



CANADA COMMUNITY-BUILDING FUND IN BRITISH COLUMBIA

HOW TO SUBMIT YOUR SPF APPLICATION IN PIMS

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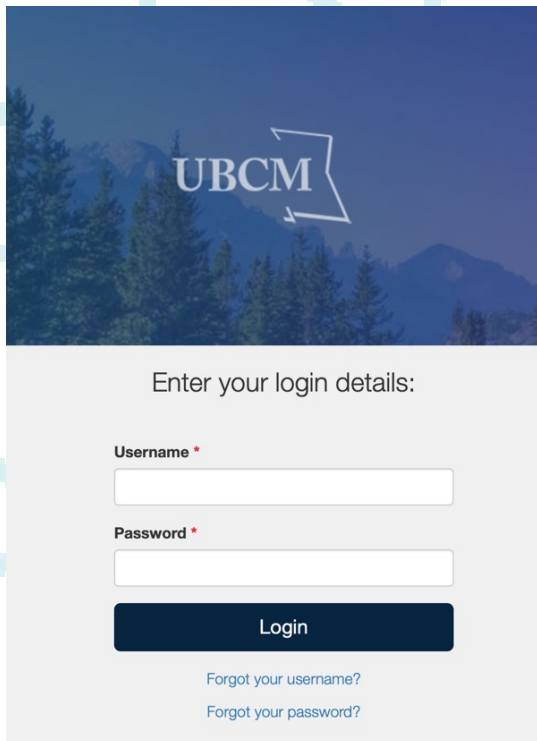


SECTION 1 - LOGGING INTO PIMS

You require a username to access to PIMS. If you do not have one, please contact PIMS@ubcm.ca

- If you have forgotten your username click on the link and follow instructions.
- If you have forgotten your password click on the link and follow instructions.
- If you have forgotten both your username and password, start by clicking the 'Forgot your username?' link

Enter your log-in details.



Enter your login details:

Username *

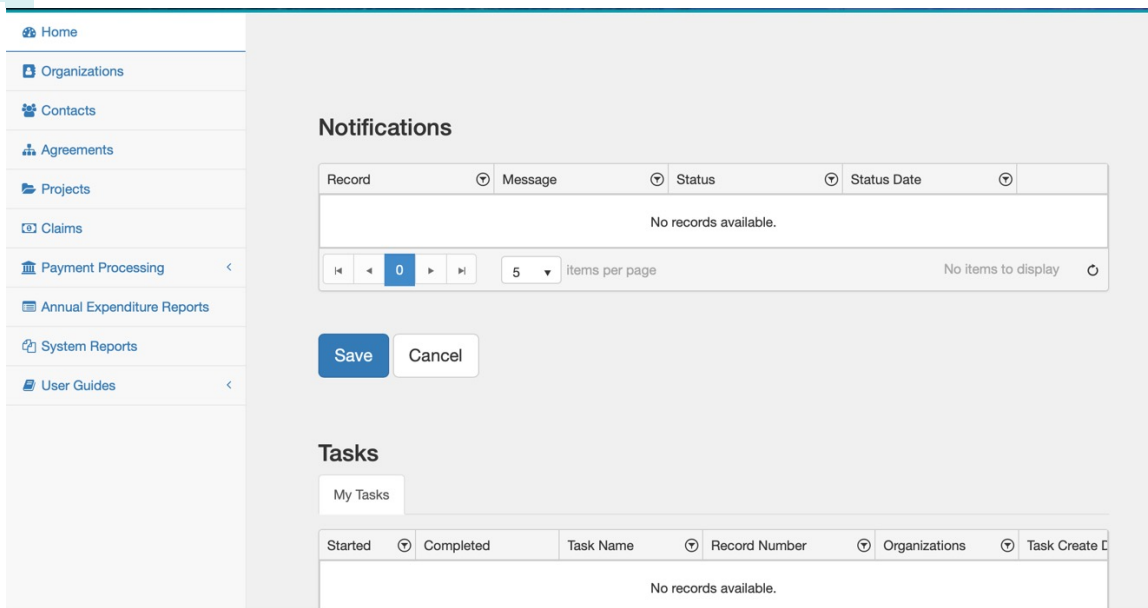
Password *

Login

[Forgot your username?](#)

[Forgot your password?](#)

Once logged in you will land on the PIMS Home page.



Home

Organizations

Contacts

Agreements

Projects

Claims

Payment Processing

Annual Expenditure Reports

System Reports

User Guides

Notifications

Record	Message	Status	Status Date
No records available.			

5 items per page No items to display

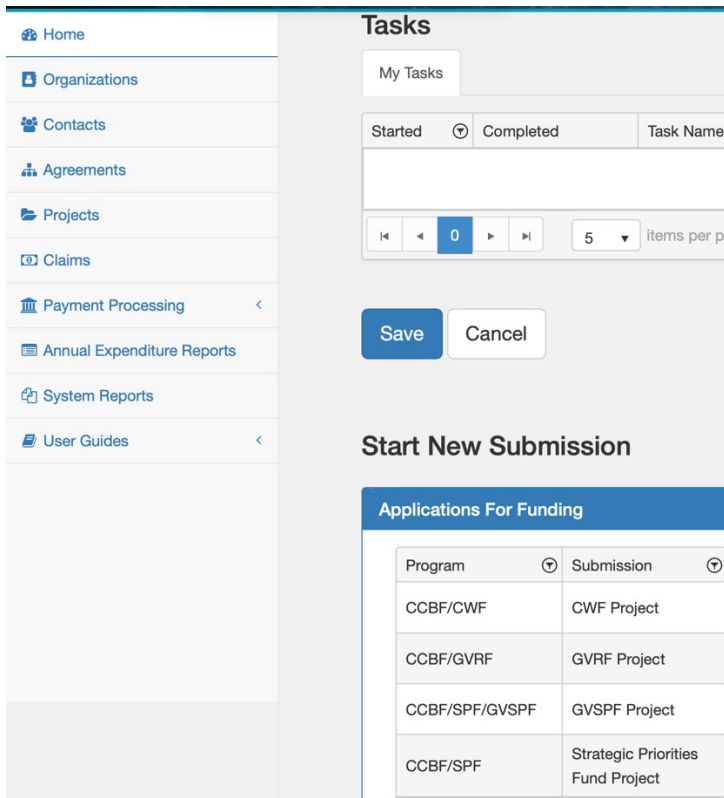
Save Cancel

Tasks

My Tasks

Started	Completed	Task Name	Record Number	Organizations	Task Create D
No records available.					

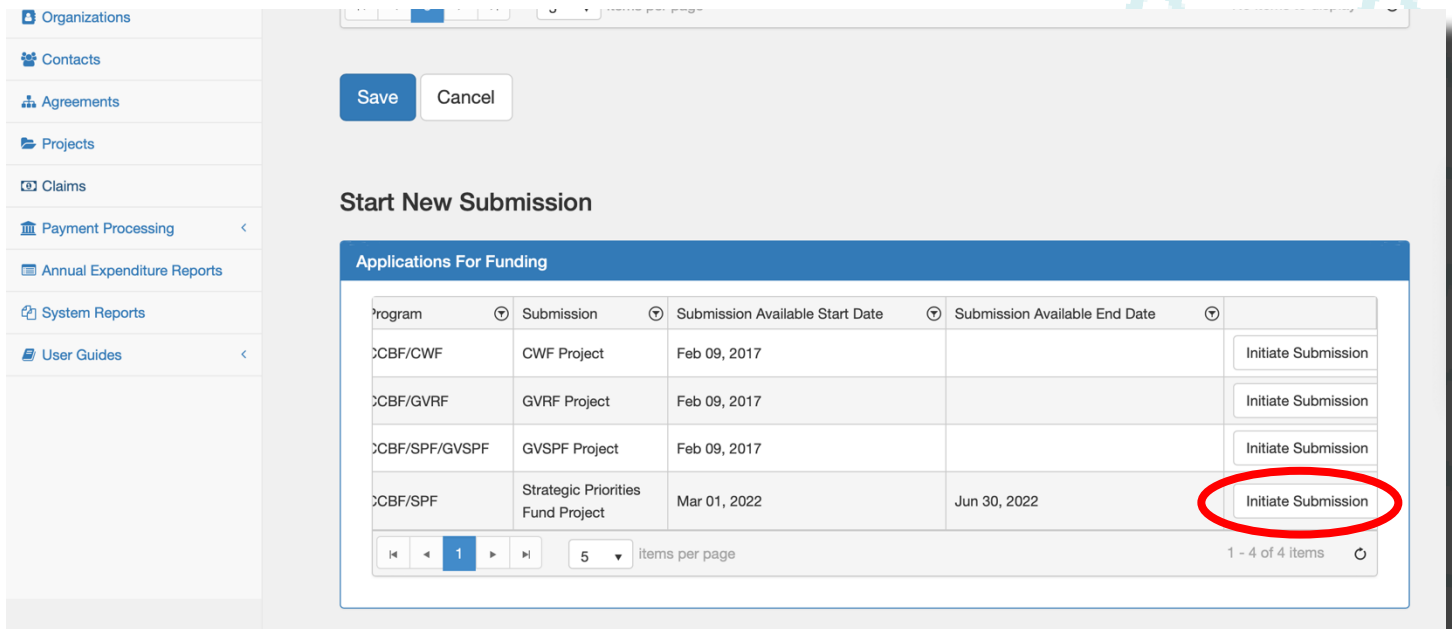
SECTION 2 - INITIATING THE PROJECT SUBMISSION



From the 'Home' page, scroll down the page until you find 'Start New Submission' under the Tasks grid.

In the New Submission Grid, scroll left until you see the 'Initiate Submission' button. Click on the button located across from the Program name CCBF/SPF, Submission Strategic Priorities Fund Project.

If you expand your screen fully you may see this button more clearly.



SECTION 3 - PROJECT RECORD

Fill Out Project Details: After clicking the 'Initiate Submission' button, a new project record will open.

All of the mandatory fields in the project record will need to be filled out in order to move onto completing the application form.

UBCM

Home
Organizations
Contacts
Agreements
Projects
Claims
Payment Processing
Annual Expenditure Reports
System Reports
User Guides

Project [ID: 8577]

Project Contact Information

Name *

Position *

Phone Number * **Ext**

Email Address *

Project Details

Program
CCBF/SPF

Application Submitted By
Victoria

Recipient(s)

If you are undertaking a project in coordination with another Ultimate Recipient, click the 'Add New Record' button and a new field will appear.

Recipient(s)




[+ Add New Record](#)

Recipient	
Victoria	Edit Delete

1 15 items per page 1 - 1 of 1 items





From the dropdown menu, select the Ultimate Recipient that you will be working with

The screenshot shows a 'Project Details' form. Under the 'Recipient(s)' section, there is a table with one row. The 'Recipient' column contains a dropdown menu with 'Victoria' selected. To the right of the dropdown are icons for 'Add New Record', 'Save', and 'Delete'. Below the table is a pagination control showing '1' of 2 items, '15 items per page', and '1 - 2 of 2 items'.

Recipient	
Victoria	  

If you need to delete a recipient click the garbage can icon in the 'Recipient' grid. If the Recipient needs to be updated, click the note pad and pen icon.

The screenshot shows the same 'Project Details' form, but now with two rows in the 'Recipient(s)' table. The first row has 'Abbotsford' in the 'Recipient' column and edit/delete icons. The second row has 'Victoria' in the 'Recipient' column and edit/delete icons. The pagination control remains the same.

Recipient	
Abbotsford	 
Victoria	 

Project Start Date and Completion Date: Click the calendar icon to enter the project start date and estimated project completion date.

Under funding details, enter the requested values for total funding request (SPF request), estimate total project costs additional funding sources secured.

The screenshot displays a software interface with a left-hand navigation menu and a main content area. The navigation menu includes items like Organizations, Contacts, Agreements, Projects, Claims, Payment Processing, Annual Expenditure Reports, System Reports, and User Guides. The main content area is titled 'Project Start Date' and 'Estimated Project Completion Date', each with a date input field and a calendar icon. Below these is a 'Notes' text area. The 'Funding Details' section is highlighted in blue and contains three dropdown menus: 'Total Funding Request *', 'Estimated Total Project Costs *', and 'Additional Funding Sources Secured? *'. At the bottom of the main content area, there are tabs for 'Related Forms', 'Attachments', and 'Workflow'.

Scroll to the bottom of the page and click the save button

A close-up view of the bottom navigation bar, which contains three buttons: 'Save' (a blue button), 'Submit' (a blue button), and 'Cancel' (a white button with a grey border).

SECTION 4 - STARTING THE APPLICATION FORM

Navigate to the related forms tab. Click the form name that is required for your application submission, Capital Infrastructure or Capacity Building. Only 1 application form is required for each project submission. The application form is required with your project submission.

Form Name	Req?
2022 Strategic Priorities Fund Capacity Building Stream Application Form	Yes
Updated 2022 Strategic Priorities Fund Capital Infrastructure Stream Application Form	No

A new window will open showing the application form. Below is an example of a Capacity Building application form. 'Create' is shown in the title of the form until you save it.

Continue to fill out the application at your leisure and remember to click save frequently.

1. Project Title *

2. Project Category *

3. Has this project started? *

4. Estimated Project Start Date *

5. Estimated Project Completion Date *

6. Project Rationale *

Provide a brief project rationale outlining why the project is important to the community.

Scroll to the bottom of the page and click save.

17. Has this project or a component of this project applied for or received funding through FCM's Municipal Asset Management Program or the Asset Management Planning Grant administered through UBCM? *

Yes
 No

SECTION 1 PROJECT INFORMATION SECTION 2 PROJECT COSTS AND SOURCES OF FUNDING SECTION 3 PROJECT OUTCOMES AND OUTPUTS
SECTION 4 PROGRAM OBJECTIVES SECTION 5 PROGRAM CRITERIA

Save Cancel

The document will be saved successfully when this message is shown.

✔ Success Messages... ✕

The 2022 Strategic Priorities Fund Capacity Building Stream Application Form has been updated successfully.

SECTION 1 PROJECT INFORMATION SECTION 2 PROJECT COSTS AND SOURCES OF FUNDING

Once saved the Application Form will no longer say 'Create' at the top of the form.

2022 Strategic Priorities Fund Capacity Building Stream Application Form

SECTION 1 PROJECT INFORMATION SECTION 2 PROJECT COSTS AND SOURCES OF FUNDING SECTION 3 PROJECT OUTCOMES AND OUTPUTS
SECTION 4 PROGRAM OBJECTIVES SECTION 5 PROGRAM CRITERIA

1. Project Title *

2. Project Category *
Select your option

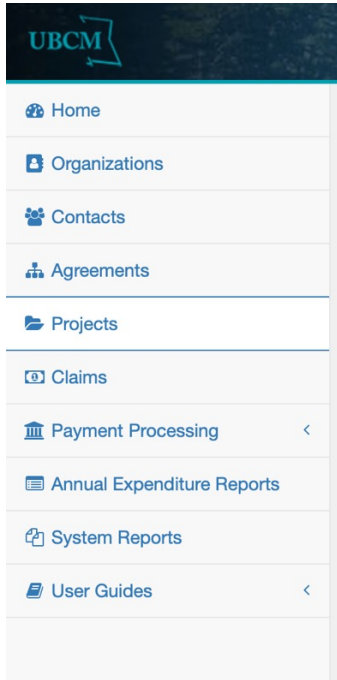
3. Has this project started? *
 Yes No

Project works, which would otherwise be eligible, become ineligible if the project works have started prior to the date the project is included in a submitted SPF application. The project is deemed to have been started if a tender has been awarded or work has commenced.

4. Estimated Project Start Date * 5. Estimated Project Completion Date *

SECTION 5 - WHERE IS MY PROJECT? FINDING THE PROJECT RECORD / APPLICATION FORM IN PIMS

From the landing page 'Home' in PIMS, click on 'Projects'.



Find the project name you created. Things to consider:

- In the project screen you will see all the projects ever created for your organization. Once a record is created it cannot be deleted.
- Do not submit the project for consideration until you have completed and submitted the application form first. All forms live within the project record.
- While the project is in the 'Draft' status, you can update any fields in the project record until the project is submitted. The functionality is the same for application form records.

In the 'Project' grid look for the following:

- File number will be 22-####-SPF.
- Look for the Project Title.
- A program will be CCBF/SPF.

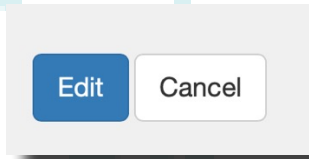
Click on the project number you want to access.

A screenshot of the PIMS 'Projects' grid. The grid is a table with columns for Project #, Project Title, Program, Recipient(s), and Status. There is an 'Export To Excel' button at the top left of the table. The table contains four rows of project data.

Project #	Project Title	Program	Recipient(s)	Status
22-0006-SPF	Rebecca: Fire Stations Test Project SPF-3 (Capital)	CCBF/SPF	Victoria, McBride	Submitted
22-0007-SPF	Test	CCBF/SPF	Victoria	Draft
22-0008-SPF	Asset Management Test Project SPF-3	CCBF/SPF	Victoria	Submitted
22-0012-SPF	DSFADSF	CCBF/SPF	Victoria	Submitted

EDITING PROJECT RECORDS

In order to edit your project record or application form scroll to the bottom of the project record and click the 'Edit' button.

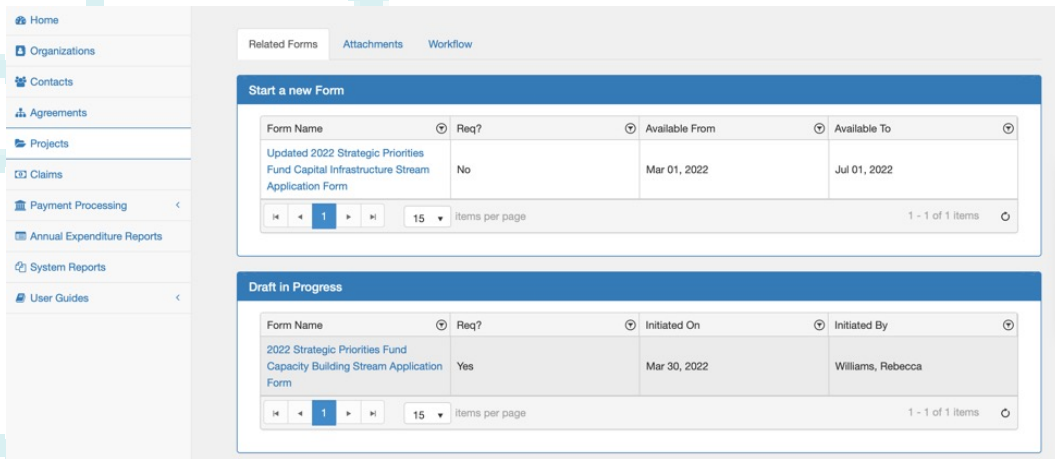


FINDING MY APPLICATION FORM

Navigate to the bottom of the project page to the 'Related Forms' tab. All saved forms are located in the 'Draft in Progress' grid. Click on the name of the form to open.

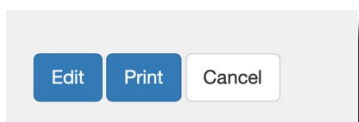
If you do not see your form under 'Draft In Progress' but you had started a form, it is possible you did not save the form prior to leaving PIMS. You may need to start the form again.

Please contact ccbf@ubcm.ca if you have issue opening a draft application form.



To edit an application form, click on the form in the 'Draft in Progress'. A new window will appear.

Scroll to the bottom of the page and click on the 'Edit' button. Don't forget to save your responses as you complete the form.

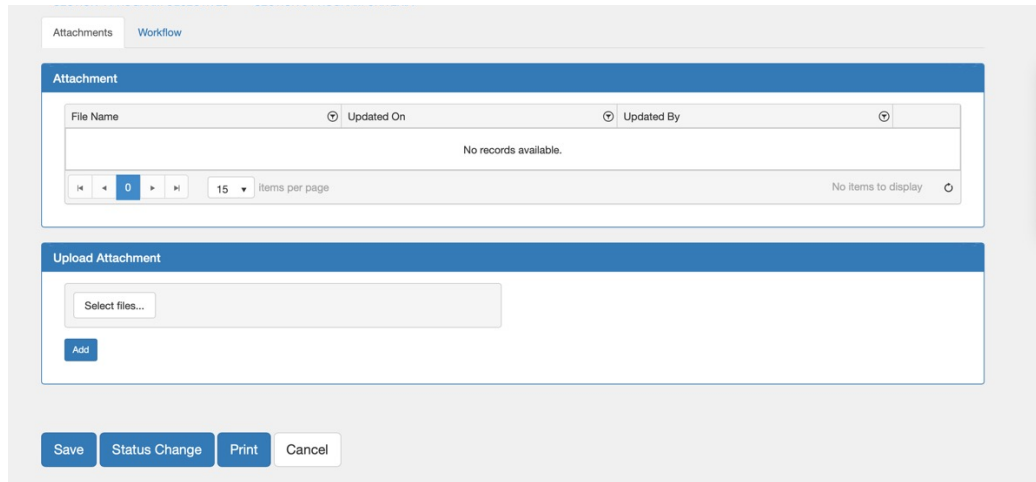


SECTION 6 - UPLOADING ATTACHMENTS TO THE APPLICATION FORM

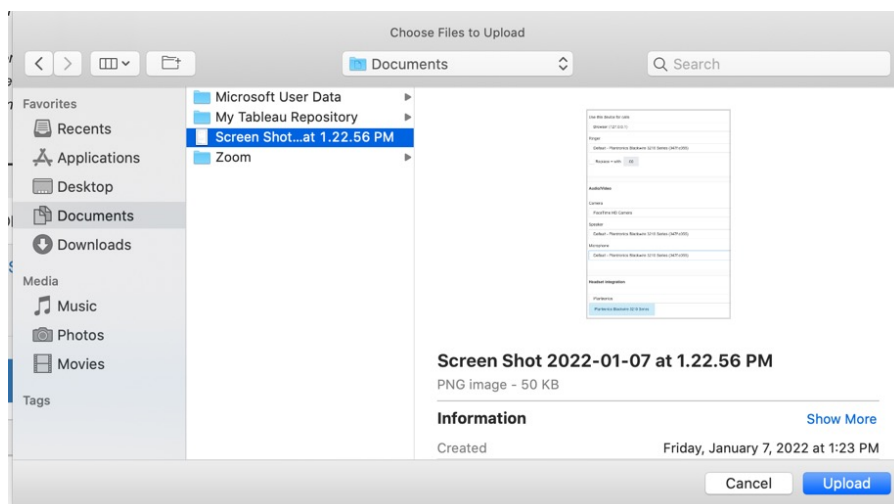
When you are ready to upload required documents and other supporting materials, navigate to the bottom of the application form page.

Note – This field will not appear until you have saved your file for the first time.

Click on the select files.. button under the Upload Attachment grid.



From the pop-up window, chose a file to be uploaded and click the upload button. The maximum file size is 20 MB.



As shown below, once the selected file is ready for upload it will appear green and ready 100%. Now click the 'Add' Button below the upload attachment grid.

The screenshot shows the 'Attachments' tab in a software interface. At the top, there are two tabs: 'Attachments' (selected) and 'Workflow'. Below this is a section titled 'Attachment' which contains a table with columns for 'File Name', 'Updated On', and 'Updated By'. The table is currently empty, displaying 'No records available.' Below the table is a pagination control showing '0' items per page and 'No items to display'. Below the 'Attachment' section is an 'Upload Attachment' section. It features a 'Select files...' button, a 'Done' button with a checkmark, and a single file entry: 'Screen Shot 2022-01-07 at 1.22.5...' with a progress indicator of '100%'. At the bottom of the upload section is an 'Add' button.

A file that is successfully uploaded will appear in the 'Attachment' grid as shown below. If you have multiple files to upload this step will need to be completed again until all the files have been uploaded successfully.

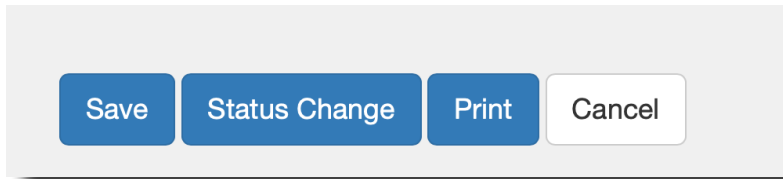
If you experience any issues uploading files, please review your file to ensure it is no more than 20 MB. Only one file can be uploaded at a time.

If you have any issues that cannot be resolved following the steps above contact ccbf@ubcm.ca

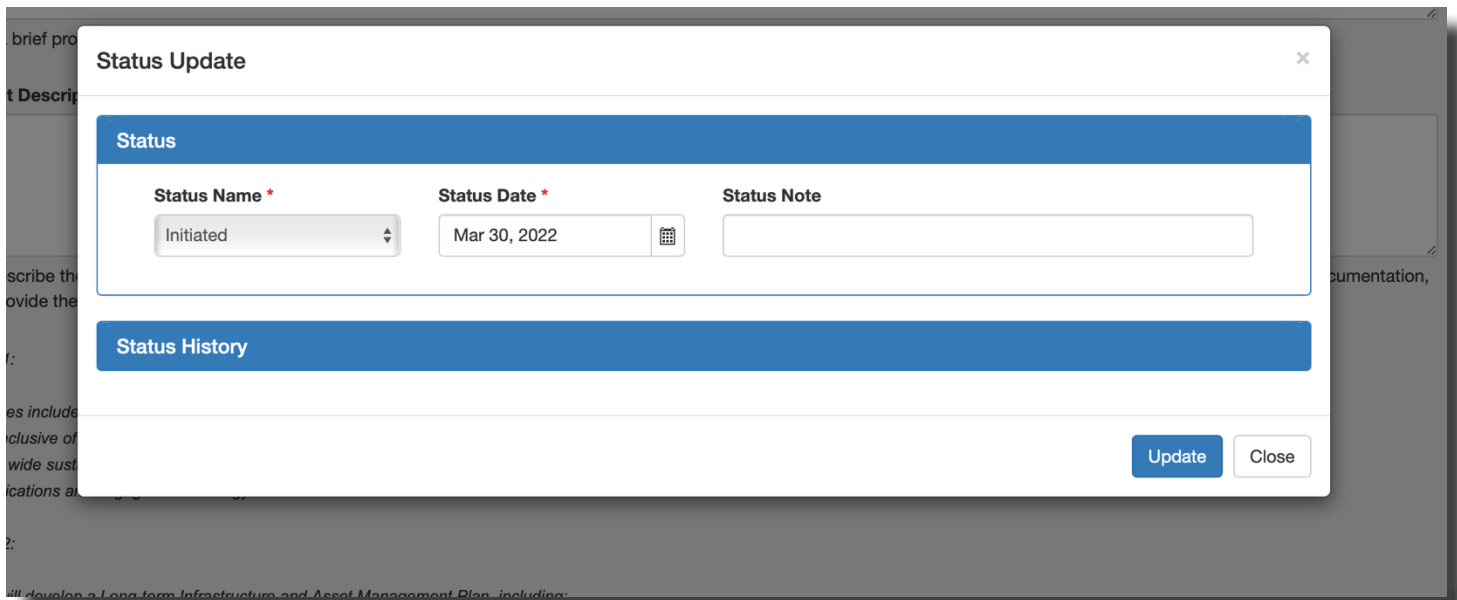
This screenshot shows the 'Attachments' tab. The 'Attachment' section now contains a table with one row of data: 'Screen Shot 2022-01-07 at 1.22.56 PM.png', 'Mar 30, 2022', and 'Williams, Rebecca'. The table also includes download and delete icons. The pagination control shows '1' item per page and '1 - 1 of 1 items'. The 'Upload Attachment' section below is now empty, with only the 'Select files...' button and the 'Add' button visible.

SECTION 7 - SUBMITTING THE APPLICATION FORM

Once the application form is complete and all of the attachments have been added you can submit your form. Click 'Save' and then click 'Status Change'.



Below is the pop-up window that appears when submitting an application form. Update the 'Status Name' to 'Submitted'. Click the 'Update' button in the lower right of the window.



After the 'Update' button is clicked a green banner will appear that reads "The Form instance has been updated successfully".

Status Update

✔ The Form Instance status has been updated successfully.

Status

Status Name *	Status Date *	Status Note
Submitted	Mar 30, 2022	

Status History

Update Close

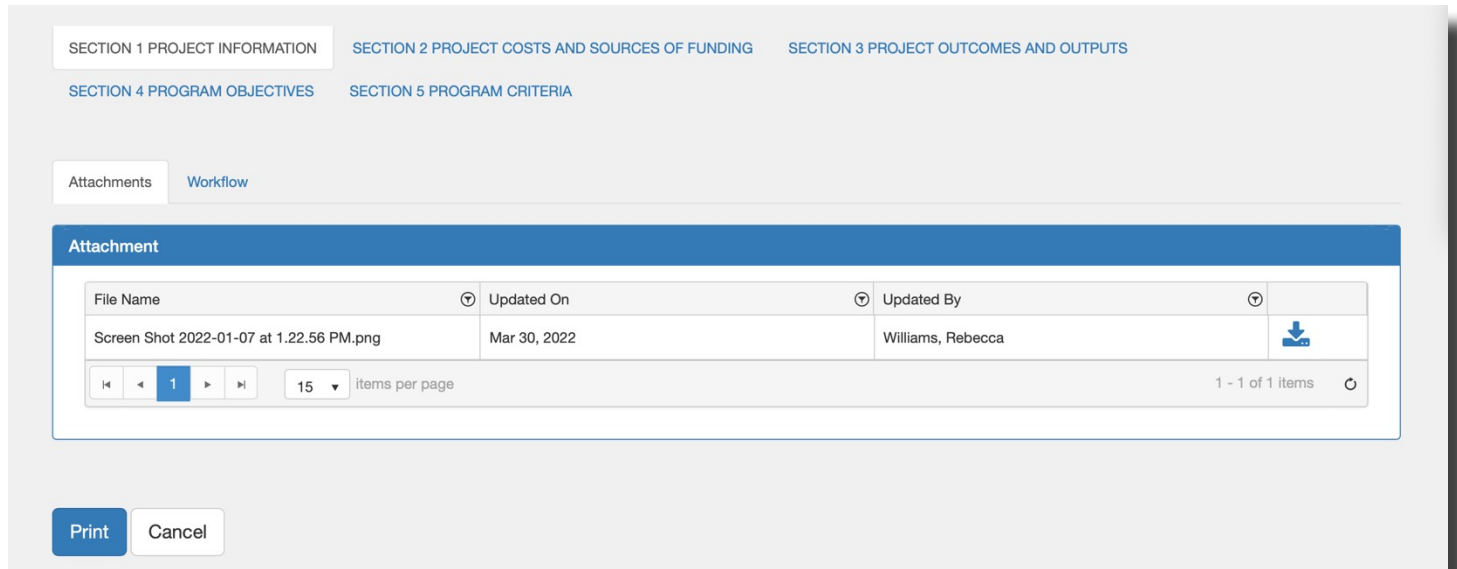
PROJECT INFORMATION SECTION 2 PROJECT COSTS AND SOURCES OF FUNDING SECTION 3 PROJECT OUTCOMES AND OUTPUTS

All information will be available in PIMS for you to read. Editing functions are not available after the application form has been submitted.

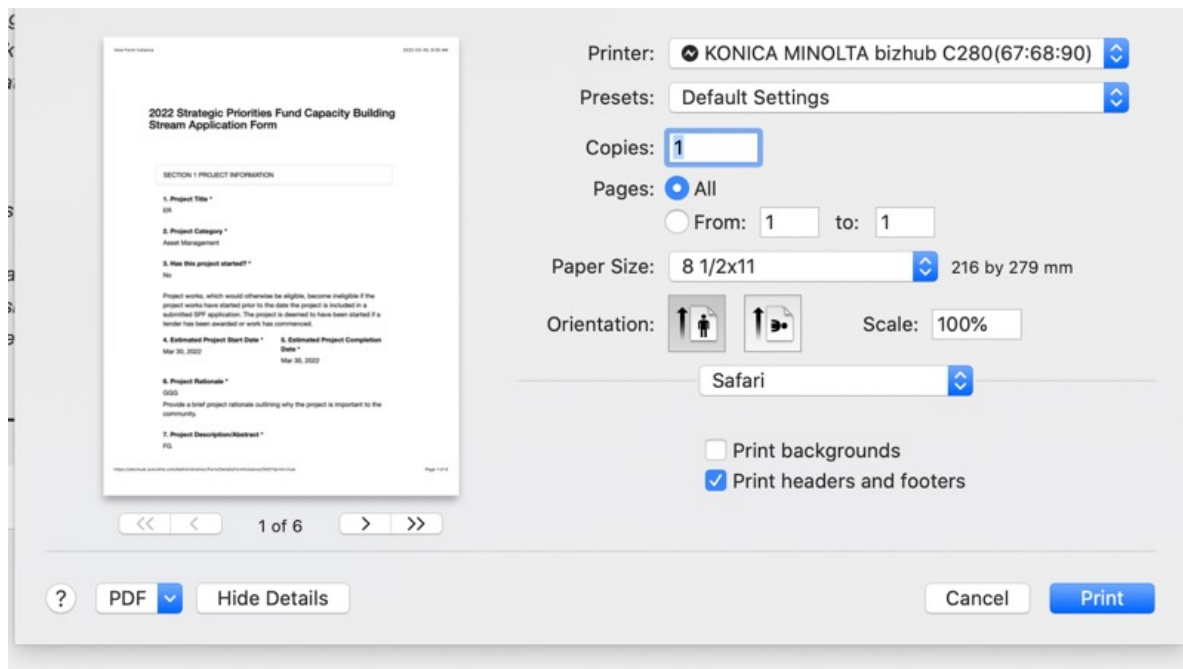
Only submitted application forms and project records will be considered for funding. If you require assistance please contact ccbf@ubcm.ca

SECTION 8 - PRINTING OR SAVING THE APPLICATION FORM AS A PDF

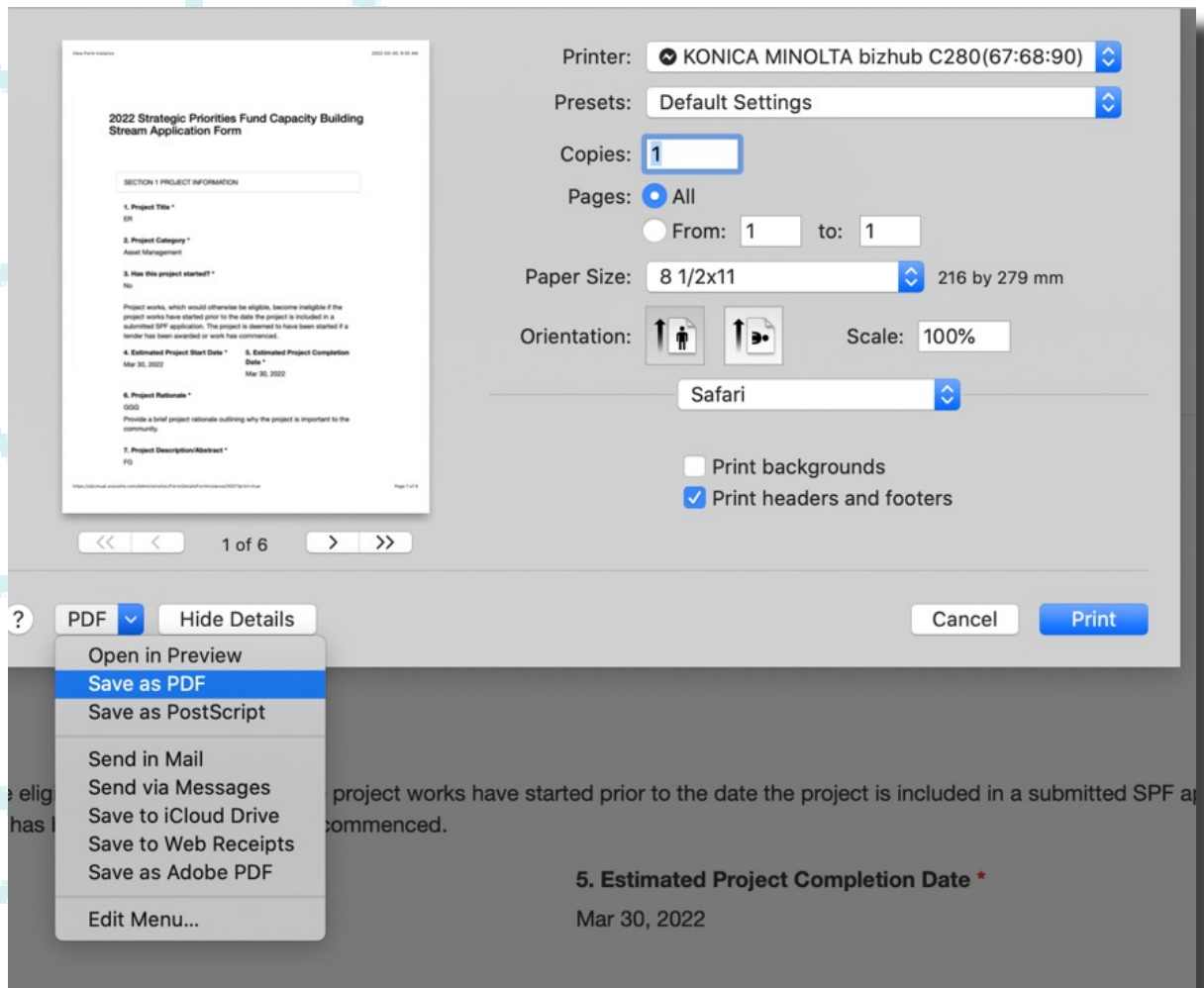
The form can now be printed or saved as a PDF. To do this, click print. A pop-up window will appear.



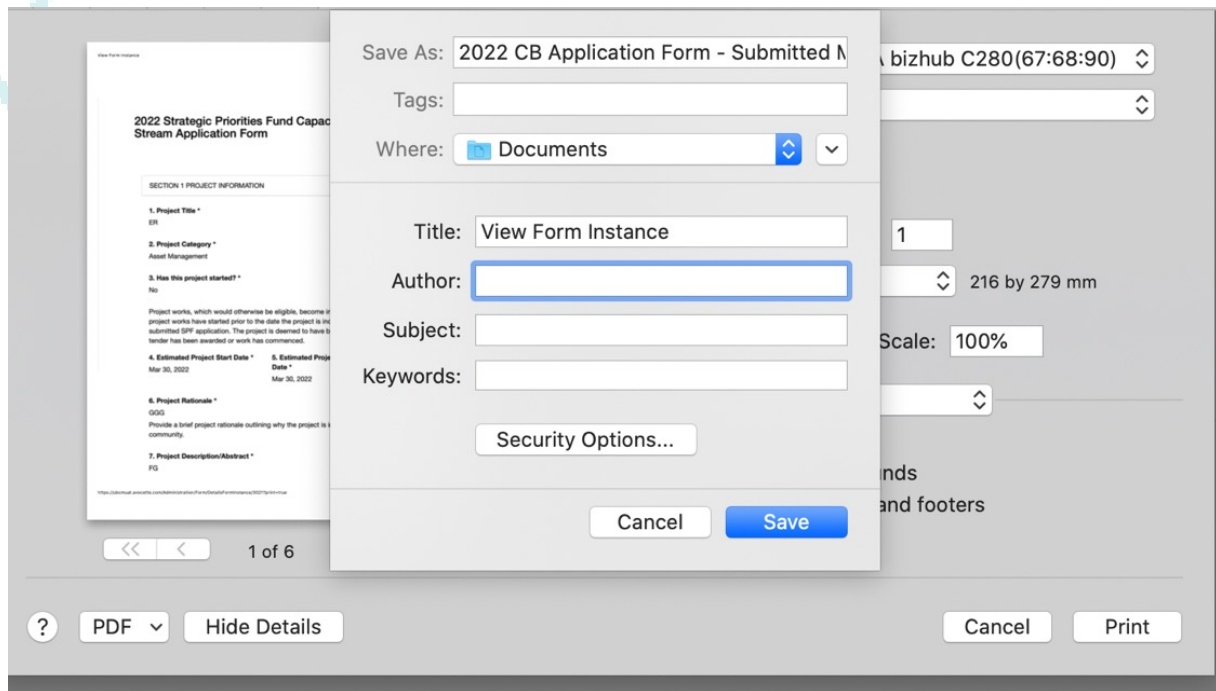
To print on paper, click the print button in the lower right corner of the pop-up window.



To print to PDF click the drop down menu on the lower left of the window. Select 'Save to PDF'.



Rename the file, select 'Where' to save the file and click the save button.



SECTION 9 - SUBMITTING THE PROJECT RECORD (YOUR STRATEGIC PRIORITIES FUND SUBMISSION)

To successfully submit your submission to the Strategic Priorities Fund you will need to submit your project record.

Ensure the application form is in the 'Submitted to UBCM' grid.

Click the 'Submit' button at the bottom of the project record.

The screenshot shows a web interface with two data grids. The top grid, titled "Draft in Progress", has columns for "Form Name", "Req?", "Initiated On", and "Initiated By". It displays "No records available." and a pagination bar showing "0" items per page. The bottom grid, titled "Submitted to UBCM", has columns for "Form Name", "Req?", "Submission Date", "Status", and "Status Date". It contains one record: "2022 Strategic Priorities Fund Capacity Building Stream Application Form" with "Req?" set to "Yes", "Submission Date" as "Mar 30, 2022", "Status" as "Submitted", and "Status Date" as "Mar 30, 2022". Below the grids are "Save", "Submit", and "Cancel" buttons.

A successfully submitted project record will show the message 'The Project has been submitted successfully'. If you need to navigate back to the project record, please see section 5 of this document.

This screenshot shows the same interface as the previous one, but with a white modal box overlaying the "Draft in Progress" grid. The modal box contains the text "The Project has been submitted successfully." and a "Close" button. The "Submitted to UBCM" grid and the "Save", "Submit", and "Cancel" buttons are still visible in the background.

Section 8 describes how to print or print to PDF the Project Record. All information will be available in PIMS for you to read. Editing functions are not available after the documents have been submitted. Only submitted application forms and project records will be considered for funding.

UNION OF BRITISH COLUMBIA MUNICIPALITIES

Victoria Office
525 Government Street
Victoria, BC V8V 0A8
250-356-5134
ccbfin@ubcm.ca

Richmond Office
Suite 60 -10551 Shellbridge
Way
Richmond, BC V6X 2W9
604-270-8226
ubcm@ubcm.ca



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