

INTELLIGRANTS[®] IGX

GRANTEE MANUAL

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Introduction

This manual will walk user(s) through using the IGX portal for proposals, applications, and a variety of reports. The IGX product adheres to ADA and WCAG 2.1 AA standards. The portal also undergoes regular 3rd party web accessibility compliance audits to ensure accessibility for users that require special accommodations.

The system was designed to be an internet application designed for and accessed through the internet. Users should be able to access the site with little to no changes to their computer’s settings, and the portal is designed to be compatible with most common up-to-date web browsers, such as Microsoft Edge, Chrome, Firefox, or Safari.

Current System Contact Information

For questions regarding submitted user registration forms (forms connected to the “New User?” link on the Login page), and/or questions regarding specific grant opportunities (and/or reports or other “Related Documents”), please contact the state agency for assistance.

Agency/Individual Name	Phone Number	Email Address	Website URL
Agate Software Helpdesk	1 (800) 820-1890	helpdesk@agatesoftware.com	
Minnesota Office of Higher Education		GWI.OHE@state.mn.us	Competitive Grant Programs (state.mn.us) ¹

¹ <https://www.ohe.state.mn.us/mPg.cfm?pageID=892>

System Overview

The system specializes in improving functionality and ease of use. These are the areas that the system shines in:

- **Reporting Panels** – The system dashboard page allows users to drill down through new reporting panels for funding account information, program budgets, and even view staff performance information.
- **SAM.GOV System Interface** – The new system interface automatically gathers address and contact information during registration and confirms a valid DUNS number or SAM number. It also allows the system to check for expiration dates and confirm whether an organization can receive federal funding.
- **Easy Configuration of Program Changes** – The system takes advantage of a new drag-and-drop configuration engine to allow users to update their programs. This includes easily updating forms, process flows, and management reports.
- **Updated Accessibility Features** – IGX was built from the ground up to adhere to ADA and WCAG 2.1 AA standards. The portal will also undergo regular 3rd party web accessibility compliance audits. It includes new options like a sharp contrast mode and new branding utilities.

System Requirements

The system was designed so that computer users can use it with little or no changes to their computer environment. The requirements that are mentioned below are common computer elements that should already be present.

Internet Connection & Access / Internet Cookies

The grants management system is an internet application designed for and accessed via the internet. This system was designed to be compatible with common up-to-date web browsers. If the web browser is not supported, the following message will display:

Your browser is not supported.

Powered by IGX™ systems cannot provide a good experience to your browser.
To use this site, please upgrade to the newest version of one of these supported browsers:



Edge ,



Chrome ,



Firefox ,



Safari

Other messages that may be seen are:

NOTE: The web browser must enable cookies for this site to access this portal.

- “The web browser must enable cookies for this site to access this portal.”
- “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.”

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.

NOTE: If the user needs to have multiple windows open, please confirm that the user is using a separate browser session instead.

If utilizing Microsoft Edge, click on the **File** link, then click on the **New Session** link for each browser session. Other internet browsers will require third party add-ons to manage multiple browser sessions.

“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.

Adobe Acrobat DC

Adobe Acrobat DC (Adobe Acrobat Reader) is used to view PDF (Portable Document Format) documents. The system will automatically generate grant documents in PDF format using information that has been saved into the various narrative and budget pages. Using Adobe Acrobat DC, the user may choose to view, print, or save these documents. Users who do not have this software installed on their systems will need to download it from www.adobe.com.

Navigation

Navigation Buttons

This section summarizes what specific button icons do throughout the portal.

Systemwide

Add (PLUS SIGN): This button allows the user to ADD an item to the portal.

Edit (PENCIL): This button allows the user to EDIT an item in the portal.

Delete (TRASHCAN): This button allows the user to DELETE an item in the portal.

Export (DOWNWARD FACING ARROW): this button allows the user to EXPORT a specific file to their computer.

Page Specific Icons

These icons will tell the user what is going on with each form:

- **Blank Square** – This icon indicates that the form is blank.
- **Flag** – This icon indicates that the form has data saved on it and that the form is still incomplete.
- **Triangle with an Explanation Point** – This icon is a warning that there is a field on the form that is incomplete.

- **Square with a Checkbox** – This icon indicates that the form has saved data and is complete.
- **Circle with an Exclamation Point** – This icon indicates that the form has saved data and contains errors.
- **Circle with an Arrow** – This icon indicates that the form has multiple instances of it. Clicking on the icon allows the user to examine a list of instances of that form to access that specific instance of the form.

Navigation Links

Users can navigate through the system using navigation links in one of multiple ways:

- **Section Tab Links** - Using the links under specific section tabs (“Searches” or “Reports” are common section tabs) tabs at the top of the page.
- **Lefthand Column Document Navigation Links** - Using links on the left side of the page (in specific instances) while working on grant opportunities or reports/related documents.

NOTE: Clicking on the down/side arrows allows the user to hide/show that section.

- **Search Results Links** - Clicking on links in search results, such as the name of a document.

System Login Page

Web URL

The Web URL will be supplied by the user's state agency and/or other user(s) in the organization.

To access the system, type the following into the address bar of the web browser and press ENTER.

NOTE: The system does not save the username and password. This option may be available for some browsers.

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.

System Home Login Page Sections

The system login page is organized into **Public Reports** , **Welcome/Announcements**, and **Login** sections.

Public Reporting Tab

Accessing the Public Reporting Tab

Clicking on this tab will bring up a list of reports available to both registered and unregistered system users. The state agency/agencies determine those reports.

Running Reports

A user can enter specific search criteria and click the SEARCH button to run a report.

Welcome/Announcements

This is the section where are welcomed to the portal and allowed to view posted announcements. These announcements may include links to other resources.

System Login Section

The system login process requires a user to enter in a **Username** and **Password** to login.

“New User?” Link Overview

If the organization already has a login within IGX, use(s) can use the login portal to access the site. If the organization does not already have a Grantee login within IGX, the user(s) will have to use the **New User?** link to register for an account to gain access.

Throughout the site, required fields will be marked with a red border that highlights the field when a user attempts to save the current screen with no data. On the **New User Registration** page, users will also be provided with an error message under the field, explaining what the error is. Once data is entered, this border will turn green.

[New User/User Registration Link](#)

The system allows the user to request access to the system. To do so, complete the following steps:

- 1) Click on the **New User? Click Here** link.
- 2) Fill in the required fields (*) in the **Person Registration** (requesting information about the user who is registering), and **Organization and Contact Information** (requesting information about the organization and how to contact it) sections. There is also a section where the user can request a preferred username and initial preferred password as well as a field to supply notes. State agencies may also include additional registration custom fields in an **Additional Information** section.
- 3) Click the REGISTER button.

NOTE: Users registering by the New User link will need to be approved by state agency users. If a user attempts to access the system before they have been approved, the system will show their password as invalid.

Logging in to the IGX Portal

NOTE: The password field is case sensitive and will not recognize characters of the wrong case. Precision when entering the username into the username field will decrease the risk of system error messages.

Username

A username is created by the new user during the registration process OR by an internal user adding a new user.

“Forgot Username”

The system allows the user to request the retrieval of their username.

To do so, complete the following steps:

- 1) Click on the **Forgot Username/Password!** link.
- 2) Click on the **Forgot Username** link.
- 3) Enter the email address and click on the EMAIL button to send an email with the username.
- 4) Click on the **Forgot Username/Password!** link.
- 5) Enter the username and the email address. Click on the EMAIL button. A temporary password will be sent to the email address supplied.
- 6) Once the user has received a temporary password, they will need to login.
- 7) At that point, the user will be brought directly to the **Profile** page and requested to create a new password. The user can use the **Edit Password** button at the bottom of the page to update the password. When the user clicks on the EDIT PASSWORD button, the **Password** and **Confirm Password** fields are available.

Password	Confirm Password
<input type="text"/>	<input type="text"/>

NOTE: Different systems will have different time periods where 1 password can be used consistently. Generally, a password is “good” for 90 days once it has been registered within the system.

Password

The password is created automatically by the portal once a new user is added.

“Forgot Password”

The system allows the user to request a temporary password be generated and sent to their email address. To do so, complete the following steps:

- 1) Click on the **Forgot Username/Password!** link. Enter the username and the email address.
- 2) Click on the EMAIL button. A temporary password will be sent to the email address supplied.

- 3) Once the user has received a temporary password, they will need to login.

NOTE: The password field is case sensitive and will not recognize characters of the wrong case.

Precision when entering the username into the username field will decrease the risk of system error messages.

- 4) At that point, the user will be brought directly to the **Profile** page and requested to create a new password. The user can use the **Edit Password** button at the bottom of the page to update the password. When the user clicks on the EDIT PASSWORD button, the **Password** and **Confirm Password** fields are available.

Password	Confirm Password
<input type="text"/>	<input type="text"/>

NOTE: Different systems will have different time periods where 1 password can be used consistently.

Generally, a password is “good” for 90 days once it has been registered within the system.

“Locked Out”

A user is “locked out” when they have exceeded a specific number of attempts to login.

- The default amount of time a user is “locked out” of a system is 15 minutes.
- The amount of time being “locked out” is set up in a system by the users who set it up.
- If an account is still “locked” after the 15-minute window, the user needs to contact the state and/or the help desk to get the account unlocked.

*Unlocking An Account By Using the **Forgot Username/Forgot Password!** Link*

A user can use the **Forgot Username/Forgot Password!** link to unlock the account for some systems.

- 1) Click on the **Forgot Username/Password!** link.
- 2) Enter the username and the email address.
- 3) Click on the EMAIL button. A temporary password will be sent to the email address supplied.
- 4) Once the user has received a temporary password, they will need to login.

NOTE: The password field is case sensitive and will not recognize characters of the wrong case.

Precision when entering the username into the username field will decrease the risk of system error messages.

- 5) At that point, the user will be brought directly to the **Profile** page and requested to create a new password. The user can use the **Edit Password** button at the bottom of the page to update the password. When the user clicks on the EDIT PASSWORD button, the **Password** and **Confirm Password** fields are available.

Password	Confirm Password
<input type="text"/>	<input type="text"/>

NOTE: Different systems will have different time periods where 1 password can be used consistently.

Generally, a password is “good” for 90 days once it has been registered within the system.

2 Step Validation Process [Variant]

Here are instructions for completing the 2 Step password authentication process:

- 1) Enter the **Username** and **Password** in the fields and click SUBMIT.
- 2) This takes the user to a page where they can choose which external validation process to request a code for. Select an option and click the NEXT button.

NOTE: Common validation processes include an automated phone call, or an email sent to the user's email address.

- 3) Once the validation process has been completed, please enter the validation code and click the SUBMIT button.

NOTE: A user can check the Remember Device checkbox to have the system remember that validation code and not request it the next the user uses this system. Other options include requesting that the validation code be resent and/or using a different validation method.

Home/Dashboard

Home/Dashboard Page

Once logged in, the user is on the **Home** page (also called the **Dashboard** page). From here, the rest of the system can be navigated.

Other important links to note on this page may include a **Searches** dropdown list, and sometimes a **Reports** dropdown list.

There are also buttons at the top of the page that may include the **Contrast Mode** button, a **Training Materials** button, and a **User Access** (aka **Name Link**) link.

Under the **Searches** dropdown list, the user will be able to search for existing documents from their organization throughout the system.

Button Information

The **Buttons** section contains buttons that link to specific independent tools.

Contrast Mode



The **Contrast Mode** button provides an option to grayscale the site. Clicking on this button will change the theme to be entirely black and white; clicking it again will toggle it back. The site will remember the user's settings for this option and whether the user has it turned on or off. If the user navigates to another page, it should continue on in the mode that was previously selected.

Contact Information



Here the user can see site specific contact information.

Training Materials



Next, there are the Training Materials, which is this icon that looks like a book. Clicking the Training Materials button will provide a menu that appears on the right-side of the page. To close the training materials menu, the user can click "X" in the corner right here.

Help



Clicking this button allows general help tips to display about the current item selected.

Dashboard

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. If the user needs more panels, or has one that isn't necessary, the user can edit the dashboard to change these panels.

Common dashboard panel types include:

- Announcements
- Account Overview
- My Opportunities
- My Tasks

Editing A Dashboard

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/applications, and visual reports organized into panels.

Adding a Panel

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

- 1) Go to the **Name** link and click the **Edit Dashboard** link.
- 2) Click on the **Add Panel** link.
- 3) 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) Go to the **Name** link and click the **Edit Dashboard** link.
- 2) Click on the WHEEL button for a specific panel.
- 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) Go to the **Name** link and click the **Edit Dashboard** link.
- 2) Click on the X button for a specific panel. 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.

Dashboard Sections

Announcements

The **Announcements** area is an area that allows the user access to announcements from the portal designers. These announcements can include (but are not limited to) training dates, news updates, or web site links. There is an announcement creation tool named **Announcement Administration** listed under the **System Configuration** section of the **Administration** menu.

Account Overview

The **Account Overview** area allows the user to quickly review grant data in a visual way – as a pie chart, bar chart, or a table summary. The user can click on the chart to pull up the account’s transaction history.

My Opportunities

The **My Opportunities** area allows the user to start grant opportunity documents (usually applications). There is a **Filter** section and the **Search Results** section.

My Tasks

The **My Tasks** area is an area that defines the tasks assigned to the user and can be filtered using the **Filter** and **Search Results** sections. It also gives the user a way to start a related document (like a report or requisition).

NOTE: There is an INITIATE A RELATED DOCUMENT button at the top of this section. This is useful for starting a report or invoice.

Using the My Tasks Filter

To use the **My Tasks** Filter to on a list of tasks assigned to the user, please follow these instructions:

- 1) Click on the > sign next to the **Filter** header.
- 2) Enter data into any of the fields and/or select an option from the **Type** drop-down. Click the SEARCH button.

NOTE: A user can click on the CLEAR button (not shown) to clear out search data.

- 3) This brings up a panel of results. The user can click on the link in the **Name** column to access a specific task.

The My Tasks Table

This panel is organized into a table containing the following columns:

- **Info (button)** - An information button is nestled (if available). Clicking on a button in this column brings up a message of what the document still needs completed.
- **Name (Document Specific Link)** - The document name (such as active grant opportunity applications and/or related documents such as reports) is listed as a link that the user can click on to access that document.
NOTE: If a document is not listed here and the user who requires access to the document is certain that the document has been started, that user needs to contact the user who added them to the organization and ask them to add them to that document specifically.
- **Document Type (Text)** – The document type column contains more information about the document.
- **Organization (Link)** – The name of the organization functions as a link to the organization record within the system. A user can click this link to access that record.
- **Status (Text)** – The status of the document is shown in this column.
- **Status Date (Text)** – The date the document entered that status.

Link Overview

Searches Overview

This is a navigation link allowing the user to conduct document searches from anywhere in the system.

- Searches are usually organized by specific document categories (such as Applications, Various Reports, etc.).
- Some **Searches** tabs are set up with a search for all document categories.

NOTE: When a user is searching for a document (like an application or a report) and they are not seeing a specific document they want to access, clicking the CLEAR button to remove search filters and then clicking the SEARCH button will bring up a wider range of search results.

Reports Overview

This is a navigation link that will allow the user to access documents available to that organization created by/for specific state agencies.

User Information (Name Link)

There is the **User Information (Name Link)** as a link available on the **Dashboard** page.

- The name displayed on that link is always the **First Name Last Name** of the user who is logged into the system.
- There is also a small arrow that expands when the user clicks on it to access additional tools available to the user. These tools include a **Profile** link, an **Edit Dashboard** link (available if the user is on the **Dashboard** page), a **Messages** link, and a **Log Out** link.

Profile Page

Clicking on the **Profile** link allows the user to see the information about the user known as the **Person Information** page. On the **Person Information** page, 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 additional security features.

The Person Information Page

General Person Information Access

Access to this information is assigned to users who have been given permission to view the **Person Information** page by the state agency. This is generally other members of the organization and state agency members.

Information about the individual is organized into the following sections:

- **Personal Information** – This section contains information is generally about the user such as name.
- **Contact Information** - This section contains information on how to contact the individual directly.
- **Address Information** - This section contains information about the user's or organization's address.

Individual Secure Information Access

There is information available on the **Person Information** page that is specifically viewed only by the individual logged in when they are logged in. This section includes:

- **A Security Image Feature** – User(s) can set this up as an additional security safeguard.
- **Username** – User(s) can update the username assigned to them here.
- **Password and Confirm Password** – These fields are used to update a user's password.

NOTE: Different systems will have different time periods where 1 password can be used consistently. Generally, a password is "good" for 90 days once it has been registered within the system.

Editing the Profile Page

The user can update any and all of these fields, as necessary. However, if the user attempts to save the page with any blank required (*) fields, those fields are highlighted by a red border. The user will not be able to save the page until those fields are filled in.

Organization(s)

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).

- 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 organization and role(s) for that organization, as well as **Active** and **Inactive** dates for that user for the organization(s).

Organization Information

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

- **General Information** – A section containing general information about the organization. It may include numbers assigned by other agencies. Sam.gov is a common agency connected to this system. If there are any ties to a parent organization, they are listed here.
- **Contact Information** - This section is specifically about the organization contact information.
- **Additional Information (Optional)** – This section is set up for some systems and contains custom data about the organization.
- **Business Address Information** – This section contains physical address information about the organization and can be validated using the USPS tool.

Organization Members

This area contains a list of members in the organization and allows the user to add additional members. The next area we are visiting is the **Organization Members** page; here, the user should be able to view all current members of the organization (and use the search options to filter them if needed). If a user has permissions within the system to edit the user, those names will 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

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.

Adding User(s) to an Organization Through Using the “Add Member to Organization” Tool

Adding an Existing Member to the Organization

Users can also add other users as new members to their organization from this page – if the role that the user has allows that level of access in the system. To add a member to the organization, please follow these instructions:

- 1) Click on the PLUS SIGN button in the **Member Search** section and select the INVITE EXISTING USER TO ORGANIZATION button.

NOTE: For some systems, the button is labeled ADD EXISTING USER TO ORGANIZATION.

- 2) Fill in the fields and click SEARCH. A list of users is visible in the bottom panel. Select a role and click SAVE.
- 3) 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. Fill in the fields and click SAVE.

Add a New User to the Organization

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 additional fields, and click the SAVE button.

NOTE: Adding user(s) this way adds the user(s) to the organization only – it does not add the user to specific documents. Please use the [Add/Edit People link in the Tools section](#) to add the user to specific document(s).

New User Page Overview

Information about the individual is organized into the following sections:

NOTE: Required information fields have a red asterisk (*) next to them.

- **General Information** – This section usually contains information about the user such as name.
- **Contact Information** - This section contains information on how to contact the individual directly.
- **Assign Roles** – This section is where the username and first temporary password are assigned to the new user.

Editing an Existing Member of the Organization

To edit an existing member's information, please follow these instructions:

- 1) Click on the name of the person in the **Person Name** column.
- 2) Complete any updates on the page and click SAVE.

Setting a Member to "Inactive"

Users are "removed" from the organization by being set as "inactive."

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 Categories

Organization Categories determine the documents (primarily applications for a specific grant opportunity and reports and other documents related to that initial document) available for the organization to use. For example, some opportunities are only offered for organization(s) in a specific location (like a county), other opportunities are only available for specific organization types (such as police departments). If an organization has a category checked, the organization can start applications for that category.

[Adding/Editing/Removing an Organization Category Assignment](#)

To update an organization category assignment, please follow these instructions:

- 1) Go to the **Administration** link, click on the **Organization & Person** link, and then the **Organizations** link.
- 2) Navigate to a specific organization.
- 3) Click on the **Organization Categories** link in the column on the left-hand side.
 - **Add/Edit Categories** - Check the checkbox(es) next to specific categories on this page to add/edit categories the organization is assigned to.
 - **Remove Categories** – Organization Categories are currently not being removed from the system.
- 4) Click the SAVE button.

Additional Organization Forms (Optional)

There may be additional forms including data about the organization on this page.

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. Emails can be “marked as read” by checking one (or more than one) of the checkboxes(es), selecting the “Mark as Read” setting from the drop-down list, and clicking the APPLY button.

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 (or more than one) 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.
- 4) This brings up past emails. A user can search for a specific message using the “**To**” and “**Subject**” fields.
- 5) To access a specific email, click on the ENVELOPE button on the right side of the screen for a specific email.

Starting Grant Opportunities

Converting a “Grant Opportunity” into an “Application”

Grant Opportunities are generally known as **Applications**. There is usually 1 grant which may allow an organization to apply only 1x or may allow an organization to apply more than 1x time.

- The state agency defines the number of times an organization can apply for an opportunity.
- There is usually a state contact managing that specific grant opportunity that organizations can ask questions of regarding what the state agency is looking for when they are reviewing applications for specific grant opportunities.
- What kind of documentation is required, and whether more documentation will be required outside the system (other systems and/or by email being 2 common examples).
- What levels of access are required to start, complete, and submit the document(s)/application(s).
- What level of review is required of the completed document(s)/application(s).

Applications generally turn into **Contracts**, which can have subdocument reports (such as progress reports, fiscal reports, financial reports, invoices, etc.) linked to them.

*** Each system will have different terminology for what grant opportunities are called, and what reporting documents connected to those documents are called. ***

Starting a Grant Opportunity

Current grant opportunities are displayed on the **My Opportunities** panel. This panel should display ALL opportunities available to users, as well as the provider, availability dates, and a brief description of the opportunity.

NOTE: The grant opportunity (once started by an organization) is referred to as an Application for these instructions.

To start a grant opportunity/application, please follow these instructions:

- 1) Login to the portal in a role that can start applications.
- 2) OPTIONAL: Use the **Provider** or **Name** fields in the **Filter** section and click SEARCH to filter the search results available in the **My Opportunities** section.
- 3) Click on the grant opportunity name in the **Name** column to bring up a menu with more application information.
- 4) This brings up a menu with more information and the PROCEED or CANCEL buttons. A user can click on the CANCEL button and then re-select the link and then click the PROCEED button.

NOTE: Other systems may have buttons labeled I AGREE, AGREE and DENY.

- 5) Once an application has been started, the user automatically sees the document's **Landing Page**.
- 6) If users navigate away from the **Landing Page**, they can use the **Searches** tab or the **Dashboard – My Tasks** section to locate the document.

Application/Document

Application/Document Search Tab

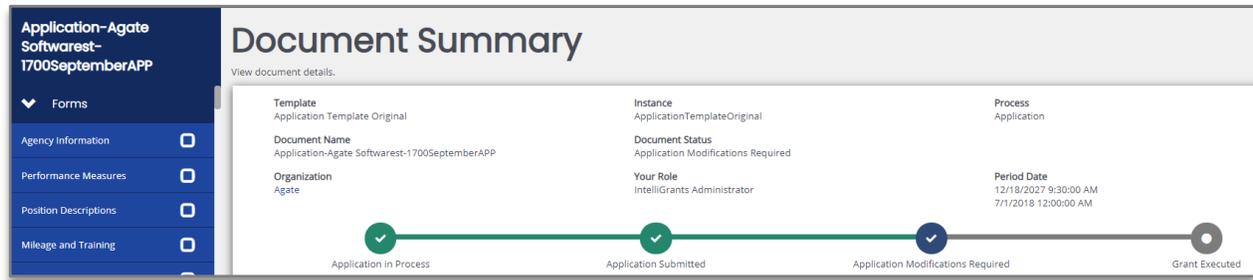
- Users can use the **Applications** search tab to locate a specific application/document to work on.

NOTE: When a user is searching for a document (like an application or a report) and they are not seeing a specific document they want to access, clicking the CLEAR button to remove search filters and then clicking the SEARCH button will bring up a wider range of search results.

The Document Landing Page

Document Landing Page Overview

The **Document Landing Page** contains a lefthand side navigation column, a section containing document details, and the **New Note** button.



Navigation Column Sections

Forms – The document forms. This list functions like a table of contents for the document.

Tools – Tools available to use for completing the document.

Status Change – The mechanism for “submitting” the document to the next group to contribute to.

Related Documents – Access links for documents “related to” or connected to this one. For example, an application may have “related documents” such as invoice(s), progress report(s), or reimbursement request(s).

Document Details

The **Document Details** section in the middle provides visual data including the grant opportunity status, future statuses, the name of the organization, the role of the user currently logged in, and both the **Period Date** and **Due Date**.

New Note Button

The **New Note** button allows a user to leave a note for other users.

Lefthand Navigation Column

Application Link

The number listed above the **Forms** header is the application number. It also functions as a link to bring the user back to the **Document Landing Page**.

NOTE: Hovering over the application number provides more information to the user.

Forms

The **Forms** section is divided into sections containing individual forms for the user(s) to fill in. There are drop-down arrows next to the **Forms** header that allow the forms to be hidden and other sections uncovered.

Tools

The **Tools** section contains tools useful for that specific document. Some tools are visualizing information tools such as the **Status History** tool displays the dates/times that a document has gone through different statuses. Other tools, such as the **Add/Edit People** tool, allow a user to add other users to that specific document.

Status Options

The **Status Options** section will display different statuses that a user can use to move the document in the process. Organizations submit documents (such as applications) at the start of the process. The document will go through different processes that review the submitted document, sign off on different requirements, can allow electronic signatures and modifications.

Related Documents

A document may have additional documents related to it. For example, an application typically has subdocuments such as distinct types of reports or invoices. The **Related Documents** section provides links to different documents related to that document.

Application/Document Forms

The lefthand column contains a list of sections and forms, with the first section visible being the default form location.



Forms

Form Options (Header)

In a row on the righthand side, are specific links/buttons.

“**Permissions**” are set up to assign users to distinct functions. Common buttons are:

Advanced View – allows the user to access additional options.

New Note – allows the user to create a new note for other users.

NOTE: For more information, please see the Notes section in the Tools area.

Save – allows the user to save the form.

Add – allows the user to create an additional instance of the form. It is the digital equivalent to being handed an extra piece of paper of a specific form to staple to an existing packet of forms.

Delete – allows the user to delete the instance of the form that is visible to the user. Clicking on the DELETE button will clear out the fields on the form (including any uploaded attachments).

Form Options (Footer)

At the bottom of the page, “Next Form” and “Previous Form” navigation buttons are available to assist with navigation.

Form Options (Advanced View)

Forms may have an **Advanced View** button in the upper right that allows an administrator to view additional form-specific details. The first item listed in the greyed-out field is the field name, followed by “|” break, and then the field ID.

Form Icons Left Side Navigation Column

There are additional icons on the left side of the page that can inform the user of the status of specific forms. This menu contains all the application forms related to this application that the user will need to complete before submitting for review. Form Names are links to that specific form, so once the link is clicked, the system displays that form.

These icons will tell the user what is going on with each form:

- **Blank Square** – This icon indicates that the form is blank.
- **Flag** – This icon indicates that the form has data saved on it and that the form is still incomplete.
- **Triangle with an Exclamation Point** – This icon is a warning that there is a field on the form that is incomplete.

- **Square with a Checkbox** – This icon indicates that the form has saved data and is complete.
- **Circle with an Exclamation Point** – This icon indicates that the form has saved data and contains errors.
- **Circle with an Arrow** – This icon indicates that the form has multiple instances of it. Clicking on the icon allows the user to examine a list of instances of that form to access that specific instance of the form.

“Locked” Fields aka “Grayed Out” Fields

Fields in a form can be “locked” from adjustments by the system. Fields on these forms are usually “grayed out” and the user cannot click in that field (but are available for use by other users who may review the document).

Data Transfers from the “Organization Information” Page to a “Document” Page

Sometimes, systems are set up so that information about an organization is populated in the **Organization Information** section and transferred automatically by the system into a document page. Error messages on a specific document page can be triggered if there isn't data in a specific field on the **Organization information** page and the document page requires it.

"Budget Summary" Forms

Sometimes forms will be organized in such a way that data on a specific form (such as "Salaries", "Travel" or "Other" will transfer to a line item on a **Budget Summary** form. The user will update the **Original** form (like "Salaries") and then click the SAVE button on a **Budget Summary** form to update the **Salaries** total on that form.

Tools

The **Tools** section contains a list of customized tools available to the user depending on the role assigned to the user. The tools section contains tools that may be helpful as the user completes the document. Each of these links directs to a different page with different purposes.

NOTE: The links available in the Tools section are set up by the administrators from the organization/agency offering the funding. These are usually set up by Role – the role a user has will determine what tools are available to the user.

Landing Page

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

Add/Edit People Tool

The ADD/EDIT PEOPLE LINK will redirect the user to the **Add/Edit People** page.

The page allows the user to add/update the user(s), user role(s), and active/inactive dates for that document.

- TO ADD USERS – Click the PLUS SIGN button and then search for a user. Next, assign the role from the dropdown for the user and click the SAVE button. Active dates are populated upon saving.

NOTE: Users from other organizations can be added to specific documents and not to the organization.

- TO REMOVE USERS – Click the PENCIL button, set an inactive date and click the SAVE button. After this date, they will no longer be assigned to the document.

Status History

The STATUS HISTORY LINK is a table that displays the different statuses the document has been in, as well as date/time information on when the document entered the status, who made the status change, and any notes entered during the status change.

Attachment Repository

The ATTACHMENT REPOSITORY LINK will direct the user to this page, which is a comprehensive list of all files currently uploaded to the document. The user may open these uploads by clicking the hyperlinked name of the upload, under the **Attachment** link column. If the user needs multiple files from this list, the user can click the “Zip” checkbox on the needed uploads and click the “Zip” button at the top of the panel. This will download them into a zip file that the user can extract and open, containing all the selected uploads.

Modification Summary

The MODIFICATION SUMMARY LINK will show all modifications made during versions steps. This page allows users to compare previous versions to other or current versions and shows the change in values. It is important to note that this page does not display ALL changes to values – so if the user enters a value, saves the page, and then changes the value, this will not be saved. The modification summary page only displays changes made during and between versioned steps. Common versioning steps are when the application is submitted, modification loops, and agency reviews.

Document Validation

The DOCUMENT VALIDATION LINK allows the user to check whether there are any errors throughout the document forms before the user submits the document for review.

Notes

The NOTES LINK is where all notes from the document are displayed. Notes can be added from any page of the document, even on other tools pages, by clicking the “New Note” button in the upper right-hand corner of the screen. Doing so brings up a modal with a rich text input, where the user can type in notes and format it accordingly.

- To add an attachment, click the PAPERCLIP button.
- To save/post the note, click the AIRPLANE button.

Print Document

The PRINT DOCUMENT LINK is where a user can create a printable PDF version of the document with all of the questions and saved answers on the document. Clicking this link will open a page on the screen, with all forms listed and three columns of radio buttons.

Radio Button Type	Description
Include (Default)	<p>The “Include” radio button selection is what includes a form in the PDF selection process.</p> <p>NOTE: The user can alter these selections, either for the entire column or individual lines.</p>
Exclude	<p>For example, if the user clicks the “Exclude” radio button for the Acknowledgements form and leaves the rest of the column checked to “Include,” the Acknowledgements form will not be included in the PDF when the user clicks the PRINT button.</p> <p>If the user clicks the “ALL” radio button for the “Exclude” radio button, the user still downloads a PDF file, but this will be empty and won’t contain any pages.</p>
“Blank Copy”	<p>The user also has the option to download a blank form. If the user checks the “Include Blank Copy” option for any of the forms, this will insert a page that has the question on the form, but not any answers. The user can print an entirely blank PDF by checking the “ALL” option.</p>

Document Messages

This tool allows the user to view information related to a specific document.

- Message Search Section** – There is a search section that a user can use to filter to a specific message about the document. A user can leave all the fields blank and click the SEARCH button to pull up a complete list of emails regarding that document.
- Messages** – This section provides a table of data about the email and an ENVELOPE button to open up the email message itself.

Status Options

The **Status Change** area allows the user to change the status of a document. This is normally useful for submitting applications or reports, signing contracts, or requesting grant modifications.

The **Status Options** section is where all the possible statuses available to the current user are. This is where applications may be pushed from one status to another, such as moving from “Application in Process” to “Application Submitted” or “Application Cancelled.”

NOTE: The page will display a confirmation message where the user clicks the OK button to confirm the status change and CANCEL to NOT complete the status change. If there are any errors existing throughout the document, a page displaying information about errors and links to specific pages will display.

EXAMPLE:

- **Submitting an Application** - Once the user has completed all of the forms and is ready to submit the document, the user can click the “Application Submitted” link. Next, the user will click OK to complete the application submission and CANCEL to return back to the application itself WITHOUT submitting the application.
- **Cancelling an Application** - If a user initiated the application by mistake, or has decided not to continue filling it out, the user can click the “Application Cancelled” link and confirm the cancellation.

Related Documents (Reports, Invoices, etc.)

The **Related Documents** section is where the user can access documents (such as reports) that are related to the application/contract. This section is where any related, such as parent, child, or sibling documents will be displayed. Because this is an application, this will be a parent document. Some documents may only be created at specific statuses, whereas others may be created during different statuses.

Starting a Related Document (Reports, Invoices, etc.)

To start a related document (common ones include reports or requests), please follow these instructions:

- 1) Navigate to the grant.
- 2) Close the **Forms, Tools, and Status Options** sections.
- 3) Click on the INITIATE RELATED DOCS button (in the **Related Documents** section or in the **My Tasks** Dashboard section).
- 4) Fill in the information and click the agreement button to start the related document.

Searches

The **Searches** section allows users to search for a variety of documents, separated by the template type. For example, searches made using the “Application” search will only return applications, and searches made using the “Contracts” search will only return contracts.

Document Searches

On a **Document Search** page, the user will have a few options available.

- If the user knows part of the document name or number, they can enter it into the **Name** field here.
- If the user knows part of the name of the organization it was created under, they can enter that into the **Organization** field.
- The **Type** field provides a dropdown list of all the document types. If there are multiple document types available for the user to search for, the statuses for ALL of those types are displayed.
- If the user knows the status the document was in, they can select it from the **Status** field. When searching by status, it is recommended that the user also select a **Type** to help narrow the statuses that display.
- Last but not least, the user can also search by **Sub Code**, which is usually the fiscal year of the document.

In the **Search Results** table (at the bottom of the page), the user will be able to see the **Name**, **Organization**, **Type**, **Status**, and **Sub Code** of the results. The **Name** column will be a link to the document. If the user has access to the document, they can use this link to navigate to the document.

NOTE: When a user is searching for a document (like an application or a report) and they are not seeing a specific document they want to access, clicking the CLEAR button to remove search filters and then clicking the SEARCH button will bring up a wider range of search results.

Custom Searches (Such as Grants.gov)

This tab allows the user to search across the entire breadth of funding opportunities available through the Grants.gov portal without ever leaving their IntelliGrants system.

To use this search tab, select this search link under the **Searches** section (at the top of the page).

Enter in text field(s) and/or select option(s) from the drop-down lists and click the SEARCH button.

The **Opportunity List** section lists the search results. For more information on a specific opportunity, click on the link for a specific opportunity in the **Opportunity Number** column.

This will bring up a page with general information, eligibility requirements, additional information, and grantor contact information.

Reports

This tab is used to access reports that were created using the **Report Builder** tool. The reports and report groups that are visible are entirely dependent on what reports and report groups are created.

Accessing a Report

To access a report, please follow these instructions:

- 1) Go to the **Reports** link, select a specific Report Group link or a specific report.
- 2) Enter in search criteria (optional) and click the SEARCH button.