INTELLIGRANTS ® IGX

Authorized Official Manual

Contents

Introduction

The IGX Portal is an encompassing platform specially designed for managing grant opportunities from the inception of the application 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 IGX portal, users can apply for grant opportunities, manage existing grants and contracts, and generate a variety of reports.

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 the designated state agency for further assistance. They will be able to provide the specific guidance necessary according to your needs.

This User Guide is intended to deliver clear, step-by-step instructions on how to navigate the IGX Portal, aiding users in deriving maximum benefit from the numerous features offered.

System Overview & Requirements

System Requirements

The system is designed to provide a seamless user experience with minimal dependency on your computer's configuration. The requirements mentioned below should already be in place in your existing environment.

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.

Here are two of the common messages you may encounter when using the system:

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 you need to have multiple windows open, we recommend creating a separate browser session.

“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.

Multiple Browser 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. **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 ellipsis (…) button, then click New inPrivate window.

“Saved” Passwords in Web Browsers

It is common for users to store a username and a password in the web browser. This functionality means that a web browser will go back to a “saved password” instead of using the more recent “unsaved password” and the user runs the risk of being “locked out” or unable to login into the system.

NOTE: If a user “saves” passwords in the web browser, the user needs to “save” the temporary password received by email, login successfully, then “save” a newly designed password in the web browser as well.

Opportunity Portal

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.

Opportunity Portal Page

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 AND/OR check at least 1 checkbox in **Eligible Organizations** section 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.

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. It is possible to have multiple system roles per account.

See the security role matrix below for which role can view and/or assign users with other security roles:

System Roles	E = Edit; V = View																			
Role	Authorized Offical	Project Director	Reader	Financial Officer	GHSP Program Administrator	GHSP Program Coordinator	Contract Specialist	Chief of Contract Administration	VTrans Financial Officer	AAG	OHS Director	Director of Highways	Deputy Director of Highways	GHSP Chief	VTrans Executive Officer	VTrans Monitoring Officer	VTrans Business Officer	VTrans Reader	Federal Program Administrator	GHSP System Administrator
Authorized Official	VE	VE	VE	VE	V	V	V	V	V	V	V	V	V	V	V	V	V	V	V	V
Project Director	V	VE	VE	VE	V	V	V	V	V	V	V	V	V	V	V	V	V	V	V	V
Reader	V	V	V	V	V	V	V	V	V	V	V	V	V	V	V	V	V	V	V	V
Financial Officer	V	VE	VE	VE	V	V	V	V	V	V	V	V	V	V	V	V	V	V	V	V
GHSP Program Administrator	VE	VE	VE	VE	VE	VE	VE	VE	VE	VE	VE	VE	VE	VE	VE	VE	VE	VE	VE	V
GHSP Program Coordinator	VE	VE	VE	VE	V	VE	VE	VE	VE	VE	VE	VE	VE	VE	VE	VE	VE	VE	VE	V
Contract Specialist	V	V	V	V	V	V	VE	V	V	V	V	V	V	V	V	V	V	V	V	V
Chief of Contract Administration	V	V	V	V	V	V	V	VE	V	V	V	V	V	V	V	V	V	V	V	V
VTrans Financial Officer	V	V	V	V	V	V	V	V	VE	V	V	V	V	V	V	V	V	V	V	V
AAG	V	V	V	V	V	V	V	V	V	VE	V	V	V	V	V	V	V	V	V	V
OHS Director	V	V	V	V	V	V	V	V	V	V	VE	V	V	V	V	V	V	V	V	V
Director of Highways	V	V	V	V	V	V	V	V	V	V	V	VE	V	V	V	V	V	V	V	V
Deputy Director of Highways	V	V	V	V	V	V	V	V	V	V	V	V	VE	V	V	V	V	V	V	V
GHSP Chief	VE	VE	VE	VE	VE	VE	VE	VE	VE	VE	VE	VE	VE	VE	VE	VE	VE	VE	VE	V
VTrans Executive Officer	V	V	V	V	V	V	V	V	V	V	V	V	V	V	VE	V	V	V	V	V
VTrans Monitoring Officer	V	V	V	V	V	V	V	V	V	V	V	V	V	V	V	VE	V	V	V	V
VTrans Business Officer	V	V	V	V	V	V	V	V	V	V	V	V	V	V	V	V	VE	V	V	V
Federal Program Administrator	V	V	V	V	V	V	V	V	V	V	V	V	V	V	V	V	V	V	VE	V
VTrans Reader	V	V	V	V	V	V	V	V	V	V	V	V	V	V	V	V	V	V	V	V
GHSP System Administrator	VE	VE	VE	VE	VE	VE	VE	VE	VE	VE	VE	VE	VE	VE	VE	VE	VE	VE	VE	VE

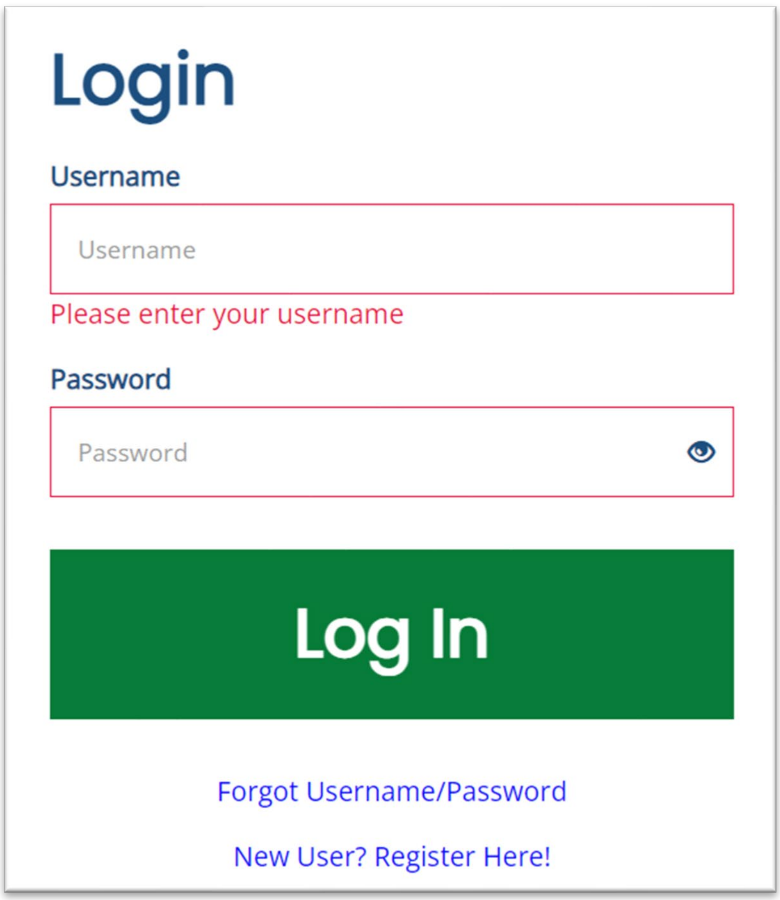
System Login Page

Web URL

Please reach out to your state contact for access to the URL.

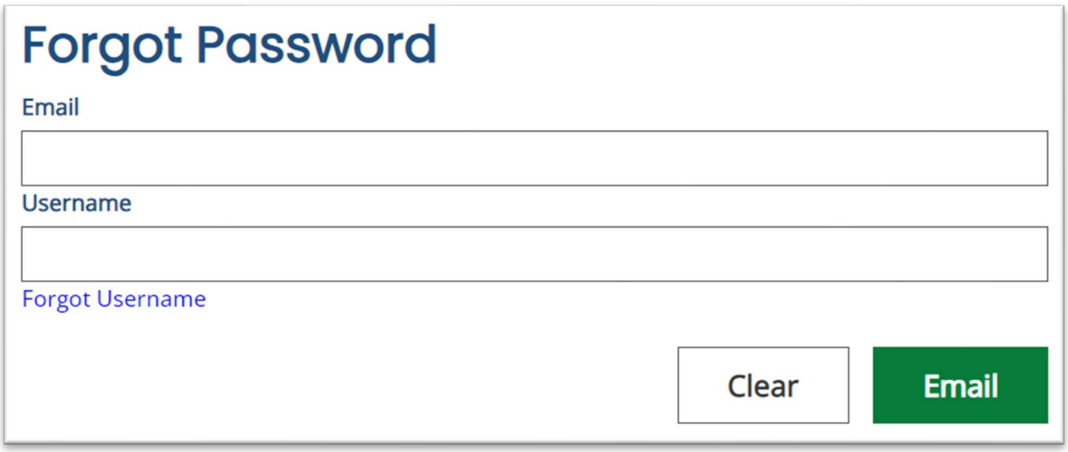
Login Process

Logging in to the portal is a straightforward process. Users must enter their username and password, then click the LOGIN button.



The “Forgot Username/Password” Link

- **Forgot Password**: For users who have forgotten their password, they can also use the "Forgot Username/Password" link to access a "Forgot Password" menu from which they can request an email allowing them to reset their password.



- **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.

Additional Considerations

- **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**: Some 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.

User and Organization Registration Process

For users seeking to register for the organization, 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. After you've filled in all the fields, click on the REGISTER button to submit the form.

3. Specific state staff members will then review your registration form. It is a manual process that ensures compliance and accuracy.

4. After the state staff has completed the review, the user will receive an email confirmation regarding their registration status.

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

Additional Considerations for User and Organization Registration

When registering an organization on the portal, it's important to keep in mind the following considerations:

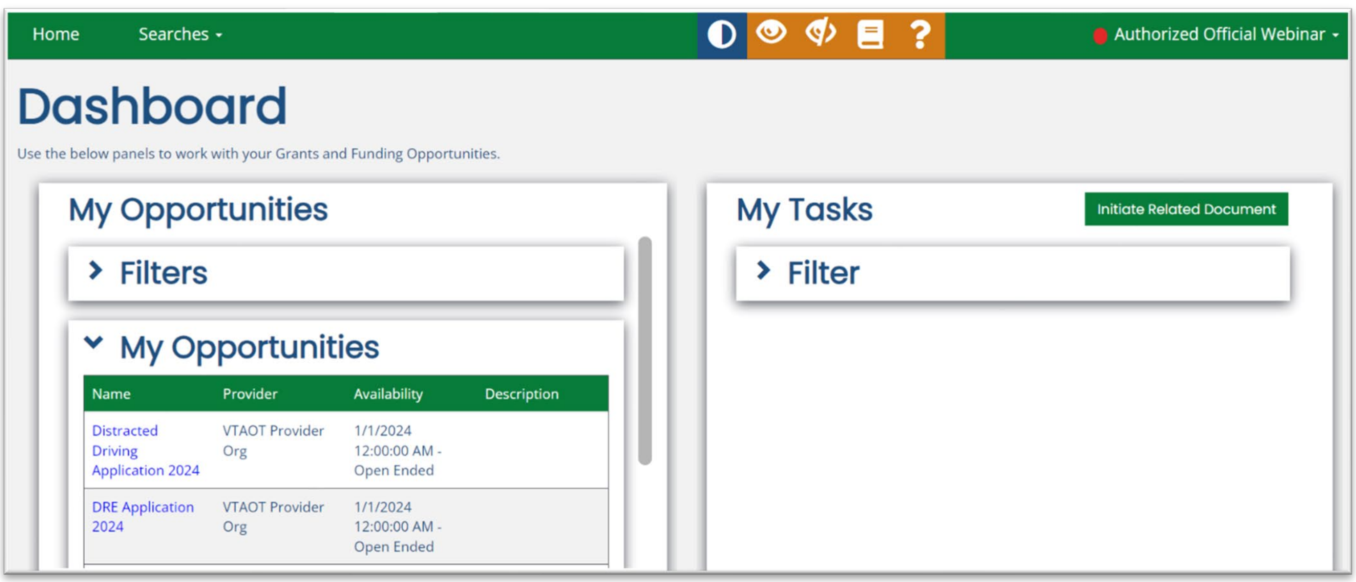
- **Organizational Leadership**: Typically, the first person to register an organization in the system should be a senior leader within the organization, such as a Project Director. They should have the authority to complete and sign off on paperwork in the system.

- **Additional User Registration**: Additional users can register in the system using the standard registration process. Alternatively, an existing user who holds a senior organizational administration role in the same organization can add new users to the organization and to existing documents for that organization.

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. Use the "Edit Dashboard" section to set up/adjust the panel settings.

Configured Dashboard



Non-Configured Dashboard Message

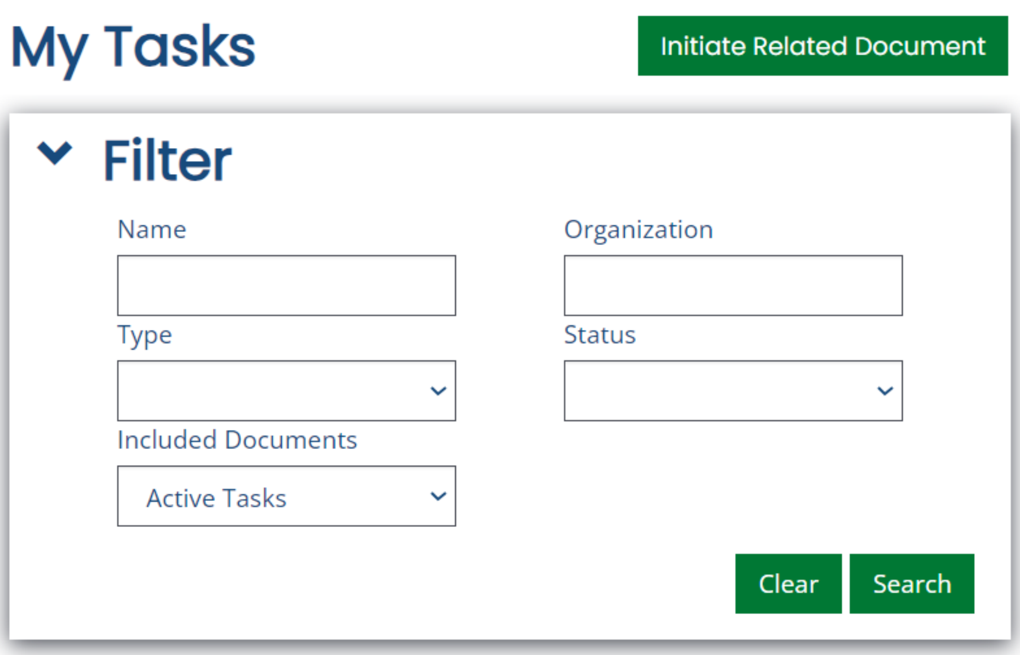
The Dashboard may not be set up the first time a user logs in. When that happens, this message is displayed on the Dashboard page, and the user can configure the Dashboard in the **Edit Dashboard** section.

Dashboard Panels

My Tasks

The "My Tasks" section is dedicated to the documents that require your immediate attention. Documents may include incomplete or pending applications that need revisions, reports approaching their due dates, 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 the state agency 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.

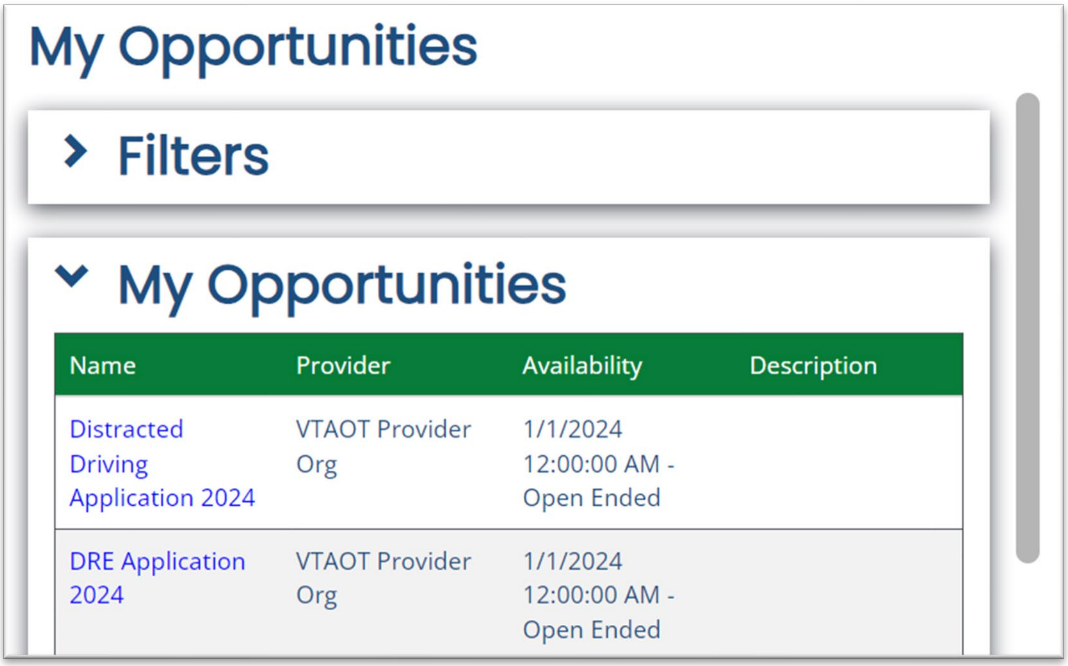
My Tasks Section

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.

My Opportunities (Accessible for Some Accounts)

The "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.

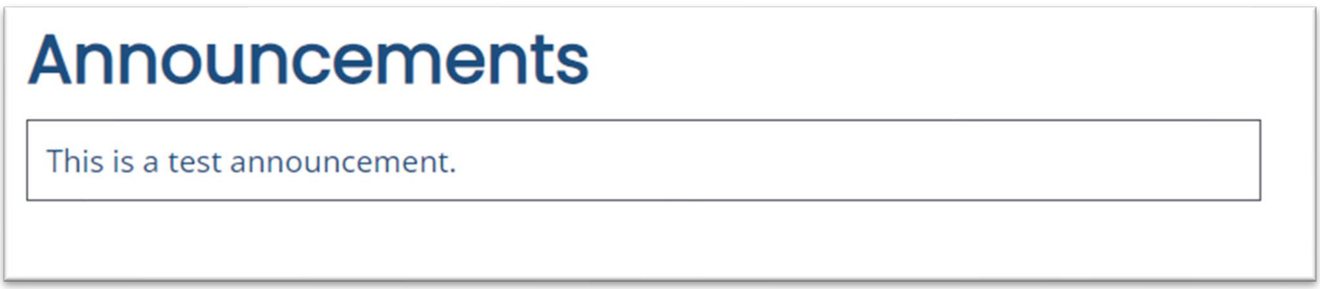
My Opportunities Section

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.

Announcements

This panel provides timely announcements, including information about upcoming system maintenance, changes in policies, new features, or any other relevant information. These announcements can be edited by administrative system roles. See the "Announcement Administration" section for more details.



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.
Searches (All Roles)	This link opens a dropdown menu providing various search options organized by document type.

Button Links

	**All Roles**	**High Contrast Mode** is an additional handy feature that allows you to switch the portal's theme to grayscale.
	Some Roles	The **Contact Info** button facilitates easy access to important contact information for state agencies and support staff.
	Some 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

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.

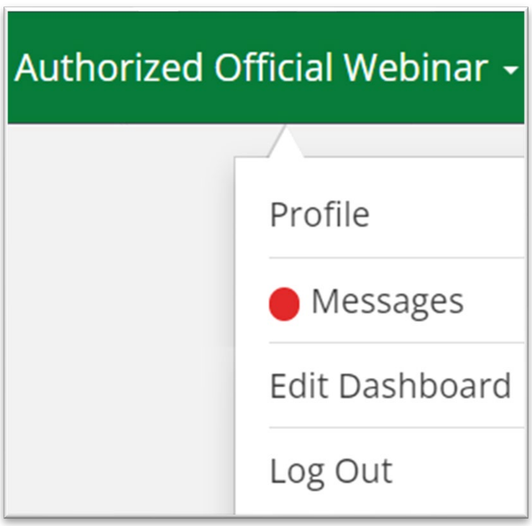
Reset (2 CIRCLING ARROWS): Used to RESET a setting.

Eye (A HUMAN EYE SHAPE): Used to VIEW an item.

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

Name Link

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



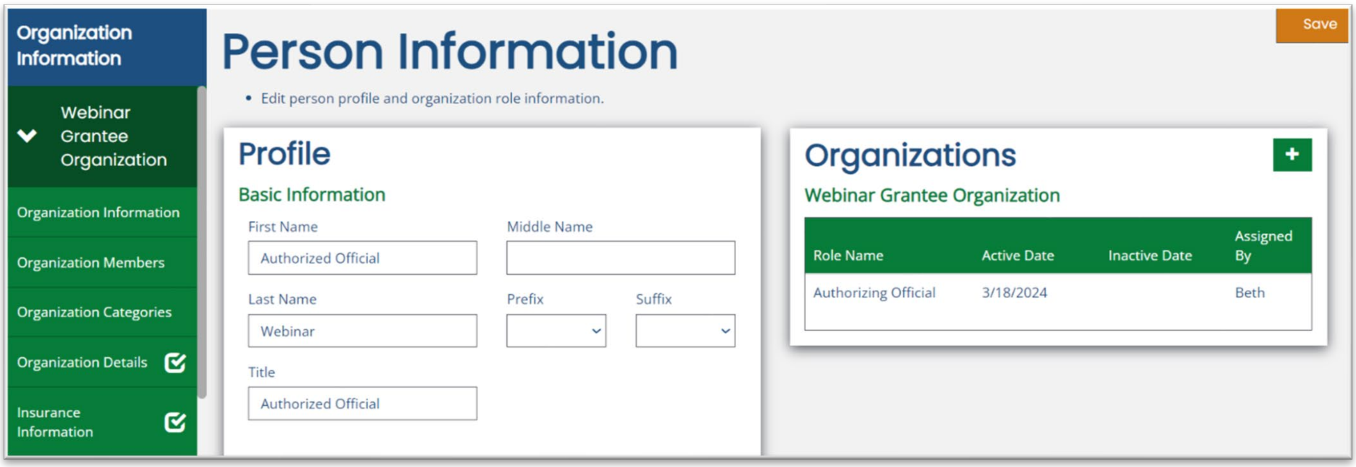
- **Profile**: This section houses all of the user's personal and organization-related details, including contact information and login credentials. This section allows users to update their individual details when necessary. The user may also be able to update the organization's details when necessary,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

- **Dashboard Settings**: 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, the organization's member(s), and/or any categories the organization is assigned to.

- **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 Page

Information about the individual is organized into the following sections:

- **Basic Information** – This section has user-specific information, such as a name.
- **Contact Information** – This section has user-specific contact and specific preferences.
- **Address Information** – This section has information about the user's address.
- **Additional Information** – This section has fields to add more user information, such as file upload(s).

- **Login Information** – This section has the user's login credentials and security features.

Editing the Profile Page

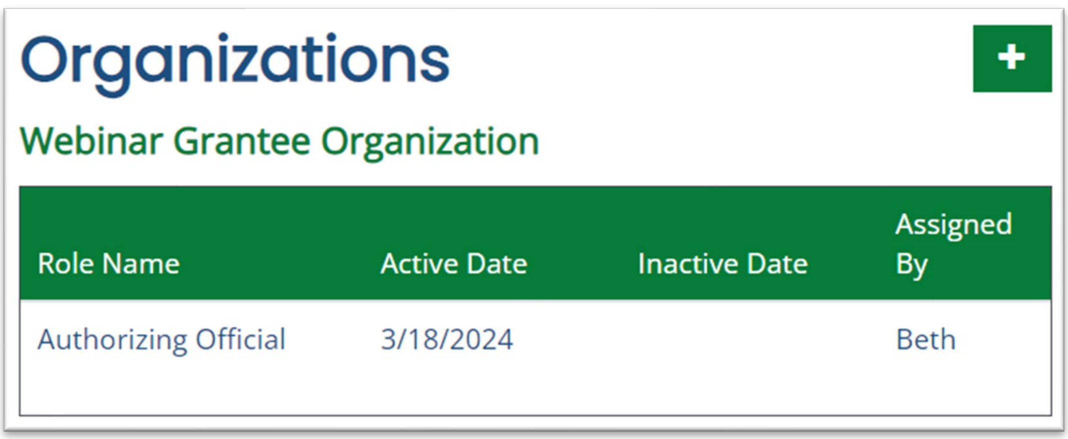
The user can update any text fields, as necessary. However, if the user tries to save the page with any blank required (*) fields, those fields are highlighted by a red border along with any required message below the field. The user will not be able to save the page until those fields are filled in.

Organization Assignments

Organizations Section

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 organization(s) to the system, there will be a PLUS SIGN button in the corner. 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).


Organizations

+

Webinar Grantee Organization

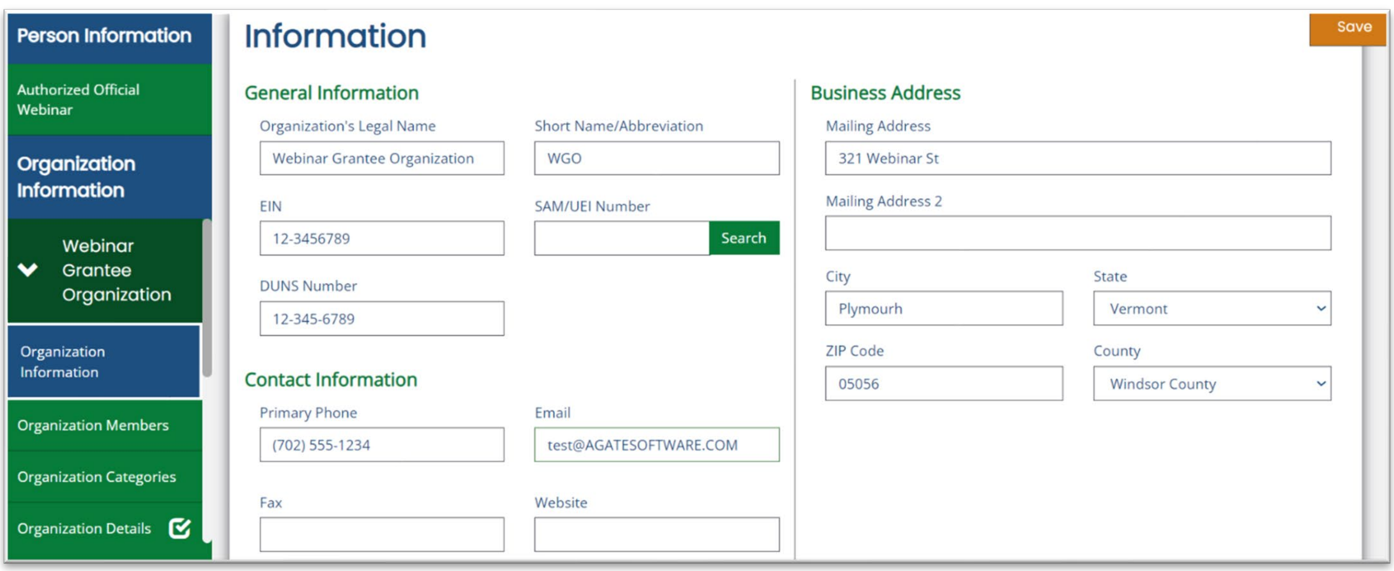
Role Name	Active Date	Inactive Date	Assigned By
Authorizing Official	3/18/2024		Beth

Organization Information Page

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

- **General Information** – A section having general information about the organization. It may include numbers assigned by other agencies including the FEIN UIE numbers. If there are any ties to a parent organization, they are listed here.

- **Contact Information (not shown)** – This section supplies organizational contact info.
- **Additional Information (not shown)** – 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 and allows the user to add other members. The user should be able to view all current members of the organization (using search options to filter results).

- If a user has permissions within the system to edit the user, those names display as links instead of text.

- If a user who doesn't have the level of access to edit another user hovers over that user's name, the system displays an "Inadequate permissions to view this person" message.

Searching for a Member & Completing Updates

A user can search the list of members in the organization by typing in the **Name** column or selecting items from either drop-down list before clicking SEARCH. This will bring up a list of members filtered by those selections.

- Update a user by clicking a user's name, complete update(s) (including adding a role if needed) and click SAVE. The recipient will be able to login and access the specific document that they are assigned to with the level of permissions that were granted by the role assignment.

NOTE: This method adds the user(s) to the organization. Use the Add/Edit People link in the Tools section to add the user to specific document(s).

Adding New Members

To add a member to the organization, please follow these instructions:

1. Click on the PLUS SIGN button in the **Member Search** section.
2. Click the ADD NEW USER TO ORGANIZATION button. This brings up a **New User** page.
3. Fill in the required fields, any other fields, and click the SAVE button.

Adding Existing Users

Administrative users can add existing users in the system to organizations:

1. Click on the PLUS SIGN button in the **Member Search** section.
2. Click the ADD EXISTING USER TO ORGANIZATION button.
3. Fill in the fields (optional) and click SEARCH.
4. A list of users is visible in the bottom panel. Select a role and click SAVE.

   NOTE: The recipient will be able to login and access the specific document that they are assigned to with the level of permissions that were granted by the role assignment.

5. Fill in the fields and click SAVE.

NOTE: This method adds the user(s) to the organization. Use the Add/Edit People link in the Tools section to add the user to specific document(s).

Removing Members

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

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.

Organization Category Assignments

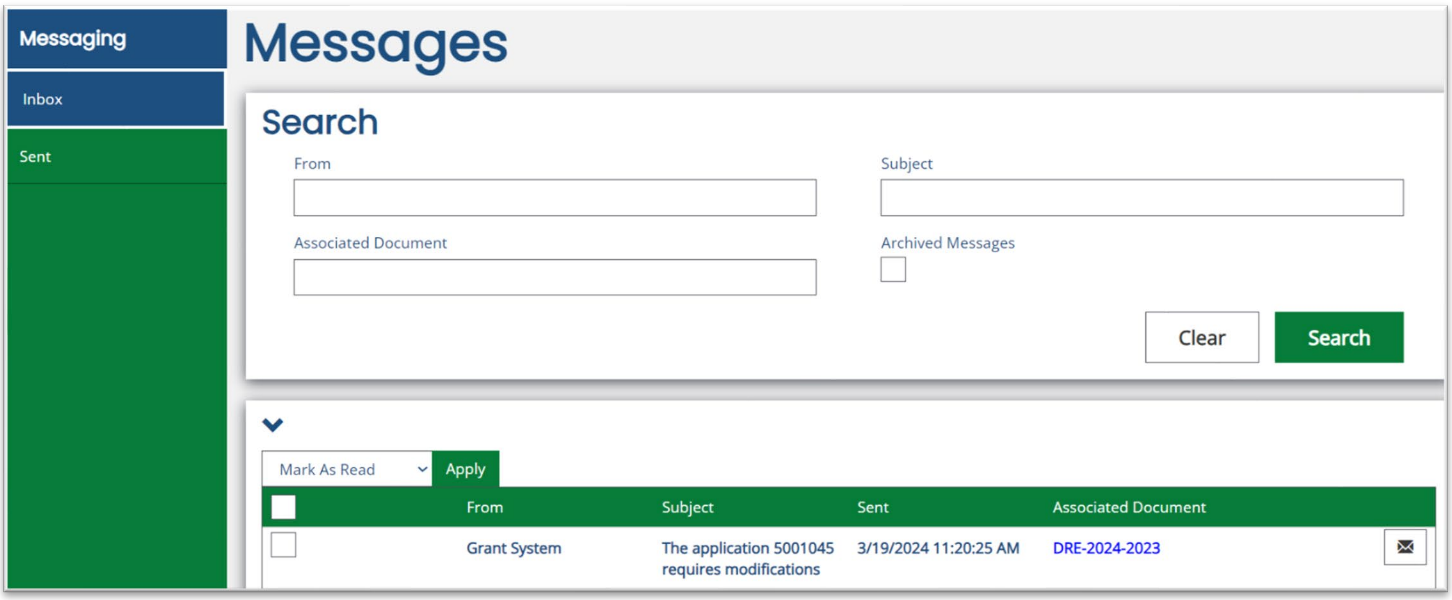
To update an organization category assignment, click on the ***Organization Categories*** link in the column on the left-hand side.

- **Assign Categories** – Check the box next to a category and press SAVE to assign the organization that category.

- **Remove Categories** – Uncheck the box next to a category and press SAVE to remove the category from the organization.

Messages

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.



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 your dashboard displays current grant opportunities provided by a variety of state agencies.

- The panel updates according to the availability dates set by each state agency offering a grant, empowering you to track and apply for relevant opportunities at any given time.

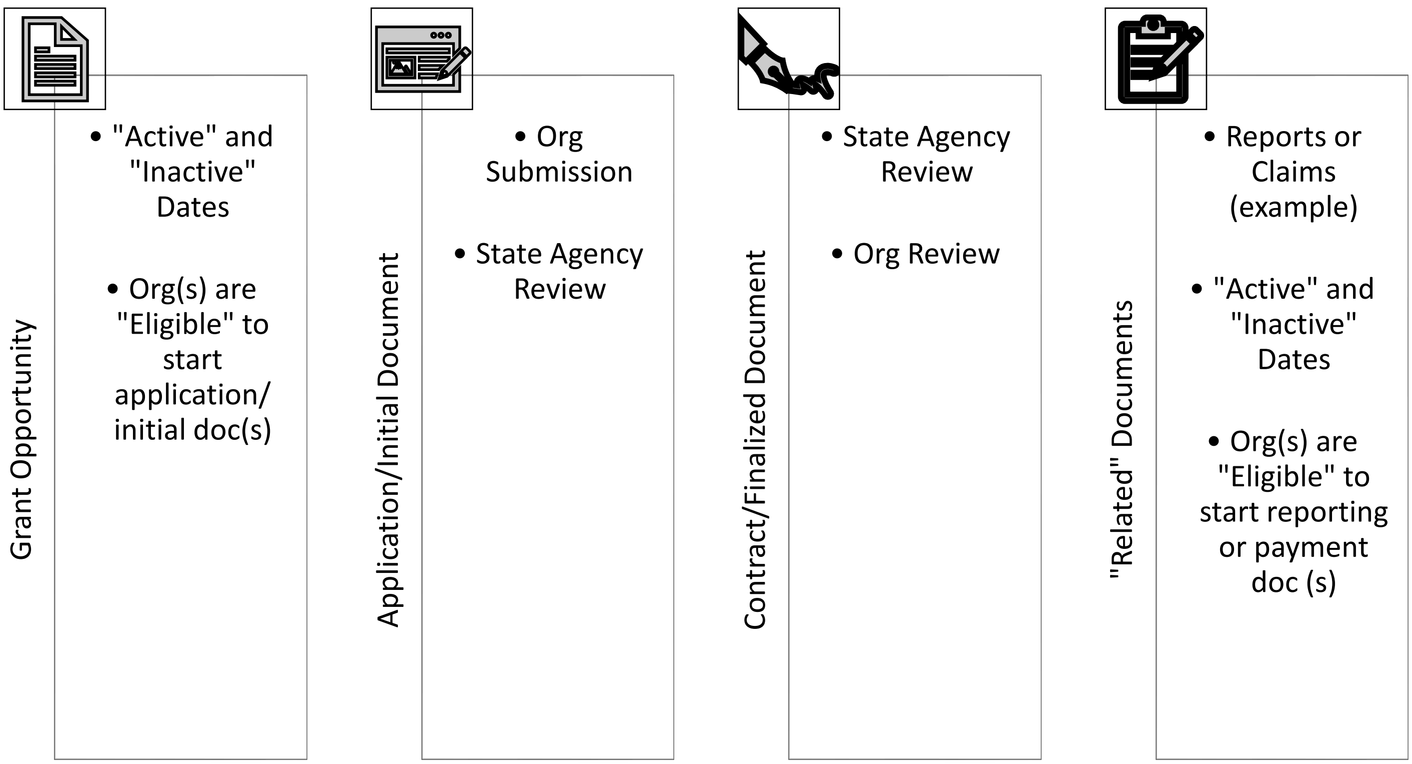
- In some cases, an application for a particular grant opportunity may not be immediately visible or listed. Should this occur, please directly contact the respective state agency to receive assistance in accessing the application.

- The process to start a document can be initiated by either the organizations themselves or by state staff on behalf of those organizations.

Grant Process Overview

Generally, a grant process has this type of structure:

- "Organization(s)" is shortened to "Org(s)"
- "Document(s)" is shortened to "Doc(s)"
- "Active Dates" refers to the start date for an opportunity or related doc.
- "Inactive Dates" refers to the end date for an opportunity or related doc.
- "State Agency" refers to the agency offering the funding.



Starting a Grant Opportunity/Document

The process for starting a grant opportunity – whether an application or a different type of document is the same.

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

3. Click on the name of the grant opportunity that you want to start. This will generally open the application starting process.

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

Navigating Back to an Initiated Grant/Document

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. Now, you need to 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 **Subgrant Landing Page** where you can view or continue working on it.

Using the My Tasks Dashboard Panel

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 Subgrant Landing Page

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

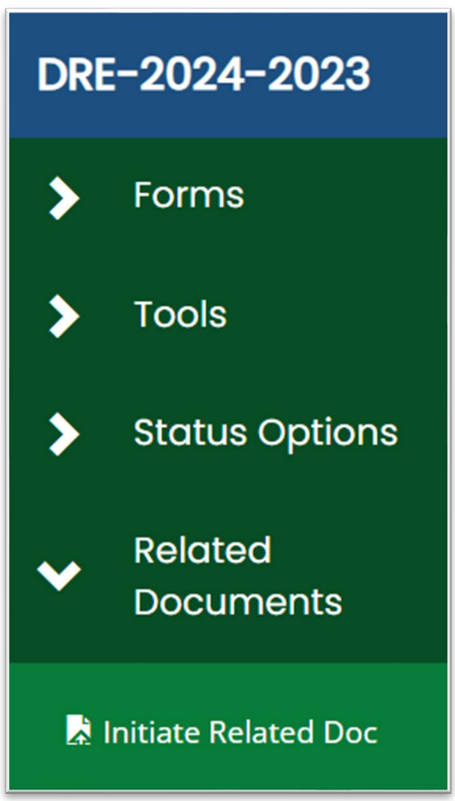
- **Upper Right Action Buttons** – The NEW NOTE button will be visible here. Notes will be discussed in the **Notes** section of this manual.

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 Subgrant 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.

Common buttons include:

- **Advanced View**: Grants the user access to additional options.
- **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 current 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.

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 and Arrow Circle	The envelope shows that there are multiple occurrences of the form, and the user can click on the arrow to access them.

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.**

Landing Page

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

Add/Edit People Tool

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

Adding Users

To add users, click the PLUS SIGN button, search for a user, assign a role from the dropdown menu and click SAVE (the **Active Date** field is optional).

NOTE: Users from other organizations can only be added to specific documents, not the entire organization from this menu.

Removing Users

To remove users, click the PENCIL button, set an inactive date, and click the SAVE button. After this date, the user will lose document access.

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.

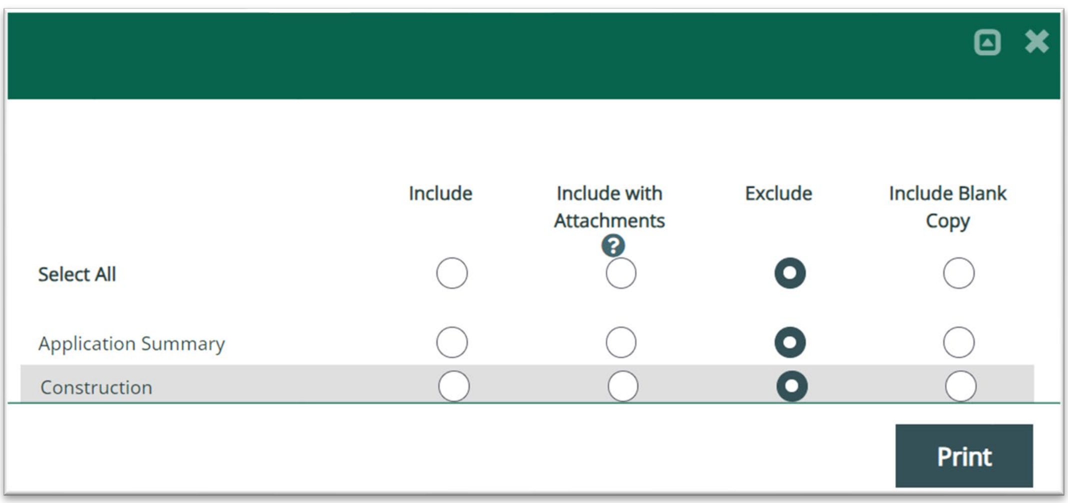
- To add an attachment, click the PAPERCLIP button.
- To save/post the note, click the AIRPLANE button.
- To mark a note as internal so that only [client name] users can see it, click the LOCK button. This option is not available to grantee users.

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.
- You can use the "Select All" feature to apply one option to all the forms in that column.

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 Tool

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 or reports, signing contracts, or requesting modifications to grants.

Status Change Area

This section is vital for transitioning contracts between different statuses. For instance, shifting a contract from "Application in Process" to "Application Submitted" or "Application Cancelled".

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 (Reports, Invoices, etc.)

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

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

The Amendment Process

Different roles can complete an amendment once the application has reached the “Grant Executed” status. Once the amendment has been submitted, the state contact reviews the amendment form. Once the review is completed, the form(s) associated with those changes will have a SAVE button available to the user(s) who requested the amendment.

An amendment to the finalized agreement may be necessary due to changing conditions reported by an organization. These updates may include organizational turnover changes requiring changing the signatory, changes to project scope, budgeting, or dates.

Related Documents: Reporting

Understanding Related Documents

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

There are distinct types of related documents, each with a specific workflow/process.

- **Report**: A report is generally used to track progress or detail the usage of grant funding. For instance, if a grant is provided for a specific project, a report document might be regularly updated to provide stakeholders with updates about the project's status, deliverables, and use of funds.

- **Other Report Type**: Other types of reports often concern financial transactions, such as payments, claims, or reimbursement requests. These documents provide detailed accounting of monetary exchanges related to a project.

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

Creating a related document, like a report or request, can be 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 or main document page within the system.

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

2. Locate and click the INITIATE RELATED DOCS button. This button can be found in the **Related Documents** section at the bottom of the left-hand column for that document.

3. Fill in the necessary information in the form and click the agreement button to start the process for the related document.

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.
3. Confirm your settings and click the CREATE button to initiate the process.

Searches

Using the Searches Tab

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