INTELLIGRANTS ® IGX

AZ DOT E-Grants Subrecipient Manual

Last Updated 1-6-25

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Introduction

The AZ Department of Transportation E-Grants IGX portal is an encompassing platform specially designed for managing grant opportunities from the inception of the Proposal process through to the closeout. It ensures seamless reporting and efficient management for grants, contracts, and more.

Committed to accessibility for all users, the IGX product adheres to ADA (American Disabilities Act) and WCAG (Web Content Accessibility Guidelines) 2.1 AA standards. To maintain these standards, third-party experts conduct regular web accessibility compliance audits.

With the E-Grants IGX portal, users can apply for grant opportunities, view application history and manage invoicing for awards.

Agate Software Contact Information

Help Desk Availability

Monday through Friday 8 AM to 5 PM MST

helpdesk@agatesoftware.com

1-800-820-1890

Current System Contact Information

Should you have questions regarding submitted user registration, or require additional information about specific grant opportunities, please reach out directly to your assigned ADOT Program Manager for further assistance. See your application Exhibit B for Program Manager assignments. They will be able to provide the specific guidance necessary according to your needs.

Note Regarding User Manual

The E-Grants IGX Subrecipient User Manual is not complete but does cover how to navigate in the new system. Transit will continue to work on converting all procedural process information that is currently included in the legacy user manual. Please refer to the old manual as needed for procedural process steps. Thank you for your patience and understanding as we work on this upgrade project!

Security Roles

Security Roles

This section summarizes the system roles that users may have in this system. Access to various system tools is controlled by what security role that user's account is given.

External User/Grantee Security Roles and Role Descriptions

AGENCY Organization Administrator

- Initiate, Complete, Submit, and Cancel Applications
- Initiate, Complete, Submit, and Cancel Reimbursement Requests
- Manage the Organization profile and permissions.

AGENCY Authorized Official

- Initiate, Complete, Submit, and Cancel Applications
- Initiate, Complete, Submit, and Cancel Reimbursement Requests
- Needs signature authority to submit grants.

AGENCY Financial Officer

- Initiate and Complete Applications
- Invoice Processing

- Initiate, Complete, Submit, and Cancel Reimbursement Requests

AGENCY Grant Writer

- Initiate, Complete, Submit, Cancel, and Review Applications

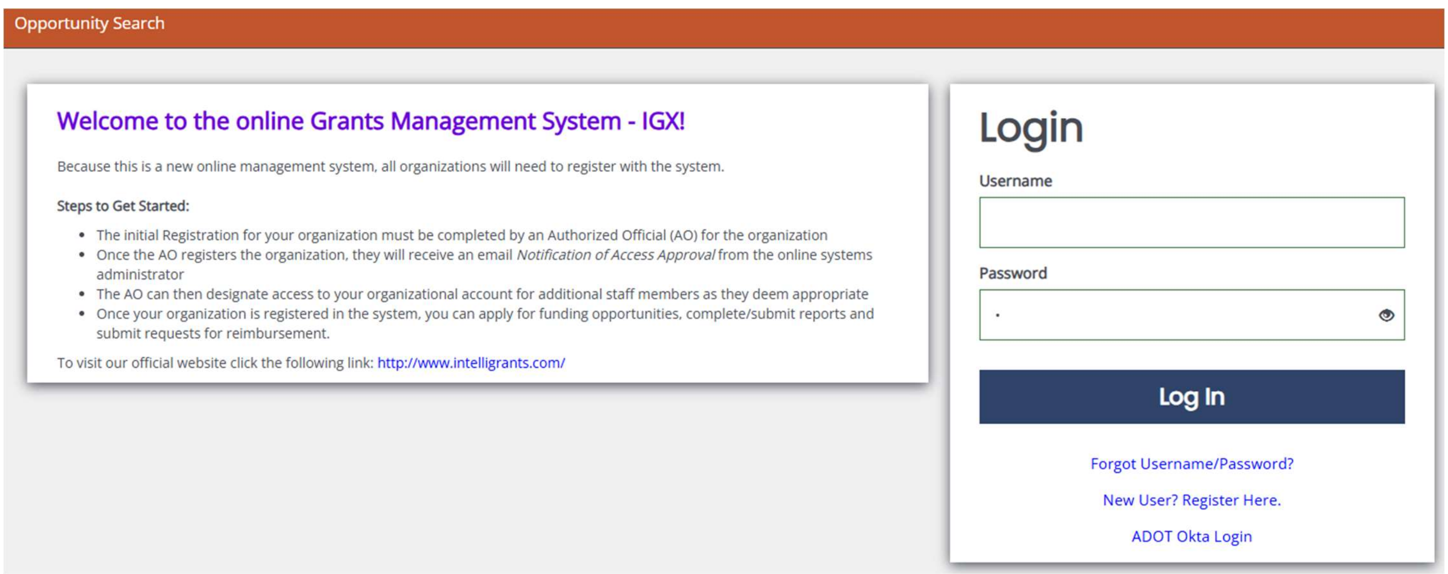
AGENCY Viewer

- View only permissions.

System Login Page

Web URL

https://AZDOT-E-Grants.Intelligrants.com



Welcome Content and Announcements

The **Welcome Content** and **Announcements** sections of the login page will contain instructions and/or announcements for users to access the system.

Welcome to the online Grants Management System - IGX!

Because this is a new online management system, all organizations will need to register with the system.

Steps to Get Started:

- The initial Registration for your organization must be completed by an Authorized Official (AO) for the organization
- Once the AO registers the organization, they will receive an email *Notification of Access Approval* from the online systems administrator
- The AO can then designate access to your organizational account for additional staff members as they deem appropriate
- Once your organization is registered in the system, you can apply for funding opportunities, complete/submit reports and submit requests for reimbursement.

To visit our official website click the following link: http://www.intelligrants.com/

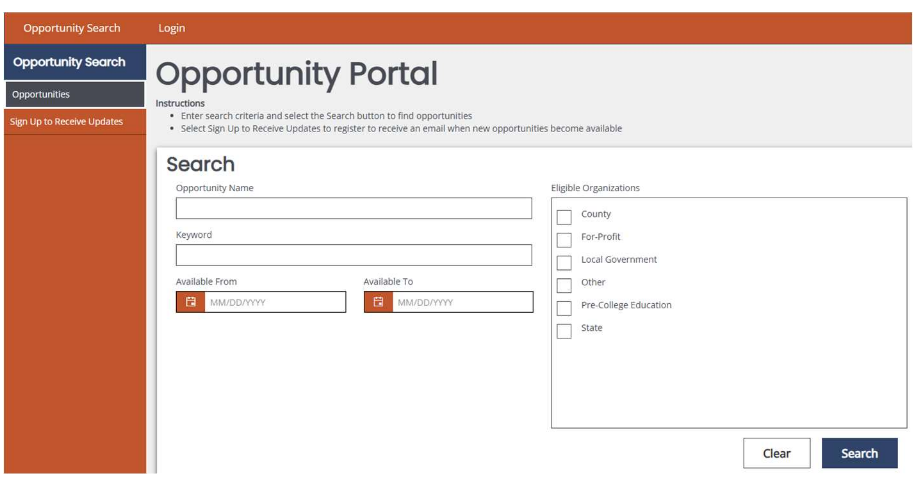
Opportunity Search Section

This is the section where users can review information about funding opportunities without the need to login.

NOTE: Users must log into the portal to start working on a grant opportunity.

The Opportunity Search

Please follow the instructions on the **Opportunity Portal** page to search for grant opportunities. This page is divided into a **Search** section at the top of the page and **Search Results** at the bottom.

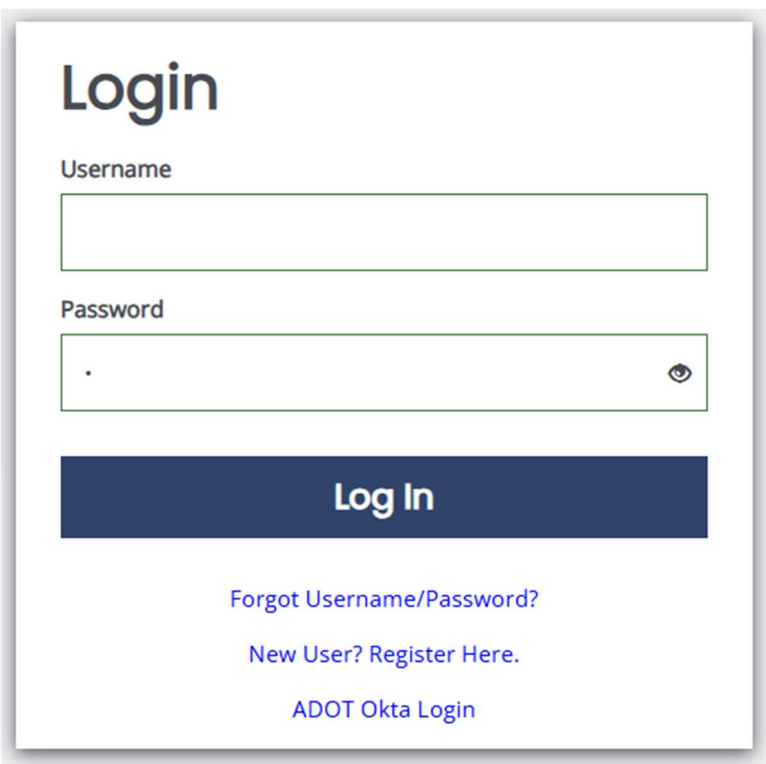


To navigate to a grant opportunity, please follow these instructions:

1. Click on the ***Grant Opportunity*** link.
2. Enter search parameters (**Eligible Organizations** are currently not configured in IGX) and click the SEARCH button. Clicking the CLEAR button will clear out the search parameters.
3. Click the link in the **Name** column for a specific grant opportunity. This brings up the **Opportunity Details** page.
4. Click the LOGIN/REGISTER button to return to login/user registration page.

Login Process – Two Factor Authentication

Logging in to the portal requires Two-Factor Authentication. Users must enter their username and password, then click the LOGIN button.



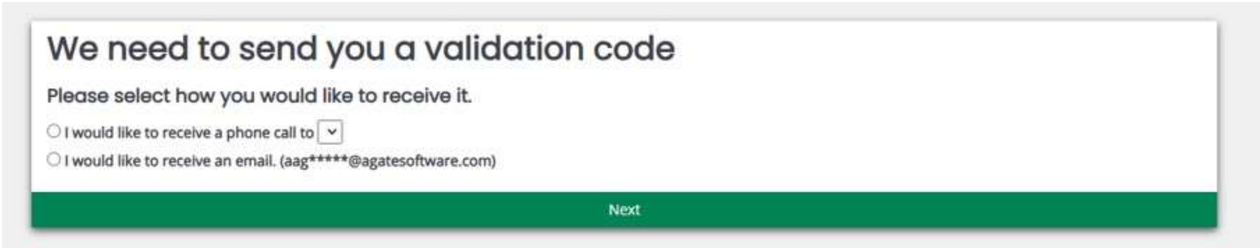
Username – The username textbox to enter a user’s username.

Password – The password textbox to enter a user’s password.

LOG IN Button – Button to press when credentials have been entered.

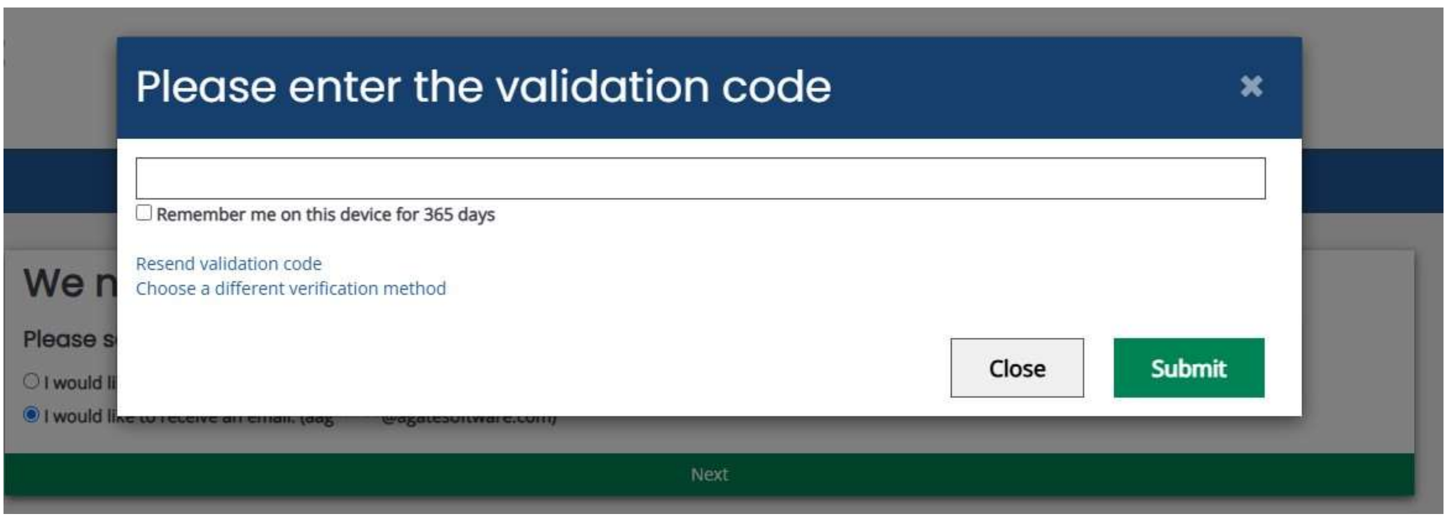
Forgot Username/Password hyperlink – A hyperlink to the “Forgot Password” page.

Another validation pop-up window will appear requesting the user how they would like to receive their code:



The user can select a phone number, or the email linked to their profile account.

They will then be prompted to enter the code that they received via whatever method they selected.



Enter the code and click on Submit.

New User? Register Here hyperlink – A hyperlink to show the registration window for new users to register themselves and the organization with which they are associated.

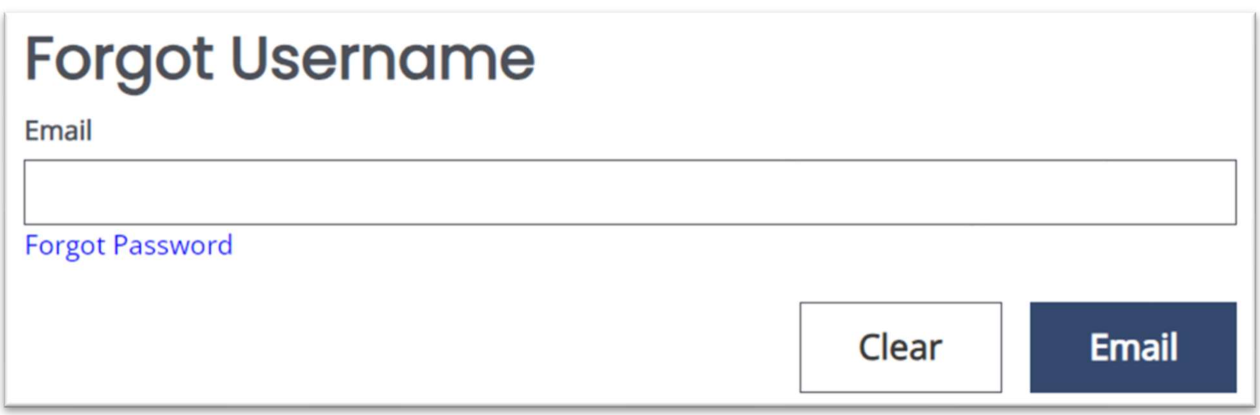
Locked Account(s)

If a user enters incorrect credentials several times, the user's account will be locked for approximately 20 minutes. The user will see an error message letting the user know that they are locked out of the system for that account. At this point, the user can either wait to log in, use the "Forgot Password" page to reset their password to unlock the account, or contact their ADOT Program Manager to get the account unlocked.

The "Forgot Username/Password" Link

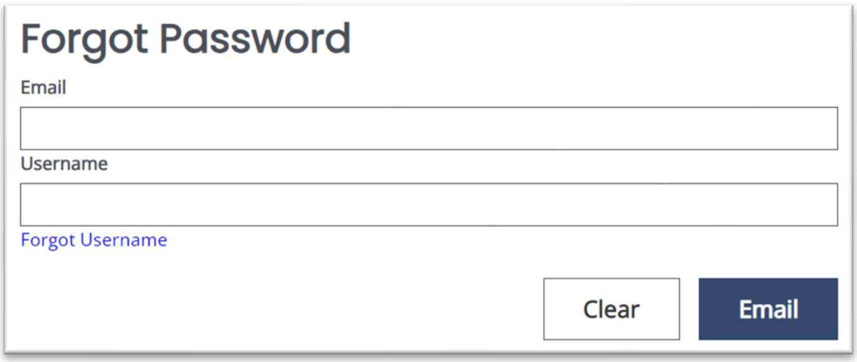
Forgot Username

For users who have forgotten their username, the portal provides a "Forgot Username/Password" link. By clicking this, users will be directed to a "Forgot Username" menu from which they can request an email with their username.



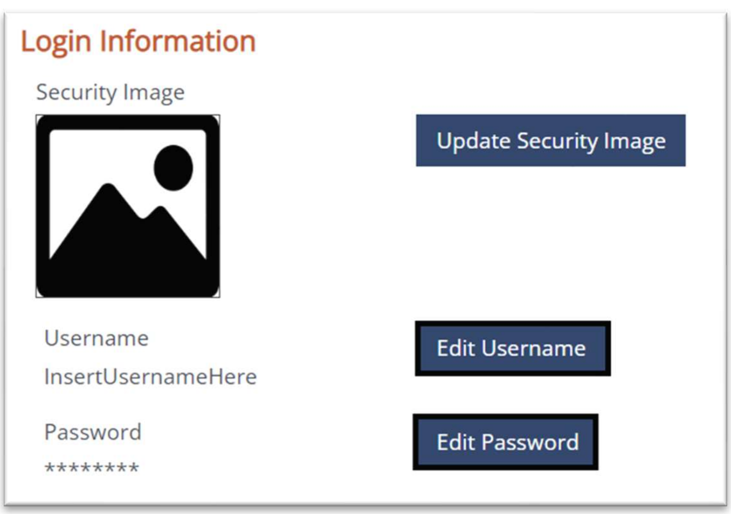
Forgot Password

Users who have forgotten their password can use the "Forgot Username/Password" link to reset the password. Next, the user can enter their email address and username to request a link where the user can design a new password for the system.



Profile Page Password Reset

Once a user requests a temporary password, a link is emailed to the user. When the user clicks on the link, they are automatically redirected to the **Profile** page for that account. To update the username and/or password, click the EDIT button(s).



Additional Considerations

If a user is having problems logging into the system, there may be other factors to consider.

- **Case-Sensitivity**: Usernames and passwords are case-sensitive, meaning 'Password' is different from 'password'.

- **Copy/Paste Errors**: When copying and pasting either the username or password, be careful not to copy over an extra space. The system will register this as an incorrect entry.

- **Browser Storage**: Certain web browsers can store usernames and/or passwords for future login ease. If your browser stores a temporary password, be sure to update it when you change your password in the system.

- **Account Lock**: After a certain number of failed login attempts, a user may be "locked out" of their account as a security measure. In such cases, reaching out to support or an administrator may be required to unlock the account.

First Time User/New User Registration Process

New User Registration Form – External Users Only

The **New User Registration** form provides guidance on necessary information for user and organization registration within the system.

NOTE: The "New User Registration" function can be used to register a new user or register both a new user AND an organization for the system at the same time.

- Character requirements for creating usernames and passwords, ensuring that users set secure login credentials.
- Organizations seeking to apply for grants through the system are typically designated "Agency" roles. A detailed list of roles indicates what each role's permissions entail, which helps in understanding access levels within the system is provided in the appendix.

New User Registration Instructions

For user(s) seeking to register for an account, please follow these step-by-step instructions:

1. Navigate to the **Login** page and click on the link that says, "New User? Register Here."
2. Complete the registration form with all the necessary details and click on the REGISTER button to submit the form.

   NOTE: Please include the preferred role in the "Notes" field at the bottom of the registration page. If no role is included, the default role of "Agency Viewer" is likely to be assigned.

3. Program Managers will then review the registration form. It is a manual process that ensures compliance and accuracy. After the Program Manager has completed the review, the user will receive an email confirmation regarding their registration status.

NOTE: Users should be aware that the review process, is subject to the priorities of the state agency overseeing the process. Generally, the review process usually takes between two to five business days. Please keep in mind that this is an average estimate and that the actual time may vary depending on factors such as the volume of registration submissions and state agency staffing considerations.

User Registration Form

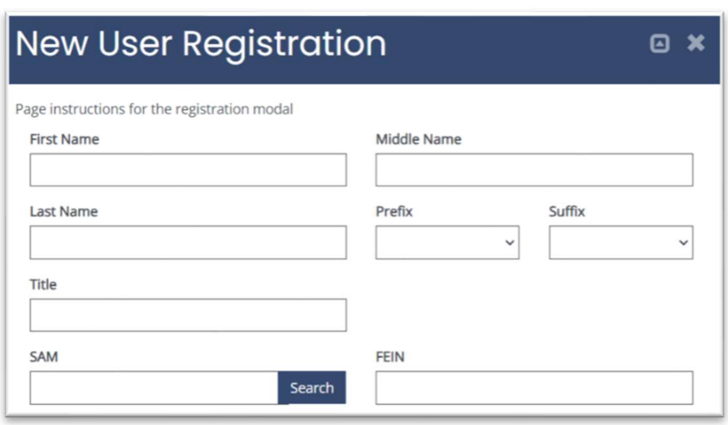
The registration process requires you to set up the user profile. The new user completes all the contact information.

- All fields with an asterisk (*) must be entered.
- Make sure to enter the **Email Address** and create a **Username** and **Password**.

User Information

The **User Information** fields are text fields to enter information about the user who is registering.

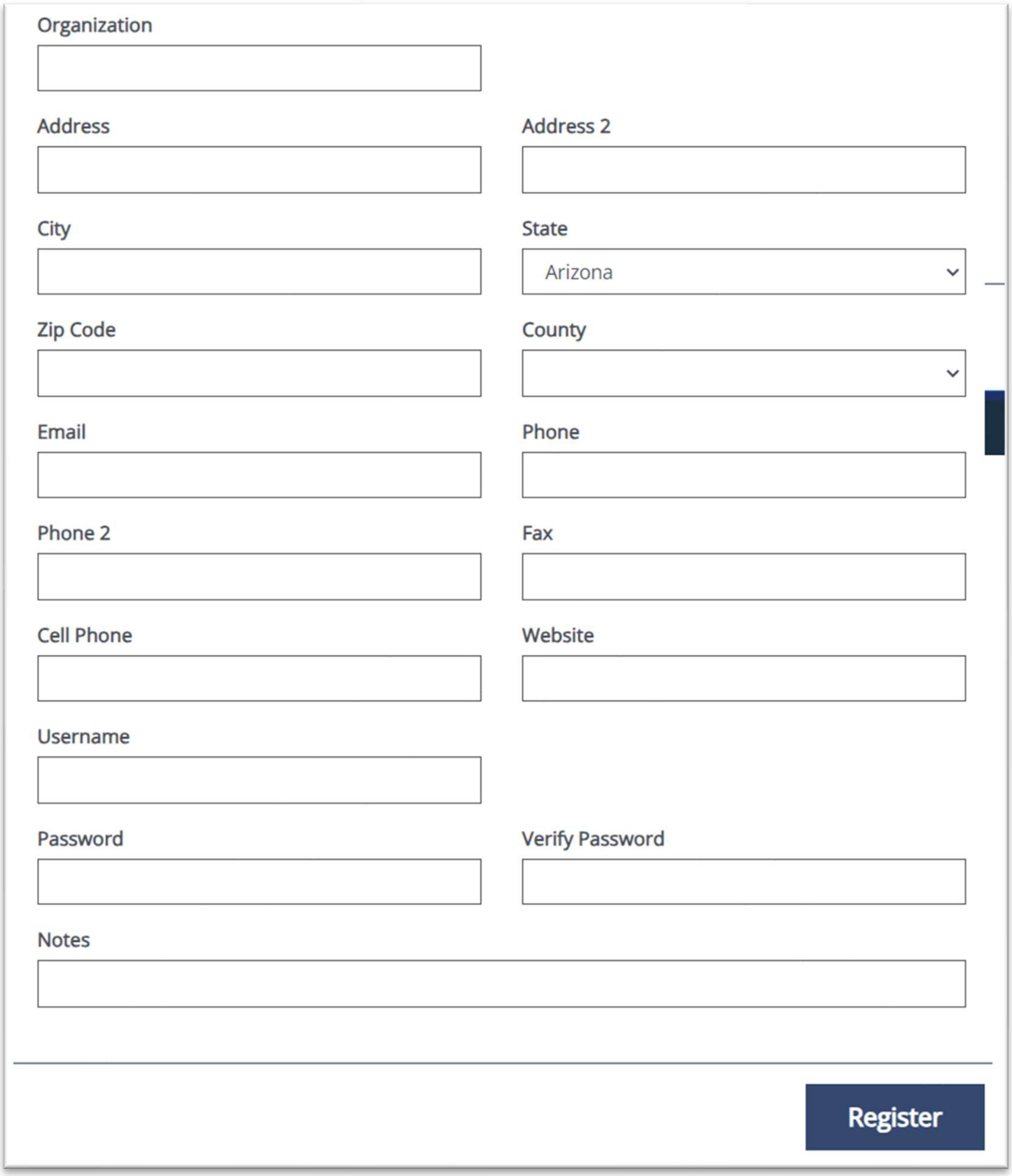
OPTIONAL - Enter a valid SAM number and click SEARCH. The system will automatically populate organization address information from the SAM.GOV web site.



Organization and Security Information

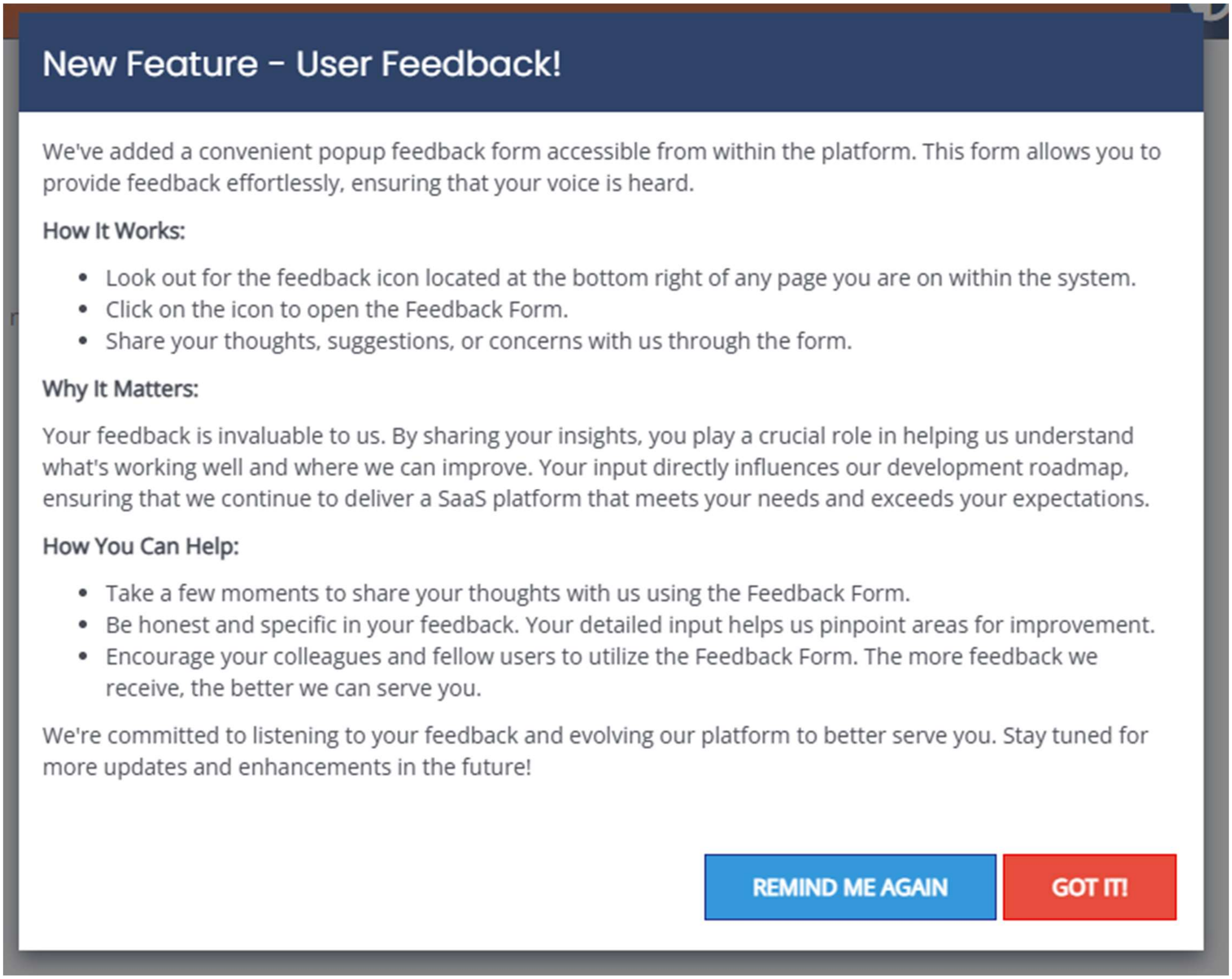
The **Organization Information** section includes the organization's physical address information as well as additional fields. Entering a SAM number above will auto populate some of the information below.

NOTE: Please enter the preferred role in the Notes section.



First Time Login

The system will display the following message:



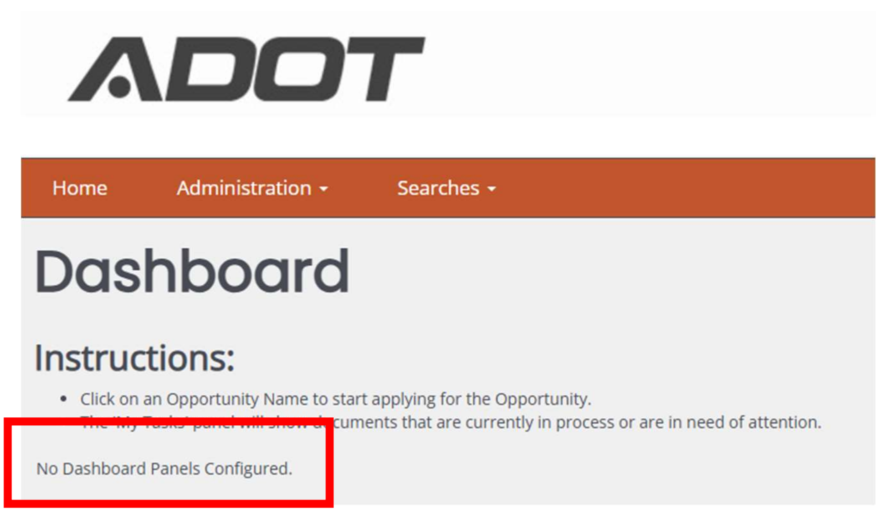
- **REMIND ME AGAIN**: If you want to revisit the message during your next login, click on this option. The system will retain the information and display the same alert for the next login.
- **GOT IT:** Choose this option if you understand the alert and no longer want to be reminded about it. Clicking this will remove the alert from your dashboard.

Home/Dashboard

Once a user has successfully logged into the portal, they will be directed to their Dashboard page. The **Dashboard** page provides a comprehensive overview and easy navigation to various essential elements within the portal. These panels can be listed in any order and in a variety of sizes.

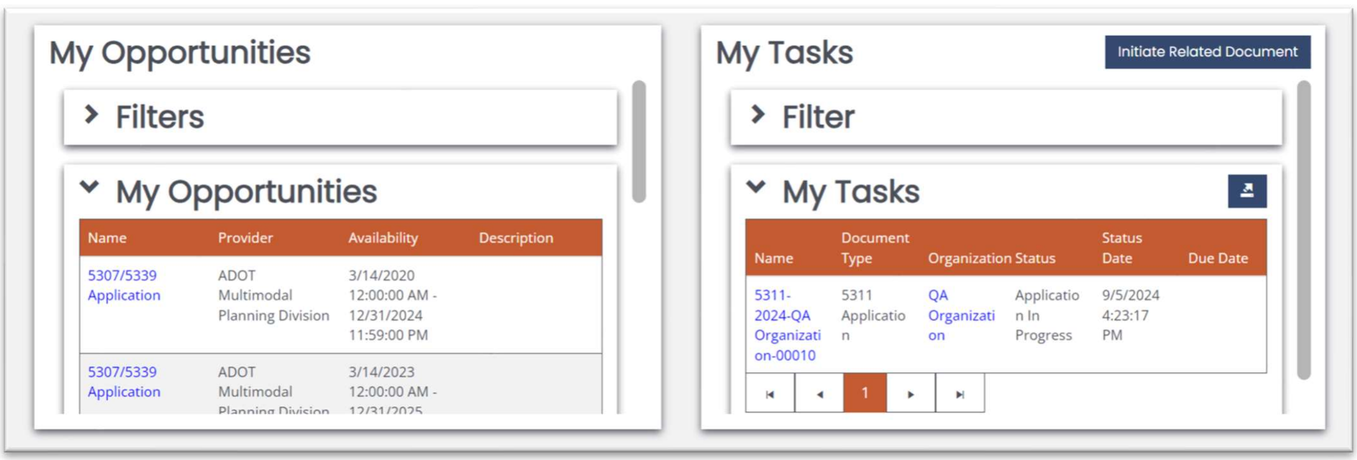
Non-Configured Dashboard Message

The Dashboard may not be set up the first time a user logs in. When that happens, this message is displayed on the Dashboard page, and the user can configure the Dashboard in the **Edit Dashboard** section by clicking on the upside-down triangle next to the user's name on the top right corner of the screen.



Configured Dashboard

This Dashboard is configured to have the largest “My Tasks” panel set up at the top of the page. If a user wants to reconfigure their Dashboard, they will need to use the **Edit Dashboard** by clicking on the upside-down triangle next to the user’s name on the top right corner of the screen. Further guidance is available in the **“**Dashboard Panels” section.

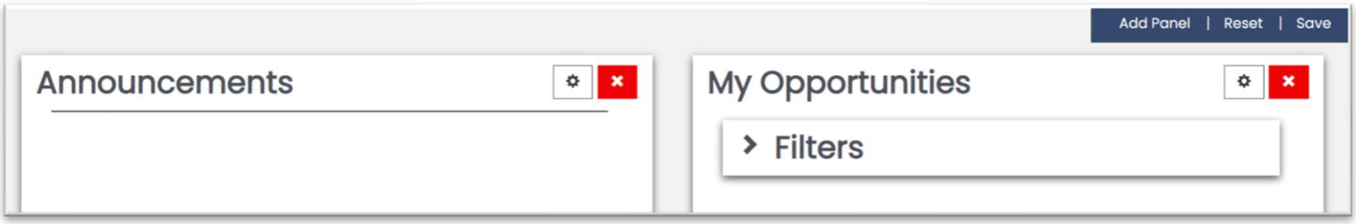


Dashboard Panels

For some users, the state agencies are setting up the **Dashboard** page before a user enters the system through logging in. The **Dashboard** is organized into panels visible upon login will depend on which role the user is assigned. <u>If the user needs more panels, or has one that isn’t necessary, the user can edit the dashboard to change these panels.</u>

Common dashboard panel types include:

- Announcements
- My Opportunities
- My Tasks



Editing Dashboard(s)

The **Edit Dashboard** link contains settings to allow the user to customize their dashboard to display specific data such as active documents (applications/reports), available grant opportunities, and visual tasks organized into panels.

Adding a Panel

To add a panel to the Dashboard, please follow these instructions:

1. Click on the upside-down triangle next to the user’s name on the top right corner of the screen. Click on the **Add Panel** link.
2. Select the panel from the dropdown and click the SAVE button.

Editing a Panel

To edit a panel in the dashboard, please follow these instructions:

1. Click on the upside-down triangle next to the user’s name on the top right corner of the screen and click the **Edit Dashboard** link.
2. Click on the dropdown field below ‘**Select the type of information that you would like to see in this panel.**’ You will see options for Standard, Jumbo, Tall, or Wide formats.
3. Select the panel from the dropdown and click the SAVE button.

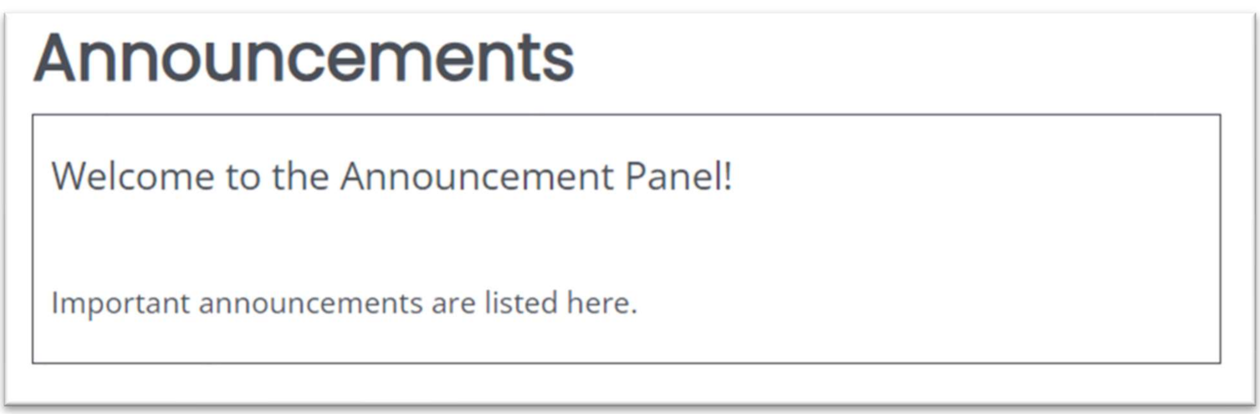
Deleting a Panel

To delete a panel from the Dashboard, please follow these instructions:

1. Click on the upside-down triangle next to the user's name on the top right corner of the screen and and click the **Edit Dashboard** link.
2. Click on the X button for the specific panel you would like to delete. The dashboard does not automatically save or remember these changes unless the user clicks the SAVE button, so remember to click that before navigating to a new page or refreshing so that these changes are committed.

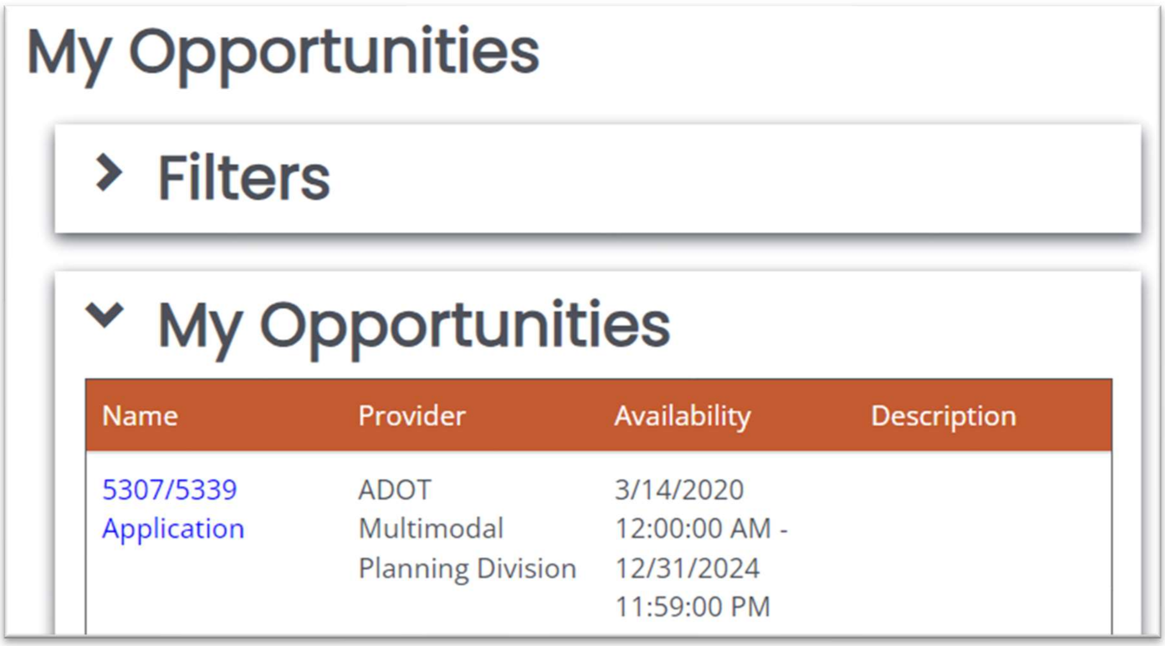
Announcements

This panel provides timely announcements, including information about upcoming system maintenance, changes in policies, new features, or any other relevant information.



“My Opportunities” (Accessible for Specific Accounts)

The "My Opportunities" panel lists grant opportunities that your user profile has permissions to apply for. Start the process by browsing opportunities.



“My Opportunities Filter” Section

The “My Opportunities Filter” section helps search for grant opportunities.

It includes the following fields:

- **Provider**: A dropdown list of providers(s) providing grant opportunities the organization is available for. If an opportunity is not listed, it likely means that the organization has not been set up as “eligible” for that grant opportunity, or that the opportunity is not “active.”

- **Name**: Text box where you can enter keywords related to task names.

“My Opportunities” Section

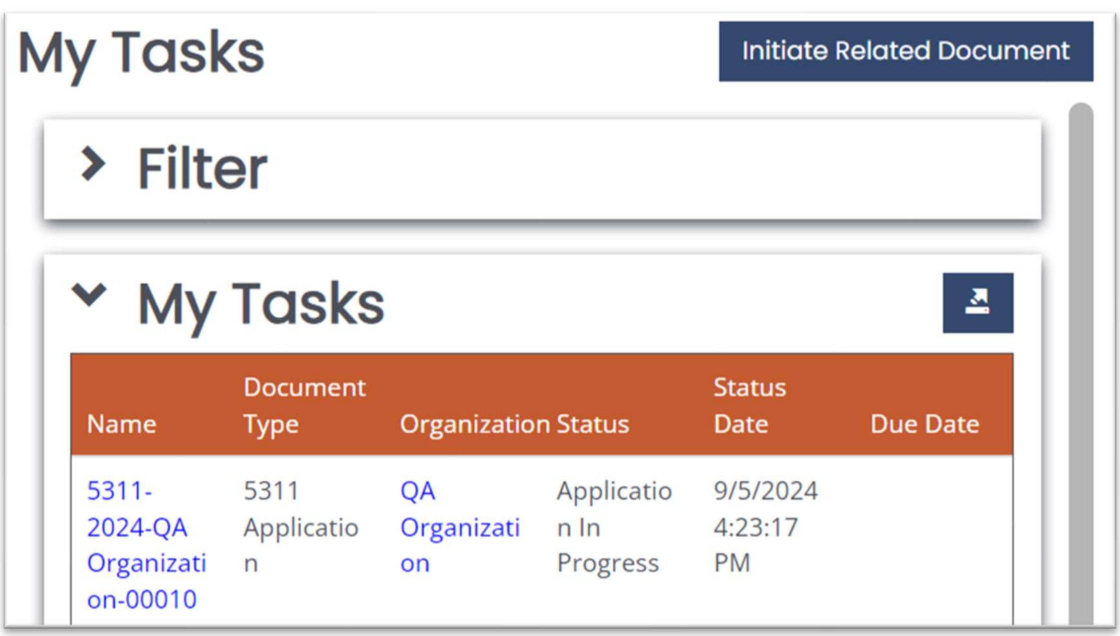
The “My Opportunities” section includes:

- **Name** – A hyperlink to the specific grant.
- **Provider** – the name of the provider providing the grant opportunity.
- **Availability** – Start & End Date/Times for the period that opportunity.
- **Description** – Grant opportunity information provided by the provider.

“My Tasks”

The "My Tasks" section is dedicated to the documents that require your immediate attention. Documents may include incomplete or pending requests that need revisions, or any other task-relevant documents. To open a document, simply click on the link provided in the "Name" column.

NOTE: If the due date for a document has passed and you cannot change the document's status, it is recommended that you reach out to your assigned Program Manager to confirm the due date.



“My Tasks Filter” Section

The "My Tasks Filter" section helps refine the tasks displayed in the My Tasks area. It includes the following fields:

- **Name**: Text box where you can enter keywords related to task names.
- **Organization**: Text box for inputting organization names.
- **Type**: Drop-down field for selecting the document type.
- **Status**: Drop-down field for specifying the status of a document.
- **Active Documents**: Drop-down field for specifying the type of included documents.

After filling these fields as necessary:

- Click the CLEAR button to remove all search parameters.
- Click the SEARCH button to generate search results based on the provided criteria.

“My Tasks” Section

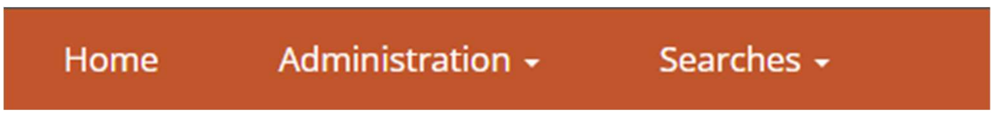
The “My Tasks” section includes:

- **Name**: A column providing the hyperlinked document name(s).
- **Document Type**: A column indicating the type of each document.
- **Organization**: A column providing the hyperlinked organization name.
- **Status:** A column showing the current status of each document.
- **Status Date**: A column indicating when the last status update was applied to a document.
- **Due Date**: A column providing the due date for each document.

Navigation – Universal Buttons

Ribbon Links

The navigation ribbon contains a collection of links that allows quick access to different sections of the portal. The content of this ribbon changes according to your user's organization role within the portal, ensuring only relevant links are displayed for your specific job functions and access rights.



Home (All Roles)	Users are redirected to the **Dashboard** page from any point in the system.
Administration (Some Roles)	Users with access to multiple organizations can search and view organization information here.
Searches (All Roles)	This link opens a dropdown menu providing various search options organized by document type.

Button Links

NOTE: The button colors visible to the user may be different than what is shown in the screenshot below.

	All Roles	**High Contrast Mode** is an additional handy feature that allows you to switch the portal's theme to grayscale.

	Specific Roles	The **Contact Info** button facilitates easy access to important contact information for state agencies and support staff.
	Specific Roles	The **Training Materials** button provides users easy access to a list of user resources supplied by the state agency.
	All Roles	The **Show Help** button allows access to form-specific guidance provided to the user.

Systemwide Navigation Buttons

NOTE: The button colors visible to the user may be different than what is shown in the screenshot below.

	Add (PLUS SIGN):	Used to ADD an item.
	Edit (PENCIL):	Used to EDIT an item.
	Delete (TRASH CAN):	Used to DELETE an item.

Export (SIDE ARROW): Used to EXPORT/download a specific file.

Reset (2 CIRCLING ARROWS): Used to RESET a setting.

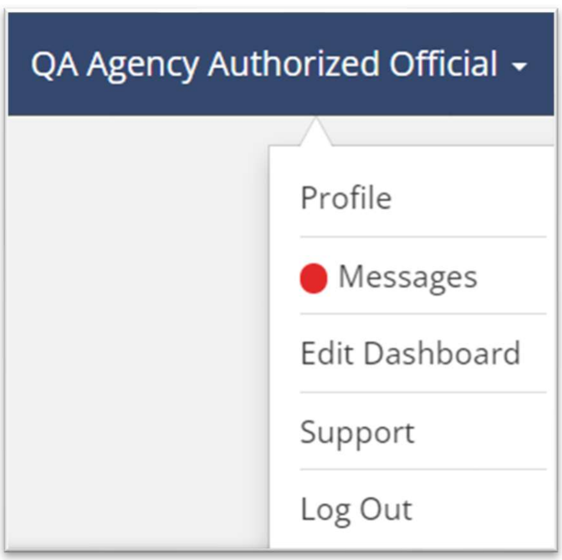
History (A CLOCK SHAPE): Used to provide the history of an item.

User Feedback Button

By clicking on the notification or the available button within the alert, a feedback form appears. Here, users can input their comments, suggestions, or any concerns regarding the specific form. It's through features like these that the system ensures users are kept aware of any updates or new features, and that their user experience is consistently improved.

User Information (Name Link)

The **Name Link** (the user's first and last name located on the top right side of the page) is a personalized feature designed to provide a convenient, centralized hub for all user-specific information.



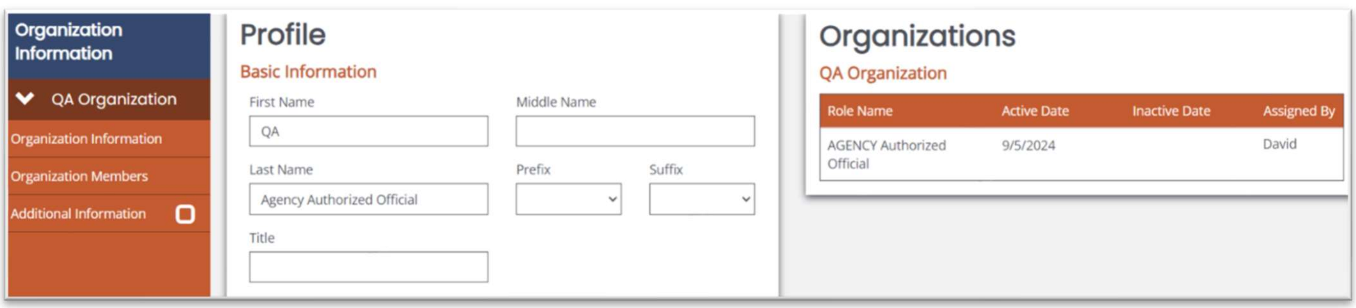
- **Profile**: This section houses all of the user's personal and organization-related details, including contact information and login credentials. This section allows users to update their individual details when necessary. The user may also be able to update the organization's details when necessary, depending on their organization role.

- **Messages**: All system-generated emails dispatched to the user are stored here. This is an in-system messaging tool used for correspondence between users that have access to the portal. It is possible to send messages as a system message from one person to another, or a document message where a specific document is being referenced within the message. Instructions on how to use this tool are listed below (See Messages Section).

- **Edit Dashboard**: This element allows users to customize their Dashboard Panels.
- **Logout Link**: This handy feature provides a way for users to log out.

Profile Overview

Clicking on the **Profile** link allows the user to see the information about the user known as the **Person Information** page.



This page is divided into 3 sections:

- **Organization Information Column (Left Side)** – Clicking on links in this column allows the user to see more information about the organization and the organization's member(s).
- **Organization Members Page (Left Side)** – There is a list of organization members along with their role and active/inactive dates. Click on their name to access their profile page. At the bottom of the member profile page, there is a section available only to the user when they are logged in with more security features.
- **Additional Information (Left Side**) – This section has information on additional addresses and Certs & Assurances.
- **Person Information Page (Center)** – There is general information about the user and how to contact them. At the bottom of the page, there is a section available only to the user when they are logged in with more security features.

- **Organizations Section (Right Side)** – This section has information on how the user is related to organization(s).

Profile/Person Information (Center)

Information about the individual is organized into the following sections:

- **Basic Information** – This section has user-specific information, such as a name and title.
- **Contact Information** – This section has user-specific contact and specific preferences.
- **Address Information** – This section has information about the user's address.
- **Login Information** – This section has the user's login credentials and security features.

Editing the Profile Page

The user can update any text fields, as necessary. However, if the user tries to save the page with any blank required (*) fields, those fields are highlighted by a red border along with any required message below the field. The user will not be able to save the page until those fields are filled in.

Profile Page Organization Information

On the right-hand side of this page, it displays a list of the user's organization(s) and role(s) within those organization(s).

NOTE: If the user has a role that allows them to add other users to the organization, there will be a PLUS SIGN button in the corner. This functionality is based on permissions and what you have been set up to have access to.

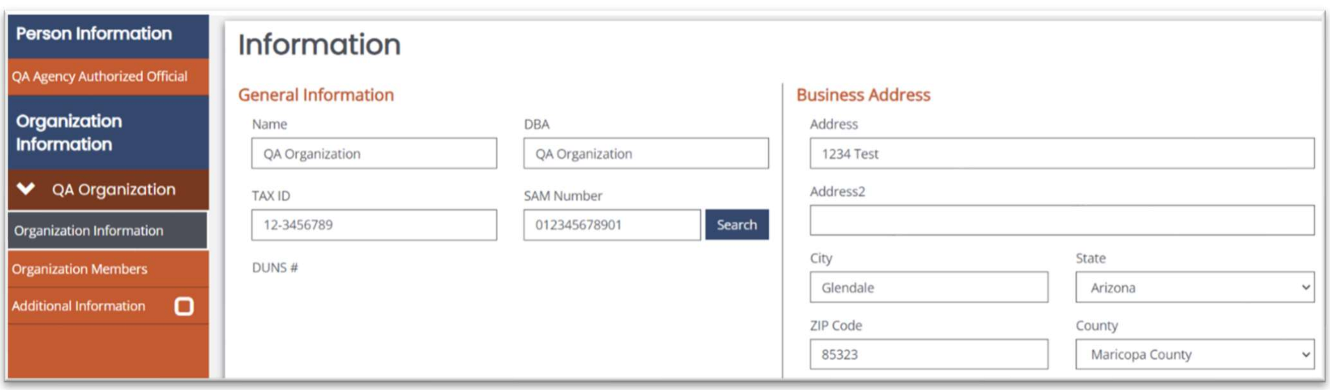
- Clicking this button brings up a page where the user can select a new role(s) for a new organization, as well as "Active" and "Inactive" dates for that user for the organization(s).

- An “Assign to Existing Documents” Y/N dropdown may also be visible so that this user in this new role can be added to existing document(s).

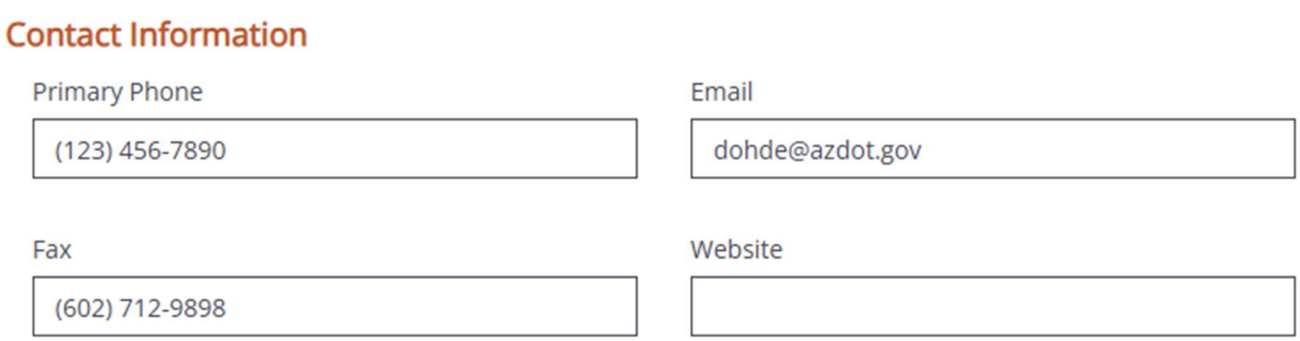
Organization Information Page

This tab has information specifically about the organization. This page has these sections:

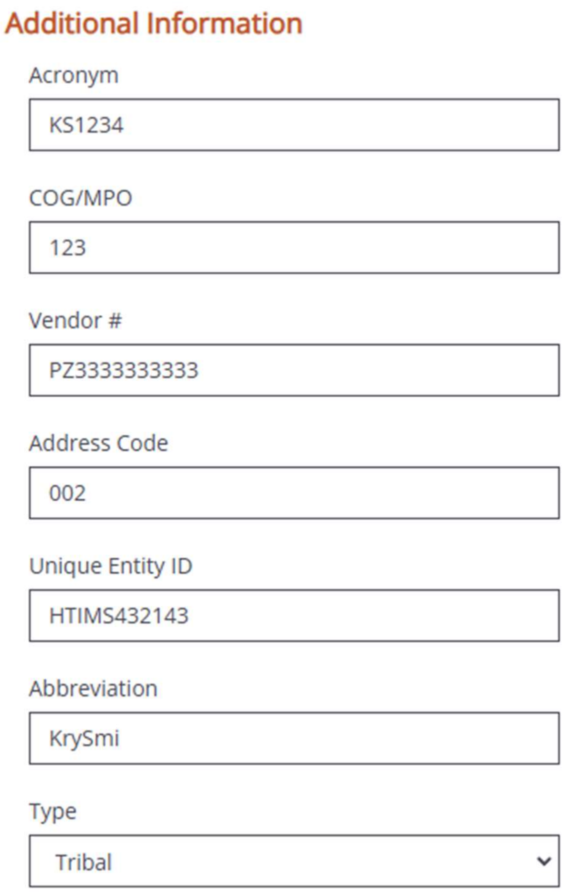
- **General Information** – A section having general information about the organization. It may include numbers assigned by other agencies including the Tax ID and Sam.gov Unique Entity ID (UEI) numbers. The Search button will auto-populate address data found on Sam.gov.
- **Business Address Information** – This section has physical address organizational info.



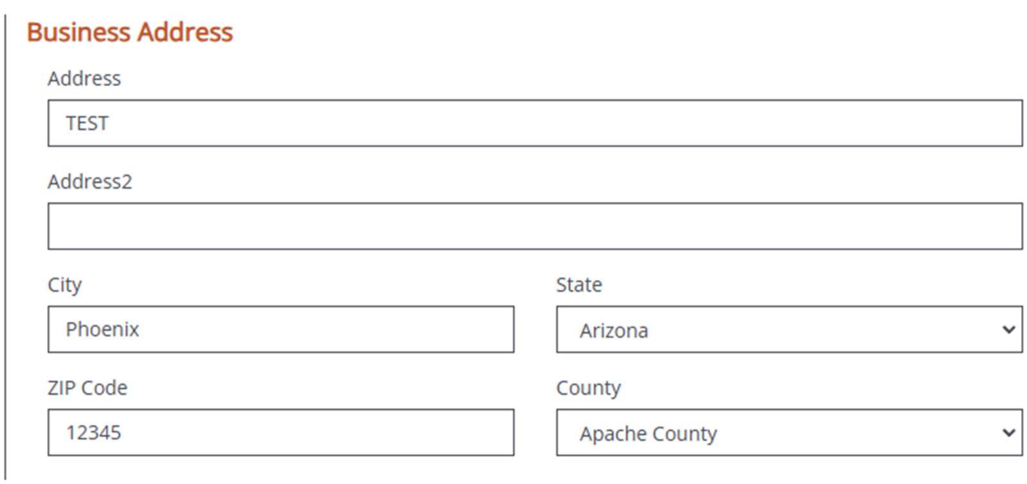
- **Contact Information** – This section supplies organizational contact info.



- **Additional Information** – This section includes more organizational info.



- **Business Address Information** – This section has physical address organizational info.



Organization Members

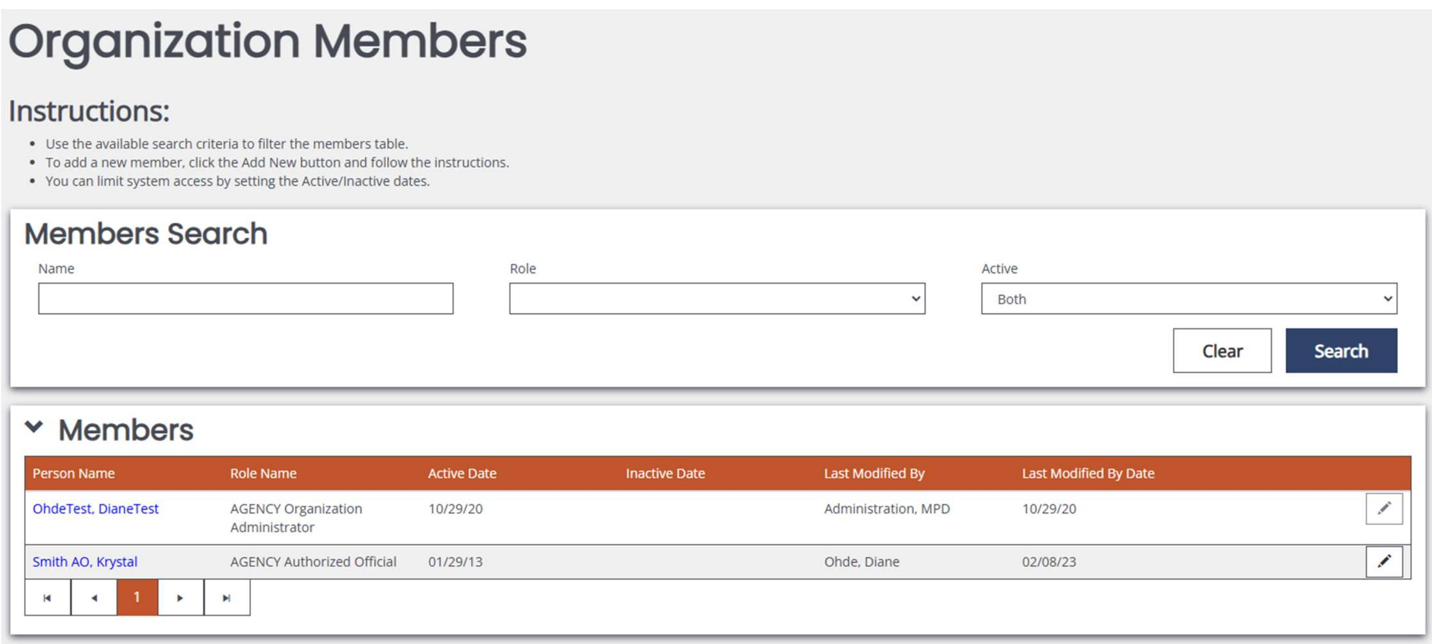
This area has a list of members in the organization. The user should be able to view all current members of the organization (using search options to filter results).

Searching for a Member of the Organization

To search for a member of the organization, please follow these instructions:

1. Login and click on the **Name** link.
2. Click on the **Organization Members** link in the navigation column on the left-hand side.
3. Enter any information in the **Members Search** section and click the SEARCH button. This will bring up a list of members filtered by those selections.

Organization Administrators roles can edit the user profiles by clicking on the Edit Pencil icon on the far right of member row.



Removing / Setting as “Inactive” Members

Organization members are “removed” from the organization by setting an inactive date.

To edit an existing member’s active and/or inactive dates, please follow these instructions:

1. Click on the EDIT button at the end of the row for a specific user.
2. Update the dates (especially the **Inactive Date** field) and click SAVE.

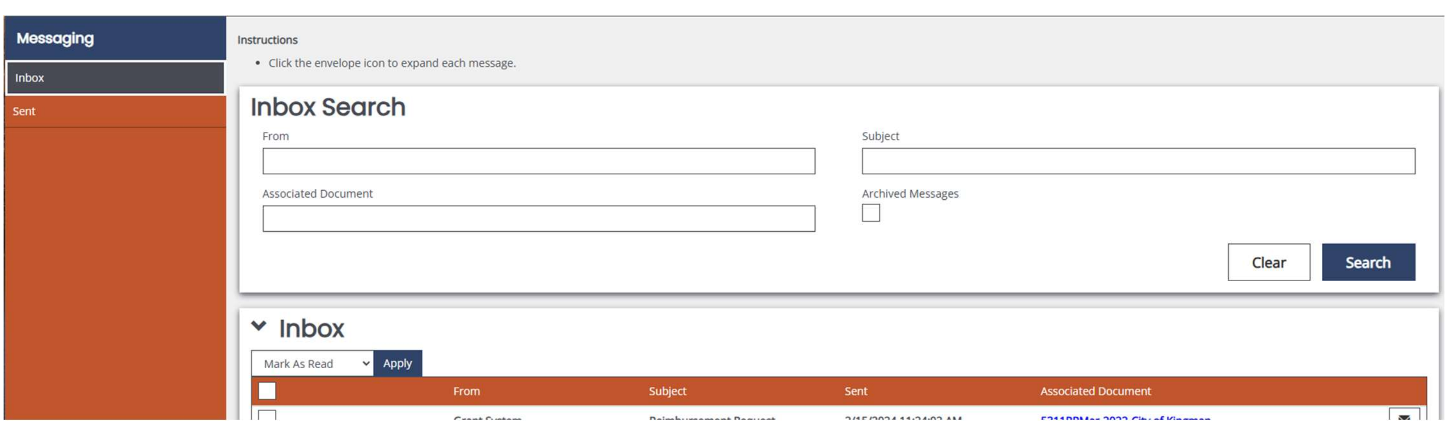
Additional Information Form

This form contains specific sections asking questions about the organization. Different sections include the **Additional Addresses**, and **Certs & Assurances** sections. Questions include radio button selections, text fields, and file uploads.

Please contact your assigned Program Manager directly with questions on what information is required for this form or with any other questions.

User Messages (Name Link)

Under the **Profile** section, there is a messaging section where the user can create messages. To get to messages in the inbox click on the ***Name*** link at the top of the page on the right side. Then click on the ***Messages*** link in the right-hand column.



- **To** – The destination user of your system message.
- **From** – The sender of your system message.
- **Subject** – The subject of the system message.
- **Sent** – the date and time the system message was sent.
- **Associated Document** – A hyperlink to the document the message is associated with.
- **PAPERCLIP (not shown)** – Indicates there is an attachment in the system message.
- **ENVELOPE button** – A button to open the message.

Inbox

This brings up the **Inbox**. Click on the row of a specific email to access it. Use the **Inbox Search** section to complete email searches. To access the inbox, please follow these instructions:

1. Click on the ***Name*** link at the top of the page on the right side.
2. Click on the ***Messages*** link in the right-hand column.
3. This brings up the **Inbox**. Email searches are completed in the **Inbox Search** section. Emails can be marked as read by checking one plus+ of the checkboxes(es), selecting the "Mark as Read" setting from the drop-down list, and clicking the APPLY button.

   NOTE: The user can click on the Inbox link on the left-hand side to access this page.
4. Click on the row of a specific email to access it.

Sent

A user can access previously sent emails by following these instructions:

1. Click on the ***Name*** link at the top of the page on the right side.
2. Click on the ***Messages*** link in the right-hand column.
3. Click on the ***Sent*** link in the left-hand column.

This brings up past emails.

- A user can search for a specific message using the "**To"** and "**Subject"** fields.
- To access a specific email, click on the ENVELOPE button on the right side of the screen for a specific email.

Starting Grant Opportunities: Applications

The **My Opportunities** panel on the dashboard displays current grant opportunities provided by AZ Dept of Transportation.

The panel updates according to the availability dates set by ADOT Transit offering a grant, empowering users to track and apply for relevant opportunities at any given time.

Starting Planning WP Application(s)

Planning WP applications will be started by ADOT.

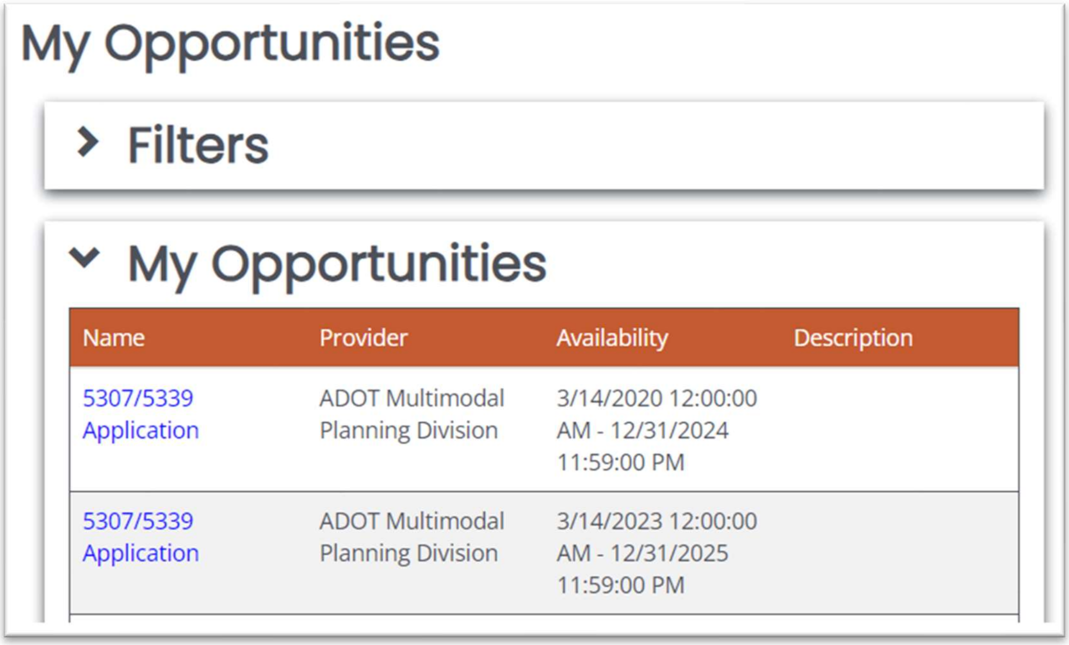
Starting Application

Users with the **Agency Authorized Official**, **Agency Organization Administrator**, **Agency Financial Officer**, or **Agency Grant Writer** roles can start, update, and submit an application.

NOTE: The organization needs to contact their assigned Program Manager if the organization wants to apply for a grant opportunity and it is not listed on their Dashboard for any of their users.

To start an application, please follow these instructions:

1. Log in with a role that has the permissions to start the grant.
2. Navigate to the **My Opportunities** dashboard panel where current grant opportunities are displayed.



3. The user will click on the name of the grant opportunity that they want to start. This will generally open the grant opportunity starting process.

   NOTE: The user may have an option in the "Agreement" section to "Copy Forward" data provided previously for this specific grant application type. The user will need to make selection from the dropdown prior to clicking the I AGREE button.

Upon starting the document, the system will navigate the user to the document's **Landing Page**. This is usually the main page for the ongoing document where user(s) can view the status, fill in required information, upload necessary files, and manage the document.

Navigating Back to an Initiated Funding Opportunity/Application/Reimbursement

Using the Searches Tab

Finding a specific document, such as an application, is a straightforward process. Here are the steps you can follow:

1. Click on the **Searches** link located in the main navigation menu.
2. A dropdown menu or list will appear, displaying diverse types of documents. Click on the link that corresponds to the type of document you are working on.
3. Next, go ahead and input search details. This could be partial or full information related to the document you're looking for. The details could go into one of the search fields or be selected from a dropdown item.

   NOTE: The more specific the information you enter, the more likely you are to filter out unrelated search results.
4. With your details entered, click on the SEARCH button.
5. The **Search Results** section will be generated at the bottom of the page, displaying documents that match your search criteria.
   - Browse through the results and click on the specific document.
   - Clicking on a result will take you to the document's **Landing Page** where you can view or continue working on it.

Using the My Tasks Dashboard Panel

Note: ADOT has not fully configured this functionality.

The **My Tasks** dashboard panel lists all the tasks or documents assigned to you or that require your attention.

To access this panel, please follow these steps:

1. Navigate to the **My Tasks** dashboard panel on the **Home/Dashboard** page.
2. Locate your document in the task list. If you've recently started a grant opportunity, it will most likely appear here.
3. Click on the link in the **Name** column to open the document again.

Remember to save your progress frequently to avoid loss of any information when navigating away from a document.

Working on a Document

Navigating the Document Landing Page

The **Document Landing Page** serves as a centralized area for information and actions related to your document. Here is what you'll find on the **Document Landing Page**:

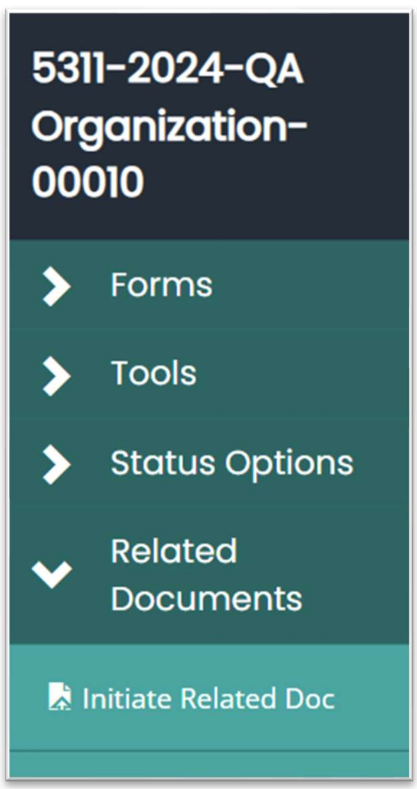
- **Left-hand Side Navigation Column** – A menu with links to other parts of the document, including forms, document tools, links to submit documents, and related documents connected to this document.
- **Document Details Section** – The main section of the document landing page is where all document-specific information is displayed, such as the document's name, status, what organization the document belongs to, your user's role on the document, specific dates related to the document such as due date, and summary information gathered from various forms that have been completed.
- **Upper Right Action Buttons** – The NEW NOTE button will be visible here. Notes will be discussed in the **Notes** section of this manual.

Left-Hand Side Navigation Column

By default, in the system interface, all sections are expanded or "open." When a section is open, any included access links are visible and available for user interaction.

To view the hidden access links in a closed section, simply click on the half-arrow button to "open" or "expand" the section. This action will reveal the concealed content, making any access links readily interactable for the user.

Please note that in the screenshot below, each of the sections is illustrated in a "closed" state and the access links within each section are **not** visible.



Document Number Link

The number listed above the **Forms** header is the document number.

- Hovering over the document number supplies more information.
- Clicking on it brings the user back to the **Document Landing Page**.
- There are dropdown arrows next to the header to hide sections.

Forms

This section functions like a table of contents for document form links.

Tools

This section offers various tools available to assist user(s). Tools such as the **Status History** tool display the dates/times for different document statuses. Other tools, such as the **Add/Edit People** tool, allow a user to add other user(s) to that specific document.

Status Change

Allows a user to “submit” or “push” the document to the next user or group.

Related Documents

This section offers access links for documents that are "related to" or connected with this one. For example, a contract may have related documents such as reimbursement requests or progress reports.

Document Navigation Overview

Form Options (Header)

Buttons are located in the upper right of a form that allow the user to complete specific functions. These buttons will display based on permissions and document status. Common buttons include:

- **New Note**: Enables the user to generate a new note for other users.
- **Save**: Lets the user preserve changes to the form.
- **Add**: Permits the user to create an additional instance of the form, like stapling an extra piece of a specific form to an existing paper form packet.
- **Delete**: Allows the user to eliminate the currently visible instance of the form, like tearing off a page from a packet of stapled forms.
- **Print**: Clicking the PRINT button allows the user to download a .pdf version of the form.

Form Options (Footer)

Navigation buttons for proceeding to the "Next Form" or returning to the "Previous Form" are furnished at the bottom of the page.

Form Buttons in the Left Side Navigation Column

This sidebar encompasses all forms connected to the current document that require completion before submission for review.

- Form names serve as links to their respective forms.
- To get more information about a button, users can hover over it.

NOTE: The button colors visible to the user may be different than what is shown in the screenshot below.

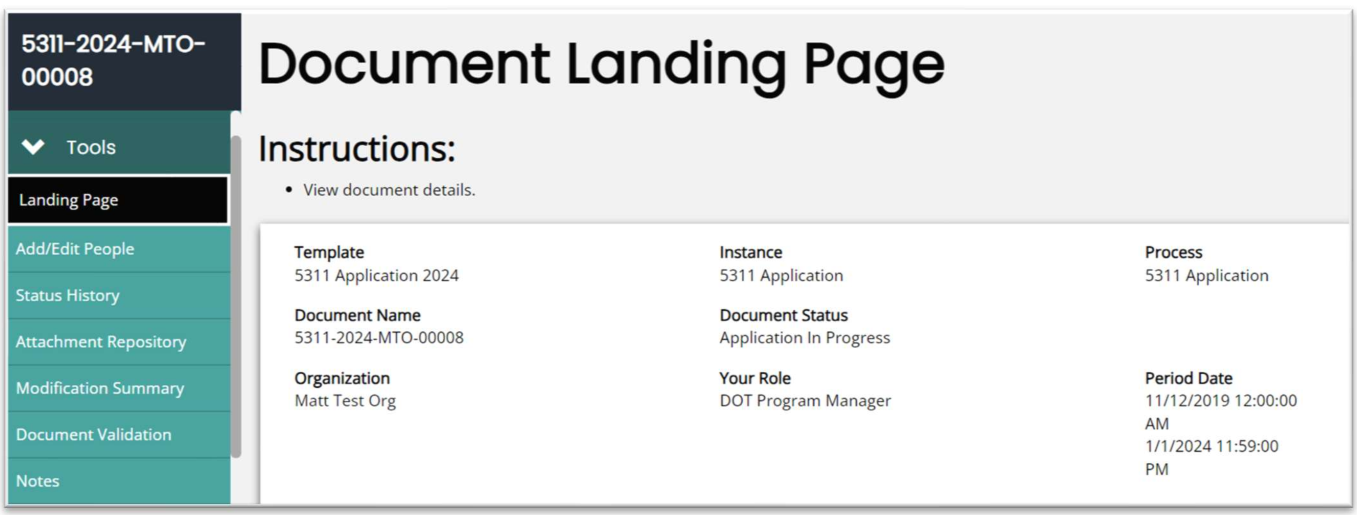
Here's an overview of these buttons:

	Blank Square	A blank square indicates that the form is empty, and no data has been entered.
	Checkbox Square	This button indicates that the form contains saved data.
	Exclamation Point Circle	This indicates that the form has errors that need to be addressed.
	Arrow Circle	Clicking on the button brings up a list of different instances of the form.
	Folder	An open folder indicates that there are multiple forms of this type grouped together. Clicking on the folder will bring up a list of the forms to the right of the button.

The Tools Section

The **Tools** section includes a list of personalized tools available to users based on their designated role. The available tools are designed to assist users as they complete the document. Note that the links in the **Tools section** are set up by administrators of the organization or agency providing the funding. **Thus, the user's role determines the available tools.**

NOTE: The colors visible to the user may be different than what is shown in the screenshot below.



Landing Page

The LANDING PAGE LINK redirects the user to the **Document Landing Page**.

Add/Edit People

The ADD/EDIT PEOPLE LINK directs the user to the Add/Edit People page. Here, users can add, update, or view user profiles, and/or if their roles permit it.

Status History

The STATUS HISTORY LINK provides a table displaying the various document statuses, the date/time when the document received its status, the user who performed the status change, and any notes entered during the status change.

Attachment Repository

The ATTACHMENT REPOSITORY LINK directs the user to a page listing all currently uploaded document files. Users can open uploads by clicking the hyperlinked name under the Attachment link column. For multiple file access, users can tick the “Zip” checkbox then click the “Zip” button to download them as a zip file.

Modification Summary

The MODIFICATION SUMMARY LINK shows all changes made during version steps, comparing earlier versions of information entered on a form to later or current versions. **It only displays changes between versioned steps**, not all value changes.

Document Validation

The DOCUMENT VALIDATION LINK enables users to check for errors in the document forms before submission.

Notes

The NOTES LINK displays all document notes. Users can add notes from any document page or other tool pages by clicking the “New Note” button in the Page's top right corner. This opens a page where users can enter and format their notes.

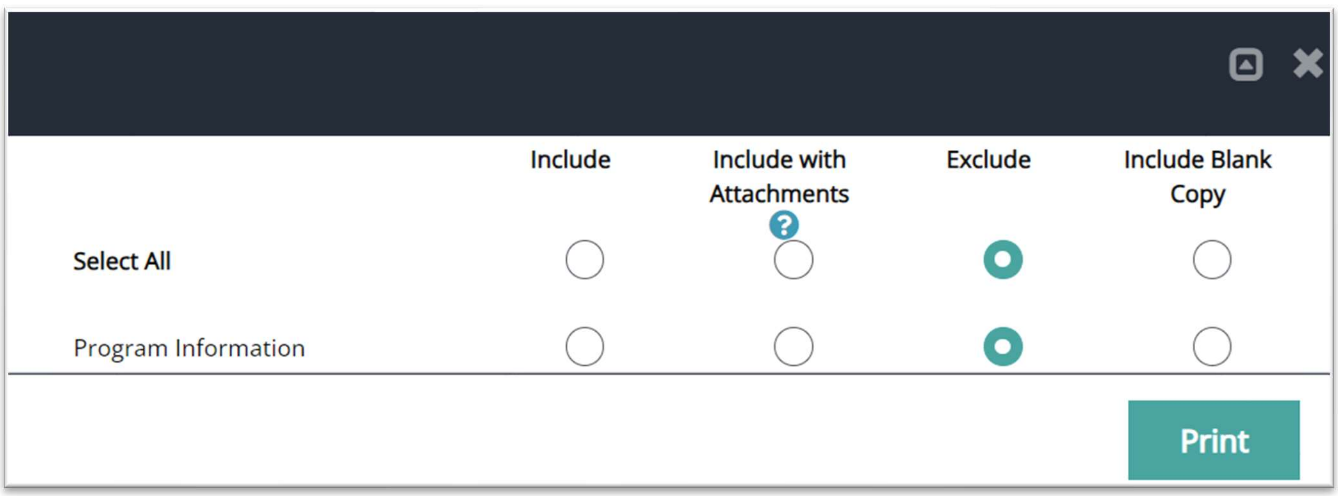
- To add an attachment, click the PAPERCLIP button.
- To save/post the note, click the AIRPLANE button.
- To mark a note as internal so that only [client name] users can see it, click the LOCK button. This option is not available to grantee users.

Print Document

The PRINT DOCUMENT tool provides users with the ability to create a printable PDF variant of any document in the system, including all the questions and their recorded answers.

- Click specific radio buttons to customize the PDF before clicking the PRINT button.
- Select a “version” from the dropdown to download the PDF for that version.

Print Document Table Properties



Print Document Options Summary

Here's a summary of the options available for each form or document:

- **Include**: Incudes a form with all its filled-out answers in the PDF.
- **Include with Attachments**: Includes both the form responses and any related attachments.
- **Exclude**: Omits a particular form to appear in your PDF copy.
- **Include Blank Copy**: Choose this option if you prefer to include a blank version of the form.

Document Messages

The **Document Messages** tool is designed to facilitate sending and receiving both email and in-system notifications relating to a specific document.

- **Message Search Section**: A search bar allows users to filter for specific messages about the document. If all fields are left blank and the SEARCH button is clicked, a complete list of emails about that document will be displayed.

- **Messages**: This section provides a table containing data about the emails relevant to the document. The ENVELOPE button allows users to open the email message.

By leveraging this tool, users can keep track of all communication pertaining to a specific document, ensuring all actions, changes, or requirements are easily accessible, visible, and understandable.

Changing the Status of a Document

The **Status Change** tool enables users to modify the status of a document. This is typically utilized when submitting applications, funding opportunities or reports, signing contracts, or requesting amendments to grants.

Status Change Area

This section is vital for transitioning documents between different statuses. For instance, shifting an application from "Application in Process" to "Application Submitted".

When you attempt a status change, a confirmation message will appear, prompting you to press OK to confirm the change, or CANCEL to abort it. Sometimes a text field appears where the user can add information about the status of the document.

If the document contains any errors, a page will display providing information about these errors and links to specific pages where these errors are present.

NOTE: It's crucial to ensure all errors are resolved before attempting to change the status of a document to avoid unnecessary delays or disruptions.

Managing Related Documents (Reimbursement Requests, etc.)

The **Related Documents** section allows users to access documents, such as reimbursements or application, which are associated with an executed grant.

It displays all related documents that might have a parent, child, or sibling relationship to the current document. As this concerns an application, it will typically function as a parent document.

Please note that specific documents can only be created at specific statuses, while others can be created during different statuses. Please see the next section for more information about this process.

Related Documents:

Understanding Related Documents

A "Related Document" is a type of document that retrieves and utilizes information from a primary or source document.

By linking to the original document, related documents maintain clarity and continuity of information, ensuring that all actions and changes are rooted in the main document's data. This also ensures that all associated records are kept consistent and accurate.

Starting a Related Document - Reimbursement

Creating a reimbursement document can be done from the navigation column for the main document OR from the Dashboard page itself.

Method 1: Main Document Navigation Column

1. Begin by navigating to the application page within the system.

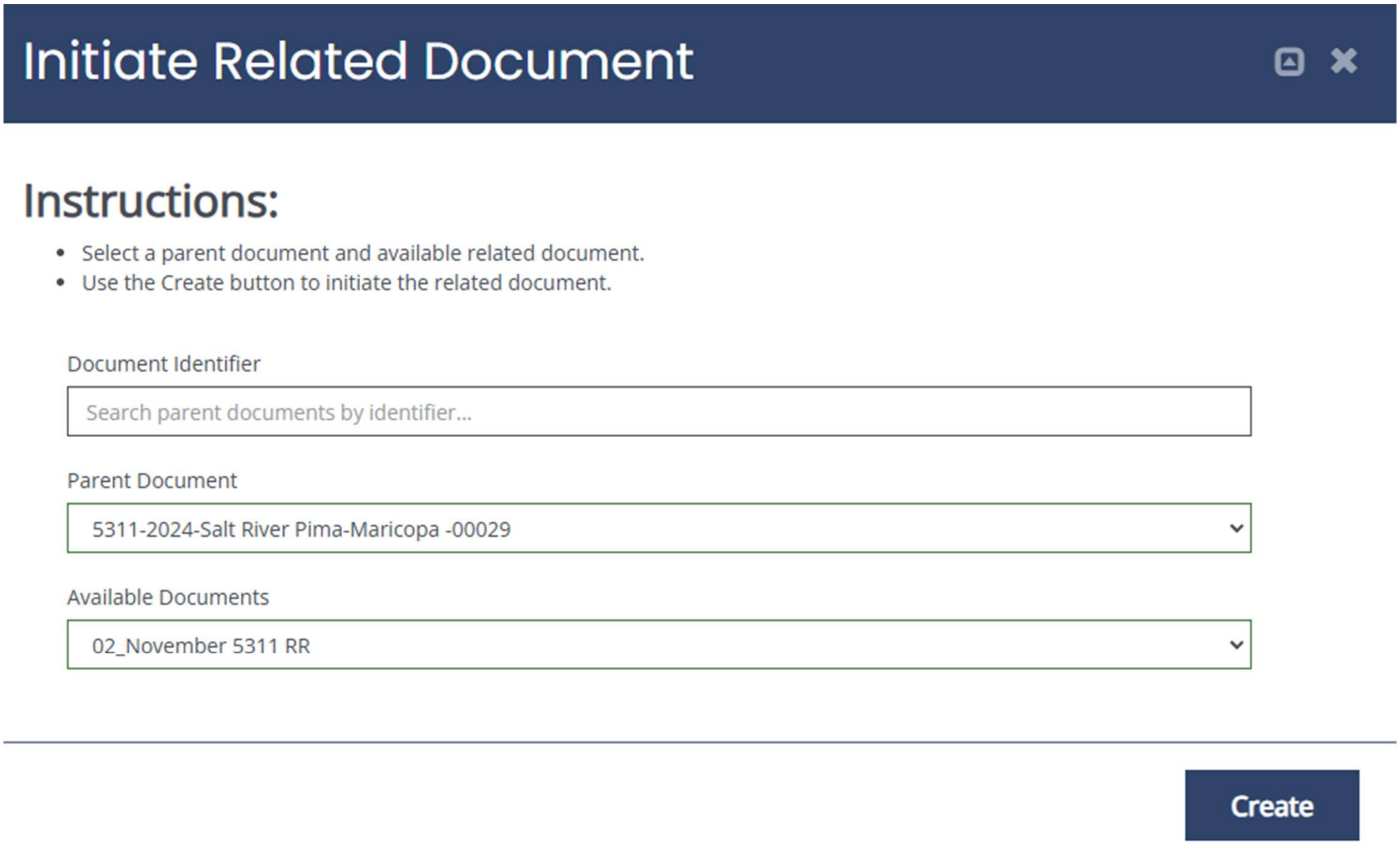
   NOTE: For a cleaner workspace, close the "Forms," "Tools," and "Status Options" sections.

2. Locate and click the **Initiate Related Doc** button. This button can be found in the **Related Documents** section at the bottom of the left-hand column for that document.
3. See additional instructions below.

Method 2: My Tasks Section of the Dashboard

1. Start by navigating to the Dashboard page within the system.
2. Locate and click on the INITIATE RELATED DOC button.

You will be presented with a pop-up window:



1. Leave Document Identifier BLANK.
2. Select the application from the dropdown options that you want to create the reimbursement for.
3. Select reimbursement from the dropdown option.
4. Confirm your settings and click the CREATE button to initiate the reimbursement.

NOTE: You will receive an error message if you attempt to initate a new reimbursement prior to an existing reimbursement being fully processed.

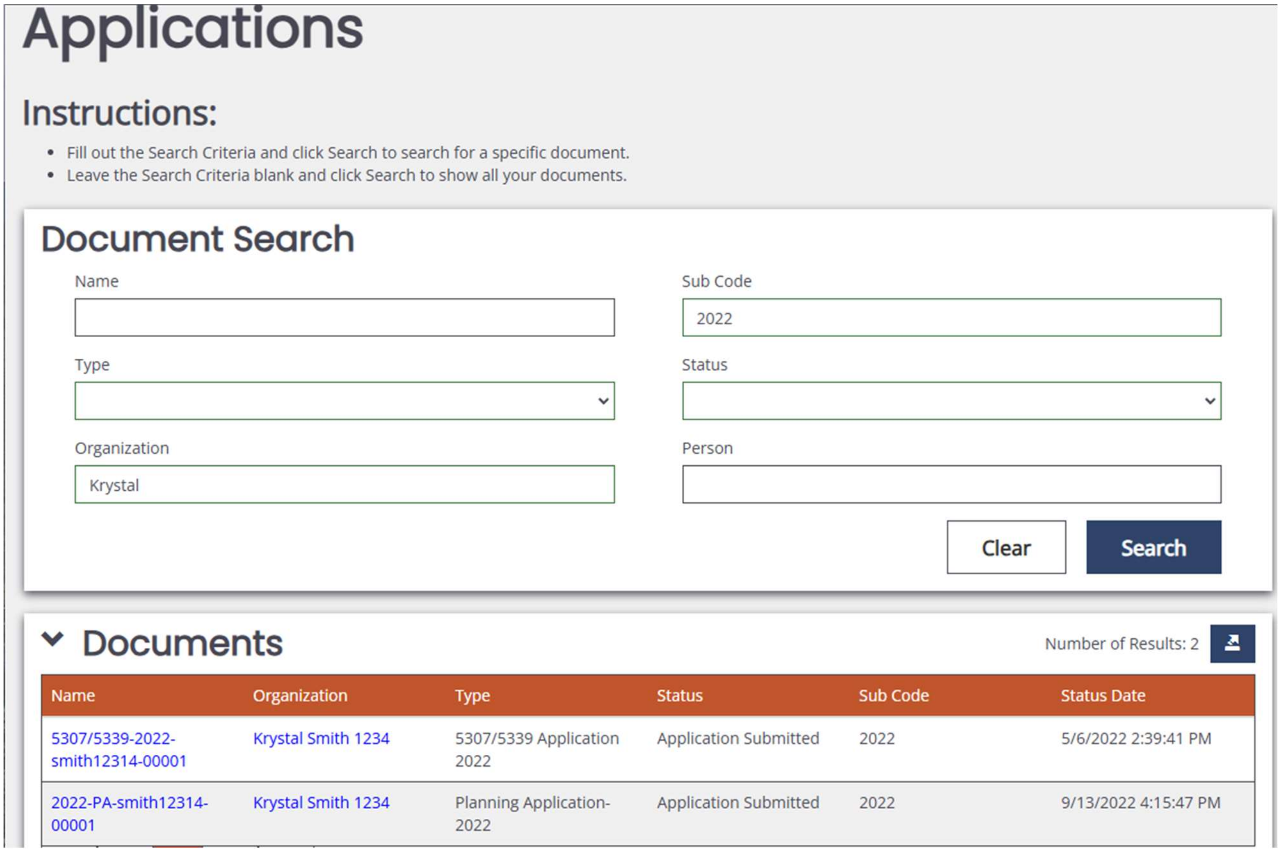
Searches

Using the Searches Tab

It is a straightforward process to find a specific document, such as an Application.

Here are the steps you can follow:

1. Click on the **Searches** link located in the main navigation menu.
2. A list will appear, click on one of the following options:
    a. Recent Documents – The system will display a list of the last 25 documents you accessed. Click on the document you would like to navigate to.
    b. Applications – You will be presented with a Document Search screen. This could be partial or full information related to the document you're looking for.
        i. . Name –Document Name you would like to search for. e.g. document id #, Program, etc.
        ii. Type – Select the application template you would like to search for.
        iii. Organization – Enter a few characters of the Organization name or Leave Blank.
        iv. Sub Code – Leave Blank
        v. Status – Leave Blank
        vi. Person – Leave Blank
        vii. Click on the SEARCH button.



c. Reimbursement Request - You will be presented with a Document Search screen. This could be partial or full information related to the document you're looking for.

   i. . Name –Document Name you would like to search for. e.g. document id #, etc.

   ii. Type – Select the Reimbursement template (Program\Year) you would like to search for.

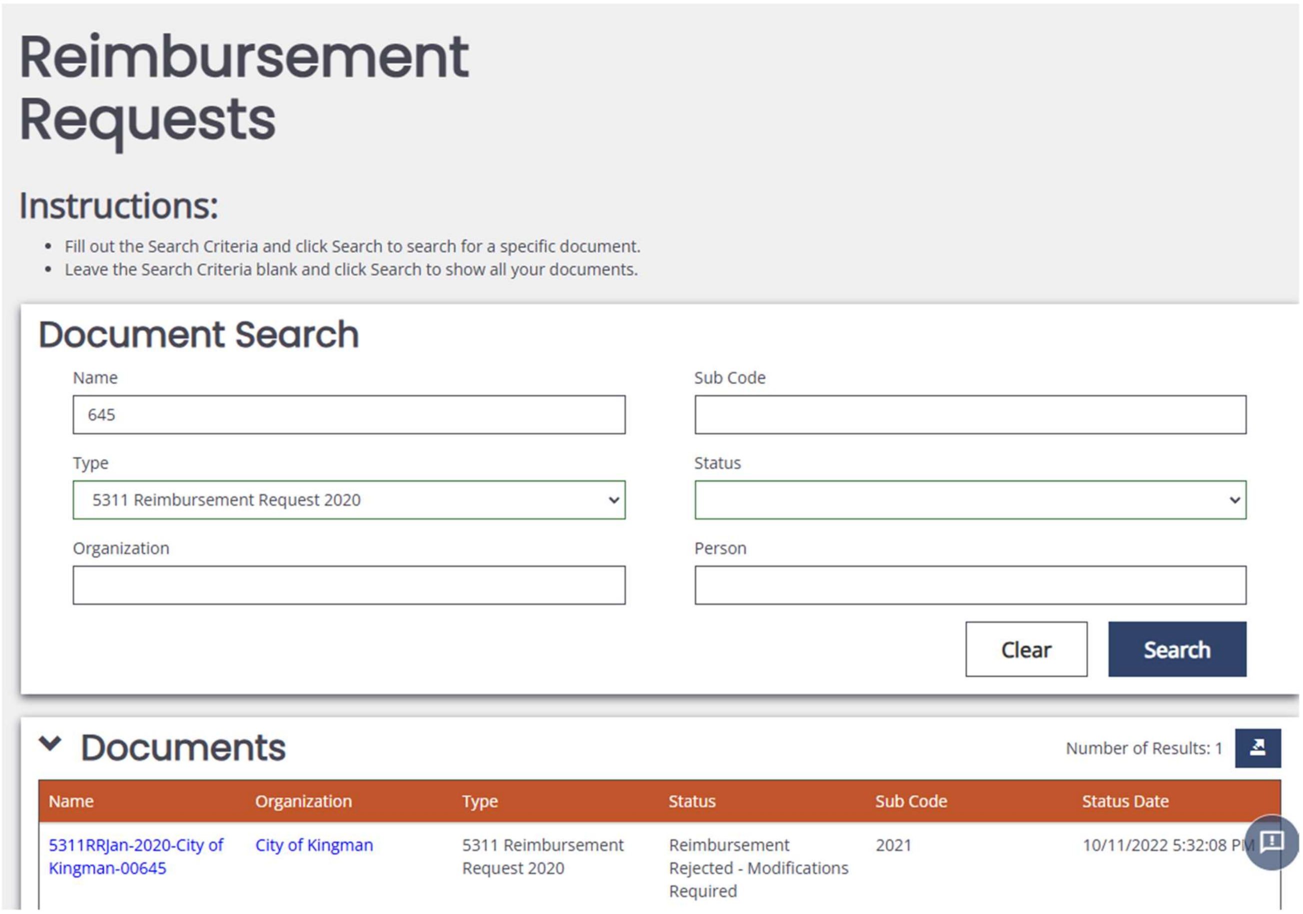
   iii. Organization – Enter a few characters of the Organization name or Leave Blank.

   iv. Sub Code – Leave Blank or enter the Year of the Reimbursement Request.

   v. Status – Select the status options from drop-down.

   vi. Person – Leave Blank

   vii. Click on the SEARCH button.



3. The **Search Results** section will be generated at the bottom of the page, displaying documents that match your search criteria.
   - Browse through the results and click on the specific document.
   - Clicking on a result will take you to the document's **Landing Page** where you can view or continue working on it.

Appendix: System Overview & Requirements

System Requirements

The system is designed to provide a seamless user experience with minimal dependency on your computer's configuration and requirements standard to existing user environments.

Hardware Requirements

Processor: 1 GHz or faster processor (or equivalent)

RAM: Minimum 2 GB

Hard Disk: Minimum 1 GB of free space

Software Requirements

Operating System: Windows 7 or higher, MacOSX 10.9 (Mavericks) or newer, Linux (any modern distribution)

Network Requirements

Internet Connection: Broadband connection with at least 1Mbps

Other Requirements

Screen Resolution: 1024 x 768 or higher.

Please note that for optimal performance, we recommend using the latest versions of the software mentioned above and a stable, high-speed internet connection.

Internet Connection & Access / Internet Cookies

The system is a robust, web-based platform meticulously designed to streamline the process of managing grants. The platform utilizes the capabilities of modern web browsers and the internet to ensure a seamless user experience.

Browser Compatibility

This system is compatible with most up-to-date web browsers including:

- Google Chrome
- Mozilla Firefox
- Safari
- Microsoft Edge
- Internet Explorer 11 or higher

Please note that if you try to access the platform with an unsupported or outdated browser, a "Your browser is not supported" message will display. We recommend updating your browser to the latest version to ensure an optimal user experience.

System Status and Requirements Messages

This system uses system messages to communicate vital information to users about system status and requirements.

Web Browser Cookies

"The web browser must enable cookies to this site."

This message appears when your web browser does not accept cookies from our site. Cookies are crucial for the system as they help in preserving your session state and personal settings.

Multiple Windows

"Do not open multiple windows or browser tabs while filling out the document, as this can cause issues with browser cookies resulting in either being kicked out of the system or work being lost."

- This important message is a cautionary guideline. When you're working on a document or form within the system, it's crucial to avoid opening multiple browser windows or tabs.

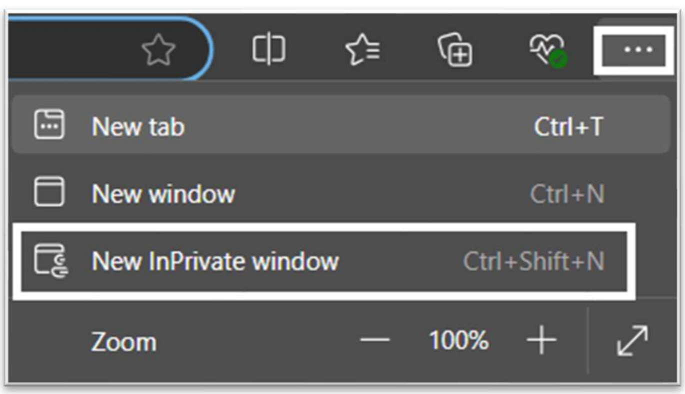
- Cookies can become confused between the different sessions, which might lead to you being signed out of the system unexpectedly, or even worse, losing unsaved work.

- Please work on one document at a time and remember to save your work frequently.

Recommended Practices for Browsing and Saving Passwords

Multiple Browser Windows

While working in the system, it's essential to avoid opening multiple windows or tabs in the same browser session. Doing so may cause issues with browser cookies, which could lead to you being logged out of the system unexpectedly or losing unsaved work. **If the user needs to have multiple windows open, please confirm that the user is using a separate browser session instead**. For example, if using Microsoft Edge and you want to open a second window, click the “Ellipsis (…)” link, then click “New inPrivate window” link.



“Saved” Passwords in Web Browsers

Web browsers often offer the feature of saving usernames and passwords for future use. While convenient, this feature can sometimes cause conflicts, especially if you have recently updated your password but your browser is utilizing an older saved password. This can potentially result in a "locked out" scenario where you are unable to log into the system.

If you choose to save your password in the browser and update your password on the portal, follow these steps:

- When you receive a temporary password via email, save this password in your browser when prompted.

- After successfully logging in with the temporary password, proceed to design and store a new password on the portal.