



SAGE

Department of State

Applicant User Guide

November 2016

This user guide gives a general overview of the *SAGE* system navigation. *SAGE* is used by Department of State Applicants to create/submit Grant Applications, reimbursement requests, and submit various reports. For inquiries, e-mail sagehelp@sos.nj.gov .

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1. SAGE System Requirements

The New Jersey Department of State (NJDOS) SAGE system is designed for use by the vast majority of computer users with little or no changes to the computer environment. The requirements that are mentioned below are common computer elements that should be present on most machines.

1.a. Operating System

NJDOS SAGE is designed for both of the two more common computer operating systems - Windows and Macintosh. It has not been tested and is not supported on other operating systems such as Linux and Unix. Users accessing SAGE from a Macintosh environment are required to have MacOS 7.5 or higher. Windows users are required to have an operating system that is Windows XP or higher.

1.b. Internet Connection

SAGE is a web site designed for access via the Internet. For purpose of accessing SAGE, minimum connection is by modem. For those using a modem, recommended connection speed is at least 33.6 kbps (kilobits per second). Internet connections “faster” than modem, i.e., cable, DSL, T1, wireless improve speed at which the system operates. In an office environment, there may already be an Internet connection, but if unsure, contact the network administrator.

1.c. Web Browser

This system was designed to be compatible with common up-to-date web browsers including Internet Explorer 7 and above, Firefox, Safari, and Opera.

1.d. Adobe Acrobat Reader

Adobe Acrobat Reader is used to view PDF (Portable Document Format) documents. The SAGE system automatically generates Grant documents in PDF format using information that is saved into various narrative and budget pages. Using Adobe Acrobat Reader can view, print, or save PDF documents. Adobe Acrobat Reader can be downloaded at www.adobe.com.

2. Applicant User Types

There are three types of applicant security roles:

- Authorized Official
- Agency Administrator
- Agency Staff

These roles have different security levels needed to access Applications/Grants, Final Reports, Requests for Reimbursement, etc. Once an Authorized Official is identified and a new user account is created, the Authorized Official can select and enter the organization's staff member names into SAGE. Staff members, assigned by an Authorized Official are given any of the 3 applicant security roles, while staff members assigned by an Agency Administrator are given either the role of Agency Administrator or Agency staff. The three security roles are summarized below:

2.a. Authorized Official

- Creates new user account (NJDOS will then validate this user)
- Adds new users to SAGE and assigns organization staff to Authorized Official, Agency Administrator or Agency staff security roles
- Edits and/or deletes user account information
- Views, applies for, and submits Grant Applications
- Enters, updates, and deletes information on Applications, Grants, Requests for Reimbursement, and Final Reports
- Downloads and attaches files to Applications, Grants, Requests for Reimbursement, and Final Reports
- Cancels Applications, Grants, Requests for Reimbursement, and/or Final Reports
- Modifies Applications, Grants, Requests for Reimbursement, and/or Final Reports with status of "Modifications Required"
- Checks status of Applications, Grants, Requests for Reimbursement, and/or Final Reports

2.b. Agency Administrator

- Adds new users to SAGE and assigns organization staff to Agency staff or Agency Administrator security roles
- Edits and/or deletes user account information
- Views, applies for, and submits Grant Applications
- Enters, updates, and deletes information on Applications, Grants, Requests for Reimbursement, and Final Reports

- Downloads and attaches files to Applications, Grants, Requests for Reimbursement, and Final Reports
- Cancels Applications, Grants, Requests for Reimbursement, and/or Final Reports
- Modifies Applications, Grants, Requests for Reimbursement, and/or Final Reports with status of “Modifications Required”
- Checks status of Applications, Grants, Requests for Reimbursement, and/or Final Reports

2.c. Agency Staff

- Edits user account information, and
- When permission is Granted by the Authorized Official or Agency Administrator:
 - Enters, updates, and deletes information on Applications, Grants, Requests for Reimbursement, and/or Final Reports;
 - Downloads and attaches files to Applications, Grants, Requests for Reimbursement, and/or Final Reports;
 - Modifies Applications, Grants, Requests for Reimbursement, and/or Final Reports with status of “Modifications Required”;
 - Checks status of Applications, Grants, Requests for Reimbursement, and/or Final Reports.

3. System Access

There are two ways to access SAGE:

1. Request access to SAGE via the SAGE Login page and get approved by a NJDOS SAGE system administrator
or
2. When an organization already has an SAGE account, obtain access from the organization's Authorized Official or Agency Administrator. This is the preferred way to access SAGE – it is quick and provides greater security for the organization's records.

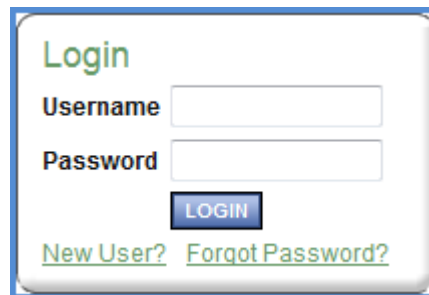
3.a. Authorized Official Access

To gain access to SAGE as an Authorized Official, first:

Create a new user account.

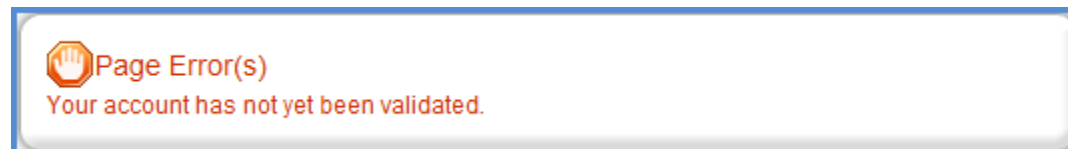
From the SAGE Home page select “New User?” located in the Login section.

1. Fill in the Contact Information as required. All items marked with an * are required
 - a. The “Username” field can consist of letters and/or numbers and must be between 5 and 20 characters long
 - b. The “Password” field can consist of letters and numbers and must be between 7-20 characters
 - c. The fields “Password” and “Confirm Password” must match



2. Save

After saving the new user information, the account will be validated by a NJDOS SAGE system administrator. If attempting to access the system before validation, the following message will appear:



When access has been granted, an e-mail confirming the account has been validated will be received. If the account is set up as an Authorized Official or Agency Administrator, the user will now be able to create additional Applicant user accounts for the organization.

Note: Applicant users are not able to access documents created *prior* to the date they are activated/assigned to an organization. For access to documents dated before a user's activation date, an Authorized Official or Agency Administrator must assign the user to each individual document using the “Add/Edit People” tool located within each document. On the document's main menu, under “Access Management Tools,” “View Management Tools,” select “Add/Edit People.”

3.b. Agency Administrator and Agency Staff Access

The preferred method for gaining access to SAGE is to have the organization’s Authorized Official or Agency Administrator add new users to the system. If an organization does not have an Authorized Official or Agency Administrator, then someone should be designated as such and this person will be validated as shown in user guide section 3.a. Authorized Official Access.

To add an Agency Administrator or Agency staff person to an organization:

1. Select “Organization(s)”
2. Select “Organization Members”
3. Select “Add Members.”

Organization - ABSECON CITY SCHOOL DISTRICT
 Follow the instructions listed below to add/remove/modify organization members.

[Organization Information](#) | [Organization Members](#) | [Organization Documents](#) | [Organization Details](#)

Organization Members

Administrators with the authority to add members to your organization can follow these steps:
 To add a member to your organization, select the **Add Members** link below.
 If a member has already added his/her information in the system, you can search for the member.
 If you need to add a member's information into the system, select **New Member**.
 For more detailed instructions, select the **Show Help** button above.

[Current Members](#) | [Add Members](#)

Sort By: -----SELECT----- -----SELECT----- **GO**

<input type="checkbox"/>	Person	Role	Active Dates	Active Documents	Assigned By	Modified By
<input checked="" type="checkbox"/>	Jersey, Brad	Authorized Official	5/14/2012 - <input type="text"/>	99	Sir Josh 5/14/2012	Jersey, Brad 6/13/2012

4. A person search field appears. Type the first or last name of the person to add and select “Search.” The results appear below. If the person’s name does not come up in the search results, skip to item 6.

Person Search **SEARCH** **NEW MEMBER**

<input type="checkbox"/>	Person	Role	Active Dates	Active Documents	Assigned By	Modified By
<input type="checkbox"/>	Harding, Jim	Agency Administrator	3/13/2013 - <input type="text"/>			

- Place a check in the box next to the person to add. Select a role, enter an active date (beginning), and “Save.” Then select “Current Members” and the person added should show with the rest of the organization member’s names. Return to step 1 to add additional members.

[Current Members](#) | [Add Members](#)

Sort By: -----SELECT----- ▾ -----SELECT----- ▾

<input type="checkbox"/>	Person	Role	Active Dates	Active Documents	Assigned By	Modified By
<input checked="" type="checkbox"/>	Harding, Jim	Agency Administrator ▾	3/13/2013 - <input type="text"/>		Jersey, Brad 3/13/2013	
<input checked="" type="checkbox"/>	Jersey, Brad	Authorized Official	5/14/2012 - <input type="text"/>	99	Sir Josh 5/14/2012	Jersey, Brad 6/13/2012

- If the person's name does not come up in the search results, then select "New Member."

Organization Members

Administrators with the authority to add members to your organization can follow these steps:
 To add a member to your organization, select the **Add Members** link below.
 If a member has already added his/her information in the system, you can search for the member.
 If you need to add a member's information into the system, select **New Member**.
 For more detailed instructions, select the **Show Help** button above.

[Current Members](#) | [Add Members](#)

Person Search

6. Enter information for the new user and “Save & Add to Organization.”

SAVE & ADD TO ORGANIZATION
SHOW HELP

[Back](#)

Organization - ABSECON CITY SCHOOL DISTRICT

Follow the instructions listed below to add/remove/modify organization members.

[Organization Information](#) |
 [Organization Members](#) |
 [Organization Documents](#) |
 [Organization Details](#)

Add/Edit Members

Administrators with the authority to add members to your organization can follow these steps:
Please complete the information below. All required fields are marked with an *.

Name	Prefix <input type="text"/>	First <input type="text"/>	Middle <input type="text"/>	Last <input type="text"/>	Suffix <input type="text"/>
Title	<input type="text"/>				
Email	<input type="text"/>				
Username	<input type="text"/>				
Password	<input type="text"/>		Confirm Password	<input type="text"/>	
Date Active	<input type="text" value="3/13/2013"/>	Date Inactive	<input type="text"/>		
Role	<input type="text"/>				

The fields below are populated with the Organization information by default. However, you may edit the information in any of the fields. This information may also be edited by the person you are creating the profile for from their Profile page.

Address	<input type="text" value="800 Irelan Avenue"/>				
City	<input type="text" value="Absecon"/>	State	<input type="text" value="New Jersey"/>	Zipcode	<input type="text" value="08201"/>
County	<input type="text" value="Atlantic County"/>				
Phone #1	<input type="text" value="609-641-5375"/>	Phone #2	<input type="text"/>		
Fax	<input type="text" value="609-641-8692"/>	Cell Phone	<input type="text"/>		
Website	<input type="text" value="abseconschools.org"/>				

4. Login Page

4.a. Accessing SAGE

To access SAGE, enter njsage.intelligrants.com into the address bar of a web browser. The page looks like the image below.

Note: SAGE does not save the username and password. This option *may* be available on the web browser.

Welcome to the State of New Jersey System for Administering Grants Electronically (SAGE)

This is the State of New Jersey's grant management system. This system requires authorization for access. If you do not have a username and password please click the **New User** link to request access to the site.

NOTE: Counties and municipalities are already established SAGE user agencies. New user access is established by your agency's officials in [DCA SAGE](#).

Helpful Links

- [SAGE Help Desk and Support Services](#)
- [Search programs available through SAGE](#)
- [Request Access to SAGE](#)
- [Reset Your Password](#)

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4.b. Bookmark/Favorites

SAGE may be bookmarked, or added, to the favorites menu.

After accessing the SAGE Login page, on the Internet Explorer (IE) menu bar:

1. Select "Favorites"
2. Select "Add to Favorites"
3. Rename the site, if desired
4. Select "Add"

4.c. Adding SAGE to List of Trusted Sites

To avoid various browser-related restrictions unnecessarily placed on SAGE, make the following changes to the web browser.

If using Internet Explorer, we recommend adding the NJDOS SAGE Home page to the list of trusted sites as follows:

1. Select "Tools";
2. Select "Internet Options";
3. Select "Security";
4. Select "Trusted sites";
5. Select "Sites";
6. In "Add this website to the zone:" enter:
<https://njsage.intelligrants.com/Login.aspx?APTHEME=NJSAGE>
7. Select "Add";
8. Select "Close" and then "OK".

5. User Contact Information

5.a. Updating User Profile

It is important to keep contact information up-to-date. This may be done quickly and easily in SAGE.

By keeping records current, NJDOS staff is able to easily contact users when a need arises. This is especially important for timely messaging. When system messages are sent from SAGE, they are sent to the e-mail address in the user profile. When an incorrect e-mail address is in the contact information, automatic notifications will not be received. Also, in the event of a forgotten password, the e-mail address is required and must match the one listed in the contact information.

Update the profile at any time by:

1. From the Home page, select "Profile";
2. Update the form with current information;
3. Select "Save".

[Training Materials](#) | [Organization\(s\)](#) | [Profile](#) | [Logout](#)

[Back](#)

Profile

Please complete all the required fields below. Required fields are marked with an *.

Contact Information

	Prefix	First	Middle	Last	Suffix
Name	<input type="text" value=""/>	<input type="text" value="Brad"/>	<input type="text" value=""/>	<input type="text" value="Jersey"/>	<input type="text" value=""/>
Organization	<input type="text" value="NJDOT"/>				
Title	<input type="text" value=""/>				
Address	<input type="text" value="1231"/>				
City	<input type="text" value="Okemos"/>	State	<input type="text" value="Michigan"/>		
County	<input type="text" value="Alcona County"/>				
Phone #1	<input type="text" value="(989) 555-6523"/>	Phone #2	<input type="text" value=""/>		
Fax	<input type="text" value=""/>	Cell Phone	<input type="text" value=""/>		
Email	<input type="text" value="jpost@agatesoftware.com"/>				
Website	<input type="text" value=""/>				
Username	<input type="text" value="bjersey"/>				
Password	<input type="text" value=""/>	Confirm Password	<input type="text" value=""/>		

Organization Information

Organization	Role	Active Dates	Assigned By
ABSECON CITY SCHOOL DISTRICT	Authorized Official	05/14/2012 - open ended	Sir Josh

5.b. Updating Another User's Contact Information

An organization's Authorized Official or Agency Administrator may edit another user's contact information as follows:

1. Select "Organization(s)";
2. Select "Organization Members";
3. Select the name of the person whose contact information to change;

Training Materials | **Organization(s)** | Profile | Logout

SAVE SHOW HELP

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Organization - ABSECON CITY SCHOOL DISTRICT

Follow the instructions listed below to add/remove/modify organization members.

[Organization Information](#) | [Organization Members](#) | [Organization Documents](#) | [Organization Details](#)

Organization Members

Administrators with the authority to add members to your organization can follow these steps:
 To add a member to your organization, select the **Add Members** link below.
 If a member has already added his/her information in the system, you can search for the member.
 If you need to add a member's information into the system, select **New Member**.
 For more detailed instructions, select the **Show Help** button above.

[Current Members](#) | [Add Members](#)

Sort By: -----SELECT----- -----SELECT----- GO

<input type="checkbox"/>	Person	Role	Active Dates	Active Documents	Assigned By	Modified By
<input checked="" type="checkbox"/>	Harding, Jim	Agency Administrator	3/13/2013 -		Jersey, Brad 3/13/2013	
<input checked="" type="checkbox"/>	Jersey, Brad	Authorized Official	5/14/2012 -	99	Sir Josh 5/14/2012	Jersey, Brad 6/13/2012

4. Update accordingly and "Save".

6. Applicant Organization

6.a. Organization Profile

When an organization's contact information changes, it is important to update the system.

Note: The following 5 fields can be changed by the applicant organization users. All other information may only be altered by a SAGE system administrator:

- SAM CAGE Code
- Phone
- Fax
- Email
- Website

Note: The SAM CAGE Code is not required for submission of any NJDOS Application

Organization - ABSECON CITY SCHOOL DISTRICT

Please complete all the required fields below. Required fields are marked with an *.

[Organization Information](#) |
 [Organization Members](#) |
 [Organization Documents](#) |
 [Organization Details](#)

Organization Information

Name	<input style="width: 90%;" type="text" value="ABSECON CITY SCHOOL DISTRICT"/>		
Federal Tax I.D. Number	<input style="width: 90%;" type="text" value="216000928"/>		
DUNS Number	<input style="width: 90%;" type="text" value="60-312-3753"/>		
SAM CAGE Code	<input style="width: 90%; border: 2px solid red;" type="text"/>		
Address	<input style="width: 90%;" type="text" value="800 Ireland Avenue"/>		
City	<input style="width: 40%;" type="text" value="Absecon"/>	* State	<input style="width: 20%;" type="text" value="New Jersey"/>
		* Zipcode	<input style="width: 20%;" type="text" value="08201"/>
County	<input style="width: 90%;" type="text" value="Atlantic County"/>		
Phone	<input style="width: 40%; border: 2px solid red;" type="text" value="609-641-5375"/>	* Fax	<input style="width: 40%; border: 2px solid red;" type="text" value="609-641-8692"/>
Email	<input style="width: 90%;" type="text" value="jgiaquinto@abseconschools.org"/>		
Website	<input style="width: 90%;" type="text" value="abseconschools.org"/>		

6.b. Deactivating a User

An Authorized Official or Agency Administrator can deactivate a member of his/her organization. A deactivated user cannot access or edit Application-related information. To deactivate a user:

1. If there is more than one organization, then first select the one to edit
2. Select "Organization Members"
3. Using the drop-down calendar, set the second "Active Dates" field to the date on which the user to have access will no longer have access
4. Select "Save"

Training Materials | **Organization(s)** | Profile | Logout

SAVE SHOW HELP

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Organization - ABSECON CITY SCHOOL DISTRICT

Follow the instructions listed below to add/remove/modify organization members.

Organization Information | **Organization Members** | Organization Documents | Organization Details

Organization Members

Administrators with the authority to add members to your organization can follow these steps:
 To add a member to your organization, select the **Add Members** link below.
 If a member has already added his/her information in the system, you can search for the member.
 If you need to add a member's information into the system, select **New Member**.
 For more detailed instructions, select the **Show Help** button above.

[Current Members](#) | [Add Members](#)

Sort By: -----SELECT----- -----SELECT----- GO

Person	Role	Active Dates	Active Documents	Assigned By	Modified By
<input checked="" type="checkbox"/> Harding, Jim	Agency Administrator	3/13/2013		Jersey, Brad 3/13/2013	
<input checked="" type="checkbox"/> Jersey, Brad	Authorized Official	5/14/2012	99	Sir Josh 5/14/2012	Jersey, Brad 6/13/2012

6.c. Organization Documents

The link titled "Organization Documents" allows the user to view all Applications, Reimbursement Requests and Final Reports that have been created by users within the organization.

Organization - ABSECON CITY SCHOOL DISTRICT
 Click on the name to view a specific document.

[Organization Information](#) | [Organization Members](#) | [Organization Documents](#) | [Organization Details](#)

Organization Documents

Export Results to: Screen Sort documents by: Document Type GO

Document Type	Name	Current Status	Year
Adolescent Health 2012	DFHS12ADL009	Application Modifications Required	2012
Adolescent Health 2014	DFHS14ADL001	Application in Process	2014
Adolescent Health 2014	DFHS14ADL002	Grant Funds Encumbered	2014
Alzheimer COPSA 2013	DACS13ALZ006	Grant Funds Encumbered	2013

You can also export the list of organization documents to excel, text, or XML files and sort the documents by type, name, status, or year.

When you are viewing the list of organization documents you can navigate to a documents menu by clicking the name of the document.

6.d. Organization Details

The link titled “Organization Details” is used to enter additional information required for some SAGE applications. After clicking “Organization Details”, click the link to any of the forms relevant to any of the grant programs you wish to apply for.

My Organization Information
 Please complete all required forms below.

[Organization Information](#) | [Organization Members](#) | [Organization Documents](#) | [Organization Details](#)

Organization Details

Status	Page Name	Note	Created By	Last Modified By
	NJ State Council on the Arts Board Chart			
	Additional Profile Information – Required for applicants to the NJ Department of State		Brad Jersey	2/26/2013 10:18:48 AM
	Additional Profile Information – Required for applicants to the NJ Department of Education		Brad Jersey	3/6/2013 3:04:18 PM
	Additional Profile Information – Required for applicants to the NJ Department of Health			
	Additional Profile Information – Required for applicants to the NJ Department of Human Services			
	Organization Vendor Numbers - Payee Name and Address			

7. Home Page

The Home page is the next page seen after logging into SAGE. From the Home page all types of documents can be accessed, such as Applications/Grants, Reimbursement Requests, Final Reports, e-mail/messages, user information, etc.

SAGE features a number of tabs across the top of the screen that allow access to the Home page, Portal Home, Applications/Grants, Requests for Reimbursement, and Final Reports.

During the Application availability period “View Available Opportunities” appears on the Home page. When the application availability period is over, this option is not visible.

Likewise, when there are no active tasks to perform, “My Tasks” does not appear on the Home page. There may be times when only “My Inbox” (e-mail/messages) appears on the Home page.

STATE OF NEW JERSEY SAGE
System for Administering Grants Electronically

Home | Calendar | All Documents | Pre-Applications | Applications/Grants | Grant Reports | Financial | Projects

[Training Materials](#) | [Organization\(s\)](#) | [Profile](#) | [Logout](#) [SHOW HELP](#)

Welcome Brad
Authorized Official
[Change Picture](#)

Instructions:
Select the **SHOW HELP** button above for detailed instructions on the following.
 > Applying for an Opportunity
 > Using System Messages
 > Understanding your Tasks
 > Managing your awarded grant

Hello Brad, please choose an option below.

View Available Opportunities
You have **14** Opportunities available.
Select the **View Opportunities** button below to see what is available to your organization.
[VIEW OPPORTUNITIES](#)

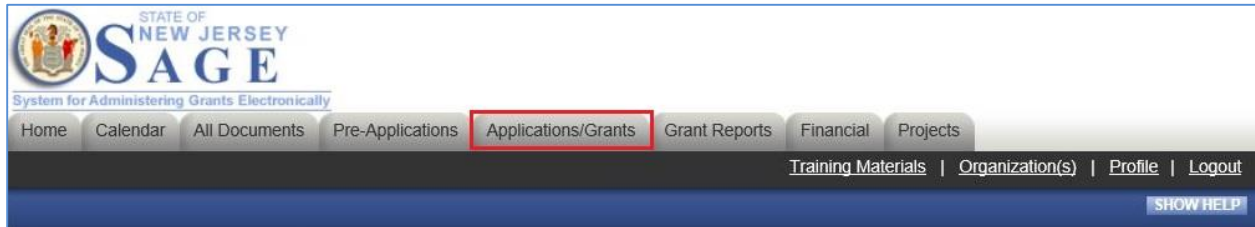
My Inbox
You have **18** new messages.
Select the **Open Inbox** button below to open your system message inbox.
[OPEN INBOX](#)

My Tasks
Export Results to Sort by:

Info	Document Type	Organization	Name	Current Status	Date Received	Date Due
	Application	NJSAGE Test Org 1	AERO-ACIP-2011-NJSAGE Test Org 1-001	Application in Process	3/12/2012	

7.a. Searching for Documents

The Pre-Applications, Applications/Grants, Reports, Financial and Projects tabs allow for searching documents in the system. Search fields and functionality are the same for all five tabs. This example will search for an Application/Grant, but the steps are the same for all document types.



To view a list of Applications/Grants:

1. Select “Application/Grant”;
2. “Search,” and the list displays below.

To view Applications/Grants by type, name, person, status, or by year:

1. Select “Application/Grant”;
2. Fill in the necessary information;
3. “Search”.

From the list of Applications/Grants, select the one to view by selecting the name.

Applications/Grants

Use the search functionality below to find a specific Application/Grant.

Search Applications/Grants

Application/Grant Types Destination Marketing Organization 2013

Application/Grant Name

Person

Status -- Select --

Year

Export Results to Screen **Sort by:** -- Select --

Number of Results **4**

Document Type	Organization	Name	Current Status	Year
Destination Marketing Organization 2013	Brad Jersey - Individual	DMO-2013-Brad Jersey - Individual-00001	Application Review Complete	2013
Destination Marketing Organization 2013	NJDOTX Test Org 1	DMO-2013-NJDOTX Test Org 1-00002	Executed	2013
Destination Marketing Organization 2013	NJDOTX Test Org 1	DMO-2013-NJDOTX Test Org 1-00003	Application in Process	2013
Destination Marketing Organization 2013	NJDOTX Test Org 1	DMO-2013-NJDOTX Test Org 1-00004	Executed	2013

Note: Until users create documents, searches for documents result in no records being found.

7.b. Viewing Available Applications

During the Application/Grant period, the “View Available Opportunities” option is only visible to Applicants and lists available Applications that Applicants can apply for and submit to NJDOS. Available opportunities will be listed on a page, and search fields are available to narrow down the selection. To initiate an Application, select “Apply Now.”

Opportunities

To apply for an item listed below, select the **Apply Now** button below each description.

RESET OPPORTUNITIES

Provider:

Document Instance:

Due Date (From - To): -

FILTER

HC CHPP DOI 2017 for NJSAGE Test Org 1
Offered By:
 NJSAGE_DOS

DOS DOI Availability Dates:
 04/01/2016-open ended

DOS DOI Period:
 not set

DOS DOI Due Date:
 05/02/2016

Description:
 NJHC CHPP Declaration of Intent

APPLY NOW **NOT INTERESTED**

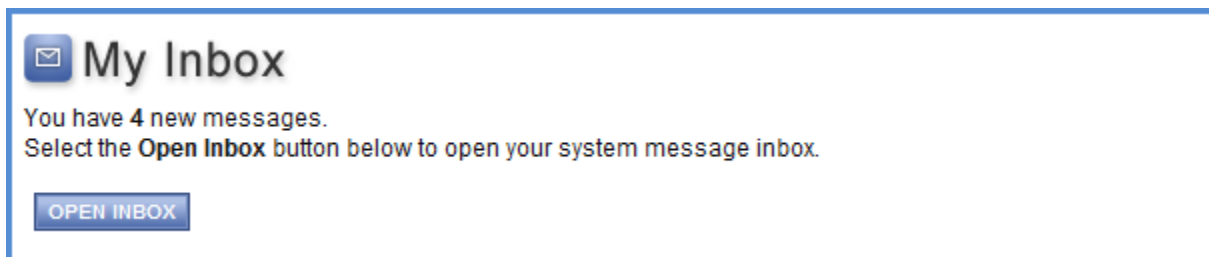
7.c. Accessing My Inbox (E-mail/Messages)

SAGE system e-mail/messages are sent periodically. E-mail appears both in SAGE at My Inbox and at the e-mail address listed in the SAGE contact information.

For example, an e-mail may be sent upon submission of an Application, an Application being returned for modification, an approaching deadline, a program change, etc. These messages keep users informed and serve as a reminder when certain tasks required action.

To receive timely messages it is important to maintain an active e-mail address in SAGE (See user guide section 5. Contact Information). An incorrect e-mail address (or an e-mail box that is full) will prevent users from receiving important SAGE-related messages.

My Inbox allows access to system e-mail/messages. To see contents, select “Open Inbox.”



7.c.1 Viewing E-mail/Messages

All new messages (unread), if any, are displayed.

The following can be done in the Inbox:

- Sort messages by Priority, Sender, Subject, or Date/Time
- Select “View All System Messages” to see all messages going back to when system access was received
- View a message’s priority status
- Select its subject link to view the message
- See date/time a message was sent
- Check box at left of message to “Mark Checked As Read” or “Mark Checked as Archived”



7.c.2 Searching for E-mail/Messages

To search for a message, select “View All System Messages.” From the “System Messages” page, enter a keyword and “Search.” A list of messages that match the search criteria will display.

The following can also be done from this menu:

- Sort search results by Priority, Sender, Subject, Date/Time, or Status;
- View all messages going back to when system access was received;
- View archived messages;
- View a message's priority status;
- See date/time a message was sent.

System Messages

Use the search functionality below to locate an email. Enter a keyword to search the sender, subject or within the body of an email. You may also filter your results before you search by using the sort functionality.

System Email Folders

- [System Messages](#)
- [Sent Messages](#)
- [My Archived Messages](#)

System Messages

Keyword search system messages for: Sort search results by: -- Select -- SEARCH

1	Priority	Sender	Subject	Date/Time	Status
		Patricia Jordan	LWD Grant S4J-FY2017-NJSAGE Test Org 1-001 Contract Revisions	8/8/2016 11:36:29 AM	Read
		Grant System	LWD Application S4J-FY2017-NJSAGE Test Org 1-001 was successfully submitted	8/5/2016 3:50:14 PM	Unread
		Ms. Chelsea Betlow	PLEASE DISREGARD PREVIOUS EMAIL ABOUT ATTACHMENT C	4/11/2016 3:58:51 PM	Unread
		Ms. Chelsea Betlow	ATTACHMENT C'S ARE UPLOADED IN YOUR AIDS16RWB GRANTS IN SAGE - PLEASE REVIEW	4/11/2016 2:14:57 PM	Unread
		Ms. Chelsea Betlow	Request for Applications (RFA) – Care and Treatment Services- State 2017	2/9/2016 4:20:56 PM	Unread

7.d. Completing My Tasks

“My Tasks” (formerly My Documents) appears on the Home page when there are tasks that require action. Some of the tasks may be critical (indicated by a red Date Due).

To access documents requiring action, select “Open Tasks” and then the name of a document to go to that document’s menu.

You can also export the list of documents to excel, text, or XML files and sort the documents by date due, date received, type, status, name, or organization.

My Tasks

Export Results to Screen Sort by: -- Select --

Info	Document Type	Organization	Name	Current Status	Date Received	Date Due
	Application	NJSAGE Test Org 1	AERO-ACIP-2011-NJSAGE Test Org 1-001	Application In Process	3/12/2012	
	Application	NJSAGE Test Org 1	AERO-ACIP-2011-NJSAGE Test Org 1-002	Application In Process	4/16/2012	
	Application	NJSAGE Test Org 1	BIKE-2003-dfghdfgh-00001	Application In Process	6/14/2010	
	ESEA-NCLB 2014	NJSAGE Test Org 1	ESEA-NCLB-2014-NJSAGE Test Org 1--001	Application in Process	9/1/2016	
	Skills Partnership Grant 2017	NJSAGE Test Org 1	S4J-FY2017-NJSAGE Test Org 1-002	Application in Process	8/18/2016	
	Youth Transitions to Work (YTTW) Grant Program FY 2017	NJSAGE Test Org 1	YT17001_NJSAGE Test Org 1	Application in Process	8/8/2016	

When there are no active tasks, “My Tasks” is not visible on the Home page.

Note: To access all Applications/Grants that are assigned, see user guide section 7.a. Searching for Documents.

8. Application Initiation

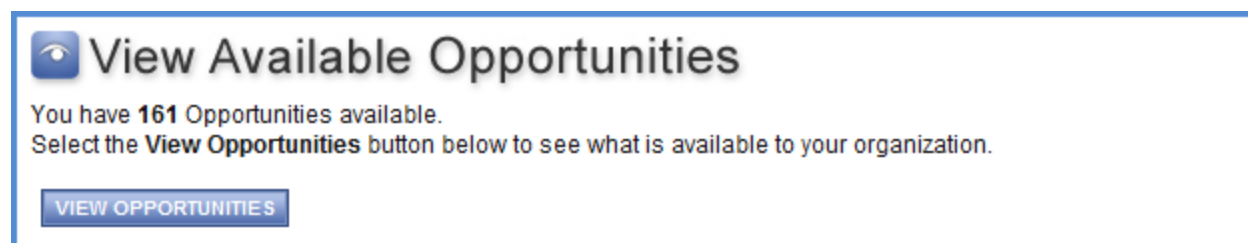
During a Grant cycle's Application period, "View Available Opportunities" appears on the Home page. When the Application period is over, this option is not visible.

An Authorized Official and Agency Administrator are the only roles authorized to initiate and submit a Grant Application.

8.a. Initiating an Application

To initiate a Grant Application:

1. On the Home page, under View Available Opportunities, select "View Opportunities."
2. A list of available Grant Opportunities displays.

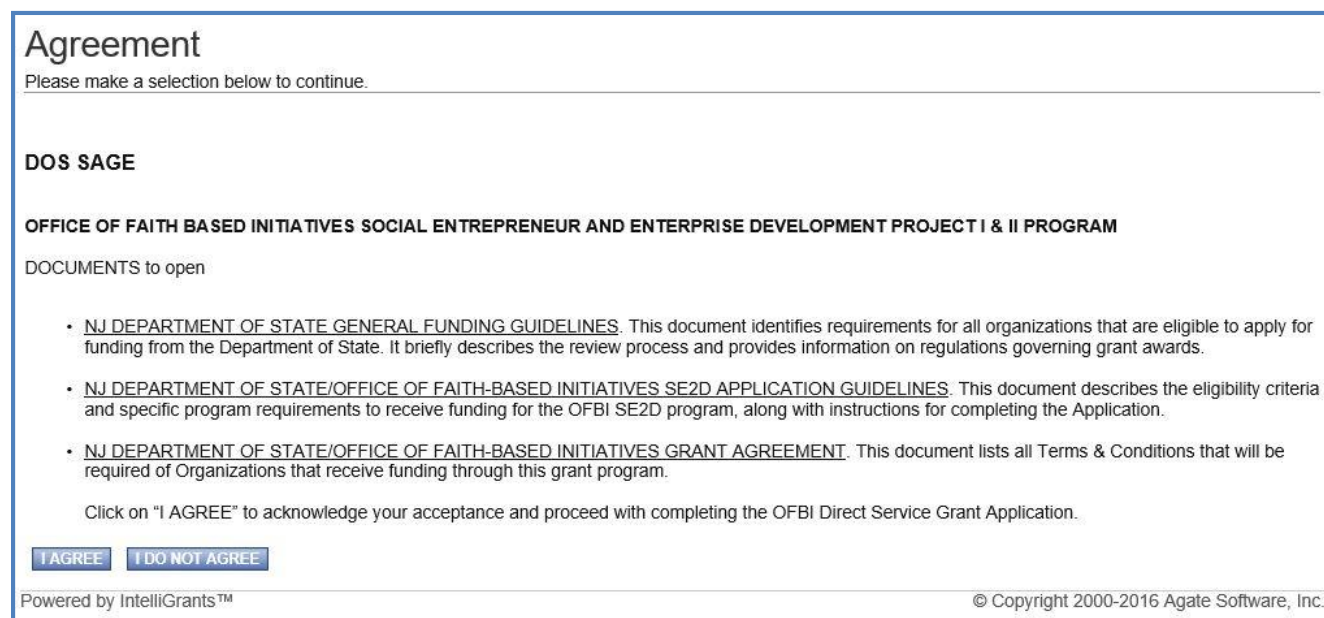


The screenshot shows a blue-bordered box containing the text "View Available Opportunities" with a magnifying glass icon. Below this, it says "You have 161 Opportunities available. Select the View Opportunities button below to see what is available to your organization." At the bottom of the box is a blue button with the text "VIEW OPPORTUNITIES".

3. To apply for Applications, select "Apply Now." (formerly Create New)



4. A page appears asking for confirmation, select "I Agree." An Application is created for the organization, and the Application/Grant menu is displayed.



The screenshot shows a page titled "Agreement" with the instruction "Please make a selection below to continue." Below this, the text "DOS SAGE" and "OFFICE OF FAITH BASED INITIATIVES SOCIAL ENTREPRENEUR AND ENTERPRISE DEVELOPMENT PROJECT I & II PROGRAM" is displayed. Under "DOCUMENTS to open", there are three bullet points with links to "NJ DEPARTMENT OF STATE GENERAL FUNDING GUIDELINES", "NJ DEPARTMENT OF STATE/OFFICE OF FAITH-BASED INITIATIVES SE2D APPLICATION GUIDELINES", and "NJ DEPARTMENT OF STATE/OFFICE OF FAITH-BASED INITIATIVES GRANT AGREEMENT". A note says "Click on 'I AGREE' to acknowledge your acceptance and proceed with completing the OFBI Direct Service Grant Application." At the bottom are two buttons: "I AGREE" and "I DO NOT AGREE". The footer contains "Powered by IntelliGrants™" and "© Copyright 2000-2016 Agate Software, Inc."

8.b. Returning to an Application in Process

Following initiation of an Application, a new task appears under the My Tasks section on the Home page.

My Tasks

Export Results to Sort by:

Info	Document Type	Organization	Name	Current Status	Date Received	Date Due
	Application	NJSAGE Test Org 1	AERO-ACIP-2011-NJSAGE Test Org 1-001	Application In Process	3/12/2012	
	Application	NJSAGE Test Org 1	AERO-ACIP-2011-NJSAGE Test Org 1-002	Application In Process	4/16/2012	
	Application	NJSAGE Test Org 1	BIKE-2003-dfghdfgh-00001	Application In Process	6/14/2010	
	ESEA-NCLB 2014	NJSAGE Test Org 1	ESEA-NCLB-2014-NJSAGE Test Org 1--001	Application in Process	9/1/2016	
	Skills Partnership Grant 2017	NJSAGE Test Org 1	S4J-FY2017-NJSAGE Test Org 1-002	Application in Process	8/18/2016	
	Youth Transitions to Work (YTTW) Grant Program FY 2017	NJSAGE Test Org 1	YT17001_NJSAGE Test Org 1	Application in Process	8/8/2016	
	Title II Adult Education and Literacy FY 2017	NJSAGE Test Org 1	ABS-FY2017-NJSAGE Test Org 1-018	Application in Process	8/12/2016	1/1/1900
	Application	NJSAGE Test Org 1	MA-2012-NJSAGE Test Org 1-00735	Application In Process	3/12/2012	9/23/2011
	HTS Federal Highway Safety Grant 2014	NJSAGE Test Org 1	FED-2014-NJSAGE Test Org 1-00232	Application In Process	4/29/2013	4/30/2013
	OFBI Social Enterprise Entrepreneurial Development 2017	NJSAGE Test Org 1	OFBI17SE2D-038	Application in Process	10/27/2016	
	Skills Partnership Expenditure Report 2017	NJSAGE Test Org 1	EXP-FY17-JAN-S4J-NJSAGE Test Org 1-001-00002	Expenditure Report in Process	9/23/2016	
	Skills Partnership Grant 2017	NJSAGE Test Org 1	S4J-FY2017-NJSAGE Test Org 1-001	Grant Funds Encumbered	8/9/2016	

When logging out of SAGE and returning later to continue working on an Application:

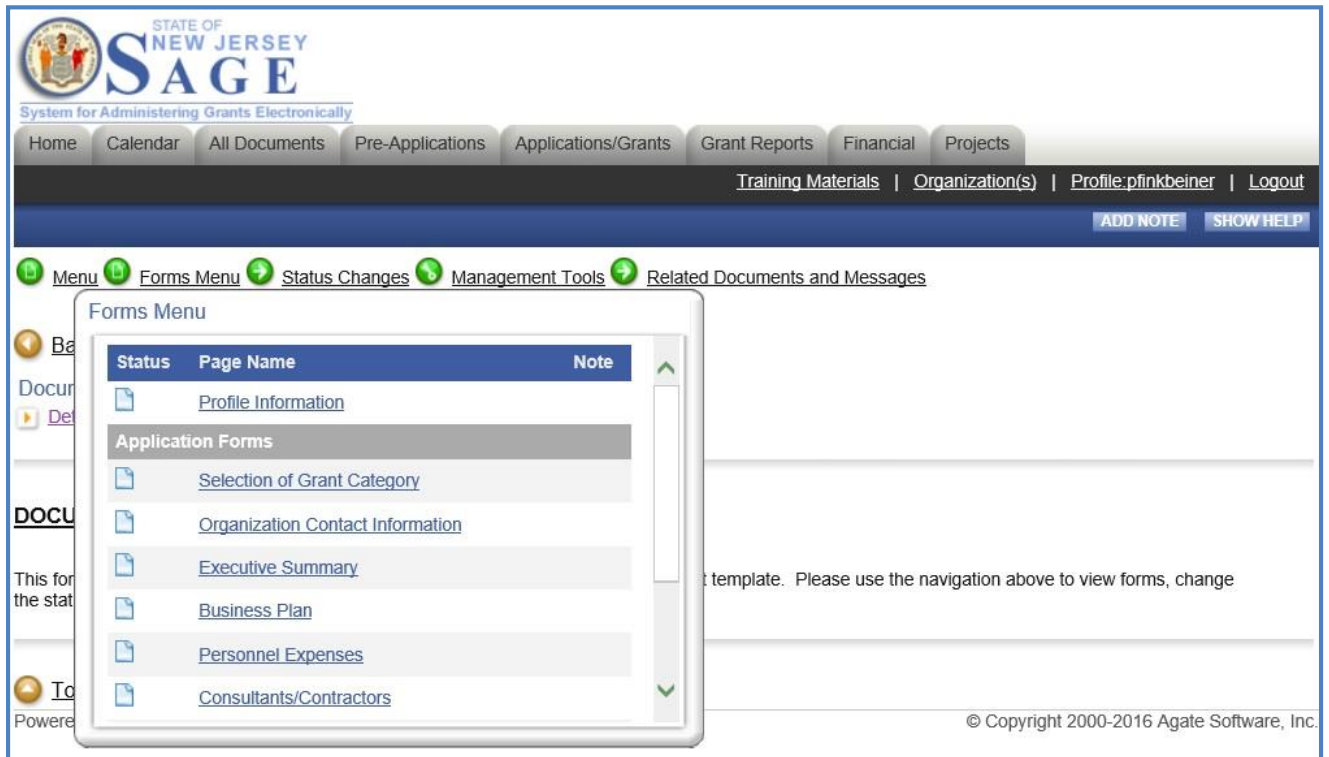
1. Go to top left of the screen, select Home;
2. Locate the Task in the My Task section.

9. Application/Grant Menu

The Application/Grant menu is ordered into four sections to help keep tasks and information organized. The sections are described below.

9.a. Viewing, Editing, and Completing Forms

The “Forms Menu” is where the vast majority of work is completed within the system. This section contains the forms necessary to complete before submitting an Application. To access a form, simply hover over the “Forms Menu” link and a list of available forms will appear.



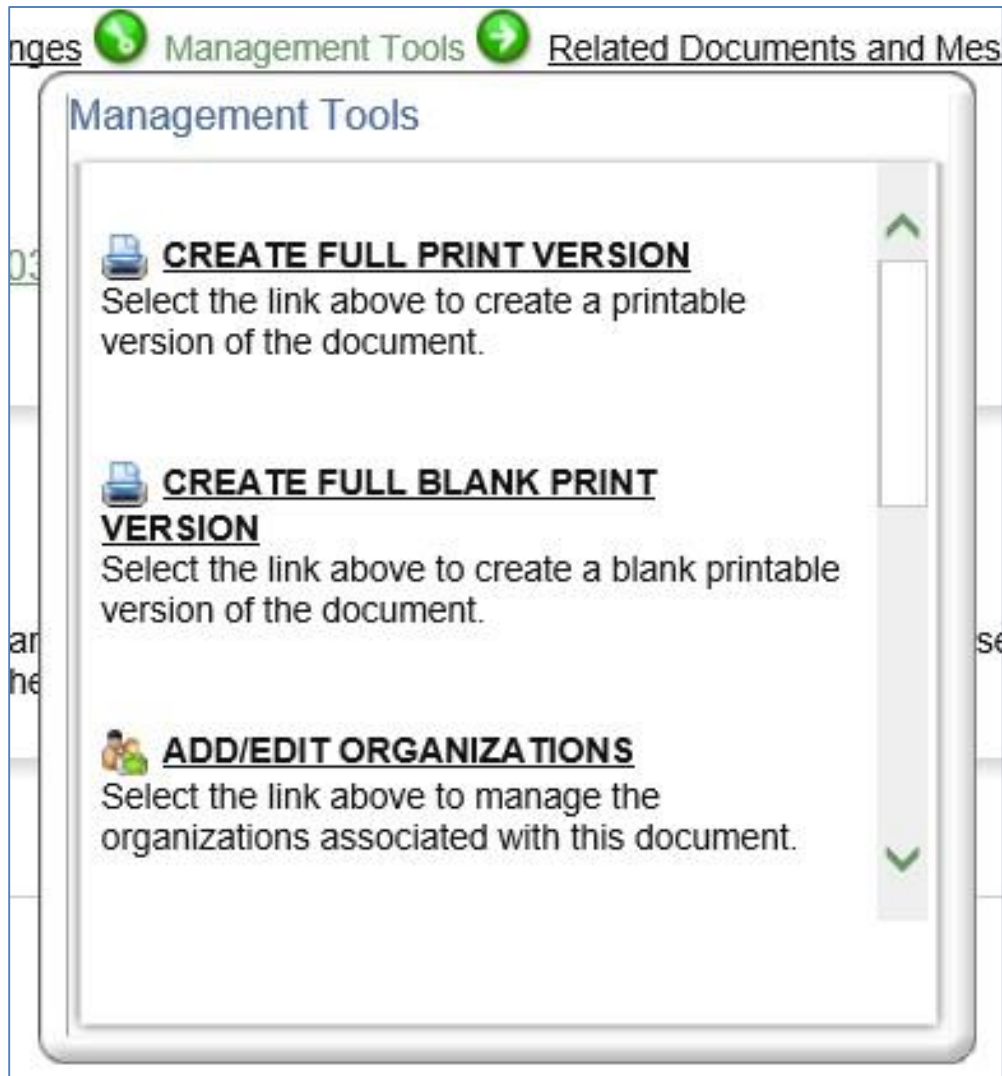
9.b. Changing the Status

The “Apply Status” button (formerly Change Status button) allows an Authorized Official or Agency Administrator to submit an Application, push Grant documents to the next status, or request amendments.


The screenshot displays the SAGE (System for Administering Grants Electronically) interface for the State of New Jersey. The top navigation bar includes links for Home, Calendar, All Documents, Pre-Applications, Applications/Grants, Grant Reports, Financial, and Projects. A secondary navigation bar shows Training Materials, Organization(s), Profile: pfinkbeiner, and Logout. The main content area features a 'Status Changes' tab with 'ADD NOTE' and 'SHOW HELP' buttons. A modal window titled 'Status Changes' is open, displaying the text 'Possible Statuses' and 'APPLICATION CANCELLED' with an 'APPLY STATUS' button below it. The background interface is partially obscured by the modal. On the left side, there are navigation links for Menu, Forms Menu, Status Changes, Management Tools, and Related Documents and Messages. Below these are links for Back, Document Information, and Details. A section titled 'DOCUMENT SNAPS' is visible, followed by a note: 'This form is configurable a the status, view related ite'. At the bottom left, there is a 'Top of the Page' link and the text 'Powered by IntelliGrants™'. At the bottom right, the copyright notice reads '© Copyright 2000-2016 Agate Software, Inc.'.


9.c. Accessing Management Tools


“Management Tools” allows Applicant users certain administrative responsibilities such as the ability to add/edit people to an Application (attach users to an Application) and view an Application’s status history. The tools available will differ depending on your security role.





Management Tools


 **CREATE FULL PRINT VERSION**
Select the link above to create a printable version of the document.


 **CREATE FULL BLANK PRINT VERSION**
Select the link above to create a blank printable version of the document.

 **ADD/EDIT ORGANIZATIONS**
Select the link above to manage the organizations associated with this document.

 **ADD/EDIT PEOPLE**
Select the link above to perform actions such as adding people, changing a security role, or altering people's active dates on this document.

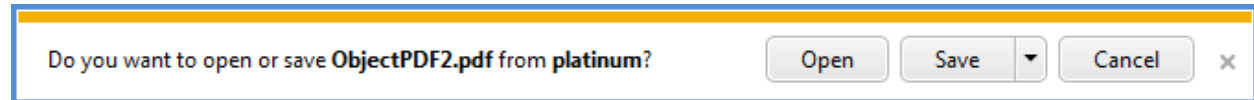
 **STATUS HISTORY**
Select the link above to view the status history of this document.

 **CHECK FOR ERRORS**
Select the link above to check the entire document for errors.


 **VIEW MODIFICATION HISTORY**
Select the link above to view various modifications that people have made to specific pages in the document.

“Create Full Print Version” creates a printable version of the document for reading and/or saving. “Create Full Blank Print Version” creates a form/template version.


NOTE: “Create Full Blank Print Version” is only functional in NJDOS Programs from 2014 and beyond.




“Add/Edit People” is used to add people, change security levels, alter active dates, etc. See user guide section 10.a. Application/Grant User Management for more details.

 **ADD/EDIT PEOPLE**
 Select the link above to perform actions such as adding people, changing a security role, or altering people's active dates on this document.

“Add/Edit Organizations” is used to add additional organizations which will be associated with this document.

 **ADD/EDIT ORGANIZATIONS**
 Select the link above to manage the organizations associated with this document.


“Status History” provides the statuses that a document has passed through.


 **STATUS HISTORY**
 Select the link above to view the status history of this document.

Document Status History


Status	Date/Time	By	Notes
Application in Process	9/4/2012 1:01:05 PM	Jersey, Brad	
Application in Review	11/8/2012 9:03:39 AM	Post, Joel	


“Check for Errors” checks document for errors and returns a list of links to pages with identified errors that need to be corrected before the document can be moved to the next status.


 **CHECK FOR ERRORS**
 Select the link above to check the entire document for errors.

 **Global Errors**

Document Information: [IDEA-2013-ABSECON CITY SCHOOL DISTRICT-01-0010-014](#)

 [Details](#)

 You must complete this page.
[General: Assurances / Board Certifications](#)

 You must complete this page.
[General: Budget Summary](#)

“View Modification History” provides a list of modifications that have been made to specific pages in the document.

Modification History

Page	Modification	Date/Time	By
Budget Summary	Added	10/5/2012 8:58:48 AM	Jersey, Brad
Refusal of Federal IDEA Funds	Added	10/3/2012 2:07:30 PM	Jersey, Brad
Nonpublic	Added	9/19/2012 11:55:27 AM	Program Staff, DOE
Expenditures	Added	9/19/2012 11:51:48 AM	Program Staff, DOE
Coordinated Early Intervening Services	Added	9/19/2012 11:38:27 AM	Program Staff, DOE
Eligibility	Added	9/4/2012 2:50:11 PM	Program Staff, DOE
Maintenance of Fiscal Effort	Added	8/28/2012 1:38:35 PM	Program Staff, DOE
IDEA Plan	Added	8/28/2012 11:32:16 AM	Program Staff, DOE
Organization Information Review Page	Added	6/29/2012 4:20:14 AM	Jersey, Brad

9.d. Related Documents and Messages

“Related Documents and Messages” is where documents such as Requests for Reimbursement, Final Reports, and related messages are found, as well as system messages relevant to the document.



9.e. Initiating a Sub Document

Sub Documents include Expenditure Reports, Progress Reports, Payment Vouchers, and numerous other documents that can be associated with a parent Application (or other document).

To initiate a Sub Document, locate the “Related Documents and Messages” link on the Application/Grants Menu. A list of available Sub Documents will appear, as well as any previously created Sub Documents. The word “Initiate” will always precede the name of an available Sub Document; click on the link of any of these to initiate the Sub Document.

Agreement

Please make a selection below to continue.

Are you sure you want to initiate an expenditure report?

Monthly financial report is due by the 10th of each month detailing all expenses incurred during the prior month as stated in contract. A check box is provided on the report if no expenses were incurred.

Note: The trainee list is linked to the expenditure report; therefore, trainees names must be on the trainee list to be available on the expenditure report. Please complete the trainee list prior to starting the expenditure report.

9.f. Adding and Editing Notes

Notes may be used to communicate with Grantor staff and other Applicants. The “Add Note” or “Show notes” button is available on all forms and from the main document menu. To add a note, select “Add Note” or “Show Notes”.



Any existing notes will be shown at the top of the new window.

Each note has the following information: message name, author, date, and action.

Drag Here

Add New Note

Message	Date	Action
I sure do love working with Pat & Steve from NJDOS	10/27/2016	Edit

By selecting the message name, the note expands showing the entire note’s message.

By selecting edit under the action column, new content can be added to an existing note, or the note can be deleted by the original author.

To add a new note:

1. Select “Add a New Note”
2. Complete in the subject and message
3. Check the user(s) the note is intended for
4. Select “Save”
5. Select “Close Notes” to close the notes window

Add New Note Drag Here

Subject

Message

The following people can be assigned access to view or *not* view your note. Check the box next to the name of the viewer to give them the ability to view the note. Uncheck the box if the note should not be seen by that viewer. Checking the **All/None** box will either check or uncheck all of the viewers.

All/None

Brad Admin Quality Reviewer1 Patricia Jordan Wes Blatt

SAVE **CANCEL** **CLOSE NOTES**

It is important to remember that notes are an informal method of communication. The author of a note has the ability to determine who can and cannot see the note. Any text entered into a note will not display on a PDF.

10. Application/Grant User Management

The Authorized Official and Agency Administrator are responsible for ensuring that appropriate users are assigned documents. Any organization staff in SAGE assigned as an Authorized Official or Agency Administrator will automatically be added to any Application/Grant document when it is initiated. Agency staff may assist the Authorized Official and Agency Administrator with completing required forms. User access can be assigned or removed throughout a Grant's lifecycle. Only an Authorized Official or Agency Administrator can submit an Application.

10.a. Assigning User Access to Application/Grant

To view SAGE documents, or to assist with completing forms, a user must be linked to the documents. To add a user to a document:

1. From the Application/Grant's main menu, under Management Tools, select "Add/Edit People."

ADD/EDIT PEOPLE

Select the link above to perform actions such as adding people, changing a security role, or altering people's active dates on this document.

- a. Type the name, or part of the user's name (at least 3 characters), in the Person Search field, and "Search";
- b. Check the box in the column next to the desired person;
- c. Select a role for the user, along with an appropriate Active Date;
- d. "Save" to complete adding the user to the document.

Person Search

Enter a name or partial name:

People Found

<input type="checkbox"/>	Person	Organization(s)	Role	Active Dates	Assigned By
<input type="checkbox"/>	Jim Harding Email	ABSECON CITY SCHOOL DISTRICT	Agency Administrator ▼	3/14/2013 - <input type="text"/>	

2. Repeat this process to add additional users, if necessary
3. Return to "Add/Edit People" to confirm that all users have been added correctly.

10.b. Removing User Access to Application/Grant

There are two ways to remove a user from an SAGE document.

1. From an Application/Grant's main menu, under Access Management Tools, "View Management Tools" and then "Add/Edit People." Edit "Active Dates" for the user. The user will not be able to access the document before a specified start-date (first field) or after a specified end-date (second field).

Current People Assigned

<input type="checkbox"/>	Person	Organization(s)	Role	Active Dates	Assigned By
<input checked="" type="checkbox"/>	Brad Jersey Email	NJDOTX Test Org 1, ABSECON CITY SCHOOL DISTRICT, Aberdeen Township	Authorized Official	10/1/2012 - []	Grant System
<input checked="" type="checkbox"/>	Jim Harding Email	ABSECON CITY SCHOOL DISTRICT	Agency Administrator ▾	3/5/2013 - 3/14/2013	

2. Remove a user by unchecking the box next to the person's name and "Save."

Current People Assigned

<input type="checkbox"/>	Person	Organization(s)	Role	Active Dates	Assigned By
<input checked="" type="checkbox"/>	Brad Jersey Email	NJDOTX Test Org 1, ABSECON CITY SCHOOL DISTRICT, Aberdeen Township	Authorized Official	10/1/2012 - []	Grant System
<input type="checkbox"/>	Jim Harding Email	ABSECON CITY SCHOOL DISTRICT	Agency Administrator ▾	3/5/2013 - []	

11. Forms Completion

On an Application/Grant's Form Menu the forms within an Application are shown. These are the forms that must be completed before submitting the Application. The following sections go through the information necessary to complete an Application.

11.a. Navigating Forms

After opening a form, there are two ways to navigate.

1. Use the links following "You are here:" To return to the forms menu, where another form can be selected to complete, select "Forms Menu."



Document Information: [OFBI17SE2D-038](#)

 [Details](#)

You are here: > [OFBI Social Enterprise Entrepreneurial Development 2017 Menu](#) > [Forms Menu](#)

2. Use the Navigation Links listed at the bottom of the page

Navigation Links provides access to next related pages. Select the appropriate page name to go to that form.

Navigation Links				
Status	Page Name	Note	Created By	Last Modified By
	Profile Information Review		Sir Josh 7/27/2011 4:31:35 PM	Jersey, Brad 7/28/2011 1:26:03 PM
	Miscellaneous Attachments		Jersey, Brad 7/28/2011 2:44:58 PM	

Note: To ensure that changes made to a form are not lost, select "Save" before leaving the form.

11.b. Completing Forms

If all information necessary to complete the forms is not available at first, begin by filling in the fields for which information is available. Complete as much as possible and select “Save.” Fields with red asterisks are required.

Instructions:

- Fields with an ***** next to them must be completed.
- After entering all information click the **SAVE** button.
- To proceed to the next page you may click the **NEXT** button or use the Related Pages section at the bottom of the page
- To return to the application menu click the **Application Menu** link above.

• **Provide a brief history of the organization.**

0 of 8000

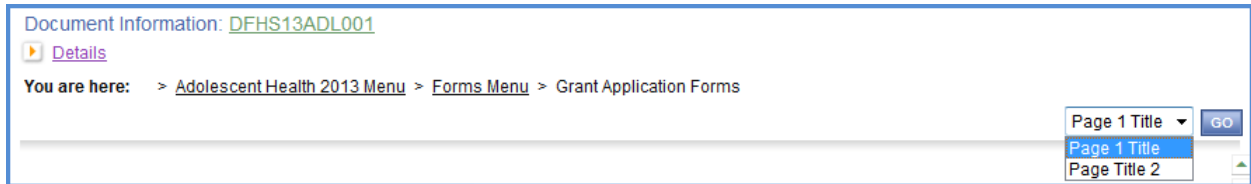
• **Furnish strategic plan with a mission statement.**

0 of 8000

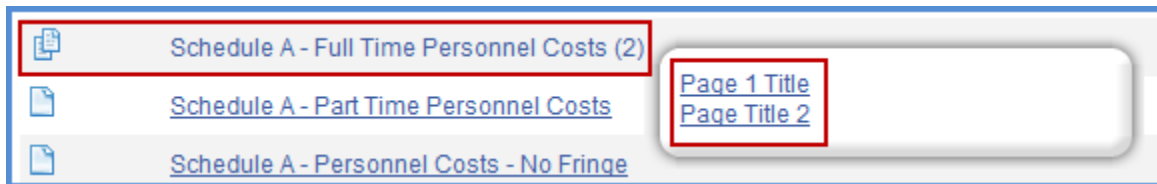
During completion of some forms, the “Add” button may be used to create additional pages. A form that has an “Add” button allows for multiple pages of that form.



When multiple pages are created for a form; choose among them by using the drop-down menu that appears at the far right of the form.



Forms with multiple pages are identified by a number in parentheses that appears after the form name indicating number of pages that the form contains. When hovering over the name of the form with your cursor, the individual page titles will be displayed and can be clicked on to navigate to that specific saved page.




11.c. Automatic Calculations

When possible, SAGE automatically calculates totals and other numbers. The Budget Summary page is a good example of this. When the page is saved, the system takes the values that were entered and displays them on the Budget Summary page. The system then calculates the numbers for the results. Remember to select “Save” in order to see the results of the form calculations.

Annual Salary	Standard Weekly Hours	Weekly Hours on Project	% of Weekly Work Time On Project	Grant Funds Requested From State	Funds From Other Sources	Total Funds Needed
\$50,000	40	32	80.00%	\$20,000	\$20,000	\$40,000
			0.00%		\$0	\$0
			0.00%		\$0	\$0
			0.00%		\$0	\$0
			0.00%		\$0	\$0
			0.00%		\$0	\$0
			0.00%		\$0	\$0
			0.00%		\$0	\$0
			0.00%		\$0	\$0
			0.00%		\$0	\$0
			0.00%		\$0	\$0
			0.00%		\$0	\$0
Sub-Totals				\$20,000	\$20,000	\$40,000
19.00% Fringe Benefits				\$3,800	\$3,800	\$7,600
Total Personnel Costs for this page				\$23,800	\$23,800	\$47,600

11.d. Error Messages

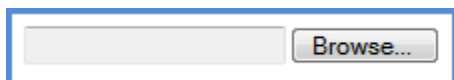
When a form is saved and business rules have been violated, an error message displays across the top of the page. Errors do not need to be corrected immediately, however to successfully submit the Application, all errors must be fixed.

 **Page Error(s)**
 If any information is entered in a row, all fields in that row must be completed.

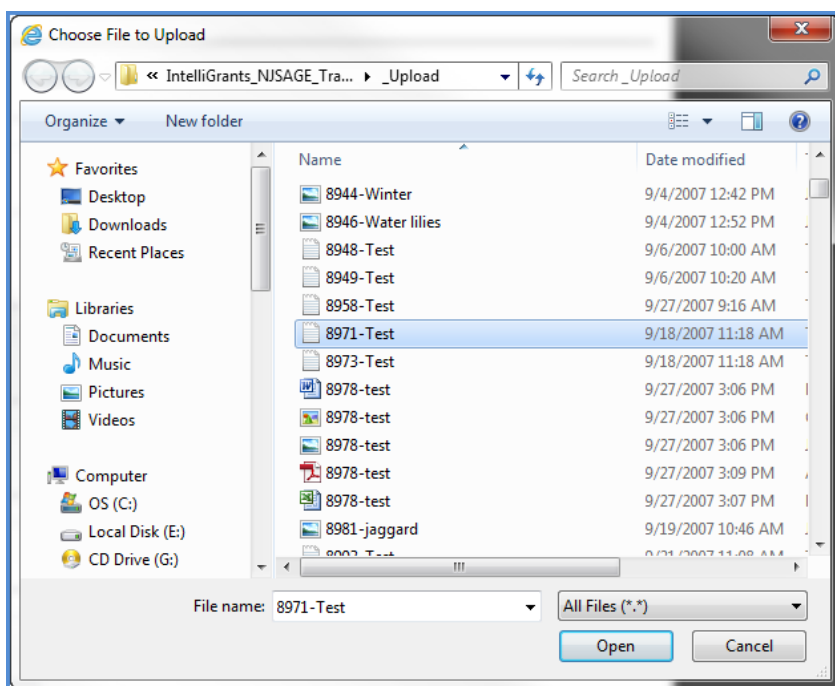
11.e. Uploading Attachments

All attachments submitted via SAGE must not contain confidential/sensitive data that is not required to support the Grants-management process. Before attachments are uploaded, sensitive information must be redacted. Examples of sensitive information include social security numbers (even if it is only the last 4 digits of an SSN), items such as bank account numbers (generally found at the bottom of a check), or credit card data.

When not enough space is available to capture the type of information that is required on a form, a file upload feature is available that allows a file to be attached. The following file types are allowed: bmp, doc, docx, gif, jpg, pdf, png, ppt, tif, txt, wpd, xls, xlsx. To locate and upload a file, select “Browse.”



Go to the folder that contains the file, select the file, and “Open.”



After the page reloads, select “Save”.

11.f. Printing (PDF)

On many pages a “Print Version” (formerly View PDF) button is available that automatically creates a printable Portable Document Format (PDF) version. This dynamic PDF can be printed, or saved to a computer. It is good practice to review the PDF files carefully for accuracy prior to submitting.



11.g. Copy and Paste Restrictions

Be cautious when using the copy and paste function of most word processing programs (e.g., MS Word) to transfer text into SAGE form fields or narrative text boxes.

SAGE does not recognize some characters and formatting, such as tables, graphs, photographs, bullets, and some tabs. Also, be aware of the different character limits of text boxes--attempting to copy and paste text that is longer than the allotted space returns an error message. The character limit is located at the bottom left of a text box.

12. Application Submission

The Authorized Official and Agency Administrator are the only ones authorized to submit an Application. When the Application is complete and no additional changes are required, the Authorized Official or Agency Administrator may submit.

**Once an Application is submitted, it becomes 'read-only'
and can no longer be changed!**

To submit an Application, the Authorized Official or Agency Administrator hovers over “Status Changes” on the Application’s main menu. Possible status changes display. Select “Apply Status” (formerly Change Status) under the appropriate status change. If errors exist on any of the Application’s forms when attempting to submit, a message appears showing the form(s) that contain errors. All errors must be fixed before SAGE will accept the Application. When errors do not exist, the Authorized Official or Agency Administrator is prompted to confirm their decision to submit.

