HCTFOnline System User Guide

Part 1 - Navigating HCTFOnline

Part 2 – Screenshot Examples

Part 1 – Navigating the HCTF Online Website

Home Page: HCTF Online Welcome

- Identify which granting stream you are applying for:
 - Enhancement and Restoration (E&R)
 - o Stewardship
 - o Caribou Habitat Restoration Fund (CHRF)
- Read the appropriate proposal writing guidelines for that granting stream and ensure you
 have referenced our website for questions on eligibility, application timelines and our multistage review process.
- Please be sure to fill out the correct proposal forms:
 - o If you are applying for E&R or Stewardship, there are five different proposal forms, as well as a budget spreadsheet (for all forms except seed). Choose the proposal type you need to be taken to the webpage for that proposal type.
 - If you are applying for CHRF, there is one application form and a specific CHRF Activity and Budget Details spreadsheet.

Proposal List view: your starting point

- Each proposal type has its own webpage that opens in a <u>Proposal List View</u>
- This web page lists your 2020-21 proposals as you create them, and any proposals you previously submitted through the online system.

On this webpage you can open a blank proposal form, open a 2020-21 project you have already started, or open a previous proposal submitted through HCTFOnline to copy it to a current form. See detailed instructions for the copy function below to ensure you are editing the correct copy.

*NOTE that since CHRF proposals have not been submitted through HCTFOnline before, the option to see or copy a previously submitted proposal is unavailable.

In HCTFOnline you can 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 <u>Edit View</u>. 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 <u>Proposal List View</u>.
- To continue working, click on your project name. The proposal will open in the <u>Display View</u>.
- Click "Edit Item" to open in <u>Edit View</u>, 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**. Before the application deadline, 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 <u>Display View</u>.
- 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:

Proponents who have previously submitted through HCTFOnline portal have the option to copy a previous proposal into an appropriate 2020-21 form. Again, this option is not available to previous CHRF proponents.

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 previous year's budget form. You must submit your budget on a 2020-21 spreadsheet form.)

To utilize the Copy function:

- In the <u>Proposal List View</u>, click on the desired 2018-19 or 2019-20 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 (2020-21)
 - 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!**
- IMPORTANT! The original proposal form you just copied will appear. Click CANCEL to close and you will go back to your <u>Proposal View</u>. Here you should see your copied form under the correct funding year, marked with a green *star.
- Click on the project title and open the 2020-21 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

It is strongly recommended that you print a copy of your proposal as you will not have access to the HCTFOnline portal once the deadline has passed.

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) if your proposal was accidentally deleted.

6. Additional Requirements & Attachments

Depending on the grant that you are applying for, you are required to submit a number of attachments with your application. 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.

The following table outlines the attachments needed for each grant.

	Table 1: Grant Attachments		
	Enhancement & Restoration	Stewardship	Caribou Habitat Restoration
	Grant	Grant	Fund Grant
i	2020-21 Budget Excel	2020-21 Budget Excel	CHRF Activity & Budget Detail
	Spreadsheet	Spreadsheet	Spreadsheet
ii	Мар	Мар	Мар
iii	Letters of support (up to three)	Letters of support (up to	Letters of support (OPTIONAL)
		three)	
iv	-	-	Shapefile

i) Budget Spreadsheet

- a) For both the **Enhancement and Restoration** grants and **Stewardship** grants, please use the HCTF 2020-21 Budget spreadsheet. This spreadsheet must be completed for all proposal types except Seed proposals.
 - Download the 2020-21 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.
- b) For the **Caribou Habitat Restoration Fund (CHRF)** grant, please use the CHRF Activity & Budget Detail spreadsheet and be sure to follow the detailed instructions in Part 2 of the CHRF Proposal Writing Guidelines saved on the HCTFOnline portal home page.
 - Download the 2020-21 CHRF Activity & Budget Detail spreadsheet from the home page. Save to your computer.
 - Open the downloaded Activity & Budget Detail spreadsheet and click the "Enable Editing" button before you start to fill in the budget information.
 - 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 2020-21 CHRF Activity & Budget Detail spreadsheet form as a worksheet, you can upload that finished form — it is the same as the spreadsheet available from the application budget tab.

ii) Map

- A map is required for all projects and all granting streams.
- Please see specific proposal writing instructions for the grant you are applying to for more details.

iii) Letters of Support

- For the **E&R** grants or the **Stewardship** grants, applicants can provide *up to three* letters of support for the project with their application.
- For **CHRF** proponents, attaching letters of support is *optional*. If you choose to provide support letters, please include the site name within the file name.

iv) Shapefile (FOR CHRF PROPOSALS ONLY)

• CHRF proponents must submit a shapefile (up to 50MB) of the site you intend to restore using **ESRI standard Shapefile** format. All data must be spatially referenced to **NAD83** and projected to **BC Environmental Albers**. All shapefiles must be submitted with a .prj file defining this projection and coordinate system See CHRF Proposal Writing Guidelines for more details.

For more information on attachments, see the specific proposal writing guidelines for the granting stream you are applying for.

7. Submitting your grant application

When ready to submit:

- Print the proposal for your records following the Print Instructions in this Guide.
- Open proposal and navigate to "Edit View" by clicking on "Edit Item".
- Click on the Submit Tab
- Click on the Submit radio button
- Click the "Save and Close" button in menu bar

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 (<u>courtney.sieben@hctf.ca</u>) if there are problems after the proposal has been submitted.

Part 2: Screenshots of HCTF Online

Home Page – Welcome



HCTF Online HCTF Online

Home

2020-21 Proposal Writing Instructions

Online User Guide

Print Instructions

Proposal Forms

New Project - Single

New Project - Multi Year

New Project - Seed

Continuing - Multi-Year

Continuing - Year 1 of New 5-Year Cycle

Caribou Habitat

HCTF Admin

Proposals - Submitted

Proposals - Approved

2020-21 Proposals

2019-20 Proposals

2018-19 Proposals

2017-18 Proposals

2016-17 Proposals

2015-16 Proposals

EDIT LINKS

Welcome to the HCTF Online Application System

Reminder: The deadline to apply for HCTF funds is Friday, November 1st by 4:30pm.

Please refer to the HCTFOnline User Guide for tips on navigating the application Don't forget to PRINT a copy of your application after your submit.

Open Granting Streams:

1. If you are applying for either the Enhancement and Restoration G

Please read the appropriate Proposal Writing Instructions for the contact Courtney. Sieben@hctf.ca.

- E&R Proposal Writing Instructions
- Stewardship Proposal Writing Instructions

Proposal Forms:

- 1. 2020-21 Budget Spreadsheet (for all forms, except seed)
- 2. New Project Single Year
- 3. New Project Year 1 of a Multi-Year Project
- 4. New Project Seed
- 5. Continuing Project Multi-Year
- 6. Continuing Project Year 1 of New 5-Year Funding Cycle

Choose the appropriate application form for the grant program you are applying for.

Enhancement & Restoration and Stewardship grants use the same proposal forms, whereas Caribou Habitat Restoration fund has its own form.

Note you can access the application forms on this homepage, as well as on the side bar.

2. If you are applying for the Caribou Habitat Restoration Fund (CHRF) Grant:

Please familiarize yourself with the CHRF Proposal Writing Instructions, the CHRF Online User Guide and our webg

Proposal Forms:

- 1. 2020-21 CHRF Activity and Detail Budget Spreadsheet
- 2. CHRF Application form

Edit View



HCTF Online PEDIT LINKS

New Project - Single Year

Home

2020-21 Proposal Writing Instructions

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Print Instructions

Proposal Forms

New Project - Single Year

New Project - Multi Year

New Project - Seed

Continuing - Multi-Year

Continuing - Year 1 of

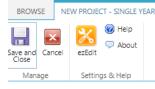
For Enhancement and Restoration and Stewardship proposal

If you have a new project that has not been funded by HCTF before and you will be applying for only one year of fundi

- 1. To start with a blank 2020-21 form: Click on "+new item".
- 2. Or, to resume writing a 2020-21 form you have already started, click on the project name in the
- 3. Or, if applicable, you may start a 2020-21 proposal by bringing forward information from a prev approved. Please see User Guide for detailed instructions on the copy function and make sure to be



After you have selected the appropriate application form, click the **+new item** button to create a new proposal. Don't forget to select the correct funding year (i.e. 2020-21).



Home

2020-21 Proposal Writing Instructions

Online User Guide

Print Instructions

Proposal Forms

New Project - Single Year

New Project - Multi Year

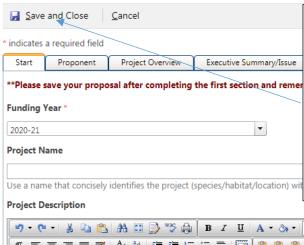
New Project - Seed

Continuing - Multi-Year

Continuing - Year 1 of New 5-Year Cycle

Caribou Habitat Restoration Fund

HCTF Admin

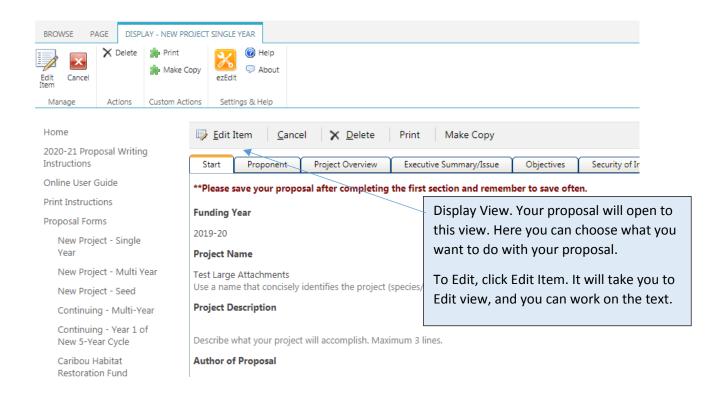


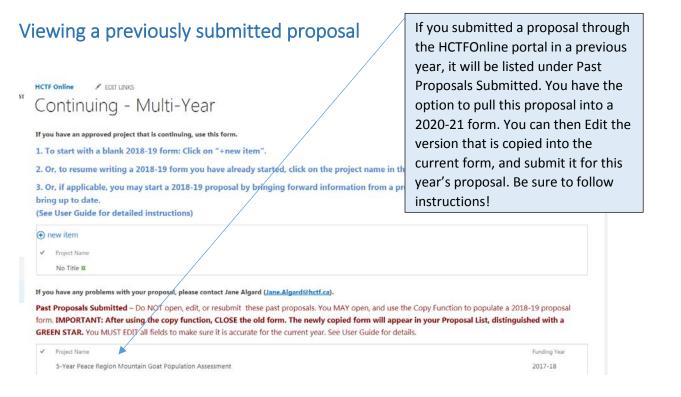
Edit View. This is where you enter and edit text. PLEASE save often.

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.

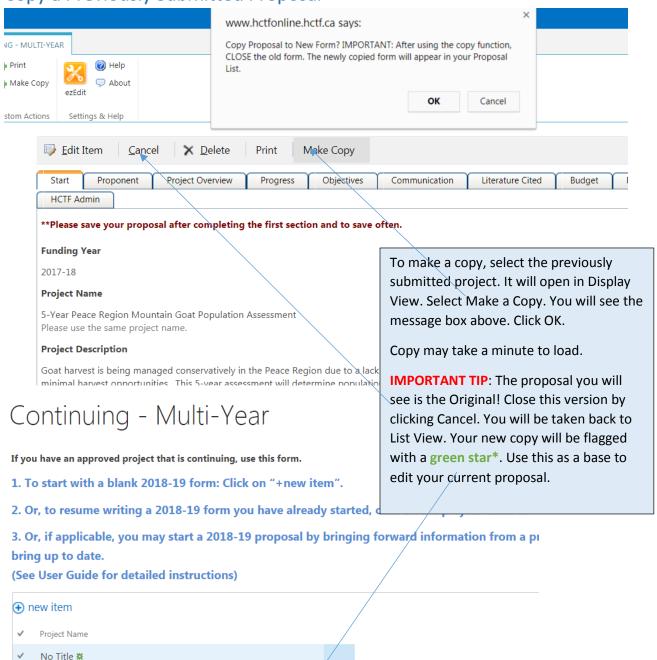


Display View





Copy a Previously Submitted Proposal



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

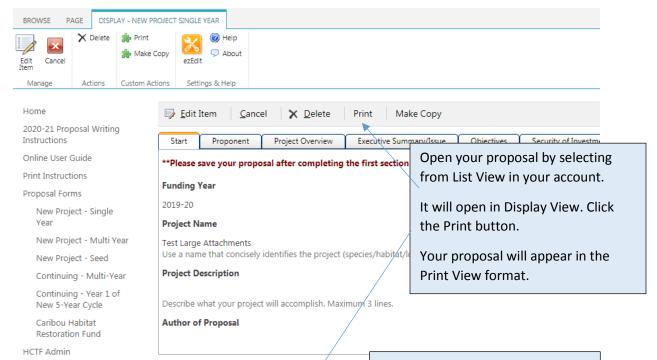
5-Year Peace Region Mountain Goat Population Assessment 🗱

Past Proposals Submitted – Do NOT open, edit, or resubmit these past proposals. You MAY open, and use t form. IMPORTANT: After using the copy function, CLOSE the old form. The newly copied form will appearance of the current year. See User Guide for details accurate for the current year. See User Guide for details accurate for the current year.

✓ Project Name

5-Year Peace Region Mountain Goat Population Assessment

Print your Proposal



HCTF Enhancement Proposal 2020-21

New Single Year Project: Test Large Attachments

Proponent Information

Author of Proposal:

Project Leader:

Title:

Organization:

Address:

City:

Phone: Email Address:

Additional Proponents:

Proponent Qualifications:

Project Overview

Project Description:

Project Group:

Project Location:

Project Map Location:

. . - . .

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

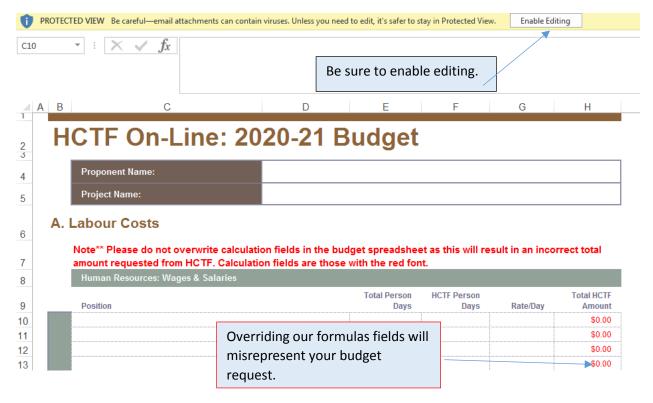
For an electronic file: Choose "Print using system dialogue", and set Adobe PDF as your printer. Save to your computer.

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

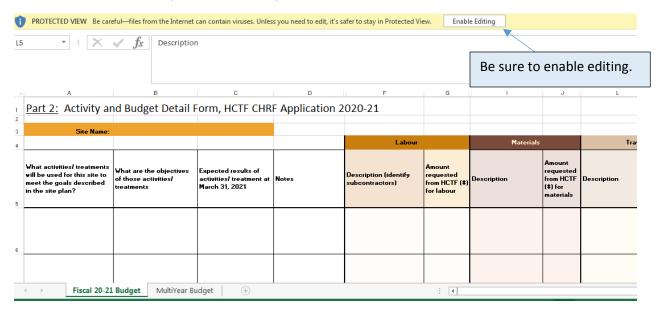
Budget Spreadsheet - Enhancement & Restoration and Stewardship

Fill out, save to YOUR computer, and then upload to the Attachments Tab

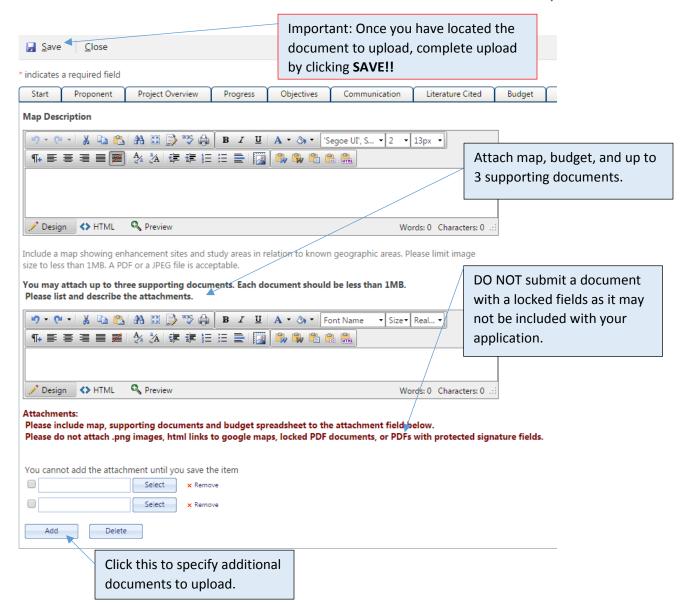


Budget Spreadsheet – Caribou Habitat Restoration Fund

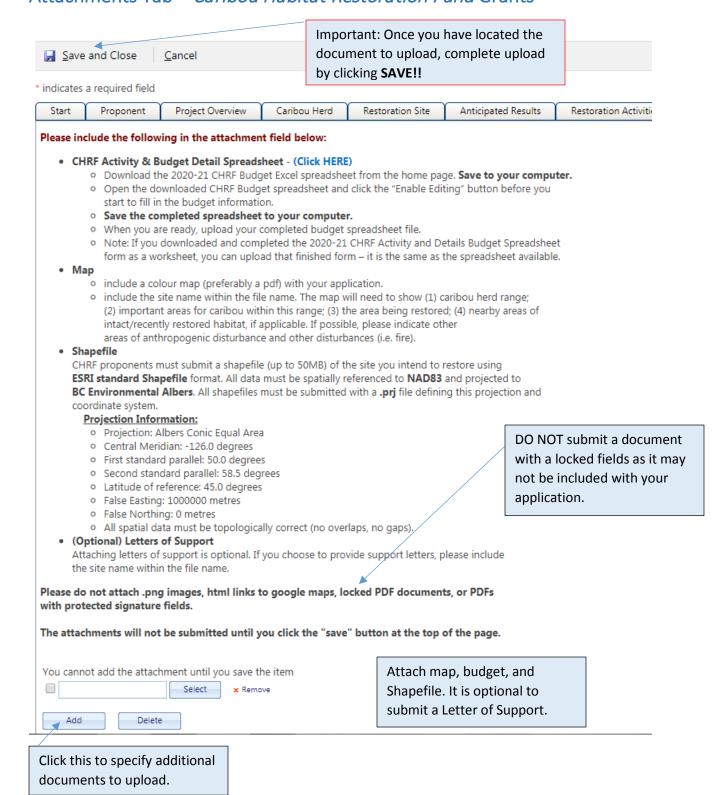
Fill out, save to YOUR computer, and then upload to the Attachments Tab



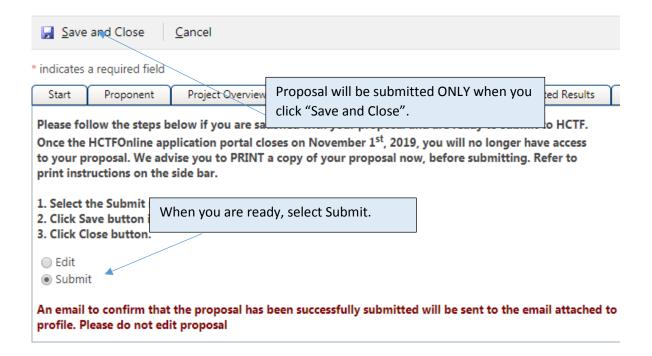
Attachments Tab – Enhancement & Restoration and Stewardship Grants



Attachments Tab – Caribou Habitat Restoration Fund Grants



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, or 250 940-9781)