INTELLIGRANTS ® IGX

MDARD AUTHORIZED OFFICIAL MANUAL

Contents

Introduction

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

The system was designed to be a grants management portal designed to help users throughout the Sub-Grant and Claim processes online. Users should be able to access the site with little to no changes to their computer's settings, and the portal is designed to be compatible with most common up-to-date web browsers, such as Microsoft Edge, Google Chrome, Mozilla Firefox, or Apple Safari.

Current System Contact Information

For questions regarding submitted user registration and/or questions regarding specific grant opportunities, please contact the state agency for assistance. They can be reached at mda-grants@michigan.gov.

Please contact the Michigan Department of Agriculture and Rural Development Customer Service Center at 1-800-292-3939 for assistance with MiLogin issues. They are available Monday through Friday from 8:00 a.m. to 5:00 p.m. (EST).

System Overview

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

- **Reporting Panels** – The system dashboard page allows users to drill down through new reporting panels for funding account information, program budgets, and even view staff performance information.

- **Easy Configuration of Program Changes** – The system takes advantage of a new drag-and-drop configuration engine to allow users to update their programs. This includes easily updating forms, process flows, and management reports.

- **Updated Accessibility Features** – IGX was built from the ground up to adhere to ADA and WCAG 2.1 AA standards. The portal will also undergo regular 3rd party web accessibility compliance audits. It includes new options like a sharp contrast mode and new branding utilities.

System Requirements

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

Internet Connection & Access / Internet Cookies

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

Other messages that may be seen are:

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

- "The web browser must enable cookies for this site to access this portal."
- "Do not open multiple windows or browser tabs while filling out the document, as this can cause issues with browser cookies resulting in either being kicked out of the system or work being lost."

Multiple Browser Windows

Do not open multiple windows or browser tabs while filling out the document, as this can cause issues with browser cookies resulting in either being kicked out of the system or work being lost.

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

For example, if utilizing Microsoft Edge and you want to open a second window, click ellipsis (…) icon, then click **New inPrivate window**.

"Saved" Passwords in Web Browsers

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

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

Security Roles

MDARD Security Roles

This section summarizes the system roles that users may have in this system. Access to various system tools is controlled by what security role your account is given. It is possible to have multiple system roles per account. See the security role matrix below for which role can view and/or assign users with other security roles:

	Roles in this section may be added and/or viewed by the roles in the Selected Role Column																												
Role	Authorized Official	Primary Contact	Project Staff	Project Read-Only	Joint Evaluation Committee	Program Admin	Authorized Signatory	Financial Analyst	Letter Generator	Report Builder	System Configurator	MDARD System Administrator	MDARD View Only	Program Manager	Site Visit Staff	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Selected Role Column (VA=View and Assign , V=View Only)																													
Authorized Official	V	V	V	V	V	V	V	v				V	V	V	V														
Primary Contact	V	V	V	V	V	V	V	v				V	V	V	V														
Project Staff	V	V	V	V	V	V	V	v				V	V	V	V														
Project Read-Only	V	V	V	V	V	V	V	v				V	V	V	V														
Joint Evaluation Committee	V	V	V	V	V	V	V	v				V	V	V	V														
Program Admin	V	V	V	V	V	V	V	v				V	V	V	V														
Authorized Signatory	V	V	V	V	V	V	V	v				V	V	V	V														
Financial Analyst	V	V	V	V	V	V	V	v				V	V	V	V														
Letter Generator	V	V	V	V	V	V	V	v				V	V	V	V														
Report Builder	V	V	V	V	V	V	V	v				V	V	V	V														
System Configurator	V	V	V	V	V	V	V	v				V	V	V	V														
MDARD System Administrator	VA	VA	VA	VA	VA	VA	VA	VA	V	V	V	VA	VA	VA	V														
MDARD View Only	V	V	V	V	V	V	V	v				V	V	V	V														
Program Manager	V	V	V	V	V	V	V	v				V	V	V	V														
Site Visit Staff	V	V	V	V	V	V	V	v				V	V	V	V														

Navigation

Navigation Buttons

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

Systemwide

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

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

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

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

Page Specific Icons

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

- **Blank Square** – This icon indicates that the form is blank.
- **Flag** – This icon indicates that the form has data saved on it and that the form has been flagged for the user's attention.
- **Triangle with an Explanation Point** – This icon is a warning that there is data on a form that has not met specific criteria.
- **Square with a Checkbox** – This icon indicates that the form has saved data and is complete.
- **Circle with an Exclamation Point** – This icon indicates that the form has saved data and contains errors.
- **Circle with an Arrow** – This icon indicates that the form has multiple instances of it. Clicking on the icon allows the user to examine a list of instances of that form to access that specific instance of the form.

System Login Page

Web URL

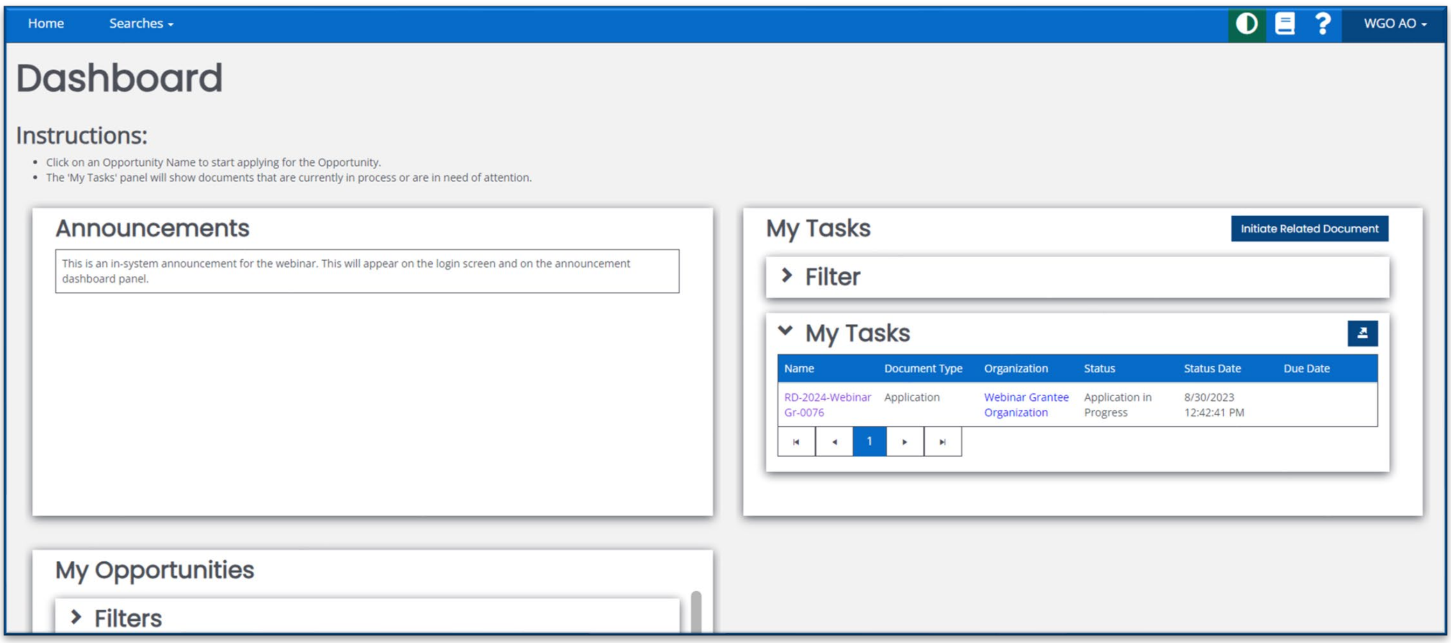
This website will utilize Single Sign On from the MiLogin portal. Please visit website https://milogintp.michigan.gov/ for more information.

System Home Login Page Sections

This website will utilize Single Sign On from the MiLogin portal. Please visit website https://milogintp.michigan.gov/ for more information.

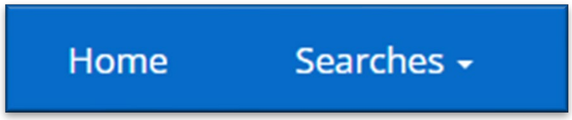
Home/Dashboard

Once logged in, the user is on the **Dashboard** page. The dashboard will contain panels for quick access to documents that require attention, system announcements, listed opportunities that a user can initiate documents for.



Ribbon Links

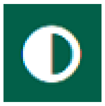
Along the top ribbon administrative users will see the following options:



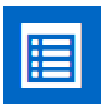
The **Home** button will take you back to the dashboard, no matter where you are in the system.

The **Searches** menu houses various document search tools to find documents that have been initiated.

Button Links



The **High Contrast Mode** button provides an option to grayscale the site. Clicking on this button will change the theme to be entirely black and white; clicking it again will toggle it back. The site will remember the user's settings for this option and whether the user has it turned on or off.



The **Navigation History** will provide a list of system pages the user has navigated to recently.

NOTE: This only appears once a user has been to a different system page.

The **Training Materials** will provide a list of training materials like the manual you are reading now.

The **Help** button provides useful information for the system page you are currently on.

The **Profile** button will provide a menu of options such as opening your profile page, viewing in-system message, and editing your dashboard panels.

Editing the Dashboard

The **Edit Dashboard** link contains settings to allow the user to customize their dashboard to display specific data such as active documents (Applications/Monitoring Reports, Reimbursement Requests, etc.), available Grant Opportunities/Applications, system announcements, and visual reports organized into panels.

Adding a Panel

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

1) Go to the **Name** link and click the **Edit Dashboard** link.
2) Click on the **Add Panel** link.
3) Select the panel from the dropdown and click the SAVE button.

Editing a Panel

To edit a panel in the dashboard, please follow these instructions:

1) Go to the **Name** link and click the **Edit Dashboard** link.
2) Click on the COG button for a specific panel.
3) Select the panel from the dropdown and click the SAVE button.

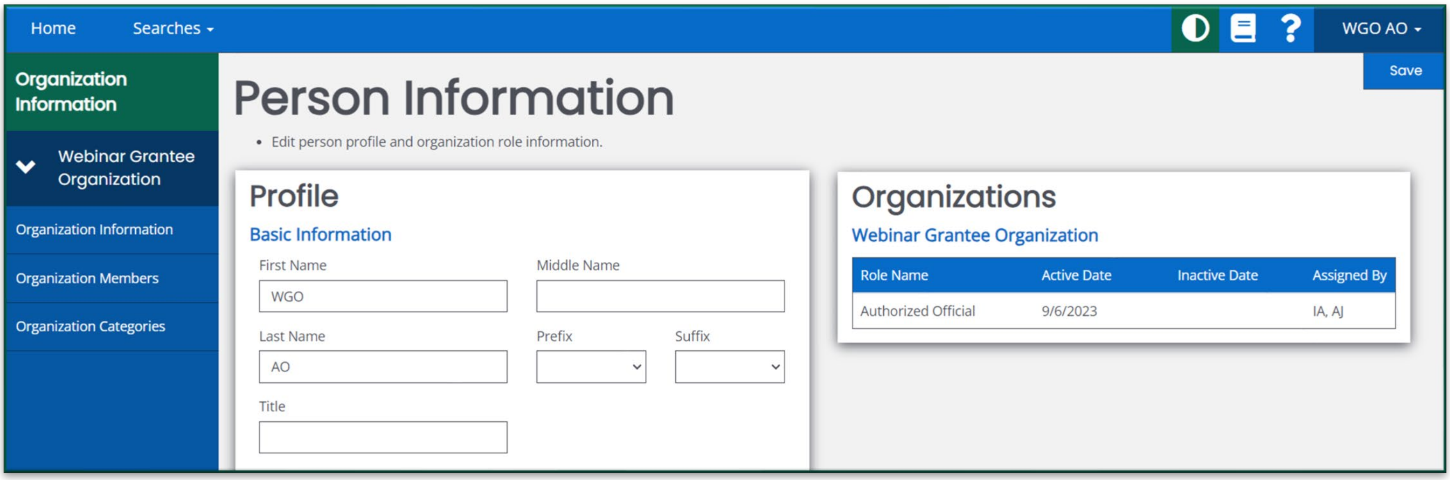
Deleting a Panel

To delete a panel from the Dashboard, please follow these instructions:

1) Go to the **Name** link and click the **Edit Dashboard** link.
2) Click on the X button for a specific panel. The dashboard does not automatically save or remember these changes unless the user clicks the SAVE button, so remember to click that before navigating to a new page or refreshing so that these changes are committed.

Profile Overview

Clicking on the **Profile** link allows the user to see the information about the user known as the **Person Information** page.



This page is divided into 3 sections:

- **Organization Information Column (Left Side)** – Clicking on links in this column allows the user to see more information about the organization, it's member(s), and/or any categories the organization is assigned to.

- **Person Information Page (Center)** – There is general information about the user and how to contact them. At the bottom of the page, there is a section available only to the user when they are logged in with additional security features.

- **Organizations Section (Right Side)** – This section contains information on how the user is related to organization(s). In this example, the user is assigned an "Authorized Official" role for the "Webinar Grantee Organization" organization.

Profile/Person Information Page

Information about the individual is organized into the following sections:

- **Basic Information** – This section contains information that is usually about the user such as name.
- **Contact Information** - This section contains information on how to contact the individual directly and specific preferences set up by the individual.
- **Address Information** - This section contains information about the user's or organization's address.
- **Additional Information** - This section contains fields to upload files or add other information about the user.
- **Login Information** – This section contains the user's login credentials and an optional Security Image.

Editing the Profile Page

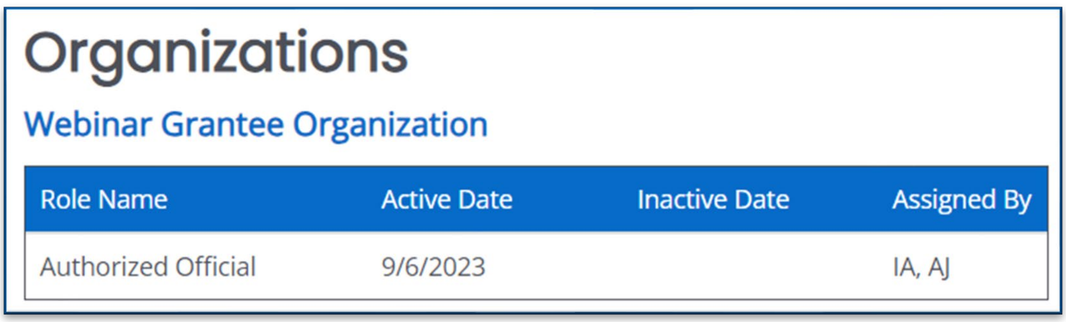
The user can update any and all of these fields, as necessary. However, if the user attempts to save the page with any blank required (*) fields, those fields are highlighted by a red border along with any required message below the field. The user will not be able to save the page until those fields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

Organization Assignments

Organizations Section

On the right-hand side of this page, it displays a list of the user's organization(s) and role(s) within those organization(s).

- If the user has a role that allows them to add other organization(s) to the system, there will be a PLUS SIGN button in the corner. Clicking this button brings up a page where the user can select a new role(s) for a new organization, as well as **Active** and **Inactive** dates for that user for the organization(s).



Organizations

Webinar Grantee Organization

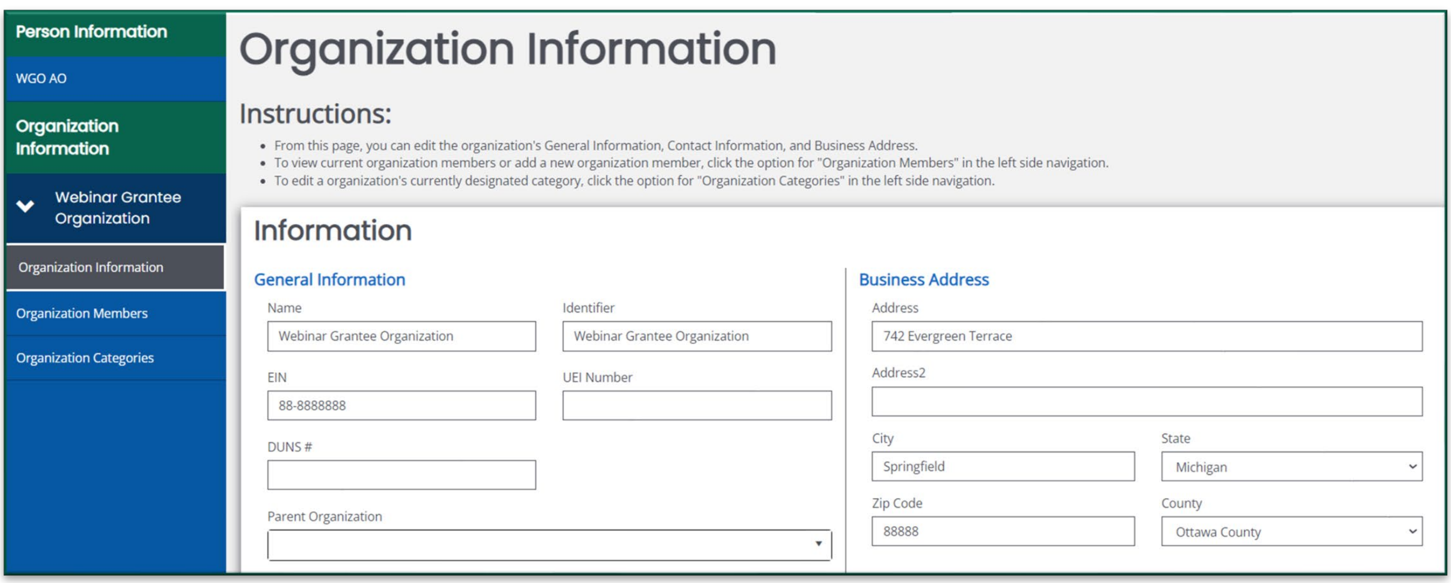
Role Name	Active Date	Inactive Date	Assigned By
Authorized Official	9/6/2023		IA, AJ

Organization Information Page

Organization Information

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

- **General Information** – A section containing general information about the organization. It may include numbers assigned by other agencies including the FEIN number. If there are any ties to a parent organization, they are listed here.
- **Contact Information** – This section is specifically about the organization contact information.
- **Additional Information** – This section includes a **SIGMA Vendor Customer ID** text field, a **501(c)(3) Proof of Non-Profit Status** file upload field, and an **Organizational Chart** file upload field.
- **Business Address Information** – This section contains physical address information about the organization.



Organization Members

This area contains a list of members in the organization and allows the user to add additional members. The user should be able to view all current members of the organization (using search options to filter results).

- If a user has permissions within the system to edit the user, those names display as links instead of text.
- If a user who doesn't have the level of access to edit another user hovers over that user's name, the system displays an "Inadequate permissions to view this person" message.

Searching for a Member

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

Adding New Members

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

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

Adding Existing Users

Administrative users can add existing users in the system to organizations by doing the following:

1) Click on the PLUS SIGN button in the **Member Search** section and click the ADD EXISTING USER TO ORGANIZATION button.

2) Fill in the fields and click SEARCH. A list of users is visible in the bottom panel.
3) Select a role and click SAVE.
4) The recipient will be able to login and access the specific document that they are assigned to with the level of permissions that were granted by the role assignment. Fill in the fields and click SAVE.

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

Removing Members

Organization members are “removed” from the organization by setting an inactive date for their organization role. To edit an existing member’s active and/or inactive dates, please follow these instructions:

1) Click on the EDIT button at the end of the row for a specific user.
2) Update the dates (especially the **Inactive Date** field) and click SAVE.

Organization Categories

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

Organization Category Assignments

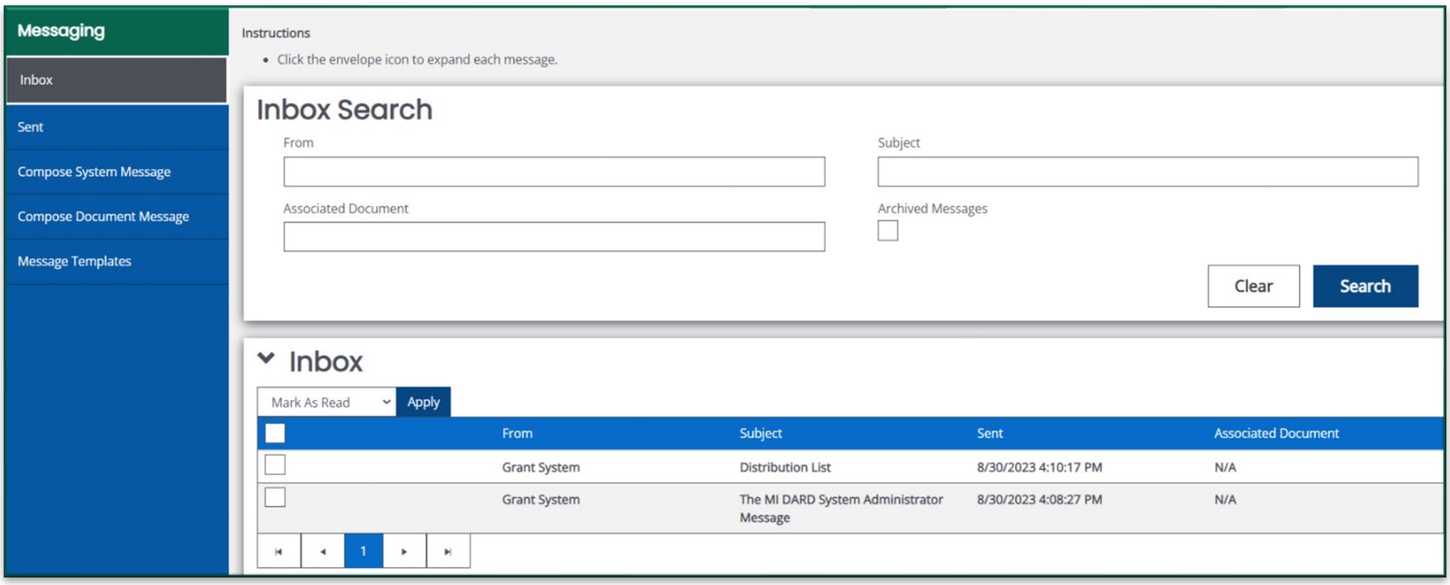
To update an organization category assignment, please follow these instructions:

1) Click on the ***Organization Categories*** link in the column on the left-hand side.
    - **Assign Categories** – Check the box next to a category and press SAVE to assign the organization that category.

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

Messages

Under the **Profile** section, there is a messaging section where the user can create messages. To get to messages in the inbox click on the ***Name*** link at the top of the page on the right side. Then Click on the ***Messages*** link in the right-hand column.



Inbox

This brings up the **Inbox**. Click on the row of a specific email to access it. Use the **Inbox Search** section to complete email searches. Emails can be “marked as read” by checking one (or more than one) of the checkboxes(es), selecting the “Mark as Read” setting from the drop-down list, and clicking the APPLY button.

To access the inbox, please follow these instructions:

1) Click on the ***Name*** link at the top of the page on the right side.
2) Click on the ***Messages*** link in the right-hand column.
3) This brings up the **Inbox**. Email searches are completed in the **Inbox Search** section. Emails can be marked as read by checking one (or more than one) of the checkboxes(es), selecting the “Mark as Read” setting from the drop-down list, and clicking the APPLY button.

   NOTE: The user can click on the *Inbox* link on the left-hand side to access this page.
4) Click on the row of a specific email to access it.

Sent

A user can access previously sent emails by following these instructions:

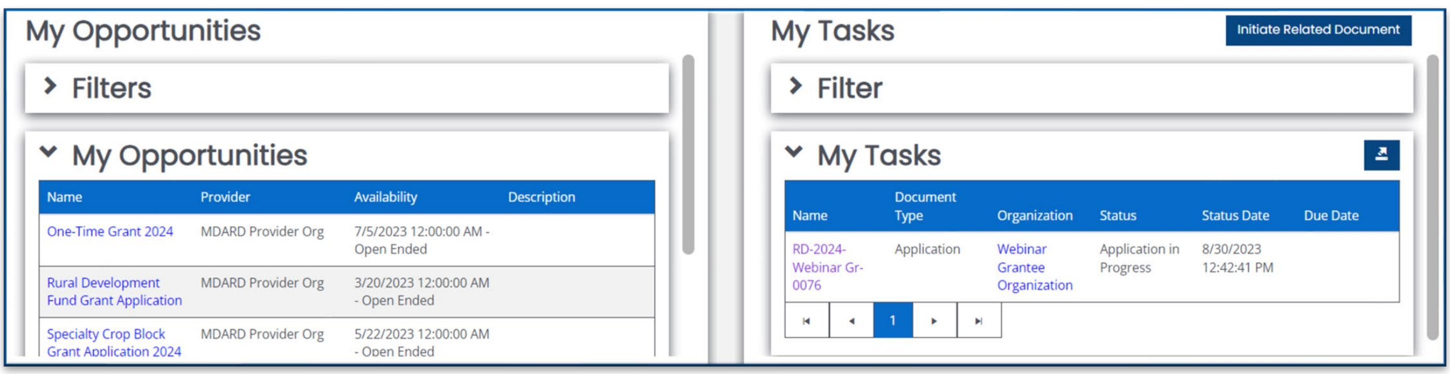
1) Click on the ***Name*** link at the top of the page on the right side.
2) Click on the ***Messages*** link in the right-hand column.
3) Click on the ***Sent*** link in the left-hand column.
4) This brings up past emails. A user can search for a specific message using the “**To”** and “**Subject”** fields.
5) To access a specific email, click on the ENVELOPE button on the right side of the screen for a specific email.

Starting Grant Opportunities

Current grant opportunities are displayed on the **My Opportunities** panel based on the availability dates provided by MDARD. The ***Authorized Official*** and ***Primary Contact*** roles are responsible for starting the application for their organization.

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

1) Login to the portal in a role that can start application(s).
2) Click on the grant opportunity name to initiate that opportunity.
3) Once an application has been started, the user is taken to the document's **Landing Page**.
4) If users navigate away from the document, they can use the **Searches** tab or the **My Tasks** dashboard panel to locate the document.

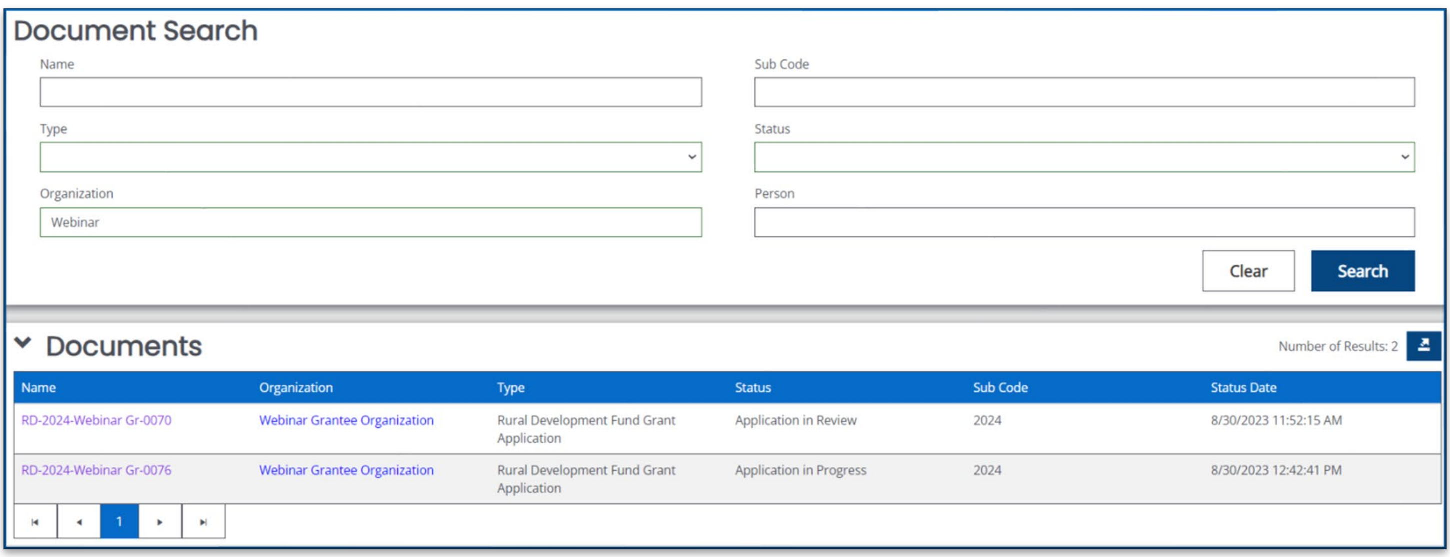


Searches

Applications Search

Use the **Applications** search tab to navigate to specific application documents. Administrative users will be able to search for all application documents, while grantee/applicant users will be able to search for application documents specific to their organization.

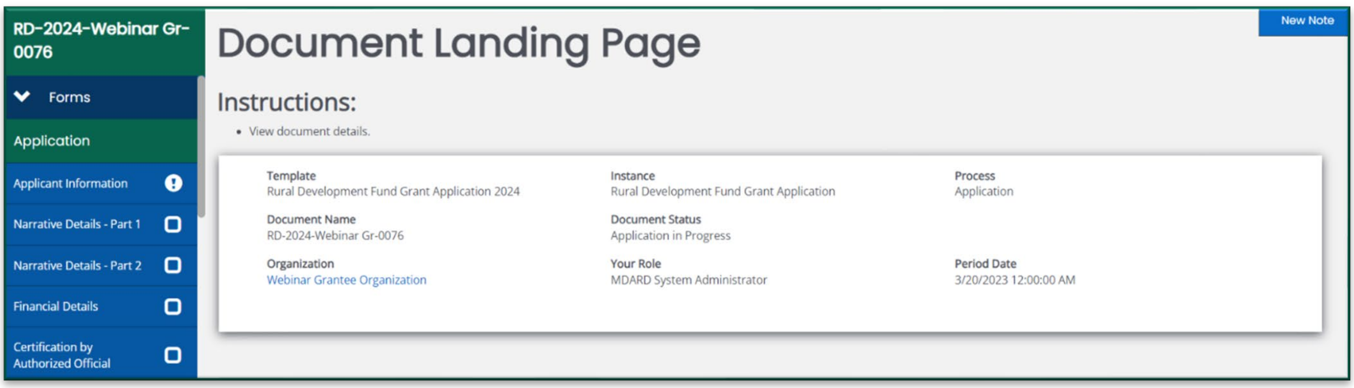
NOTE: If a user does not have access to a particular document, they will be redirected back to the Dashboard page.



The Document Landing Page

Document Landing Page Overview

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



Navigation Column Sections

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

Tools (currently not shown) – Tools available to use for completing the document.

Status Change (currently not shown) – The mechanism for “submitting” the document to the next user group.

Related Documents (currently not shown) – Access links for documents “related to” or connected to this one. For example, an application may have “related documents” such as reimbursement request(s).

Document Details & New Note Button

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

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

Lefthand Navigation Column

Document Number Link

The number listed above the **Forms** header is the document number. Clicking on it brings the user back to the **Document Landing Page**.

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

Forms

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

Tools

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

Status Options

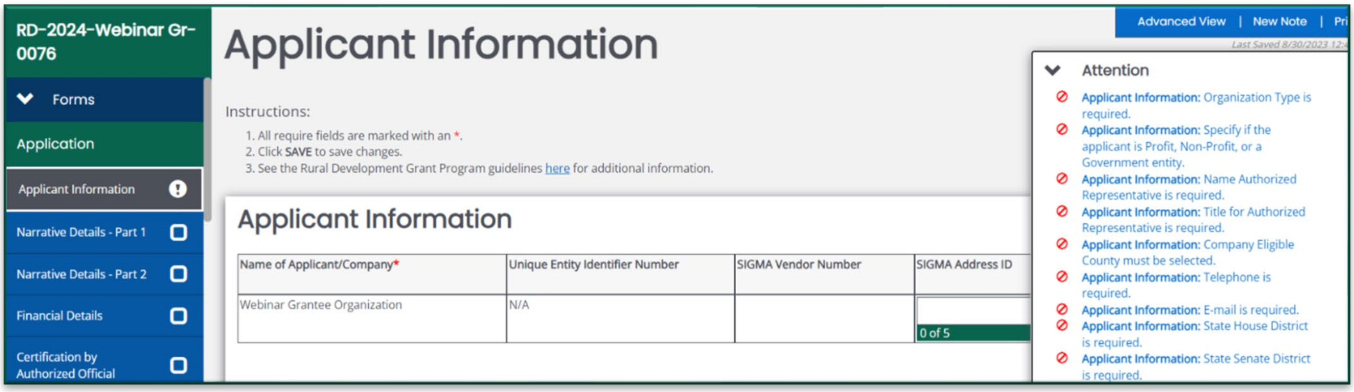
The **Status Options** section will display different statuses that a user can use to move the document in the process. The document will go through different processes that review the submitted document, sign off on different requirements, can allow electronic signatures and modifications.

Related Documents

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

Application/Document Forms

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



Forms

Form Options (Header)

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

"Form Permissions" are set up to assign users to distinct functions. Common buttons are:

Advanced View – allows the user to access additional options.

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

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

Save – allows the user to save the form.

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

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

Form Options (Footer)

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

Form Options (Advanced View)

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

Form Icons Left Side Navigation Column

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

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

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

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

Tools

The **Tools** section contains a list of customized tools available to the user depending on the role assigned to the user. The tools section contains tools that may be helpful as the user completes the document.

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

Landing Page

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

Add/Edit People Tool

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

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

- TO ADD USERS – Click the PLUS SIGN button and then search for a user. Next, assign the role from the dropdown for the user and click the SAVE button. Active dates are populated upon saving.
  NOTE: Users from other organizations can be added to specific documents and not to the organization.

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

Status History

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

Attachment Repository

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

Modification Summary

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

Document Validation

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

Notes

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

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

Print Document

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

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

Document Messages

This tool allows the user to send/receive email and in-system notifications related to a specific document.

- **Message Search Section** – There is a search section that a user can use to filter to a specific message about the document. A user can leave all the fields blank and click the SEARCH button to pull up a complete list of emails regarding that document.

- **Messages** – This section provides a table of data about the email and an ENVELOPE button to open the email message itself.

Status Options

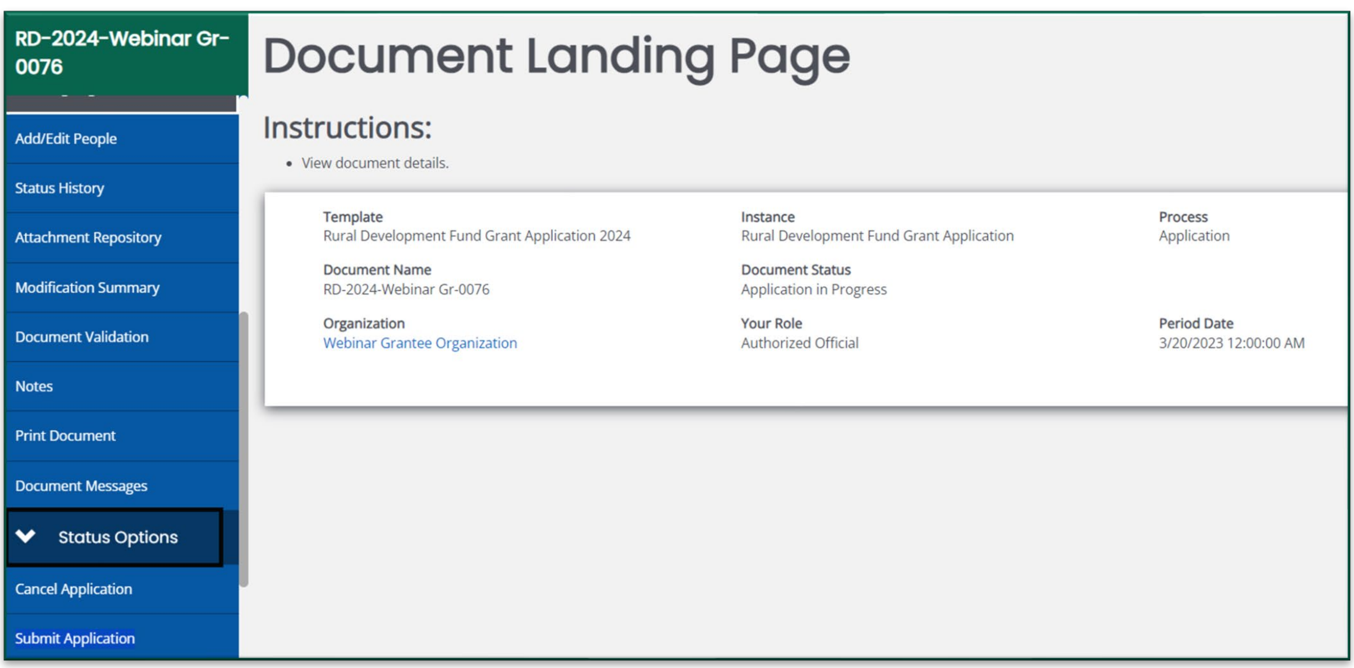
The **Status Change** area allows the user to change the status of a document. This is normally useful for submitting Application(s) or reports, signing contracts, or requesting grant modifications.

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

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

EXAMPLE:

- **Submitting an Application** - Once the user has completed all of the forms and is ready to submit the document, the user can click the "Application Submitted" link in the **Status Changes** section of the navigation column on the left (all the way down). Next, the user will click OK to complete the application submission and CANCEL to return back to the application itself WITHOUT submitting the application.



Related Documents (Reports, etc.)

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

Starting a Related Document (Reports, etc.)

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

1) Navigate to the Application document.
2) Close the **Forms**, **Tools**, and **Status Options** sections.
3) Click on the INITIATE RELATED DOCS button (in the **Related Documents** section at the bottom of the lefthand column for that document or in the **My Tasks** Dashboard section).

4) Fill in the information and click the agreement button to start the related document.