

TCI Operations Manual



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Overview of the Portal

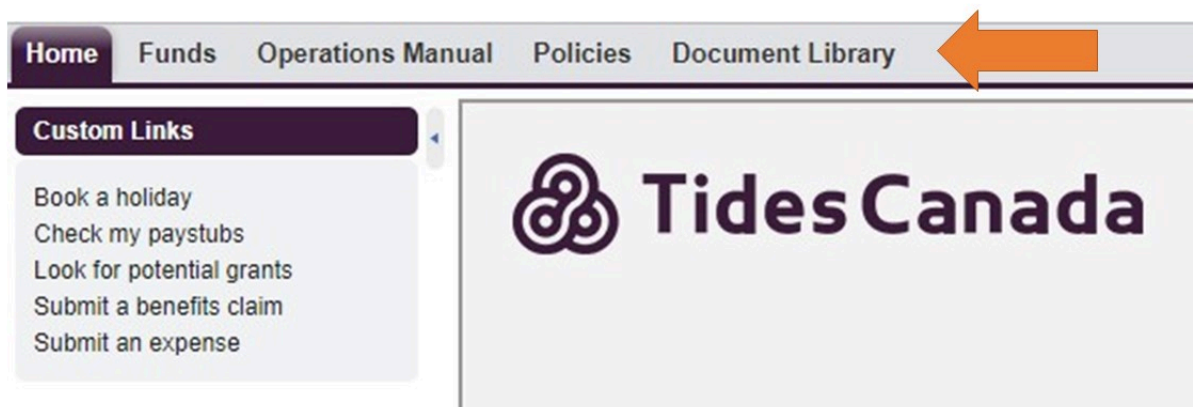
What can I do on the portal?

The portal is set up to make it easy for you to work with your MakeWay Support Team. On the portal, you'll find details about your project's set-up, such as your Terms of Reference and Consent to Acts for Steering Committee members. You can also find a number of useful resources, such as the Operations Manual and all of MakeWay's policies. This is also the spot where you'll submit CRA activity reports.

How do I navigate the portal?

Most of the information on the portal can be found in the different tab pages. You can move between pages by clicking on the tabs on the top ribbon on any page (see image below).

Each tab page has different information, which we'll describe in the following pages.



Home Page

What is on my home page?

Your home page is the community portal landing page. Every time you sign in to the portal, you will see the home page. In the message box, we'll share updates about what's happening at MakeWay and other relevant information.

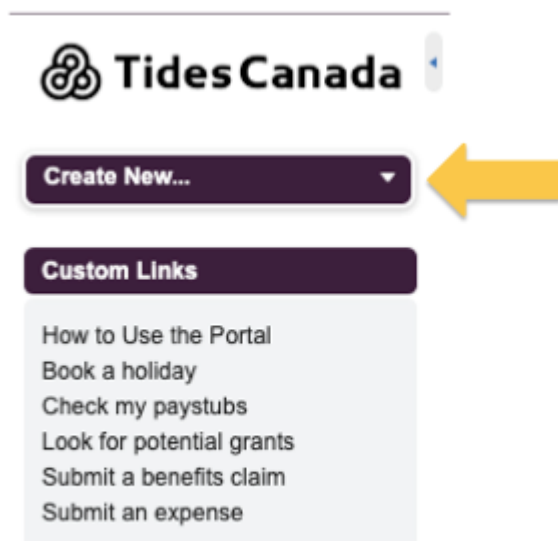
In the side bar, we've provided links to websites that you're likely to use as a project.

We're still working through the additional features we can add to this page, so stayed tuned for new features.

What are the custom links in the side bar?

The custom links sidebar will connect you with a number of the websites MakeWay uses. We've set it up as a task-based list to make it easier for you to identify where you're going when clicking on a link.

If you want to hide the sidebar, you can click on the small arrow beside MakeWay on the sidebar (see image below).



Fund Page

What is a Fund?

Fund is the way that Salesforce refers to projects. The fund tab will provide you with a direct link to your Salesforce data as it is stored in the MakeWay system.

Your managed funds are the projects for which you are either the Project Director or Secondary contact. For Projects with multiple staff, some staff may not see the Fund Page. This is because they are neither the Project Director nor Secondary contact.

What is on my fund page?

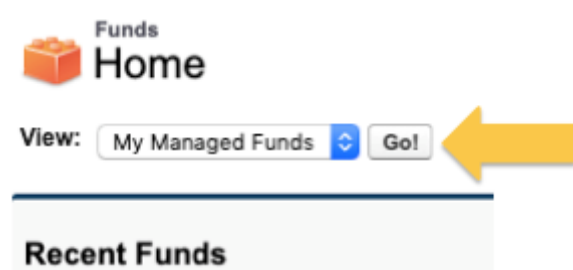
Your fund page has a lot of valuable information. Here are the things you should know about:

- Fund Name: This is your project Name
- Public Name: If you've ever changed your project name, the current name will appear here.
- Mission: This is your charitable purpose as established in your terms of reference.
- Acknowledgment Purpose: This is what will go on all tax receipts issued for your project.
- Fund Roles: This box lists all the people associated with your project, including staff, Steering Committee members, and MakeWay Support Team.
- CRA Reports: You can access all your old CRA reports from your fund page and submit new ones.

How do I access my fund details?

Once you're on a fund page, you'll have to select the fund you want to view.

To do this click, "Go!" beside the view box (see image).

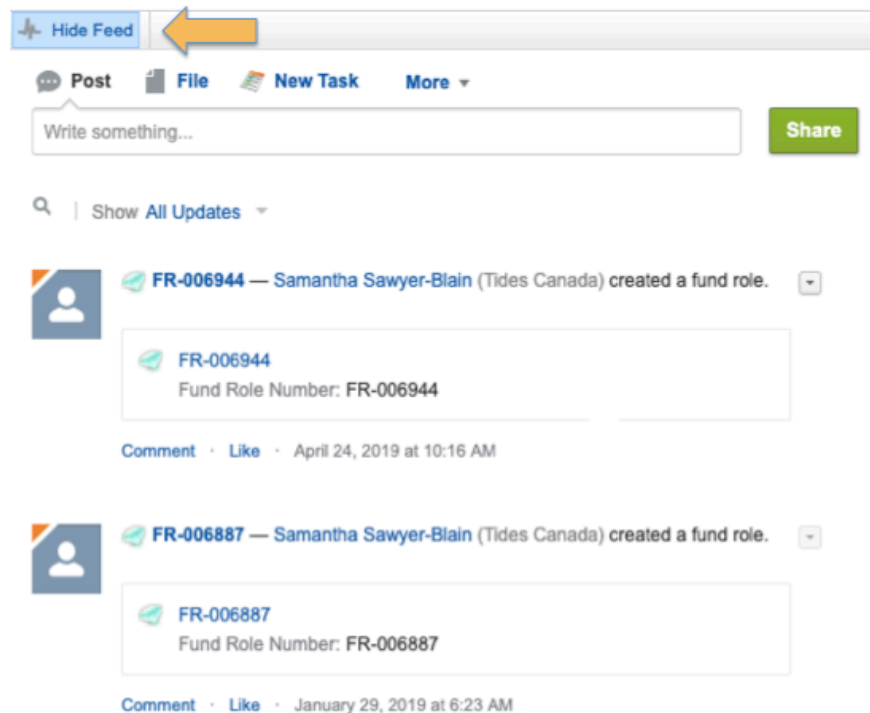


Then you'll have to click on your project name under Fund name. You should then automatically be taken to your fund card.

What are all these updates on my fund page?

When you first sign on to your fund card, you might see a long list of activities (typically a code made up with a series of numbers and letters followed by a line saying PERSON created ACTIVITY – see image below). These are all the activities that have occurred on your fund card.

They'll include things like CRA report submissions, set up of new fund roles, or changes to fund details. If you don't want to see this list, you can hide it by clicking on the Hide Feed button on the top left-hand corner of the gray box under your fund name (see image below).



What if I want to update something on my fund card?

Please email any changes to your Project Specialist.

How do I submit a PPDDA or Fundraising report?

From your fund page, click "New CRA Activity Report"



To create a report, use the drop-down to select which type of activity you are reporting on – PPDDA Activity or Fundraising Activity.



New CRA Activity Report

Select CRA Activity Report Record Type

Select a record type for the new cra activity report.

Select CRA Activity Report Record Type

Record Type of new record

PPDDA Activity Report

Fundraising Activity Report

PPDDA Activity Report

Continue

Cancel

CRA Activity Report Edit

[Save](#) [Save & New](#) [Cancel](#)

Report Information

Fund **P005 - Rivers Without Border**

Status **Draft**

Date Submitted [5/21/2019]

Date Approved [5/21/2019]

Record Type **PPDDA Activity Report**

Reporting Year

Period **--None--**

No Activity to Report ☐

Project Specialist

[Save](#) [Save & New](#) [Cancel](#)

The "Reporting Year" is the Fiscal Year on which MakeWay will report to the CRA. The reports are submitted (a) after the end of the Fiscal Year, and (b) for the previous year.

I.e. when submitting April-Sept reports the current fiscal year is the same as the next calendar year.

Enter the reporting year and select the reporting period, or click 'No Activity to Report' if you do not have any activities to report during this period.

Record Type	Political Activity Report [Change]
Reporting Year	2019
Period	<div>October 1 - March 31</div> <div>January 1 to March 31 (2018 Only)</div> <div>April 1 - September 31</div> <div>October 1 - March 31</div>
No Activity to Report	<input type="checkbox"/>
Project Specialist	

Record Type	Political Activity Report [Change]
Reporting Year	2019
Period	October 1 - March 31
No Activity to Report	<input checked="" type="checkbox"/>

Once you have created your report you can begin adding details of the specific activities by clicking 'New CRA Activity'. Please include all activities for the selected type (political or fundraising), reporting year, and period in this one report.

CRA Activity Report Detail

EditDeleteCloneSubmit for Approval

Project Information

Activity Report NameAR-0005

FundP043 - Give Green Canada

StatusDraft

Sum of Actual Fundraising Cost\$0.00

Date Submitted

Date Approved

Record TypeFundraising Activity Report [\[Change\]](#)

Reporting Year2017

PeriodJanuary 1 to June 30

No Activity to Report☐

Project Specialist

System Info

Created By

Last Modified By

EditDeleteCloneSubmit for Approval

Activities

New CRA Activity

No records to display

Staff and other costs are itemized here. Be sure to complete all fields, review, and then click 'Save Activity'.

Political Activity Detail

Fund OrgTCI

Other Costs

Description

travel

Total:\$10.00

Add RowUpdate

Save ActivityCancel

Continue to add new activities for each additional activity that was carried out during the year and period selected. Once you are done and have reviewed, click 'Submit for Approval'.

Activities

New CRA Activity

ActionNameActivity Type

EditDelTCA-0001

Advertisements/Print/Radio

Approval History

Submit for Approval

No records to display

To create the second CRA Activity Report, go back to your project page via the Funds tab and click 'New CRA Activity Report'.

Once you have submitted your report for approval you will receive a confirmation email. The report will be reviewed by your project specialist, who will either approve the report or request additional information. If additional information is required, you will receive an email specifying the details needed. If your report is approved, you will receive an email confirming approval.

Should you have any questions or experience any issues, please contact your project specialist.

Thank you very much for submitting this important information.

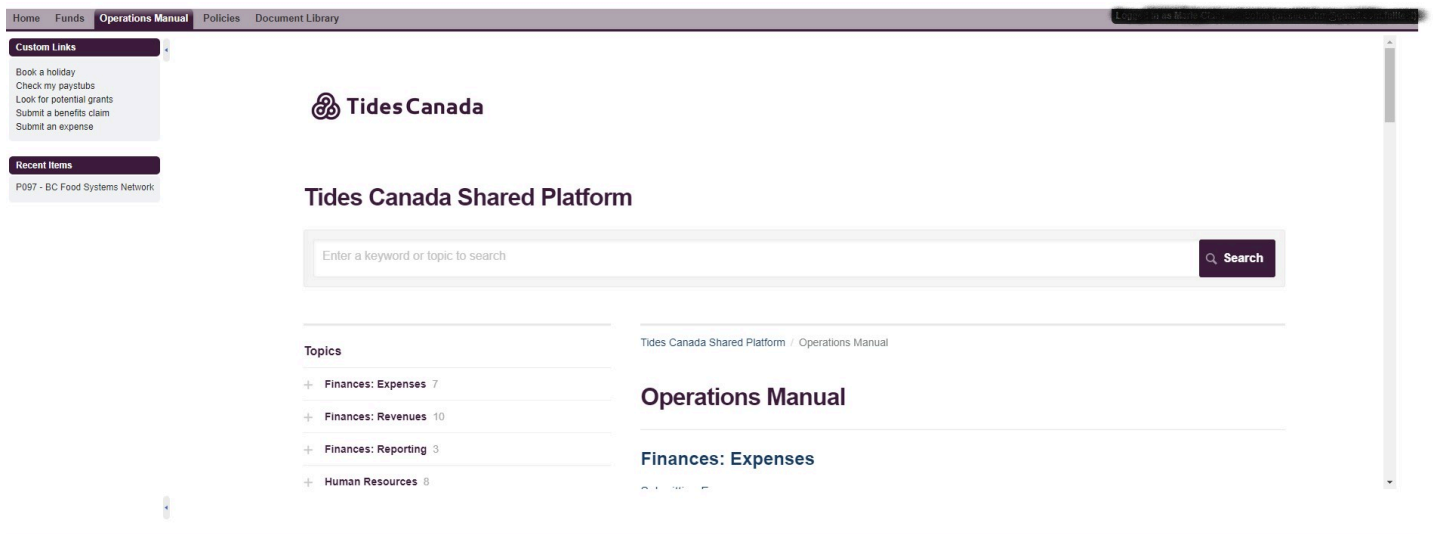
Operations Manual

How do Project access the Operations Manual?

Projects can access the Operations Manual through the tabs at the top of the portal page.



After clicking on the Operation Manual tab, the manual will home in a window.



You can navigate the manual through scrolling, searching, or selecting sections from the topics list on the left hand side.

How is the Operations Manual laid out?

We've tried to make the Operations Manual as easy as possible to follow. Each section is divided into a topic area (such as Finances: Revenue, Human Resources, Government Relations, etc).

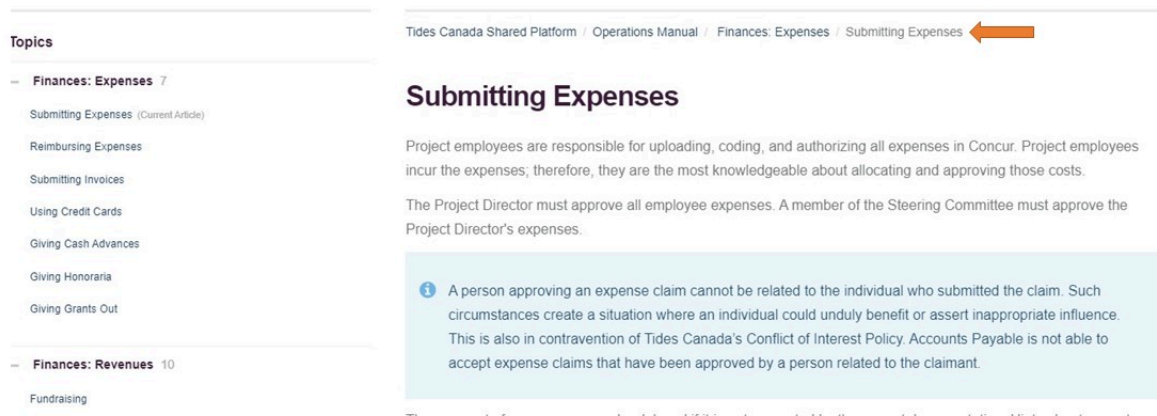
Within each section, we've sub-divided into the different tasks that Projects might have questions about. Whenever possible, we've written the Operations Manual as a step-by-step guide.

How do I navigate the Operations Manual?

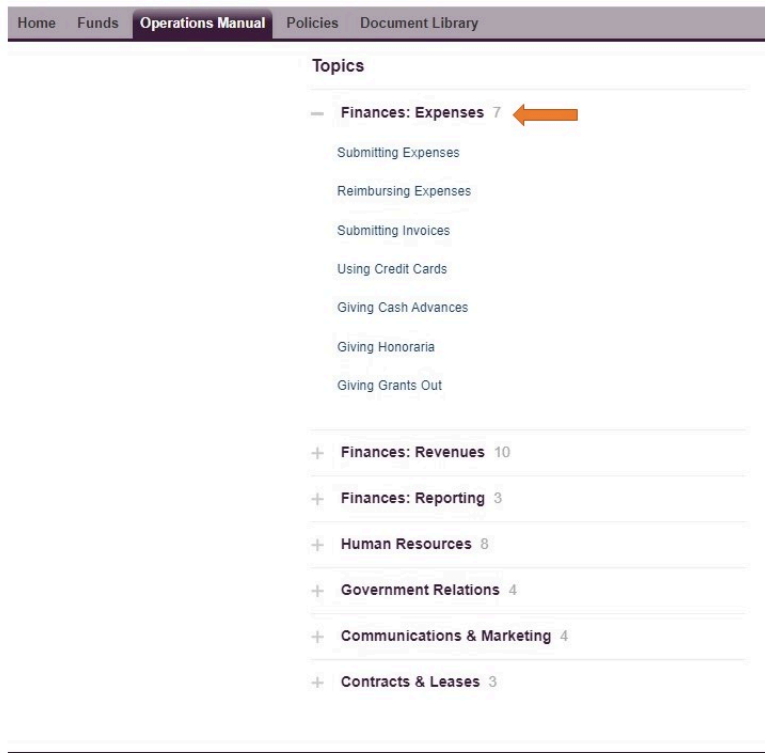
You can navigate the Operations Manual in a few different ways. If you know what you are looking for, we recommend using the search bar.

If you are not looking for a specific item or are unsure about what to search for, you can scroll through the different sections and open articles by clicking on them. When you select an article, it will take you to a new screen as shown below.

In each chapter, you can go back to the start of the manual via the navigation bar (shown with the orange arrow).



You can also navigate by using the topics section on the left hand of the page. To use the topics section, click on each chapter title (shown by the orange arrow) to expand the section. Then click on the title of the article, you want to read.



Is the Operations Manual searchable?

Yes. To search the manual, type your term into the search bar and click search. Then you can scroll through all the results to find the information you need.

How can Projects download the Operations Manual?

If Projects are working in rural or remote areas with limited access to the internet, we recommend they download a pdf version of the Operations Manual and any forms they may need.

To download, a PDF version of the Operations Manual, scroll to the bottom of the Topics List on the left-hand side of the page. Under the expandable list, you should see a link that says Generate Manual PDF.

[Home](#)
[Funds](#)
[How To](#)
[Policies](#)
[Document Library](#)

+ Government Relations 4

+ Communications & Marketing 4

+ Contracts & Leases 3

+ Insurance 3

+ Legal 2

+ Strategy & Programming 2

+ Working With Tides Canada 6

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Other Resources

[How to Use the Portal](#)
[Policies](#)
[Operations Manual](#)

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[Reimbursing Expenses](#)
[Submitting Invoices](#)
[Using Credit Cards](#)
[Giving Cash Advances](#)
[Giving Honoraria](#)
[Giving Grants Out](#)

Finances: Revenues

[Fundraising](#)
[Accepting Donations](#)
[Pursuing Grants](#)
[Performing Fee for Service Work](#)
[Charging Membership Fees](#)
[Pursuing Sponsorships](#)
[Selling Tickets for Events](#)
[Running a Lottery or Game of Chance](#)

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+ Working With Tides Canada 7

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Finances: Revenues

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[Charging Membership Fees](#)
[Pursuing Sponsorships](#)
[Selling Tickets for Events](#)
[Running a Lottery or Game of Chance](#)
[Selling Goods](#)

Click on Download Manual PDF. The Operations Manual will open in a new window and you can save the file directly to your desktop.

Policies Page

What is the policies page?

The Policies Page is where we've hosted all Tides Canada Initiatives policies. As a project of Tides Canada, we are legally part of the same organization and you are expected to follow all Tides Canada policies.

How do I navigate the policies page?

You can navigate the Policies Page in a few different ways. From the main tab, you can scroll through the different sections and expand each policy by clicking on the title.

You can also navigate by using the topics section on the left hand of the page. To use the topics section, click on each title to expand it. Then click on the policy, you want to read.

Document Library

What is the document library?

This is where we store the various forms, templates, and other resources you need to work with MakeWay.

The templates are organized in folders by function. What this means is that if you're looking for a Request for New Employee Form, you should look in the HR folder.

How do I use documents in the document library?

You can access any document in the library by clicking on its name. This will open the document in a Box window. If you want, you can scroll through the document within box.

You can also choose to open it directly on your computer using the open button at the top right hand. If you open the document and make any edits, it will automatically save an updated version in Box. We recommend that if you wish to edit the document, download it directly on to your desktop and edit there rather than in Box.

If you'd like to save a copy on your desktop, you can download it by using the download button at the top right hand.