

# Online User Guide, Part 1 – Navigating the HCTF Online Website

## [Home Page: HCTF Online Welcome](#)

- Identify proposal type and click on the appropriate form from menu on left margin. You will be taken to the webpage for that proposal type.

## [Proposal List view: your starting point](#)

- Each proposal type has its own webpage that opens in a [Proposal List View](#)
- This web page lists your 2018-19 proposals as you create them, and any 2017-18 proposals you previously submitted.

On this webpage you can open a blank proposal form, open a 2018-19 project you have already started, or open a 2017-18 proposal and copy it to a 2018-19 form. This saves you a lot of cutting and pasting, but you must remember to edit the copy.

**Do one of the following:**

### [1. Start with a blank proposal:](#)

- Click on “+new item” to open a blank form. The form opens in the [Edit View](#). Begin filling in fields on the Start Tab.
- Once you have entered the information, it is **highly recommended** that you SAVE the document by clicking “Save and Close”. That will take you back to the [Proposal List View](#).
- To continue working, click on your project name. The proposal will open in the [Display View](#).
- Click “Edit Item” to open in [Edit View](#), and continue filling in fields in all sections.
- Please SAVE OFTEN, preferably as each section of the proposal is completed. (The proposal form times out after about 30 minutes. Any information entered and not saved could be lost.)
- If you leave the computer for more than a minute or two, you are advised to **SAVE and CLOSE**. You may reopen your proposal as often as you like to continue creating and editing.

### [2. Resume editing a proposal you have already started:](#)

- To continue working, click on your project name. The proposal will open in the [Display View](#).
- Click “Edit Item” to open in [Edit View](#), and continue filling in fields in all sections.
- Please SAVE OFTEN, preferably as each section of the proposal is completed. (The proposal form times out after 30 minutes. Any information entered and not saved could be lost.)

### [3. Copy and edit last year’s proposal:](#)

You can copy your 2017-18 proposal into an appropriate 2018-19 form. **It is your responsibility to ensure ALL sections are EDITED to reflect this year’s information, and that any NEW sections are filled in.** (Note you cannot copy the 2017-18 budget form. You must submit your budget on a 2018-19 spreadsheet form.)

To Copy:

- In the Proposal List View, click on the desired 2017-18 proposal from the list of Past Proposals Submitted.
- It will open in the "Display View".
- From the menu bar, click on "Make Copy".
- A window will pop up. Click on "OK" to copy the proposal. The next window will ask for details:
  - Select the correct funding year (2018-19)
  - Select the correct proposal type
- Click on "Copy" (it may take some time for the copy to be made, depending on the length of the proposal). **Do NOT click on the Copy button more than once!**
- **The original 2017-18 form you just copied will appear. Click CANCEL to close and you will go back to your Proposal View. Here you should see your copied form, marked with a green \*star.**
- Click on the project title and open the 2018-19 form.
- Click on "Edit Item" to open in Edit View, and work on your proposal.
- Please **SAVE OFTEN**, preferably as each section of the proposal is completed. (The proposal form times out after 30 minutes. Any information entered and not saved could be lost.)
- If you leave the computer, you are advised to **SAVE and CLOSE**. You may reopen your proposal as often as you like to continue creating and editing.

### 3. Printing your proposal

You may print your proposal from Display View.

To print a hard copy:

- Save and close the proposal form
- In the Proposal List View, click on the proposal. It will open in Display View.
- Click on "Print" on the menu bar.
- The **PRINT VIEW** will open.
- Right click to bring up the Right click menu (Context menu). Select Print.

To create a PDF (if your computer has the capacity)

- Follow the above instructions to get **PRINT VIEW**.
- Select the Print command from your browser, or right click to bring up the context menu.
- Choose "Print using system dialog".
- Select "Adobe Pdf" from your printer menu. Choose where to save the document on your computer, and print.

To create a Word copy:

- Follow the above instructions to get **PRINT VIEW**.
- Copy the text and paste into a Word document.
- Save to your computer.

## 4. Deleting a proposal

If you decide to abandon a proposal, you may completely delete it from your list of proposals.

- In Proposal List View, click on the relevant proposal name. It will open in Display View.
- From the menu bar, click **DELETE**.

Please contact Jane Algard ([jane.algard@hctf.ca](mailto:jane.algard@hctf.ca)) if your proposal was accidentally deleted.

## 5. Budget Spreadsheet

The budget spreadsheet provided must be completed for all proposal types except Seed proposals.

To work with your proposal budget:

- Download the 2018-19 Budget Excel spreadsheet from the Budget Tab. **Save to your computer.**
- Open the downloaded Budget spreadsheet and click the “Enable Editing” button before you start to fill in the budget information.
- **Do not type in any of the calculated fields which are in red font.**
- Fill in the spreadsheet and **save the completed spreadsheet to your computer.**
- When you are ready, go to the Attachments Tab to upload your completed budget spreadsheet file.
- Note: If you downloaded and completed the 2018-19 budget form as a worksheet, you can upload that finished form – it is the same as the spreadsheet available from the application budget tab.

## 6. Attachments

Attach your map, your completed budget spreadsheet, and up to three supporting documents by accessing the Attachments Tab. Note the maximum size for an attachment is 1MB. All attachments must be submitted with the proposal. Late attachments may not be accepted.

- On the Attachments Tab, click on the “Select” button.
- Browse to locate the document from your computer files.
- Click “Open” to select the document
- Click Save, on the menu bar of your proposal, to upload and attach the document.
- To upload multiple files, click the Add button to add another attachment field.

## 7. Submitting

When ready to submit:

- Print the proposal for your records following the Print Instructions in this Guide (Section 3).
- Open proposal and navigate to “Edit View” by clicking on “Edit Item”.
- Click on the Submit Tab
- Click on the Submit radio button
- **Click Save button in menu bar**

- Click Close button to finalize the submit process.

**You will receive an automatic email confirming your application has been successfully submitted. The email will be sent to the address you used to obtain your username and password. If you do not receive this, please contact us.**

Please contact Jane Algard ([jane.algard@hctf.ca](mailto:jane.algard@hctf.ca)) if there are problems after the proposal has been submitted.

## PART TWO: TIPS FOR FILLING OUT FORM

### Appendix: Screenshots of HCTF Online

#### Home Page – Welcome

**HCTF Online** EDIT LINKS

## Welcome to HCTF Online Application System

**Reminder: HCTF Application Deadline Thursday, November 2nd by 4:30pm.**

The following steps will help you prepare your HCTF Enhancement Grant application:

- Step 1:** Make sure to review the **HCTF Online webpage**, for new content including criteria used to evaluate your proposal.
- Step 2:** Read the new-2018 Proposal Writing Instructions to make sure you are providing all required information.
- Step 3:** Identify the Status of the Proposal you are submitting.
- Step 4:** Fill in the appropriate HCTF Online application form – be sure to attach the completed Budget spreadsheet.
- Step 5:** Submit your application.

**Proposal Forms:**

1. **New Project - Single Year**
2. **New Project - Year 1 of a Multi-Year Project**
3. **New Project - Seed**
4. **Continuing Project - Multi-Year**
5. **Continuing Project - Year 1 of New 5-Year Funding Cycle**


**See Proposal Status Definitions to determine correct application form.**

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## List View

BROWSEPAGE



HCTF Online

EDIT LINKS

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Proposal Forms

**New Project - Single Year**

New Project - Multi Year

New Project - Seed

Continuing - Multi-Year

Continuing - Year 1 of New 5-Year Cycle

Print Instructions

HCTF Admin

Proposals - Submitted

If you have a new project that has not been funded by HCTF before and you will be applying for only one year of funding, select this proposal type.

1. To start with a blank 2018-19 form: Click on "+ new item".

2. Or, to resume writing a 2018-18 form you have already started, click on the project name in the box below.

3. Or, if applicable, you may start a 2018-19 proposal by bringing forward information from a previously submitted proposal. Edit all fields to bring up to date.

(See User Guide for detailed instructions)

+ new item

✓ Project Name ↑

HCTF test 2018-19 Proposal ✕

If you have any problems with your proposal, please contact Jane Algard ([Jane.Algard@hctf.ca](mailto:Jane.Algard@hctf.ca)).

**Past Proposals Submitted** – Do NOT open, edit, or resubmit these past proposals. You must start a new form. **IMPORTANT: After using the copy function, CLOSE the old form. The newly created form will have a GREEN STAR.** You MUST EDIT all fields to make sure it is accurate for the current year.

List View. This is where you can access your proposal once you have started and saved your form.

Click on the Project Name to open and resume working on your current proposal.

## Display View

BROWSEPAGE

DISPLAY - NEW PROJECT SINGLE YEAR

Edit Item

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Proposals - Submitted

Edit Item

Cancel

Delete

Print

Make Copy

Start

Proponent

Project Overview

Executive Summary/Issue

Objectives

Communication

Literature Cited

HCTF Admin

**\*\*Please save your proposal after completing the first section and to save often.**

**Funding Year**  
2018-19

**Project Name**  
HCTF test 2018-19 Proposal  
Use a name that concisely identifies the project (specify year if applicable).

**Project Description**  
Describe what your project will accomplish. Maximum 1000 characters.

**Author of Proposal**

Display View. Your proposal will open to this view. Here you can choose what you want to do with your proposal.

To Edit, click Edit Item. It will take you to Edit view, and you can work on the text.

## Edit View

BROWSEPAGEEDIT - NEW PROJECT - SINGLE YEAR

Save

Close

ezEdit

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Print Instructions

HCTF Admin

Proposals - Submitted

Proposals - Approved

2018-19 Proposals

2017-18 Proposals

SaveClose

\* indicates a required field

StartProponentProject OverviewExecutive Summary/IssueObjectivesCommunicationLiterature

HCTF Admin

**\*\*Please save your proposal after completing the first section and to save often.**

Funding Year \*

2018-19

Project Name

HCTF test 2018-19 Proposal

Use a name that concisely identifies the project (species/habitat/loc

Project Description

Edit View. This is where you enter and edit text. PLEASE save often.

TIP! Before taking a break from your work, please SAVE and CLOSE to avoid losing data. It is easy to reopen from List View, and you will be certain that you resume your editing on a “live” form.

## Viewing a previously submitted proposal

HCTF Online

EDIT LINKS

Continuing - Multi-Year

If you have an approved project that is continuing, use this form.

1. To start with a blank 2018-19 form: Click on “+new item”.

2. Or, to resume writing a 2018-19 form you have already started, click on the project name in the box below.

3. Or, if applicable, you may start a 2018-19 proposal by bringing forward information from a previously submitted proposal. Edit all fields to bring up to date.

(See User Guide for detailed instructions)

+ new item

✓ Project Name

No Title

If you have any problems with your proposal, please contact Jane Algard ([Jane.Algard@hctf.ca](mailto:Jane.Algard@hctf.ca)).

**Past Proposals Submitted** – Do NOT open, edit, or resubmit these past proposals. You MAY open, and use the Copy Function to populate a 2018-19 proposal form. **IMPORTANT: After using the copy function, CLOSE the old form. The newly copied form will appear in your Proposal List, distinguished with a GREEN STAR.** You MUST EDIT all fields to make sure it is accurate for the current year. See User Guide for details.

✓ Project Name

5-Year Peace Region Mountain Goat Population Assessment

Funding Year

2017-18

If you submitted a proposal in 2017-18, it will be listed here. You may copy this proposal into a 2018-19 form. You can then Edit this copy, and submit it for this year's proposal.

## Copy a Previously Submitted Proposal

www.hctfonline.hctf.ca says:

Copy Proposal to New Form? IMPORTANT: After using the copy function, CLOSE the old form. The newly copied form will appear in your Proposal List.

OK Cancel

Edit Item Cancel Delete Print Make Copy

Start Proponent Project Overview Progress Objectives Communication Literature Cited Budget

HCTF Admin

**\*\*Please save your proposal after completing the first section and to save often.**

**Funding Year**  
2017-18

**Project Name**  
5-Year Peace Region Mountain Goat Population Assessment  
Please use the same project name.

**Project Description**  
Goat harvest is being managed conservatively in the Peace Region due to a lack of minimal harvest opportunities. This 5-year assessment will determine population

To make a copy, select the previously submitted project. I will open in Display View. Select Make a Copy. You will see the message box above. Click OK.

Copy may take a minute to load. IMPORTANT TIP: The proposal you will see is the Original! Simply close by clicking Cancel. You will be taken back to List View. Your new copy will be flagged with a green star. Use this as a base to edit your current proposal.

## Continuing - Multi-Year

If you have an approved project that is continuing, use this form.

1. To start with a blank 2018-19 form: Click on "+ new item".
  2. Or, to resume writing a 2018-19 form you have already started, click on the project name in the box below.
  3. Or, if applicable, you may start a 2018-19 proposal by bringing forward information from a previously submitted proposal. Edit all fields to bring up to date.
- (See User Guide for detailed instructions)

+ new item

✓ Project Name

✓ No Title ✱



5-Year Peace Region Mountain Goat Population Assessment ✱

If you have any problems with your proposal, please contact Jane Algard ([Jane.Algard@hctf.ca](mailto:Jane.Algard@hctf.ca)).

**Past Proposals Submitted** – Do NOT open, edit, or resubmit these past proposals. You MAY open, and use the Copy Function to populate a 2018-19 proposal form. **IMPORTANT: After using the copy function, CLOSE the old form. The newly copied form will appear in your Proposal List, distinguished with a GREEN STAR.** You MUST EDIT all fields to make sure it is accurate for the current year. See User Guide for details.

Project Name	Funding Year
5-Year Peace Region Mountain Goat Population Assessment	2017-18

## Print your Proposal

 Edit Item | Cancel |  Delete | **Print** | Make Copy

Start | Proponent | Project Overview | Executive Summary/Issue | Objectives | Communication | Literature Cited

HCTF Admin

**\*\*Please save your proposal after completing the first section and to save often.**

**Funding Year**  
2018-19

**Project Name**  
HCTF test 2018-19 Proposal  
Use a name that concisely identifies the project (species/habitat/location) with 10 words or less.

**Project Description**  
This proposal will be used to help proponents fill out their online application forms. Describe what your project will accomplish. Maximum 3 lines.

**Author of Proposal**  
Jane Algard

Open your proposal by selecting from List View in your account.

It will open in Display View. Click the Print button.

Your proposal will appear in the Print View format.

## HCTF Enhancement Proposal 2018-19

New Single Year Project: HCTF test 2018-19 Proposal

### Proponent Information

Author of Proposal: Jane Algard

Project Leader:

Title:

Organization:

Address:

City:

Province: British Columbia Postal Code:

Phone:

Cell:

Email Address:

Additional Proponents:

Proponent Qualifications:

### Project Overview

Project Description:

This proposal will be used to help proponents fill out their online application forms.

**To print a hard copy:** Right click to bring up the Context Menu (Right click menu). Choose Print.

**For an electronic file:** Choose "Print using system dialogue", and set Adobe PDF as your printer. Save to your computer.

**TIP:** Once your proposal is imported to our system, it will be reformatted for easier viewing. You may obtain a copy of this at a later date.

**TIP:** If you want a **Word document**, you may convert the PDF, or you can copy and paste from the print



# Budget

Fill out, save to YOUR computer, and upload to your form at appropriate spot.

HCTF Online 2016-17 Budget [Protected View] - Excel

FILE HOME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW DYMO Label ACROBAT

PROTECTED VIEW Be careful—email attachments can contain viruses. Unless you need to edit, it's safer to stay in Protected View. [Enable Editing](#)

D4

Be sure to enable editing.

HCTF On-Line: 2018-19 Budget

Proponent Name:

Project Name:

A. Labour Costs

Note\*\* Please do not overwrite calculation fields in the budget spreadsheet as this will result in an incorrect total amount requested from HCTF. Calculation fields are those with the red font.

Human Resources: Wages & Salaries

Position	Total Days on Project	HCTF Person Days	Rate/Day	Total HCTF Amount
				\$0.00
				\$0.00
				\$0.00



Overriding our formulas fields will misrepresent your budget request.

## Attachments

The screenshot shows a web form titled 'Map Description' with a navigation bar at the top containing tabs: Start, Proponent, Project Overview, Progress, Objectives, Communication, Literature Cited, and Budget. The 'Map Description' tab is active. Below the navigation bar is a text area for the map description, followed by a section for attachments. The attachment section includes a table with two rows, each with a 'Select' button and a 'Remove' button. A red box highlights the 'Add' button at the bottom left. Several callout boxes provide additional information:

- A blue box at the top left points to the 'Save' button, stating: 'Save'.
- A blue box at the top left points to the 'Close' button, stating: 'Close'.
- A blue box at the top left points to the asterisk in the 'Map Description' label, stating: '\* indicates a required field'.
- A blue box at the top right points to the 'Attach map, budget, and up to 3 supporting documents.' text, stating: 'Attach map, budget, and up to 3 supporting documents.'
- A blue box at the bottom right points to the 'Add' button, stating: 'Click this to specify additional documents to upload.'
- A blue box at the bottom right points to the 'Important: Once you have located the document to upload, complete upload by clicking **SAVE!!**' text, stating: 'Important: Once you have located the document to upload, complete upload by clicking **SAVE!!**'.
- A blue box at the bottom right points to the 'TIP: If you submit a letter with a locked fields, it may not be included with your application.' text, stating: 'TIP: If you submit a letter with a locked fields, it may not be included with your application.'

## Submit

 Save  Close

\* indicates a required field

Start

Proponent

Project Overview

Executive Summary/Issue

Objectives

Communication

Lit

HCTF Admin

**Please follow the steps below if you are satisfied with your proposal and are ready to submit to HCTF. We advise you to Print your proposal before submitting. Refer to print instructions.**

1. Select the Submit radio button below.
2. Click Save button in the menu bar above.
3. Click Close button.

☐ Edit

☒ Submit

Proposal will be submitted ONLY when you click "Save and Close".

When you are ready, select Submit.

**Please do not edit proposal after it has been submitted. If you have any problems with your proposal, please contact Jane Algard ([Jane.Algard@hctf.ca](mailto:Jane.Algard@hctf.ca)).**

An automatic confirmation will be delivered to the email you used to establish your user id and password.

**TIP! If you do not receive notification within 1 hour, please notify HCTF and we will sort it out!**

Good luck, and don't hesitate to contact us for assistance!

([jane.algard@hctf.ca](mailto:jane.algard@hctf.ca), or 250 940-9781)