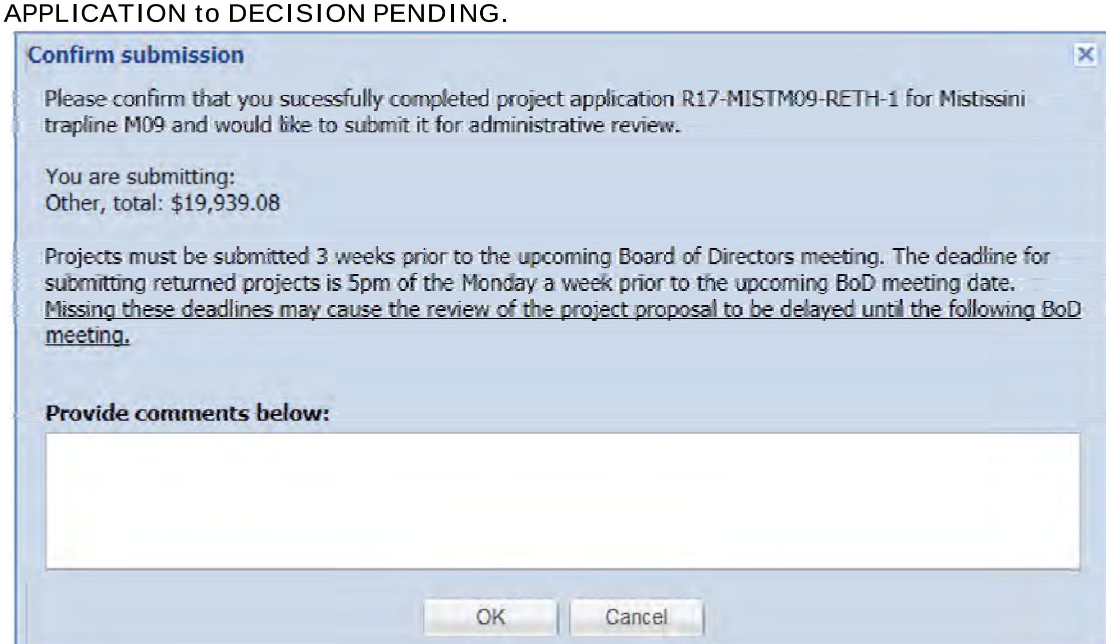
Once a project application is complete, click SAVE APPLICATION. It is strongly recommended to click SAVE often during the application creation process. Once the application has been saved and the mandatory fields filled the SAVE button will become the SUBMIT FOR REVIEW button. Changing any field will cause the button to revert to SAVE APPLICATION.

Click on SUBMIT FOR REVIEW once you are satisfied the project application is complete. Once an application is submitted it can no longer be edited by local officers. After submission, a project application can only be edited if the Regional Officer returns it to the Local Coordinator for corrections or modifications.


Clicking SUBMIT FOR REVIEW will cause the following prompt below to appear. This provides the Local Coordinator a last chance to decide whether the application is ready for submission, some general information about deadlines, and the ability to send a message to the Niskamoon officer reviewing the project by typing in the text box. All messages are saved in the Records panel of the project.

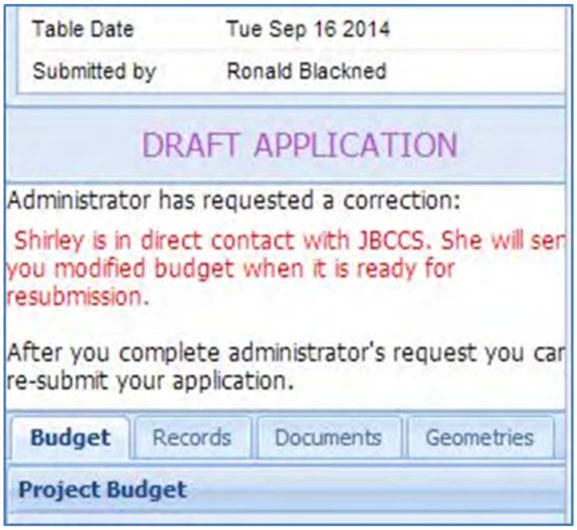
Click YES to complete the submission process. The status of the application will change from DRAFT APPLICATION to DECISION PENDING.



## Alerts from the Regional Officer

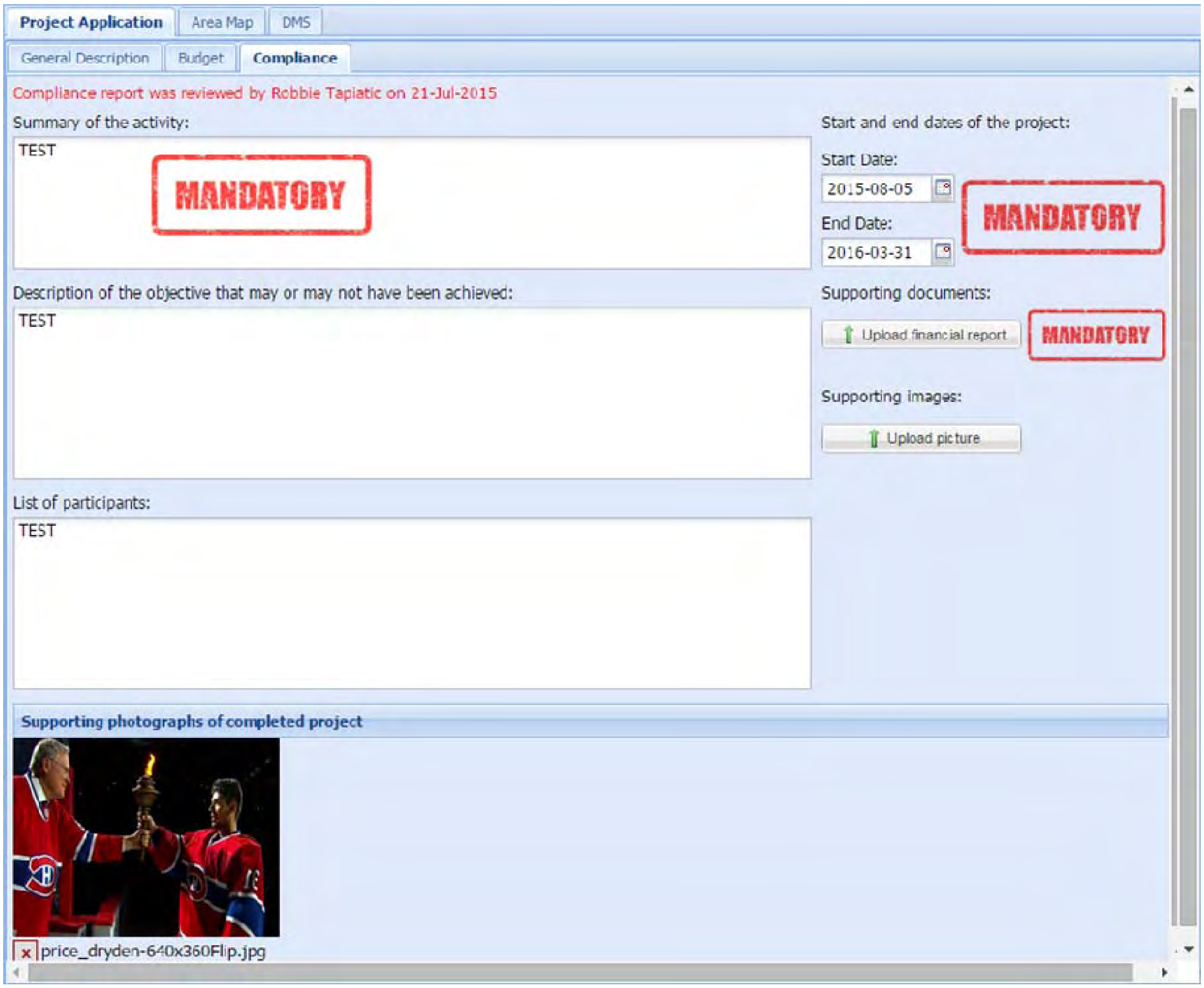
The regional officer may require a modification be made to a project application. When this happens the project will be returned from PENDING status to DRAFT status and the system will send the Local Coordinator an automatic email containing the Application ID of the project application in question.

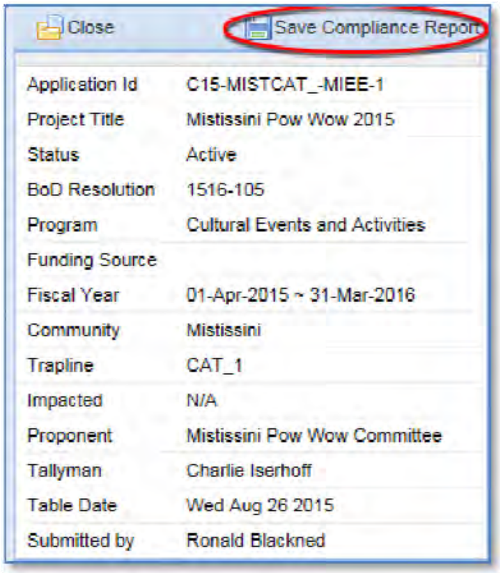
Upon opening the project the LC can now see a memo from the Regional officer, located on the left of the screen, specifying what modifications are needed. Once modified, an application can be resubmitted for approval as illustrated above.



## The Compliance Report Tab

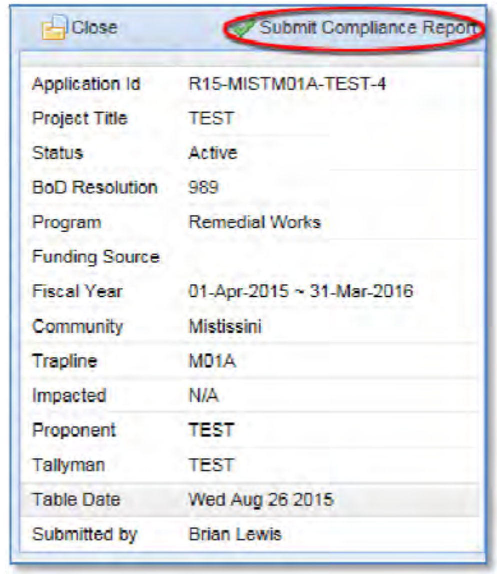
The compliance report tab is accessible to the Local Officer when a project has a status of ACTIVE or OVERDUE. This tab contains direct input fields to contain the elements of the Activity Report and an upload button for the Financial Report. A Compliance Report (which consists of both the Activity and Financial Report) <u>cannot be submitted for review until all the mandatory fields have been filled and the Financial Report uploaded.</u>





Close | Save Compliance Report

| | |
|---|---|
| Application Id | C15-MISTCAT_-MIEE-1 |
| Project Title | Mistissini Pow Wow 2015 |
| Status | Active |
| BoD Resolution | 1516-105 |
| Program | Cultural Events and Activities |
| Funding Source | |
| Fiscal Year | 01-Apr-2015 ~ 31-Mar-2016 |
| Community | Mistissini |
| Trapline | CAT_1 |
| Impacted | N/A |
| Proponent | Mistissini Pow Wow Committee |
| Tallyman | Charlie Iserhoff |
| Table Date | Wed Aug 26 2015 |
| Submitted by | Ronald Blackned |



Close | Submit Compliance Report

| | |
|---|---|
| Application Id | R15-MISTM01A-TEST-4 |
| Project Title | TEST |
| Status | Active |
| BoD Resolution | 989 |
| Program | Remedial Works |
| Funding Source | |
| Fiscal Year | 01-Apr-2015 ~ 31-Mar-2016 |
| Community | Mistissini |
| Trapline | M01A |
| Impacted | N/A |
| Proponent | TEST |
| Tallyman | TEST |
| Table Date | Wed Aug 26 2015 |
| Submitted by | Brian Lewis |

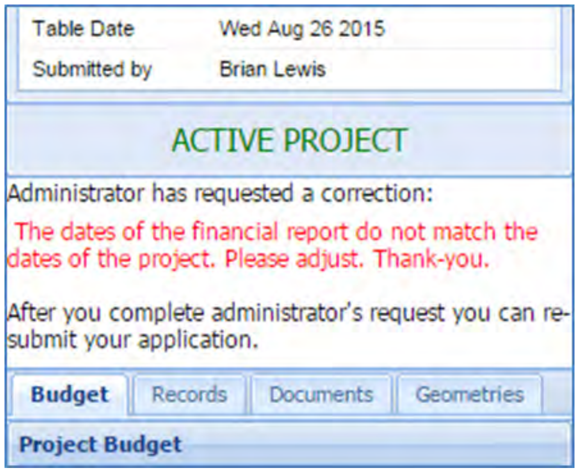
Once all the mandatory fields are entered, the "Save Compliance Report" button changes to "Submit Compliance Report". The button changes back to Save after any other change is made to the Compliance tab allowing Local Coordinators to continue editing and saving or to submit. It is best practice to save your work frequently.

Once you are certain the Compliance tab is completely filled in press the Submit button. This causes the project Status to change from Active or Overdue to Compliance and **locks the fields** in the Compliance tab. The Regional Director and Compliance Officer receive an automatic email from NIMS alerting them to the new Compliance Report ready for review.

## Alerts from the Compliance Officer

The Regional Director or Compliance Officer may require a modification be made to the Compliance report. When this happens the project will be returned from Compliance status to Active or Overdue status, the Compliance fields are unlocked and the system will send the Local Coordinator an automatic email containing the Application ID of the project application in question.

Upon opening the project the LC can now see a memo from the Regional Director or Compliance Officer, located on the left of the screen, specifying what modifications are needed. Once modified, a compliance report can be resubmitted for approval as illustrated above.




Please send questions or comments about the application or this guide to:
Brian Lewis- brian@strata360.com

# APPENDIX A: NIMS Administrative Powers

The table below demonstrates which administrative powers the Local Coordinator, Regional Officer, and the Corporate Secretary have.

| Security Level | LOCAL | | | | | REGIONAL (Remedial, Fisheries, Training and Other) | | | | | CORPORATE SECRETARY | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Admin Powers | | | | | | • Manage Categories<br>• Manage Rates<br>• Manage B.o.D. Calendar<br>• Manage Users | | | | | • Manage Categories<br>• Manage Rates<br>• Manage B.o.D. Calendar<br>• Manage Users | | | | |
| Project Status | Edit | Request Change | Set Complete | Alerts | Delete Projects | Edit | Request Change | Set Complete | Alerts | Delete Projects | Edit | Request Change | Set Complete | Alerts | Delete Projects |
| Draft | Y | | | | | Y | | | | | | | | | |
| | Own projects | | | | | | | | | | | | | | |
| Pending | | | | | | Y | Y | | Y | | Y | Y | | | |
| Tabled | | | | | | | Y | | Y | | Y | Y | | Y | |
| | | | | | | | | | | | BOD Resolution | | | | |
| | | | | | | | | | | | Dates | | | | |
| | | | | | | | | | | | Fiscal Year | | | | |
| | | | | | | | | | | | Funding | | | | |
| | | | | | | | | | | | Enter amount | | | | |
| | | | | | | | | | | | Program | | | | |
| Active | | | | | | | | | | | Y | | Y | | |
| | | | | | | | | | | | B.o.D. Resolution | | | | |
| Overdue | | | | | | | | | | | Y | | Y | | |
| | | | | | | | | | | | B.o.D. Resolution | | | | |
| Completed | | | | | | | | | | | Y | | | | |
| | | | | | | | | | | | B.o.D. Resolution | | | | |
| Project Summary Report | | | | | | Y | | | | | Y | | | | |