

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

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

- Identify the Enhancement and Restoration proposal type you need 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 2019-20 proposals as you create them, and any 2018-19 proposals you previously submitted.

On this webpage you can open a blank proposal form, open a 2019-20 project you have already started, or open a 2018-19 proposal and copy it to a 2019-20 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 2018-19 proposal into an appropriate 2019-20 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 2018-19 budget form. You must submit your budget on a 2019-20 spreadsheet form.)

To Copy:

- In the Proposal List View, click on the desired 2018-19 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 (2019-20)
  - 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 2018-19 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 2019-20 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 Courtney Sieben ([courtney.sieben@hctf.ca](mailto:courtney.sieben@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 2019-20 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 2019-20 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.

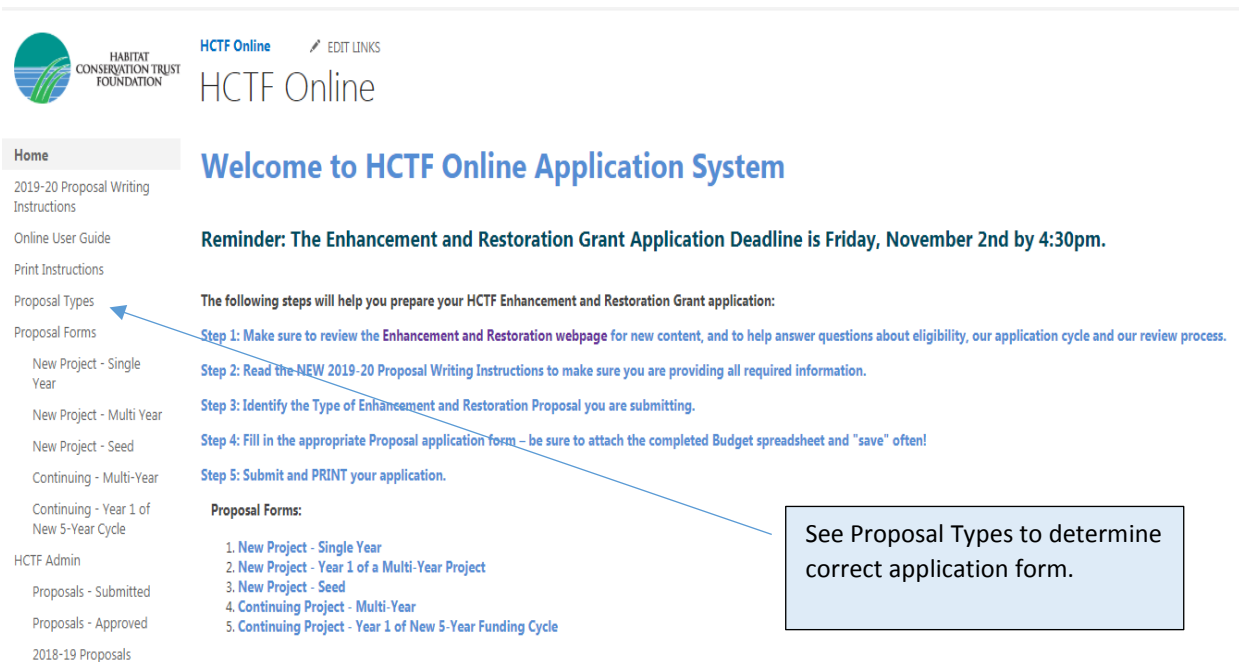
**You will receive an automatic email confirming your application has been successfully submitted. The email will be sent to the address you used to obtain your username and password. If you do not receive this, please contact us.**

Please contact Courtney Sieben ([courtney.sieben@hctf.ca](mailto:courtney.sieben@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: The Enhancement and Restoration Grant Application Deadline is Friday, November 2nd by 4:30pm.**

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

- Step 1:** Make sure to review the [Enhancement and Restoration webpage](#) for new content, and to help answer questions about eligibility, our application cycle and our review process.
- Step 2:** Read the [NEW 2019-20 Proposal Writing Instructions](#) to make sure you are providing all required information.
- Step 3:** Identify the Type of Enhancement and Restoration Proposal you are submitting.
- Step 4:** Fill in the appropriate Proposal application form – be sure to attach the completed Budget spreadsheet and "save" often!
- Step 5:** Submit and PRINT 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 Types to determine correct application form.

# List View



HCTF Online [EDIT LINKS](#)

## New Project - Single Year

Home

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.

2019-20 Proposal Writing Instructions

1. To start with a blank 2019-20 form: Click on "+new item".

Online User Guide

2. Or, to resume writing a 2019-20 form you have already started, click on the project name in the box below.

Print Instructions

3. Or, if applicable, you may start a 2019-20 proposal by bringing forward information from a previously submitted proposal. Edit all fields to bring up to date.

Proposal Types

(See User Guide for detailed instructions)

Proposal Forms

New Project - Single Year

+ new item

✓ Project Name

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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

BROWSE PAGE DISPLAY - NEW PROJECT SINGLE YEAR

Edit Item Cancel Delete Print Make Copy ezEdit Help About

Manage Actions Custom Actions Settings & Help

Home

2018-19 Proposal Writing Instructions

Online User Guide

Proposal Status Definitions

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

Edit Item Cancel Delete Print Make Copy

Start Proponent Project Overview Executive Summary/Issue Objectives Communication Literature Citec

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 (spec

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

**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

## Viewing a previously submitted proposal

HCTF Online [EDIT LINKS](#)

### Continuing - Multi-Year

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

- To start with a blank 2018-19 form: Click on "+ new item".
- Or, to resume writing a 2018-19 form you have already started, click on the project name in the box below.
- 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)

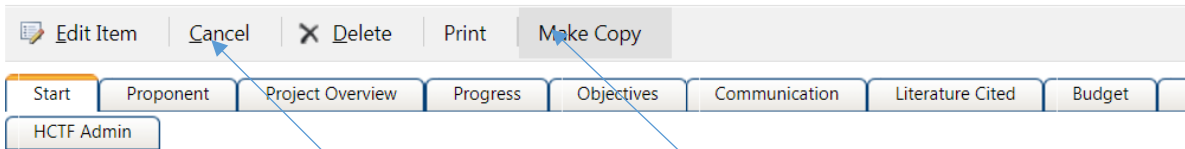
+ new item	
✓ Project Name	
No Title	

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

# Copy a Previously Submitted Proposal



**\*\*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. It 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 list.
  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

The screenshot shows a web interface for editing a proposal. At the top, there is a navigation bar with buttons: Edit Item, Cancel, Delete, Print, and Make Copy. Below this is a series of tabs: Start, Proponent, Project Overview, Executive Summary/Issue, Objectives, Communication, and Literature Cited. The 'Start' tab is active. Underneath, there is a 'HCTF Admin' button. A red warning message reads: "\*\*Please save your proposal after completing the first section and to save often." Below the warning are several sections: 'Funding Year' (2018-19), 'Project Name' (HCTF test 2018-19 Proposal), 'Project Description' (This proposal will be used to help proponents fill out their online application forms...), and 'Author of Proposal' (Jane Algard). A blue arrow points from the 'Print' button in the top bar to a text box on the right.

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:

**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

### Project Overview

**Project Description:**  
This proposal will be used to help proponents fill out their online application forms.



# 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.

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

Important: Once you have located the document to upload, complete upload by clicking **SAVE!!**

\* indicates a required field

Start Proponent Project Overview Progress Objectives Communication Literature Cited Budget

**Map Description**

Rich text editor toolbar with font settings (Segoe UI, Size 2, 13px) and various editing tools.

Attach map, budget, and up to 3 supporting documents.

Include a map showing enhancement sites and study areas in relation to known geographic areas. Please limit image size to less than 1MB. A PDF or a JPEG file is acceptable.

**You may attach up to three supporting documents. Each document should be less than 1MB. Please list and describe the attachments.**

TIP: If you submit a letter with a locked fields, it may not be included with your application.

Rich text editor toolbar with font settings (Font Name, Size, Real...) and various editing tools.

**Attachments:**  
Please include map, supporting documents and budget spreadsheet to the attachment field below.  
Please do not attach .png images, html links to google maps, locked PDF documents, or PDFs with protected signature fields.

You cannot add the attachment until you save the item

Click this to specify additional documents to upload.

# Submit

The screenshot shows a web interface for submitting a proposal. At the top, there are buttons for 'Save' and 'Close'. Below this is a navigation bar with tabs for 'Start', 'Proponent', 'Project Overview', 'Communication', and 'Lit'. A callout box points to the 'Save' button, stating: 'Proposal will be submitted ONLY when you click "Save and Close".' Below the navigation bar, there is a section for 'HCTF Admin' with instructions: '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.' A list of steps is provided: '1. Select the Submit radio button below.', '2. Click Save button', and '3. Click Close button'. A callout box points to the 'Submit' radio button, stating: 'When you are ready, select Submit.' Below the instructions, there are two radio buttons: 'Edit' and 'Submit', with the 'Submit' button selected. A callout box points to the 'Submit' radio button.

\* indicates a required field

Save Close

Start Proponent Project Overview 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
3. Click Close button

When you are ready, select Submit.

Edit

Submit

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 as soon as we can!**

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

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