Publication Training Guide – Briefing Note Titles

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#  1 – The Registry

* [The Open Government Registry](http://registry.open.canada.ca/en/) houses all of the Government of Canada’s metadata records for all datasets across federal organizations and allows you to upload and manage proactive disclosures.
* All proactive disclosure documents (Summaries of completed access to information requests, Contracts, Travel and Hospitality, Reclassification, Briefing Note Titles, and Founded Wrongdoing) will be uploaded to the Registry and then published and made searchable on the [Open Government portal](http://open.canada.ca/en/search/grants).

# 2 - How to register an account

* If you don’t already have a registry account you will need to create one.
* On the right side of the page, click on the [Request an Account](http://registry.open.canada.ca/en/user/register) link and fill out the mandatory information and click “I agree”.



* This action will automatically create an account which you can use to log in right away. However, your account will need to be linked to your organization in order to have access to your organization’s templates.
* Once you’ve registered, the Open Government Team will link your account to your department and notify you by email.
* If there are any issues with your account throughout the registration process, please contact the Open Government team by sending an email to the Open Inbox.

# 3 - Logging in to the Registry

* You now have access and can log in to the Registry by selecting the Log in tab in the menu bar.
* Once you enter your Username and Password you can select the “Remember me” checkbox to save your information in your browser.

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* If you have logged in successfully you will see a note at the top of the page indicating that you are logged in. You will also see the “Log Out” option in the top menu bar:



# 4 - Finding your organization

* Now that you are logged into the registry, you will see the “Quick Links” menu where you can select “Proactive Disclosure – Briefing Note Titles”:



# 5 - Accessing your template:

* After selecting your proactive disclosure type you will be brought to the Briefing Note Titles page where you will select your organization from the drop down menu:



* After you’ve selected your organization from the drop down menu, you’re ready to download your template. The first step is to download the document and save it to your desktop or hard drive:



* PLEASE NOTE – it is imperative that you do not alter the file name in any way, PLEASE SAVE IT AS IS. The template is named uniquely for your department and may not allow you to upload the completed version if it has been changed.



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# 6 - Completing your template

* Now that you’ve saved your organization’s template on your hard drive, you can begin to complete the document. Of note – every proactive disclosure line item MUST have a “Briefing Note Number” (the internal tracking number of the briefing note), this will allow users to modify and delete items if necessary:



* As always, if there are any issues when completing your template, please contact the Open Government team through the Open Inbox for assistance.

# 7 - Uploading your template

* Now that you’ve completed your template, you’re almost done.
* The next step is to log back in to the registry and return to your organizations page (the same page where you downloaded the template).
* You will see the “Upload” option directly below the button where you downloaded your template. Click the “Choose File” button and select your completed template from your hard drive:



* Once you’ve selected your completed template from your computer you will see the file name in the upload box:



* Click “Submit” and your template will be uploaded to the registry. You will receive a message on the top of the form indicating that your template has been successfully added to the system, and you will be able to see the information that was captured in the template on this page:



* Once your template has been successfully uploaded, you will be able to view all of the uploaded data in the “Preview” section below. You can also Search for a single line item by entering the “Briefing Note Number” in the ***Filter items*** section:



(Note: templates are harvested overnight, so you will not be able to see your completed template on the open.canada portal until the next morning)

* If you receive an error message, please make the necessary changes outlined in the error message, and try re-uploading your template.

# 8 – Adding, Modifying or Deleting an Item

* Once completed templates are uploaded, they may contain errors and omissions that need to be fixed. To delete an item, you will select the ***Delete*** tab below the Organization drop down menu:



* When you have selected the Delete tab, the system will prompt you to enter the “Briefing Note Number” of the item you wish to delete: (The Briefing Note Number is the unique identifier in the first column of all Proactive Disclosure templates)



(If you have multiple line items to delete, please ensure you enter only one Briefing Note Number per line)

* You will enter the Briefing Note Number of the item you wish to have removed and will be prompted to make sure you want to delete the record:



* Once you have confirmed the deletion of the record, you will be taken back to the previous page where you will see the confirmation.
* To add or modify an item, the spreadsheet simply needs to be re-uploaded into the registry and it will add any new items or modify and existing ones.
* You will be able to preview any of these changes in the Preview section within each organization.

As always, if you are still experiencing any issues, contact the Open Government Team team by sending an email to the Open Inbox.