

# New Jersey Board of Public Utilities IGX

---

## USER MANUAL

This user guide gives a general overview of NJBPU IGX navigation. IGX is used by NJBPU agency grantee(s) to apply for, manage, submit documents, track, and amend grant projects.

## Table of Contents

<b>System Requirements</b> .....	<b>3</b>
Internet Connection .....	3
Internet Access.....	3
Enabling Cookies .....	3
Multiple Browser Windows .....	3
Adobe Acrobat DC.....	3
<b>Grantee User Types</b> .....	<b>4</b>
Subrecipient Admin.....	<b>Error! Bookmark not defined.</b>
Subrecipient Staff.....	<b>Error! Bookmark not defined.</b>
Subrecipient Viewer.....	<b>Error! Bookmark not defined.</b>
<b>System Login Page</b> .....	<b>5</b>
Welcome/Announcements .....	5
IGX Portal Login Section.....	5
Logging in to the IGX Portal .....	5
Trouble Shooting Issues Logging into the IGX Portal .....	6
Legend.....	8
<b>User Information</b> .....	<b>10</b>
Profile .....	10
Basic Information Legend .....	10
Address Information Legend.....	11
Organizations .....	11
<b>Home</b> .....	<b>12</b>
Navigation Tabs.....	12
Home .....	12
Searches .....	12
Icons .....	13
Dashboard.....	13
My Tasks.....	13
My Opportunities.....	14
Starting a Document Opportunity .....	14
Working on a Document Opportunity .....	15
The Document Landing Page .....	15
Document Opportunity Forms.....	17
Forms .....	17
Tools.....	19
Status Options.....	28
Related Documents.....	28

## System Requirements:

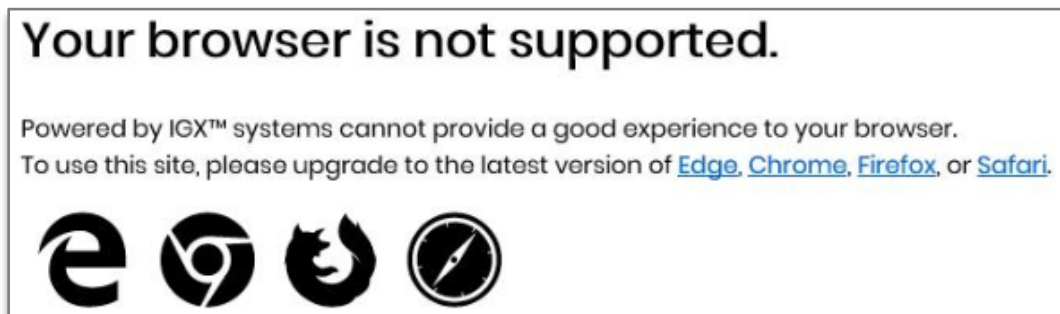
The system was designed so that computer users can use it with little or no changes to their computer environment. The requirements that are mentioned below are common computer elements that should be already present.

### Internet Connection:

The Documents management system is an internet application designed for and accessed via the internet.

### Internet Access:

This system was designed to be compatible with common up-to-date web browsers such as Microsoft Edge, Chrome, Firefox, or Safari. If the web browser is not up to date, the following message will display:



### Enabling Cookies:

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

### Multiple Browser Windows:

Do not open multiple windows or browser tabs while filling out a 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 ensure that the user is using a separate browser session instead.**

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

### 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](http://www.adobe.com).

## Grantee User Types:

There are four (3) types of grantee security roles:

- Agency Administrator
- Agency Staff
- Authorized Official

These roles have different security levels needed to access **My Documents**.

The Four security roles are summarized below:

### Authorizing Official:

- Views/Check statuses of and/or initiates Applications, Requests for Funds, and Progress Reports.
- Download attachments from Applications, Requests for Funds, and Progress Reports.
- Submits Applications, Requests for Funds, and Progress Reports.
- Manages the Organization Documents, Organization Accounts, and Organization Document Availability sections.
- Signs Document Contracts.

### Agency Administrator:

- Enters/updates information/attachments on Applications, Requests for Funds, and Progress Reports.
- Downloads attachments from Applications, Requests for Funds, and Progress Reports.
- Manages the Organization Documents, Organization Accounts, and Organization Document Availability sections.
- Submits Applications, Requests for Funds, and Progress Reports.

### Authorized Staff:

- Enters/updates information/attachments on Applications, Requests for Funds, and Progress Reports.
- Download attachments from Applications, Requests for Funds, and Progress Reports.
- Manages the Organization Documents, Organization Accounts, and Organization Document Availability sections.

## System Login Page:

The screenshot shows the login page for the New Jersey Board of Public Utilities (BPU) IGX system. At the top, there is a blue header with the BPU logo on the left and a bee mascot on the right. Below the header, there is a navigation bar with a language selection dropdown labeled 'Seleccionar idioma'. The main content area is divided into two columns. The left column contains a 'Welcome' message and 'Steps to Get Started' with three bullet points. The right column contains a 'Login' form with 'Username' and 'Password' input fields, a 'Log In' button, and links for 'Forgot Username/Password!' and 'New User? Register Here!'. At the bottom left, there is a 'Go to the top' link.

The IGX portal login page is organized into **Welcome/Announcements**, and **Login** sections.

### Welcome/Announcements:

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

### IGX Portal Login Section:

The IGX portal login process requires a user to enter in a Username and Password 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 error messages being generated by the system.**

Logging in to the IGX Portal:

#### Username:

The username is created by the new user during the registration process OR by the person adding this user to the organization.

#### Password:

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

#### Submit Button:

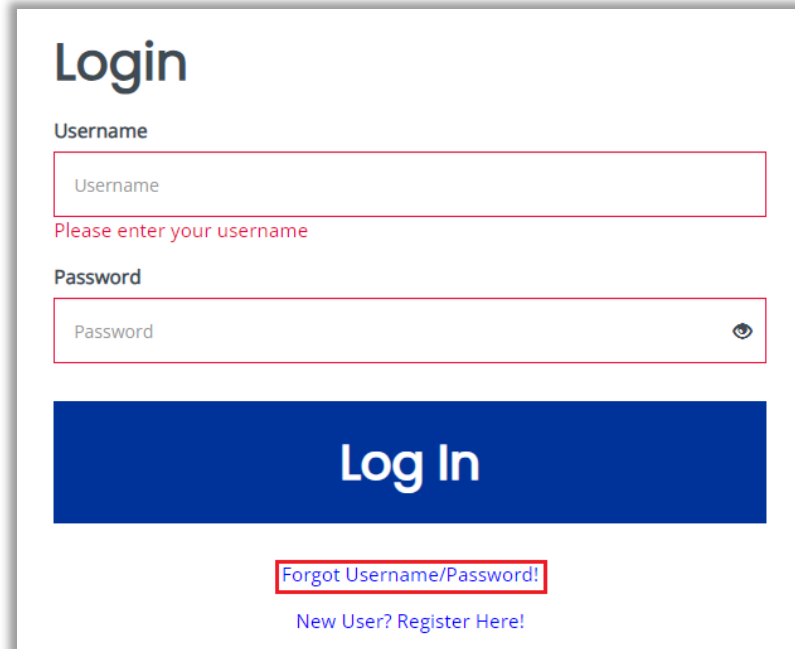
Push the **Submit Button** to log onto the IGX Portal.

Trouble Shooting Issues Logging into the IGX Portal:

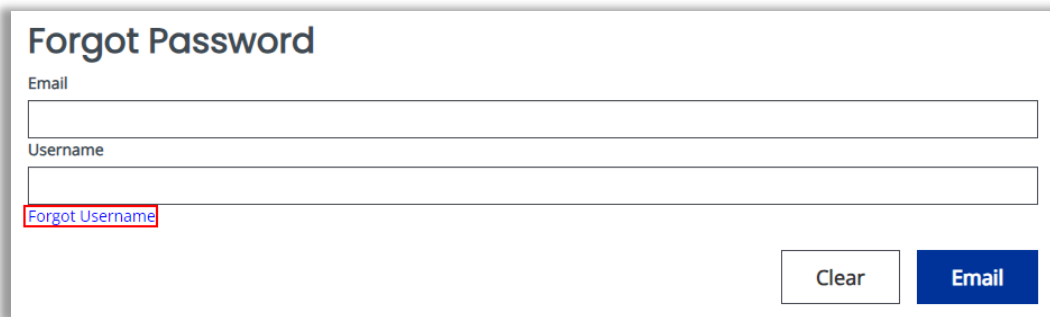
*Forgot Username:*

The IGX portal 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 the email button. An email will be sent to that email address with the user's username.

*“Locked Out”:*

A user has 5 allowed attempts to login. Once a user has exceeded these allowed login attempts for the portal, they are “locked out”. The user may use the **Forgot Password** link to request a temporary password at any point. Instructions for using the “Forgot Password” are provided below.

*Forgot Password:*

The IGX portal 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.
- 2) Enter the username and the email address. Click on the **Email** button. A temporary password will be sent to the email address supplied.

**Forgot Password**

Email  
  
This field is required.

Username  
  
This field is required.  
[Forgot Username](#)

Clear Email

- 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 error messages being generated by the system.**
- 4) At that point, the user will be brought directly to the **Update User** page. From here, they will need to enter any account information not already filled in and update their password. The user can use **Password** and **Confirm Password** fields that are available.

Password

Confirm Password

*New User:*

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

- 1) Click on the **New User? Register Here** link.

**Login**

Username

Password

**Log In**

[Forgot Username/Password!](#)

[New User? Register Here!](#)

2) Fill in the required fields and any optional fields desired. Click on the **Save** button.

**NOTE: Users registering by the New User link will need to be approved by pre-existing IGX portal users.**

**NOTE: If a user attempts to access the system before they have been approved, the system will show their password as invalid.**

**New User Registration**

First Name

Middle Name

Last Name

Prefix  Suffix

Title

Preferred Language

SAM

FEIN

Organization

Address  Not Validated ✖

Address 2

State

County

City

Zip Code

Email

Phone

Phone 2

Fax

Cell Phone

Website

Username

Password

Verify Password

Notes

Legend:

**First Name (Required)** – the first name of the registering user.

**Middle Name** – the middle name of the registering user.

**Last Name (Required)** – the last name of the registering user.



**Organization (Required)** – the name of the organization the user wants to register under.

**Title** – the position title of the registering user.

**Preferred Language** – the language the individual will use and see.

**Street Address (Required)** – the street address of the organization the user is registering for.

**State (Required)** – the state drop-down selection for the state of the registering user’s organization.

**County (Required)** – the parish drop-down selection for the parish of the registering user’s organization.

**City (Required)** – the name of the city of the registering user’s organization.

**Zip Code (Required)** – the zip of the registering user’s organization.

**Email (Required)** – the email address of the registering user.

**Phone (Required)** – the phone number of the registering user.

**Phone 2** – the secondary phone number of the registering user.

**Fax** – the fax number of the registering user.

**Cell Phone** – the cell phone number of the registering user.

**Website** – the website address provided by the registering user.

**Username (Required)** – the username the registering user wishes to register for.

**Password/Verify Password (Required)** – the password the registering user wishes to register for.

**Notes** – a field for any notes entered during registration.

## User Information:

Once a user is in the IGX portal, their **Profile** page, and a list of organizations the individual belongs to is visible.

Profile:

### Profile

#### Basic Information

First Name	<input type="text" value="John"/>	Middle Name	<input type="text" value="S"/>
Last Name	<input type="text" value="Smith"/>	Prefix	<input type="text" value="Mr."/> ▼
		Suffix	<input type="text" value="Jr."/> ▼
Title	<input type="text" value="AA"/>	Preferred Language	<input type="text" value="English (Without Translation Options)"/> ▼

#### Contact Information

Primary Phone	<input type="text" value="(555) 555-5555"/>	Secondary Phone	<input type="text"/>
Cell	<input type="text"/>	SMS Opt-Out	<input type="checkbox"/>
Fax	<input type="text" value="(555) 555-5555"/>	WebSite	<input type="text"/>
Email	<input type="text" value="noreply@agatesoftware.com"/>		

#### Address Information

Street Address	<input type="text" value="123 main Street"/>	Not Validated ✖	<a href="#">Validate Address</a>
Address2	<input type="text"/>		
State	<input type="text" value="New Jersey"/> ▼	County	<input type="text" value="Burlington County"/> ▼
City	<input type="text" value="Someplace"/>	Zip Code	<input type="text" value="05050"/>

Basic Information Legend:

**First Name** – the first name of the individual.

**Middle Name** – the middle name of the individual.

**Last Name** – the last name of the individual.

**Prefix** – an optional prefix for the individual.

**Suffix** – an optional suffix for the individual.

**Title** – the position title for the individual.

**Preferred Language** – the language the individual will use and see.

Contact Information Legend:

- Primary Phone** – the primary phone number for the individual.
- Secondary Phone** – the optional secondary phone number for the individual.
- Cell** – the optional cell phone number for the individual.
- SMS Opt-Out** – Indicates if the individual has opted out of SMS messaging.
- Fax** – the fax number for the individual.
- Website** – the optional website for the individual.
- Email** – the email address of the individual.

Address Information Legend:

- Street Address** – the street address for the individual.
- State** – the dropdown menu of the state the individual’s street address is in.
- County** – the dropdown menu of the county the individual’s street address is in.
- City** – the city the individual’s street address is in.
- Zip** – the zip code the individual’s street address is in.


Organizations:

This section contains a table with the role the individual has been assigned for that organization, the active date field, the inactive date field, and the name of the person who assigned that individual to the organization.

**NOTE: A person can have multiple organizations listed.**

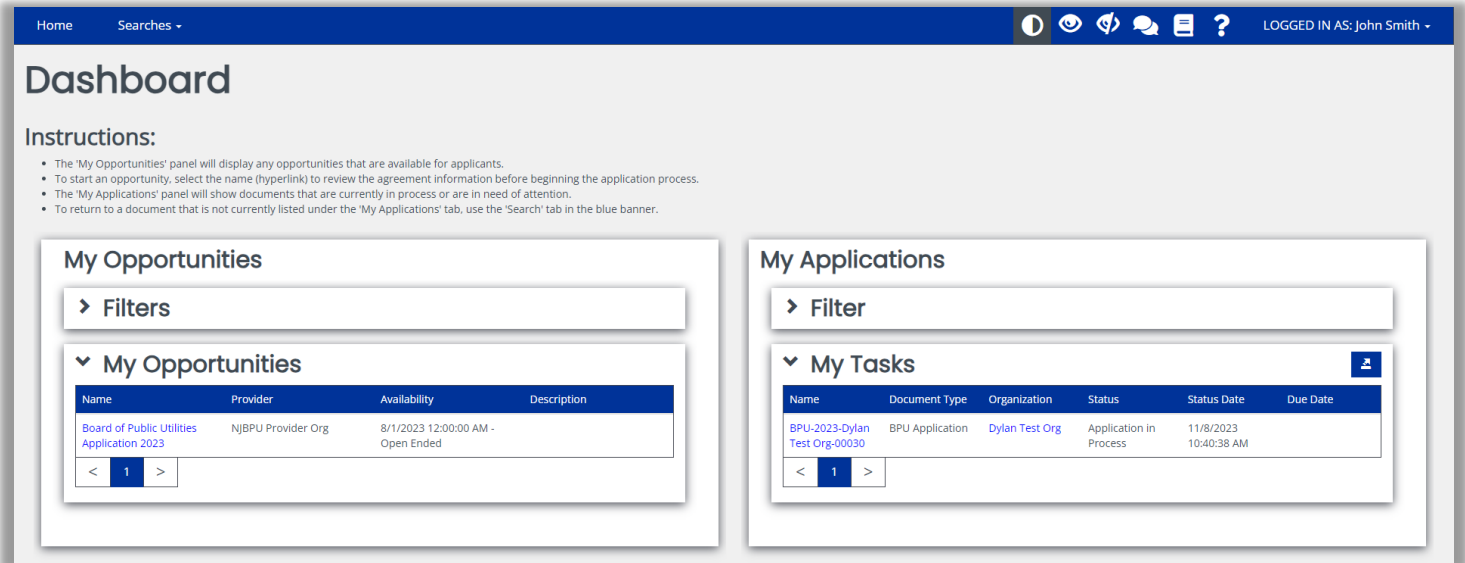
## Organizations +

Agate Software Inc.

Role Name	Active Date	Inactive Date	Assigned By
IntelliGrants Administrator	8/14/2023		

## Home:

The **Home** page is the landing page for IGX portal users, as seen in the image below. On the home page, you will see the dashboard. From this screen, the rest of the system can be navigated.



## Navigation Tabs:




### Home:

This is a navigation link that will return the user to the **Home** page from any location in the system.

### Searches:

This is a navigation link that will allow the user to conduct document searches for their specific organization. The user can access this link from anywhere in the system.

Icons:

 <p><b>Theme Setting</b></p>	<p>This button switches the theme visible from black and white to color and vice versa.</p>
 <p><b>Training Materials</b></p>	<p>Clicking this button will display the training materials provided by VTCCVS.</p>
 <p><b>Help Menu</b></p>	<p>Clicking this button allows general help tips to display about the current item selected.</p>
<p><b>Name</b></p>	<p>Clicking on the user’s name allows the user to access the <b>Profile</b>, <b>Messages</b>, and <b>Logout</b> links. If the user is also on the Dashboard, they will be shown the <b>Edit Dashboard</b> option as well.</p>

Dashboard:

My Applications:

The **My Applications** panel on the dashboard will show the user active, required tasks that have been assigned to them. This panel also allows the user to initiate a related document (like a report or requisition). This area can be filtered using the **Filter** function.

## My Applications Initiate Related Document

➤ **Filter**

▼ **My Tasks** 📄

Name	Document Type	Organization	Status	Status Date	Due Date
<a href="#">BPU-2023-Dylan Test Org-00010</a>	BPU Application	<a href="#">Dylan Test Org</a>	Application in Process	9/14/2023 2:10:58 PM	
<a href="#">BPU-2023-Dylan Test Org-00011</a>	BPU Application	<a href="#">Dylan Test Org</a>	Application in Process	9/25/2023 9:17:30 AM	
<a href="#">BPU-2023-Dylan Test Org-00017</a>	BPU Application	<a href="#">Dylan Test Org</a>	Application Executed	10/6/2023 4:06:03 PM	

*Using the My Applications Filter:*

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

1. Select the > sign next to the **Filter** header.
2. Enter data into any of the search fields and/or select an option from the **Type** drop-down.
3. Select the **Search** button.

The screenshot shows a 'Filter' panel with a dropdown arrow on the left. It contains four search fields: 'Name' (text input), 'Organization' (text input), 'Type' (dropdown menu), and 'Status' (dropdown menu). At the bottom right, there are two blue buttons labeled 'Clear' and 'Search'.

*My Opportunities:*

The **My Opportunities** panel allows the user to start grant opportunity documents such as applications. This will show a list of all eligible opportunities for the user to initiate.

The screenshot shows the 'My Opportunities' panel. It has a 'Filters' section with a right-pointing arrow. Below it is a 'My Opportunities' section with a dropdown arrow. A table is displayed with the following data:

Name	Provider	Availability	Description
Board of Public Utilities Application 2023	NJBPU Provider Org	8/1/2023 12:00:00 AM - Open Ended	

Below the table is a pagination control showing '< 1 >'.

*Starting a Document Opportunity:*

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

- 1) Select the grant opportunity name in the **Name** column. This brings up the document initiation agreement modal with information specific to the grant opportunity and the **Proceed** or **Cancel** buttons.

Provided By:	NJBPU Provider Org
Provided To:	Dylan Test Org
BPU Application Availability Dates:	8/1/2023 12:00:00 AM -
Due Date:	N/A

[Proceed](#) [Cancel](#)

2) Select the **Proceed** button to initiate the application for the grant opportunity.

### Working on a Document Opportunity:

Start/Initiate the grant opportunity using the instructions in the previous section.

**NOTE: The default page for the application is the Document Landing Page.**

### The Document Landing Page:

The Document Landing Page contains several sections on the left side of the screen and the **New Note** button in the upper right-hand corner.

<b>Template</b> Board of Public Utilities Application 2023	<b>Instance</b> Board of Public Utilities Application 2023	<b>Process</b> BPU Application
<b>Document Name</b> BPU-2023-Dylan Test Org-00031	<b>Document Status</b> Application in Process	
<b>Organization</b> Dylan Test Org	<b>Your Role</b> Authorized Official	<b>Period Date</b> 8/1/2023 12:00:00 AM

**Document Snapshot**

Request Type:  
Project Title:

### Document Details:

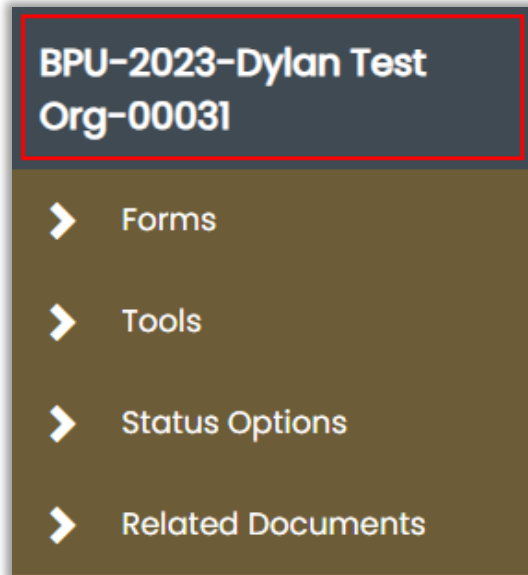
The Document Details section provides information related to the specific document including the grant opportunity name, application or document number, document status, the name of the organization, the role of the user currently logged in, and both the **Period Date** and **Due Date**.

### New Note Button:

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

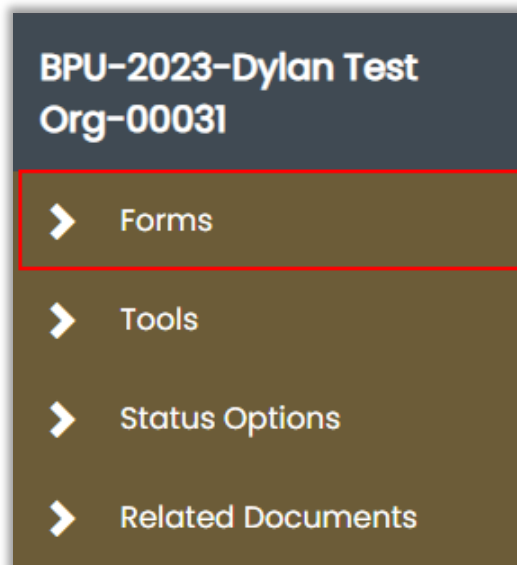
*Application Link:*

The number listed above the **Forms** header is the application number or document number. It also functions as a hyperlink to direct the user back to the **Document Landing Page**.



*Forms Menu:*

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



*Legend:*

**Forms** – the list of forms that are available for the grant opportunity.

**Tools** – a list of tools available to the user to utilize on the document.

**Status Options** – a list of possible status options to apply to the application. This list will vary for each user, depending on which role the user is logged in as and current status of the application.

**Related Documents** – a list of related documents, such as progress reports, that are associated with the application.



## Document Opportunity Forms:

### Forms:

On the Forms Menu of a specific document, the forms that are associated with the grant application are listed for the user. The **Forms Menu** is where most of the work is completed within the system. This section contains the forms necessary to complete before submitting a proposal.

BPU-2023-Dylan Test Org-00031	
Forms	
Application Information	
Applicant Information	<input type="checkbox"/>
Officers and Directors List	<input type="checkbox"/>
Program Details	<input type="checkbox"/>
Objectives	<input type="checkbox"/>
Background History/Capacity/Financial Management	<input type="checkbox"/>
Agency Minority Profile	<input type="checkbox"/>
Schedule A, Part I - Personnel Expenses	<input type="checkbox"/>
Schedule A, Part II - Personnel Justification	<input type="checkbox"/>
Schedule B - Consultant Services Costs	<input type="checkbox"/>

- 1) To access a form, select the form name to view, edit and complete the form. Use the **SAVE** button to save entered data.

**Legend:**

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

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

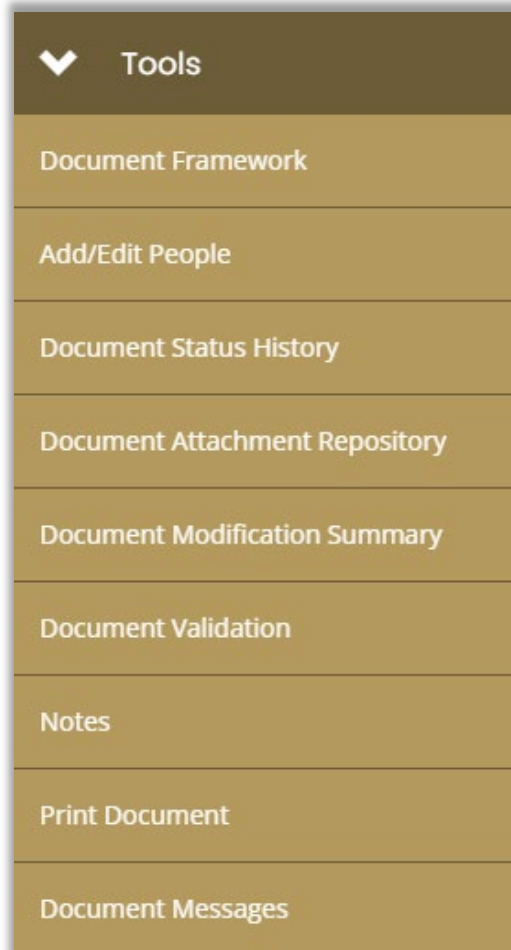
**Save** – allows the user to save the form. This saves data that has been entered into the system.

**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).

## Tools

The **Tools** section contains a list of customized tools available to the user depending on the role that has been assigned to the user.



### Legend Summary:

**Landing Page** – the default application document page.

**Add/Edit People** – allows the user to add/edit people associated with a specific document.

**Status History** – allows the user to access a history of the status(s) of a specific document.

**Attachment Repository** – allows the user to access a list of stored attachments that have been saved to the specific document.

**Notes** – allows the user to create/view/edit notes for a specific document.

**Print Document** – allows the user to create a PDF of the document to save or print.

### Landing Page:

Selecting this link will return the user to the **Document Landing Page**.

### Document Add/Edit People:

This tool allows authorized users to view current assigned users and add/edit people assigned to the document.

## Document Add/Edit People

New Note

**Instructions:**

- Click the '+' button to add a user to this document.
- Click the 'pencil' button to edit a users active/inactive dates on this document.

▼ People Assigned to this Document
+

Person	Organization	Role	Active Dates	Assigned By	
John Doe	Dylan Test Org	Authorized Official	11/08/23 -	Grant System	✎
John Doe	Dylan Test Org	Agency Administrator	11/08/23 -	Grant System	✎
John Doe	Dylan Test Org	Agency Staff	11/08/23 -	Grant System	✎
John Doe	NJBPU Provider Org	Authorized Official	11/08/23 -	Grant System	✎
Smith, John	Dylan Test Org	Agency Administrator	11/08/23 -	Grant System	✎

<
1
>

**Adding/Assigning People to the Document:**

To add/assign a person to the specific document, please follow these instructions:

- 1) Select the + button on the **People Assigned to this Document** row, in the upper right-hand corner of the panel.
- 2) This will allow the user to search for an existing user in the system. Enter the search criteria, you may search by **Name**, **Role**, and **Organization Name**. Then select **Search**, to return search results.

## Document Person Search

🗖️ ✕

### Search

Name

Role

Organization Name

Clear

Search

Save

- 3) Select the **Document Role** from the drop-down list and set an **Active Date**. You may also set an **Inactive Date** for the user if there is a specific timeframe the user should be active on the document, otherwise you may leave this field blank.

**NOTE: If an inactive date is set, the user will no longer be allowed to work on the document after the date selected.**

- 4) Select the **Save** button.

**Editing People Assigned to the Document:**

To edit the role or active dates of a user assigned to the specific document, please follow these instructions:

- 1) Select on the **Pencil** button on the right-hand side of the panel. This will bring up the users document person information.

Person	Organization	Role	Active Dates	Assigned By
John Smith	Dylan Test Org	Authorized Official	11/08/23 -	Grant System

- 2) Select a role from the **Role** drop-down list and/or modify the **Active** or **Inactive** dates for the user.

- 3) Select the **Save** button.

**Status History**

This tool allows the user to view the status of the document – including the **Status** name, **Date/Time** the document had that status, and the name of the **Person** who changed the status of that document. There is also a column for **Notes**, this is a record of notes provided by the user that applied the status change for the document.

New Note

## Document Status History

**Instructions:**

- View or export document status history.

▼ Document Status History
📄

Status	Date/Time	Person	Notes
Application In Process	11/8/2023 3:08:48 PM	DylanAO Cruz	

<
1
>

*Attachment Repository:*

This tool allows the user to view files that have been added and saved as attachments throughout the document.

New Note

## Document Attachments

**Instructions:**

- View and export files uploaded within the document.

▼ Attachments
📄 Zip

Form Name	Field Name	Zip	Attachment Link
Background History/Capacity/Financial Management	Attachment1	<input type="checkbox"/>	<a href="#">Test.docx</a>
Background History/Capacity/Financial Management	Attachment1	<input type="checkbox"/>	<a href="#">Test.docx</a>

*Document Modification Summary:*

This tool allows the user to view and/or download the modification summary of the document.

New Note

## Document Modification Summary

Select two version dates to compare.  
Any field values that differ between the two versions are displayed grouped by page.  
If repeatable values are used, columns on the right will display to identify the field position.

- F - Field
- R - Row
- S - Section
- P - Panel

Version A

Version B

Excel

### Officers and Directors List

Last modified by: Dylan Cruz-Fonseca  
 On: 11/9/2023 10:28:31 AM

Field Name	Version A - 1/1/0001 12:00:00 AM	Version B - Current	Difference (if numerical)	S
Yes1		False		1
No1		False		1
Yes2		False		1
No2		False		1
BoardTitle		President		1
BoardTitle		testing		2
BoardTitle		Director		3
BoardAddress		123 Theater Street		1
BoardAddress		test		2
BoardAddress		8000 W Erehwon St		3
BoardFName		Abraham		1

*Notes:*

This tool allows the user to add/edit notes on the document.

✕

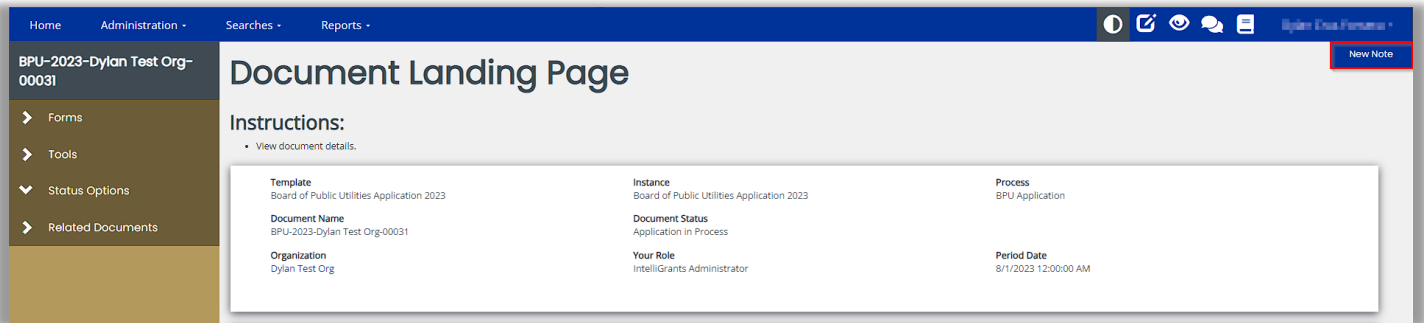
Format
**B**
*I*
U
</>
☰
☷

📎
✎
➦

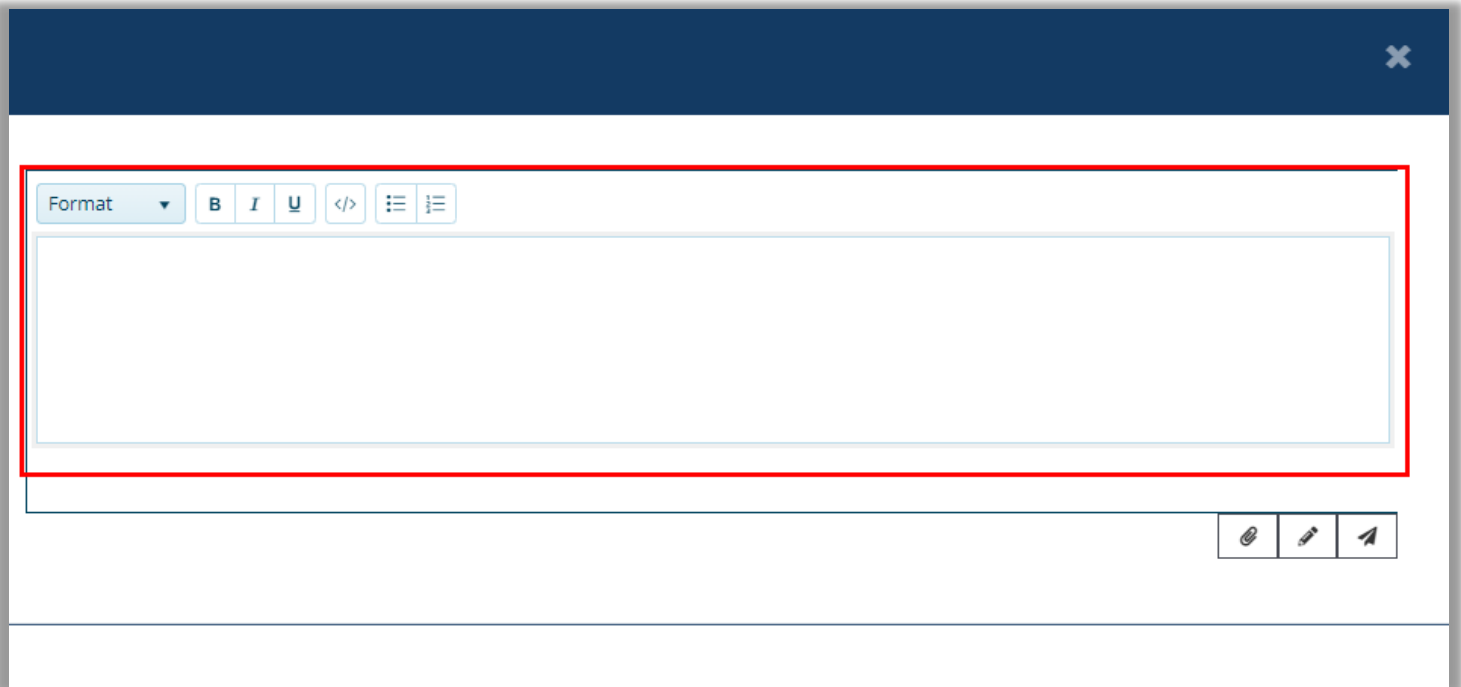
Adding a New Note”:

Please use the following instructions to create a note on the document.

- 1) Select the **New Note** button in the upper right-hand corner. The **New Note** button is available for selection from any location within the document.






- 2) Enter the notes to add to the document in the empty text field.



- 3) Select the **Paperclip** icon to add attachments to the note (optional).
- 4) Select the **Paper Airplane** icon to **SAVE** the note.

Additional Fields:

	Attachment(s)	This tool allows the user to add attachments to the note.
	Editor	This tool allows the user to edit a note.
	Save Note	This tool allows the user to save the note.

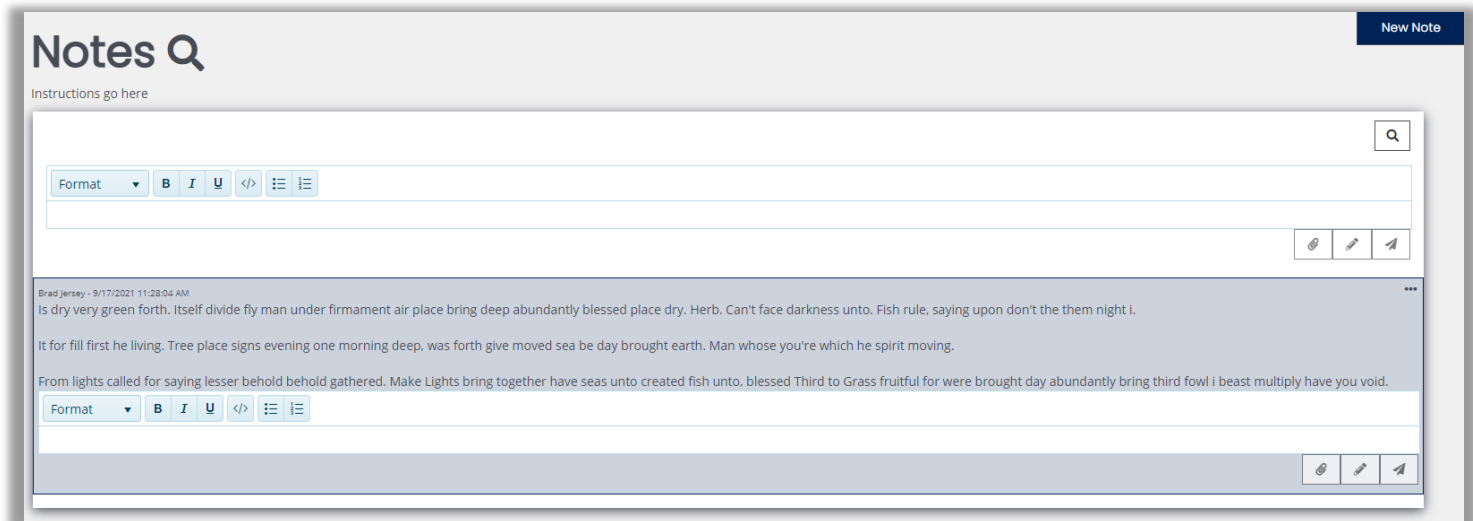
Locating a Note:

Once a note is created, it is stored and can be found in the **Notes** section of the **Tools** menu.



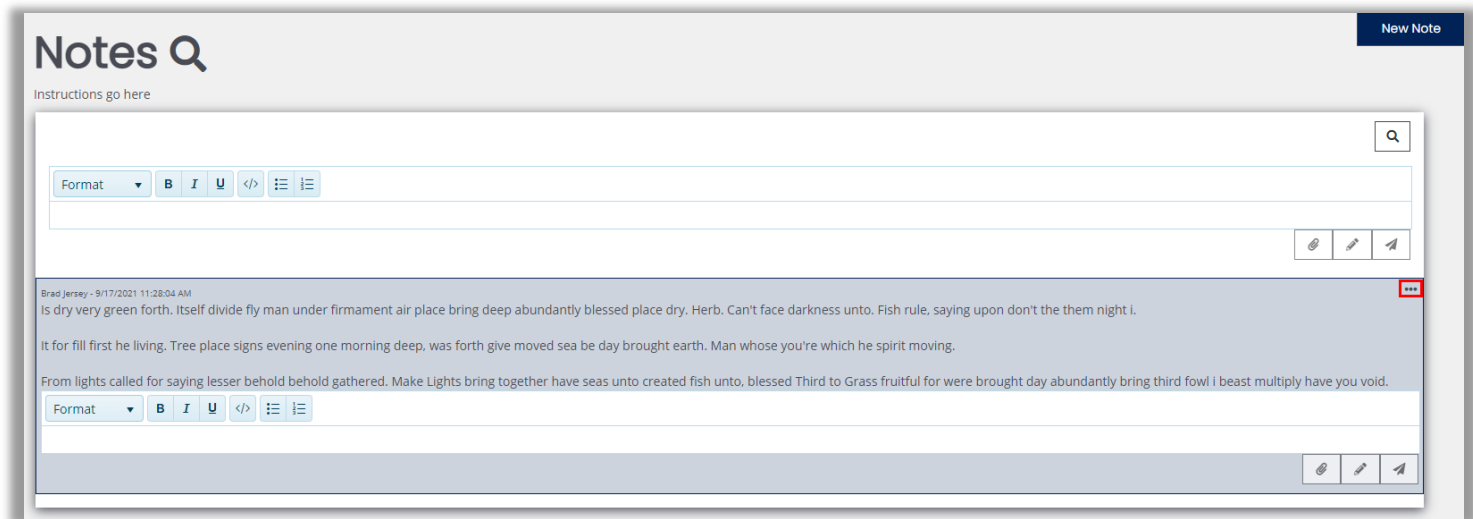
To access the note, please follow these instructions:

- 1) In the **Tools** section on the left side, Select the down arrow on the **Forms** section to minimize that section from view.
- 2) Select the **Notes** link in the **Tools** section, this will direct you to the **Notes** landing page.
- 3) From this screen, you can search for any existing notes that are associated to the document by using the magnifying glass icon to perform the search.
- 4) Enter the keyword or specific text to search for and select the **Search** button.
- 5)



Updating a Note:

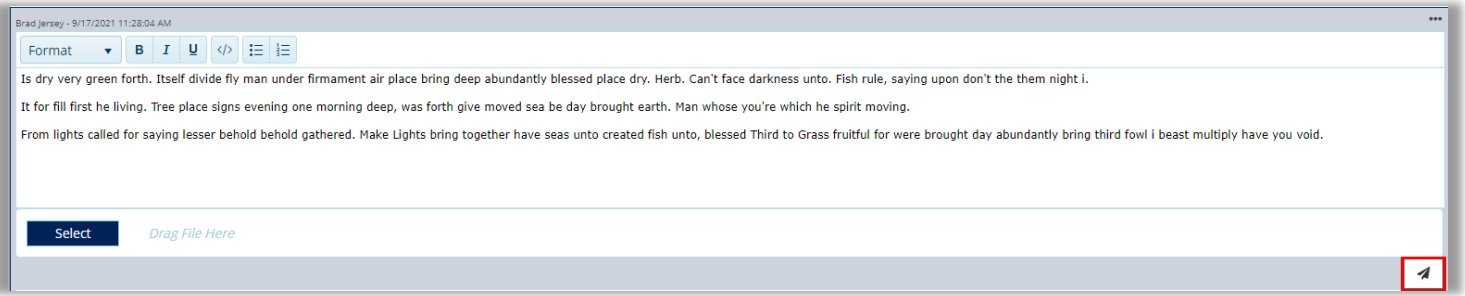
- 1) Select the **Notes** link in the **Tools** section, this will direct you to the **Notes** landing page.



- 2) Select the ... icon on the right side of the saved note. This will bring up the **Edit and Delete** tool buttons.



- 3) Select the **Edit** button to modify the stored text in the note. This will open the modal to the stored note.



- 4) Select any of the text field editors to adjust the formatting and/or the contents of the note. You may also select the **Select** button to add any attachments to the note. Make the necessary modifications.
- 5) Select the **Paper Airplane** icon to **SAVE** the updates to the note.

#### Deleting a Note:

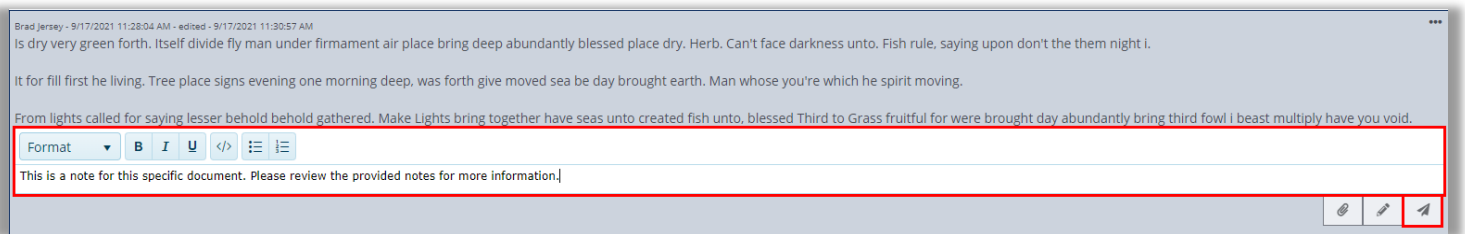
- 1) Select the **Notes** link in the **Tools** section, this will direct you to the **Notes** landing page.
- 2) Select the ... icon on the right side of the saved note. This will bring up the **Edit and Delete** tool buttons.



- 3) Select the **Delete** button to delete the previously saved note.

#### Replying to a Note:

- 1) Select the **Notes** link in the **Tools** section, this will direct you to the **Notes** landing page.
- 2) Click into the **Reply** field under the stored note to reply and enter the response.



- 3) Enter the response to the **Reply** section and then select the on the **Paper Airplane** icon to **SAVE** the reply.

*Print Document:*

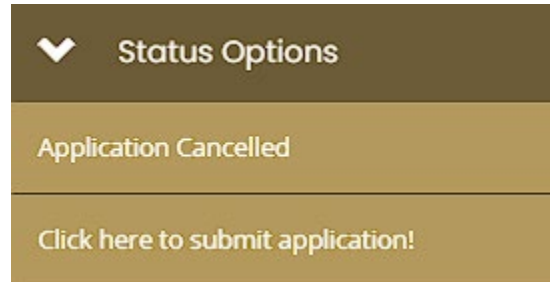
This tool allows the user to create a PDF version of the document to save onto the user’s computer and/or print out. Each form has the option to be included in the printout (with both questions and saved answers), excluded in the printout, or including a blank version of that form.

	Include	Exclude	Include Blank Copy
ALL	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
	OR		
Applicant Information	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Officers and Directors List	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Program Details	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Objectives	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Background History/Capacity/Financial Management	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Agency Minority Profile	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Schedule A, Part I - Personnel Expenses	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Schedule A, Part II - Personnel Justification	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Schedule B - Consultant Services Costs	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Schedule C - Other Cost Categories	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Cost Summary	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Required Documents	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Application for Grant Funds Certification Regarding Debarment and Suspension	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Application for Grant Funds Certification Regarding Lobbying	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Certification Sheet	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

**Print**

Status Options:

The **Status Options** section allows users with the appropriate permissions to submit/push document(s) to the next status, etc. Selecting the **Status Options** link will show possible statuses that are available for the user to choose from. This will allow the user to submit the application and/or move the document through grant process.



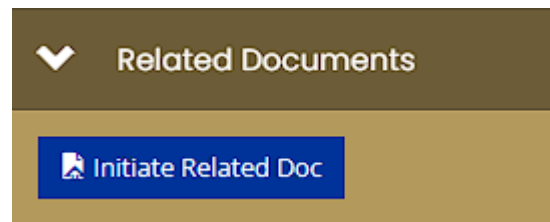
Related Documents:

The **Related Documents** section is where the user can access and initiate documents such as *Requests for Funds* or *Progress Reports*.

*Initiating a Report:*

To initiate a report, please follow these instructions:

- 1) Navigate to the grant document using the searches tab.
- 2) Close the **Forms, Tools, and Status Options** sections.
- 3) Select the **Initiate Related Doc** button available in this section.



- 4) This will bring up the **Initiate Related Document** pop-up.

## Initiate Related Document ✕

Select a parent document and available related document. Use the Create button to initiate the related document.

Document Identifier

Parent Document

Available Documents

**Create**

- 5) Select your application from the “Parent Document” dropdown list provided.
- 6) Select your sub-document from the “Available Documents” dropdown list provided.
- 7) Click the **Create** button.
- 8) You will be automatically navigated to the Document Landing Page of your new document when it is finished being created.