



# HCTF Online User Guide

## 2017-18 Applications

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# 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 2017-18 proposals as you create them, and any 2016-17 proposals you previously submitted.

On this webpage you can open a blank proposal form, open a 2017-18 project you have already started, or open a 2016-17 proposal and copy it to a 2017-18 form.

**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 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.

### [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 2016-17 proposal into an appropriate 2017-18 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 budget form. You must submit your budget on a 2016-17 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 (2017-18)
  - 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 2015-16 form you just copied will appear. Click CANCEL to close and you will go back to your [Proposal View](#).**
- Click on the project title. It will open in a **2017-18 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 [Print View](#).

To get to [Print View](#) and 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.
- Select the Print command from your browser, or right click, and click on print.

To create an electronic 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

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

To work with your proposal budget:

- Download the 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 add your completed budget spreadsheet file.

## 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.**

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 one: Screenshots of HCTF site web pages

#### Home Page – Welcome

**HABITAT CONSERVATION TRUST FOUNDATION** HCTF Online  
HCTF Online

Home  
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

### Welcome to HCTF Online Application System

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

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

- Step 1: Identify the Status of the Proposal you are submitting.**
- Step 2: Fill in the appropriate HCTF Online application form – be sure to attach the completed Budget spreadsheet.**
- Step 3: Submit your application.**

**Proposal Forms:**

- New Project - Single Year**
- New Project - Year 1 of a Multi-Year Project**
- New Project - Seed**
- Continuing Project - Multi-Year**
- Continuing Project - Year 1 of New 5-Year Funding Cycle**

See Proposal Status Definitions

# Proposal List view – example 1



HCTF Online

## New Project - Single Year

- Home
- 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

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. Click "+ new item" to open a blank proposal form.
2. Or click on the project name to open and edit proposal form.
3. Or click on the project name in the Past Proposals Submitted section to copy a 2015-16 proposal to 2016-17.

+ new item

✓ Project Name

There are no items to show in this view of the "New Project - Single Year" list.

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

### Past Proposals Submitted

✓ Project Name Funding Year

There are no items to show in this view of the "New Project - Single Year" list.

Save and Close Cancel

\* indicates a required field

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

Funding Year \*

2017-18

Project Name

Use a name that concisely identifies the project (species/habitat/location) with 10 words or less.

Project Description

Rich text editor toolbar with Design, HTML, and Preview tabs. Words: 0 Characters: 0

Describe what your project will accomplish. Maximum 3 lines.

Author of Proposal

Edit View. Please Save and Close after filling in fields on the Start Tab. Reopen, and continue.

## Proposal List View - example 2



HABITAT  
CONSERVATION TRUST  
FOUNDATION

HCTF Online

### Continuing - Multi-Year

- Home
- 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

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

1. Click "+ new item" to open a blank proposal form.
2. Or click on the project name to open and edit proposal form.
3. Or click on the project name in the Past Proposals Submitted section to copy a 2015-16 proposal to 2016-17.

+ new item
✓ Project Name HCTF sample 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

✓ Project Name	Funding Year
There are no items to show in this view of the "Continuing - Multi-Year" list.	

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

**Funding Year**

**Project Name**  
HCTF sample proposal  
Use a name that concisely identifies the project (species/habitat/location) with 10 words or less.

**Project Description**

Display View. To get to Edit View, click Edit Item.

## Proposal List View - example 3

+ new item
✓ Project Name HCTF sample 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**

✓ Project Name	Funding Year
5-Year Peace Region Mountain Goat Population Assessment	<input type="text" value="2016-17"/>

If you submitted a proposal in 2016-17, it will be listed here.

## Copy a 2016-17 submitted application

✎ Edit Item | Cancel | ✕ Delete | Print | Make Copy

Start | Proponent | Project Overview | Progress | Objectives | Communication | Literature Cite

**Funding Year**

2016-17

**Project Name**

5-Year Peace Region Mountain Goat Population Assessment  
Use a name that concisely identifies the project (species/habitat)

**Project Description**

Goat harvest is being managed conservatively in the Peace Region, resulting in minimal harvest opportunities. This 5-year assessment will determine population estimates and define Population Management Units (PMU) for mountain goats, so that a sustainable harvest rate can be applied for each PMU, resulting in increased hunting opportunities in the Peace Region.

Message from webpage

Copy Proposal to New Form?

OK Cancel

## Copy Multi Year Continuing Proposal

**Funding Year:** 2017-18

**Make Copy To:** Continuing - Multi-Year Proposal

- Please only click the Copy button once to copy the proposal form to a new form.
- Copying takes up to 60 seconds to complete and will redirect back to the original form.
- Attachment files cannot be copied to the new form.

Copy Cancel

Please press ONCE ONLY. The form may take up to a minute to load.

In most cases there is only one appropriate choice of form.



# Print proposal

Edit Item | Cancel | Delete | Print | Make Copy

Start | Proponent | Project Overview | Progress | Objectives | Communication | Literature

**Funding Year**  
2017-18

**Project Name**  
HCTF sample proposal  
Use a name that concisely identifies the project (species/habitat/location) with 10 words or less.

**Project Description**

HCTF Enhancement Proposal 2017-18 7  
Multi-Year Continuing Project: HCTF sample proposal

**Proponent Information**

Author of Proposal:  
Project Leader:  
Title:  
Organization:  
Address:  
City: Province: British Columbia Postal Code:  
Phone: Cell: Fax:  
Email Address:  
Additional Proponents:  
Proponent Qualifications:

**Project Overview**  
Project Description:

Print View. Once your project is logged into our database, it will be reformatted for easier viewing.

# Delete proposal

Edit Item | Cancel | Delete | Print | Make Copy

Start | Proponent | Project Overview | Progress | Objectives | Communication | Literature

**Funding Year**  
2017-18

**Project Name**  
HCTF sample proposal  
Use a name that concisely identifies the project (species/habitat/location) with 10 words or less.

**Project Description**  
Describe what your project will accomplish. Maximum 3 lines.

**Author of Proposal**

# Budget

Please complete the HCTF budget spreadsheet for your proposal.

1. Download the Budget spreadsheet.
2. Save the Budget spreadsheet to your computer.
3. Fill in the spreadsheet and save the completed spreadsheet.
4. Go to the Attachments tab and attach the Budget spreadsheet to your online form.

 [HCTF Online Budget.xlsx](#)

Be sure to enable editing.

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

A	B	C	D	E	F	G	H
1	<b>HCTF On-Line: <input type="text" value="2017-18"/> Budget</b>						
2							
3							
4	Proponent Name:						
5	Project Name:						
6	<b>A. Labour Costs</b>						
7	<b>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.</b>						
8	Human Resources: Wages & Salaries						
9	Position		Total Days on Project	HCTF Person Days	Rate/Day		Total HCTF Amount
10							\$0.00
11							\$0.00
12							\$0.00

Overriding our formulas fields will misrepresent your budget request.

# Attachments

Save Close

\* indicates a required field

Start Proponent Project Overview Progress Objectives Communication Literature Cited Budget

### Map Description

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.**

**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

Select Remove

Select Remove

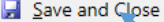

Add Delete

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

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

Click this to specify additional documents to upload.

## Submit tab

 Save and Close |  Cancel

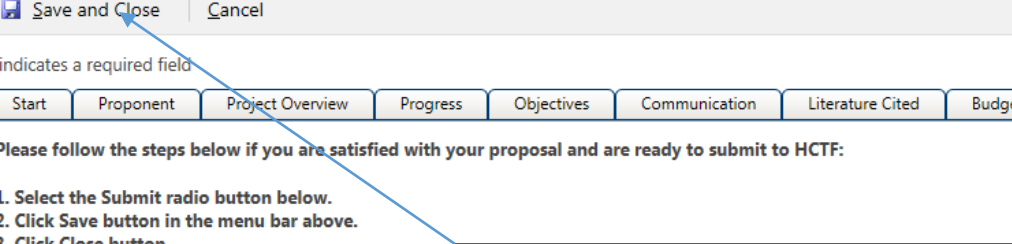
\* indicates a required field

Start | Proponent | Project Overview | Progress | Objectives | Communication | Literature Cited | Budget

**Please follow the steps below if you are satisfied with your proposal and are ready to submit to HCTF:**

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 when you click "Save and Close".

An automatic confirmation will be delivered to the email you used to establish your user id and password. If you do not receive notification within 1 hour, please notify HCTF.

([jane.algard@hctf.ca](mailto:jane.algard@hctf.ca))