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:
  o Enters, updates, and deletes information on Applications, Grants, Requests for Reimbursement, and/or Final Reports;
  o Downloads and attaches files to Applications, Grants, Requests for Reimbursement, and/or Final Reports;
  o Modifies Applications, Grants, Requests for Reimbursement, and/or Final Reports with status of “Modifications Required”;
  o 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:

   ![Login Page](image)

   Your account has not yet been validated.

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.”

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.

- 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.
5. If the person’s name does not come up in the search results, then select “New Member.”
6. Enter information for the new user and “Save & Add to Organization.”
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.

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”.

![Profile page screenshot]

<table>
<thead>
<tr>
<th>Contact Information</th>
<th>Organization Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Organization Name</td>
</tr>
<tr>
<td>Prefix</td>
<td>Role</td>
</tr>
<tr>
<td>First</td>
<td>Active Dates</td>
</tr>
<tr>
<td>Middle</td>
<td>Assigned By</td>
</tr>
<tr>
<td>Last</td>
<td></td>
</tr>
<tr>
<td>Suffix</td>
<td></td>
</tr>
<tr>
<td>Organization</td>
<td></td>
</tr>
<tr>
<td>Title</td>
<td></td>
</tr>
<tr>
<td>Address</td>
<td></td>
</tr>
<tr>
<td>City</td>
<td></td>
</tr>
<tr>
<td>County</td>
<td></td>
</tr>
<tr>
<td>Phone #1</td>
<td></td>
</tr>
<tr>
<td>Phone #2</td>
<td></td>
</tr>
<tr>
<td>Fax</td>
<td></td>
</tr>
<tr>
<td>Email</td>
<td></td>
</tr>
<tr>
<td>Website</td>
<td></td>
</tr>
<tr>
<td>Username</td>
<td></td>
</tr>
<tr>
<td>Password</td>
<td></td>
</tr>
<tr>
<td>Confirm Password</td>
<td></td>
</tr>
</tbody>
</table>

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

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**Organization - ABSECON CITY SCHOOL DISTRICT**

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

<table>
<thead>
<tr>
<th>Organization Information</th>
<th>Organization Members</th>
<th>Organization Documents</th>
<th>Organization Details</th>
</tr>
</thead>
</table>

**Organization Information**

- **Name**: ABSECON CITY SCHOOL DISTRICT *
- **Federal Tax I.D. Number**: 216000928 *
- **DUNS Number**: 60-312-3753
- **SAM CAGE Code**: 
- **Address**: 800 Irelan Avenue *
- **City**: Absecon * State: New Jersey * Zipcode: 08201 *
- **County**: Atlantic County *
- **Phone**: 609-641-5375 * Fax: 609-641-8692
- **Email**: jgijaquinto@abseconschools.org
- **Website**: 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”

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.
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.
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.
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.

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](image)

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.

1. **System Email Folders**
   - System Messages
   - Sent Messages
   - My Archived Messages

2. **System Messages**

   **Keyword search system messages for:**
   
   **Sort search results by:**

<table>
<thead>
<tr>
<th>Priority</th>
<th>Sender</th>
<th>Subject</th>
<th>Date/Time</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Patricia Jordan</td>
<td>LWD Grant S4U-FY2017-NJ SAGE Test Org 1-001 Contract Revisions</td>
<td>8/5/2016 11:36 AM</td>
<td>Read</td>
</tr>
<tr>
<td></td>
<td>Grant System</td>
<td>LWD Application S4U-FY2017-NJ SAGE Test Org 1-001 was successfully submitted</td>
<td>8/5/2016 3:50 PM</td>
<td>Unread</td>
</tr>
<tr>
<td></td>
<td>Ms. Chelsea Bellows</td>
<td>PLEASE DISREGARD PREVIOUS EMAIL ABOUT ATTACHMENT C</td>
<td>4/11/2016 3:38 PM</td>
<td>Unread</td>
</tr>
<tr>
<td></td>
<td>Ms. Chelsea Bellows</td>
<td>ATTACHMENT C'S ARE UPLOADED IN YOUR AIDS16RWB GRANTS IN SAGE - PLEASE REVIEW</td>
<td>4/11/2016 2:14 PM</td>
<td>Unread</td>
</tr>
<tr>
<td></td>
<td>Ms. Chelsea Bellows</td>
<td>Request for Applications (RFA) – Care and Treatment Services - State 2017</td>
<td>2/9/2016 4:20 PM</td>
<td>Unread</td>
</tr>
</tbody>
</table>

### 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]

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.

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.

Agreement

Please make a selection below to continue.

DOS SAGE

OFFICE OF FAITH BASED INITIATIVES SOCIAL ENTREPRENEUR AND ENTERPRISE DEVELOPMENT PROJECT I & II PROGRAM

DOCUMENTS to open

- NJ DEPARTMENT OF STATE GENERAL FUNDING GUIDELINES. This document identifies requirements for all organizations that are eligible to apply for funding from the Department of State. It briefly describes the review process and provides information on regulations governing grant awards.

- NJ DEPARTMENT OF STATE/OFFICE OF FAITH BASED INITIATIVES SE20 APPLICATION GUIDELINES. This document describes the eligibility criteria and specific program requirements to receive funding for the OFBI SE20 program, along with instructions for completing the Application.

- NJ DEPARTMENT OF STATE/OFFICE OF FAITH BASED INITIATIVES GRANT AGREEMENT. This document lists all Terms & Conditions that will be required of Organizations that receive funding through this grant program.

Click on "I AGREE" to acknowledge your acceptance and proceed with completing the OFBI Direct Service Grant Application.
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.

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

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

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

<table>
<thead>
<tr>
<th>Page</th>
<th>Modification</th>
<th>Date/Time</th>
<th>By</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget Summary</td>
<td>Added</td>
<td>10/5/2012 8:58:48 AM</td>
<td>Jersey, Brad</td>
</tr>
<tr>
<td>Refusal of Federal IDEA Funds</td>
<td>Added</td>
<td>10/3/2012 2:07:30 PM</td>
<td>Jersey, Brad</td>
</tr>
<tr>
<td>Nonpublic</td>
<td>Added</td>
<td>9/19/2012 11:55:27 AM</td>
<td>Program Staff, DOE</td>
</tr>
<tr>
<td>Expenditures</td>
<td>Added</td>
<td>9/19/2012 11:51:48 AM</td>
<td>Program Staff, DOE</td>
</tr>
<tr>
<td>Coordinated Early Intervening Services</td>
<td>Added</td>
<td>9/19/2012 11:39:27 AM</td>
<td>Program Staff, DOE</td>
</tr>
<tr>
<td>Eligibility</td>
<td>Added</td>
<td>9/4/2012 2:50:11 PM</td>
<td>Program Staff, DOE</td>
</tr>
<tr>
<td>Maintenance of Fiscal Effort</td>
<td>Added</td>
<td>8/28/2012 1:38:35 PM</td>
<td>Program Staff, DOE</td>
</tr>
<tr>
<td>IDEA Plan</td>
<td>Added</td>
<td>8/28/2012 11:32:16 AM</td>
<td>Program Staff, DOE</td>
</tr>
</tbody>
</table>
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.

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.

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

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.”

   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.

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).

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

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.

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.

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.
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.

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.