# INTELLIGRANTS ® IGX

## MIDHHS - DIVISION OF VICTIM SERVICES

## GRANTEE MANUAL

DIVISION of VICTIM SERVICES

# Contents

# Introduction

## IGX Overview

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

- **IGX Dashboard** – The IGX Dashboard allows users to drill down through new reporting panels for funding account information, program budgets, and even view staff performance information.

- **SAM.GOV System Interface** – The new system interface automatically gathers address and contact information during registration and confirms a valid DUNS number. It also allows the system to check for expiration dates and confirm whether an organization can receive federal funding.

- **Easy Configuration of Program Changes** – The IGX portal takes advantage of a new drag-and-drop configuration engine to allow users to make changes to 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 high contrast mode and new branding utilities, making it easier to accommodate individuals with disabilities.

## Current IGX Contact Information

IGX has supplied the following contact information for users:

| Agency/Individual Name | Phone Number | Email Address | Website URL |
|---|---|---|---|
| **Agate Software Helpdesk** | 1 (800) 820-1890 | helpdesk@agatesoftware.com | |
| | | | |

# 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 grants 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 update, 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 the document, as this can cause issues with browser cookies resulting in either being kicked out of the system or work being lost.

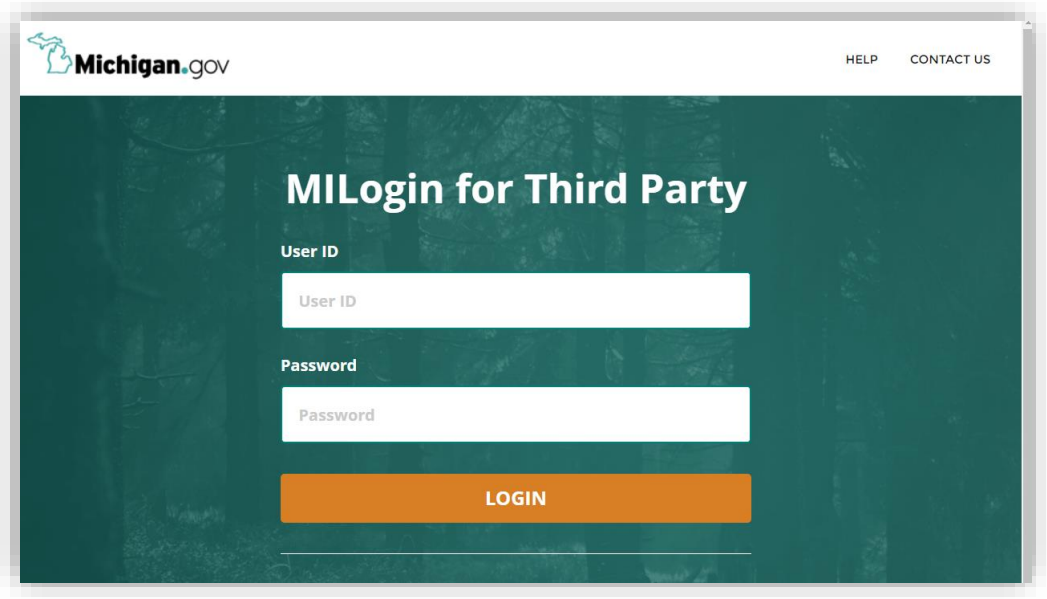
**NOTE: If the user needs to have multiple windows open, please ensure that the user is using a separate browser session instead.**

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.

# System Login Page (MiLogin for Third Party)

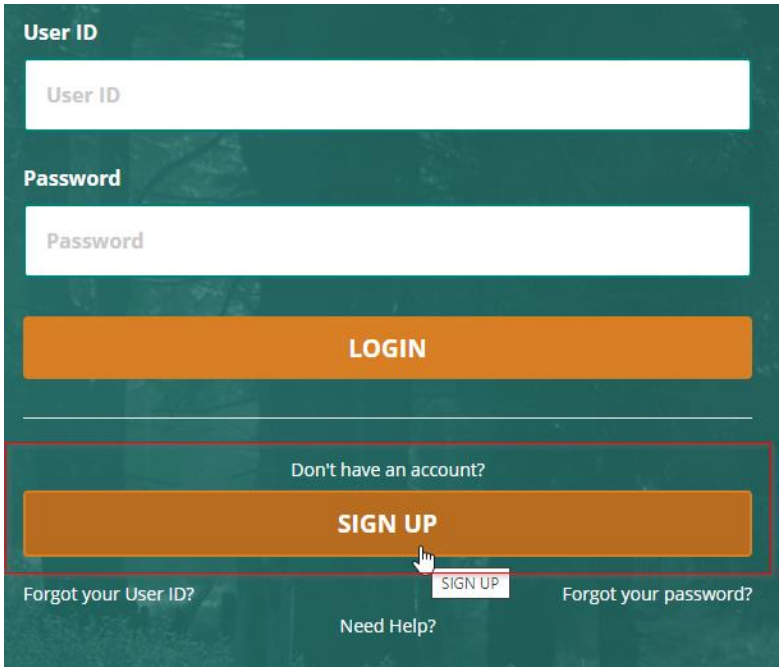
## URL

To access the IGX portal, navigate to the MiLogin portal [https://milogintp.michigan.gov/](https://milogintp.michigan.gov/)

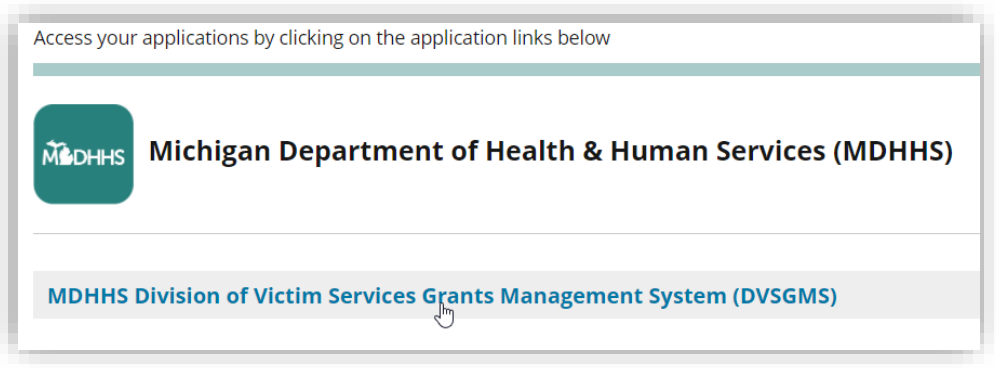



If you do not already have an account with Milogin, please follow the instructions on the screen request an account.

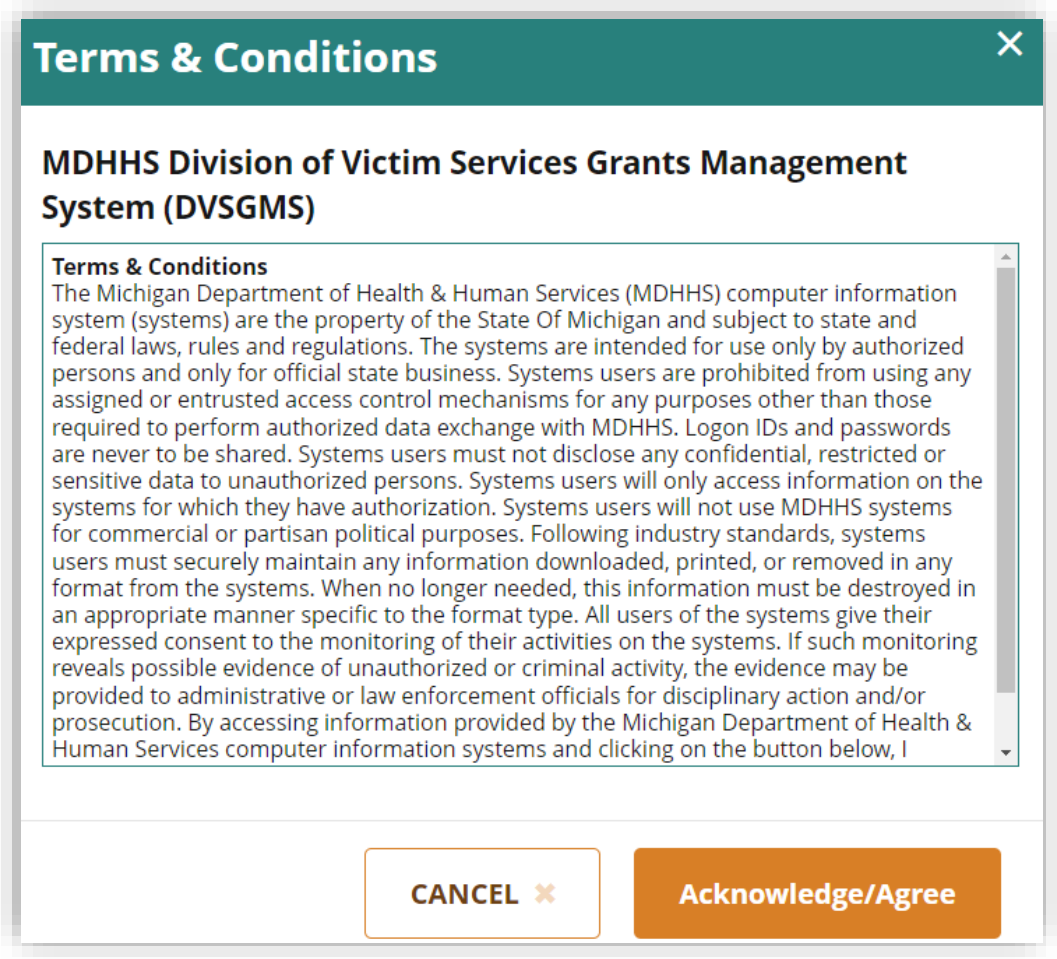
The account request must be approved by a DHHS administrator before moving forward with the login process.



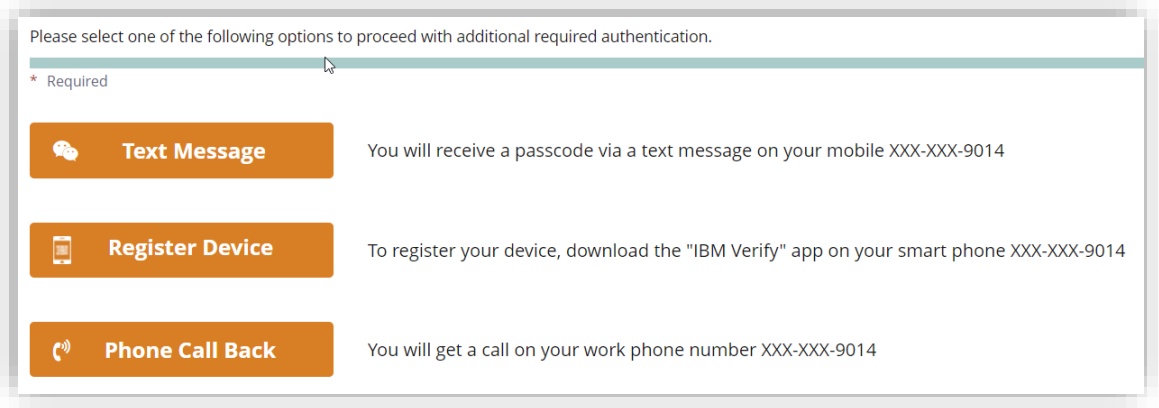
Once logged into the MiLogin portal, select the link below to access the IGX portal.



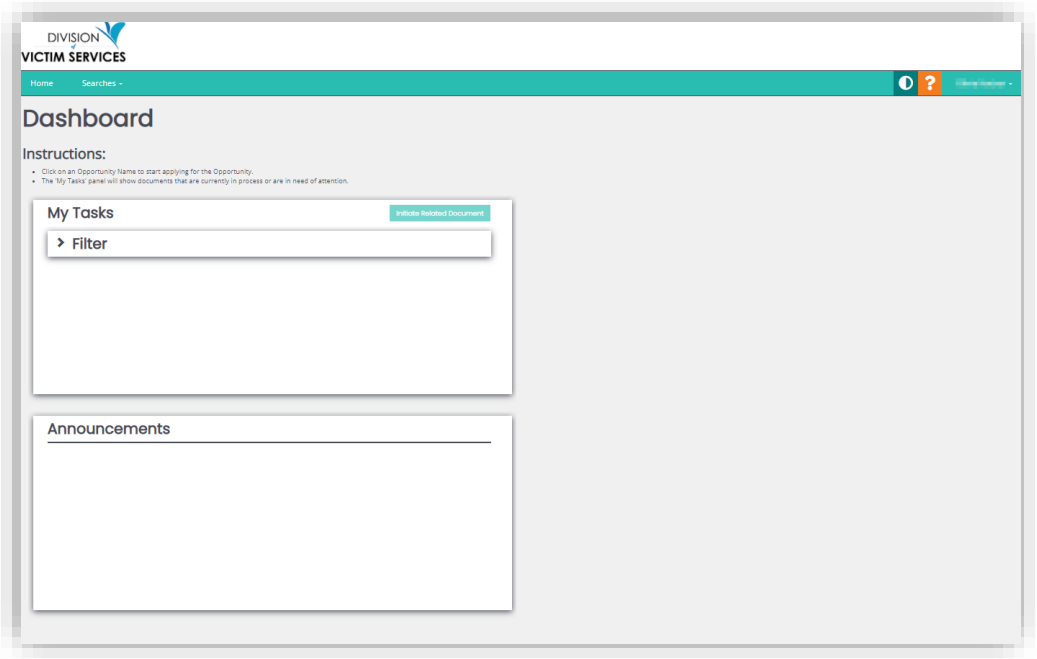

Select “Acknowledge/Agree” on the Terms & Conditions pop up modal to proceed.




A new window will open displaying options for the authentication login process. Select an option to proceed with the login process and follow the instructions for the option selected.

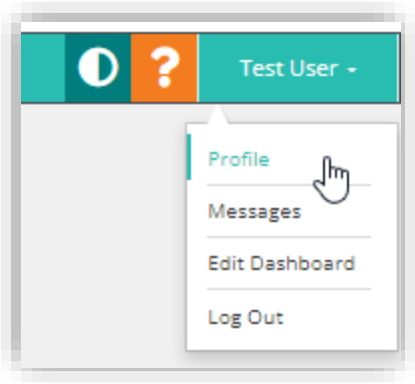



Once the login authentication process is complete, the user account will be logged into the DVS Grants IGX portal and the “Dashboard” screen will display.




# User Information

Once a person logs into the system and clicks the ***Profile*** link, these sections are visible.




## Organization Information Column

There is a column on the left-hand side of the screen that contains links to the organization(s) the user is connected to.

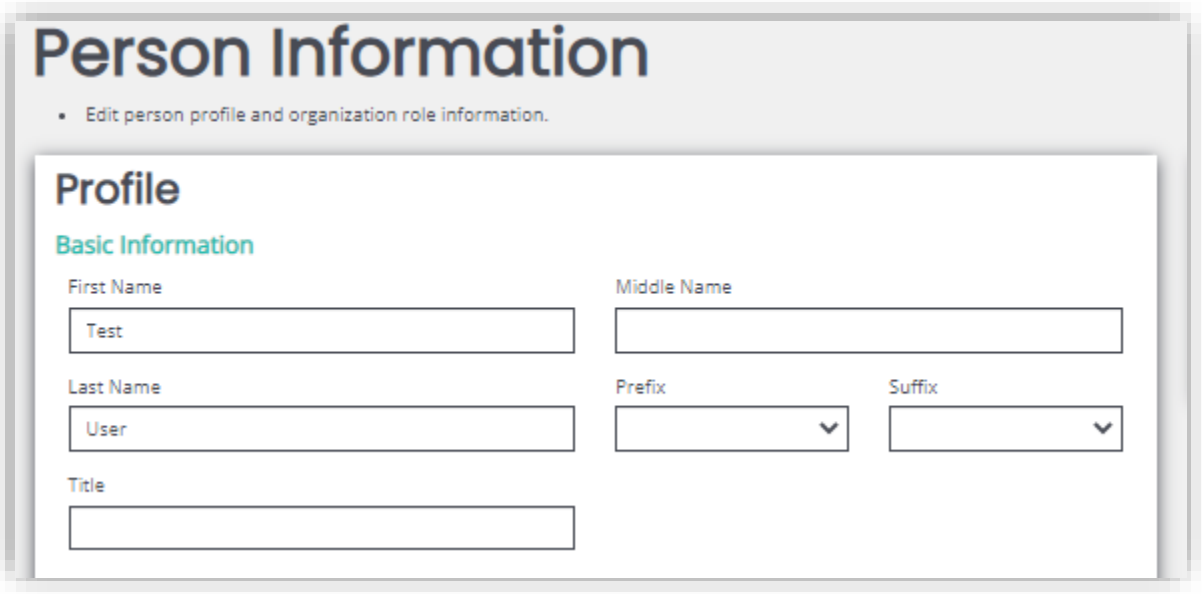

## Profile Page

This is the page for the user information.

## User Information

*Basic Information Section*

This section includes basic personal information about the individual.




### 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.

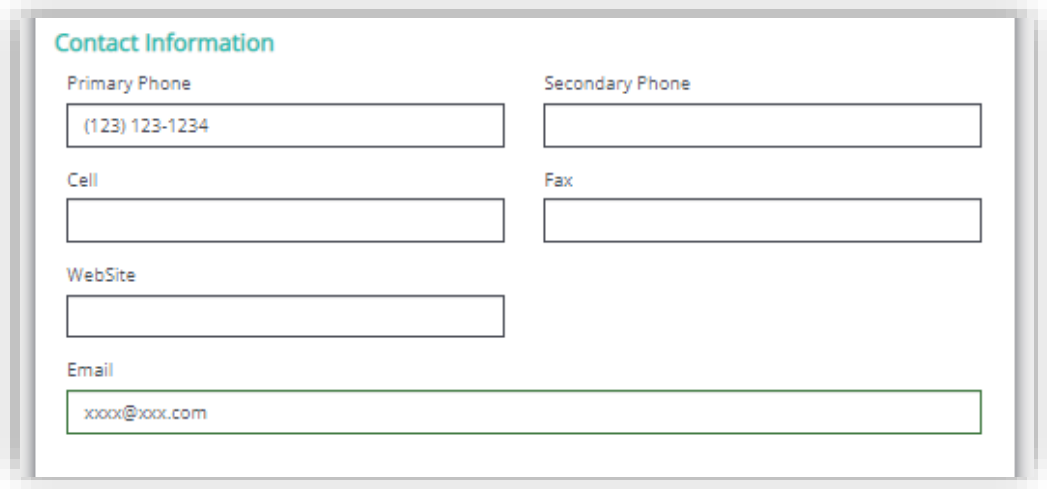
**Prefix** – an optional prefix for the individual.

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

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

*Contact Information Section*

This section contains contact information for the individual.




## Contact Information Legend

**Primary Phone** – the primary phone number for the individual.

**Secondary Phone** – the optional secondary phone number for the individual.

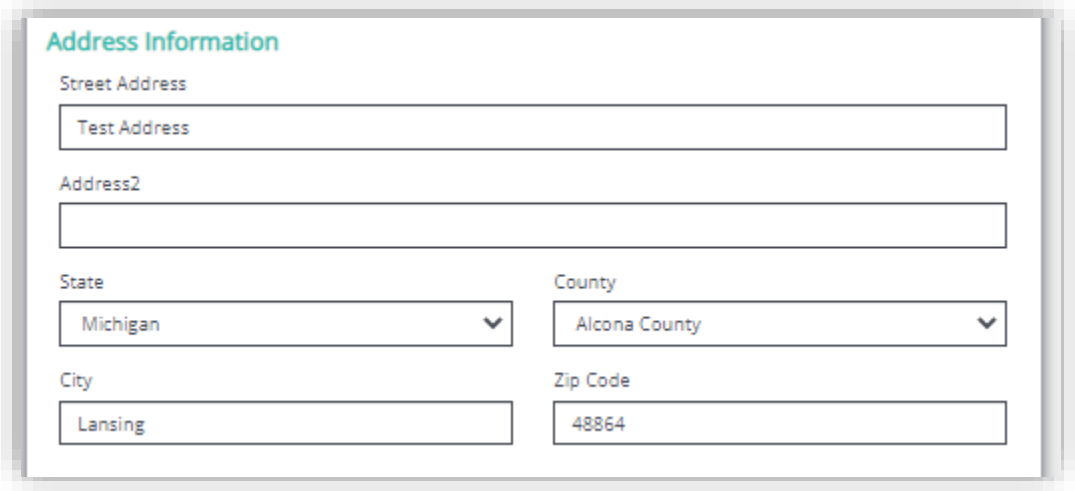
**Cell** – the optional cell phone number for the individual.

**Fax** – a fax phone number for the individual.

**Email** – the email address of the individual.

*Address Information Section*

This section includes address information about the individual.




## Address Information Legend

**Address** – the street address for the individual.

**Address 2** – the secondary street address for the individual.

**State** – the dropdown menu of the state the individual's street address is in.

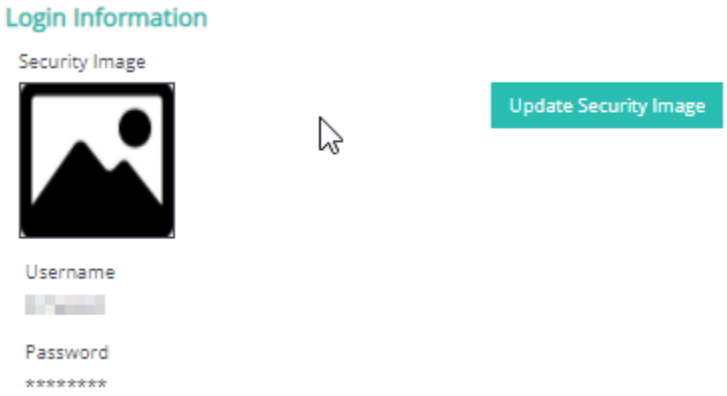
**County** – the dropdown menu of the county the individual's street address is in.

**City** – the city the individual's street address is in.

**Zip** – the zip code the individual's street address is in.

*Login Info Section*

This section includes additional information like the username and password and the Security Image which can be updated if needed.




## Login Info Legend

**Username** – a label containing the individual's username.

**Password** – a label containing the individual's current password.

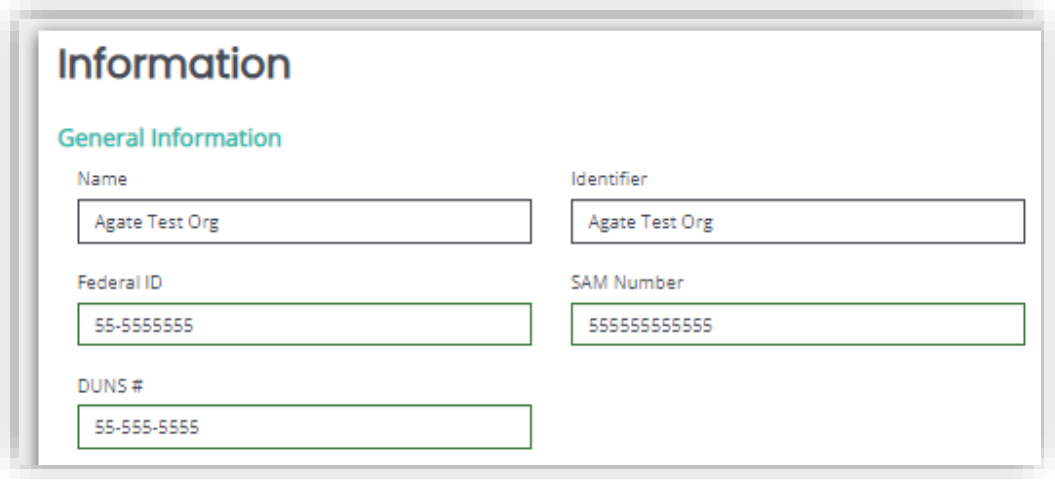
**Security Image** – an image that can be updated to link to your account.

## Organization Information

This tab contains organization specifically about the organization.

*General Information Section*

This section contains organization specific information regarding how to identify the organization, including tying the organization to a parent organization.




### General Information Legend

**Name** – a text field for the name of the organization.

**Identifier** – a text field for the identifier assigned to the organization.

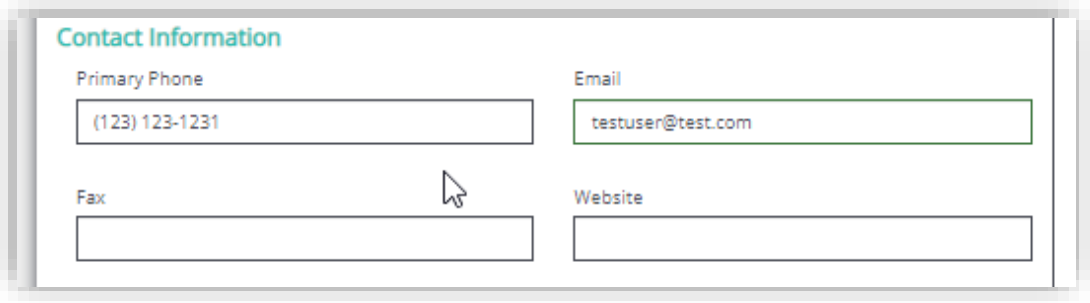
**Federal ID** – a text field for entering the Federal Tax ID number for the organization.

**SAM Number** – a text field and SEARCH button to identify this number for the organization.

**DUNS #** – a text field for the organization.

### *Contact Information Section*

This section contains information on how to contact the organization.




### Contact Information Legend

**Primary Phone** – a text field for entering the primary telephone number of the organization.

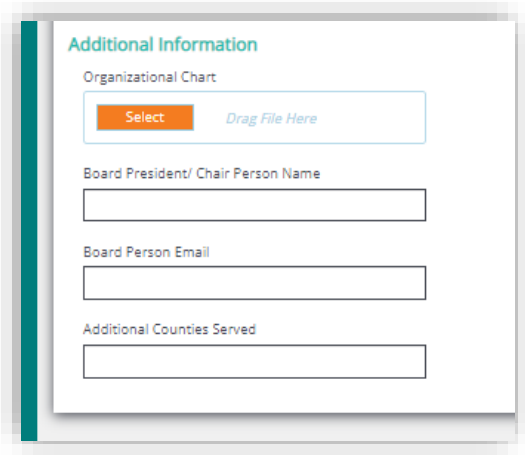
**Email** – a text field for entering the primary email address for the organization.

**Fax** – a text field for entering the primary fax number for the organization.

**Website** – a text field for entering the primary website (URL) for the organization.

### *Additional Information Section*

A section for including additional information about the organization




### Additional Information Legend

**Organizational Chart** – an upload field for organizational information

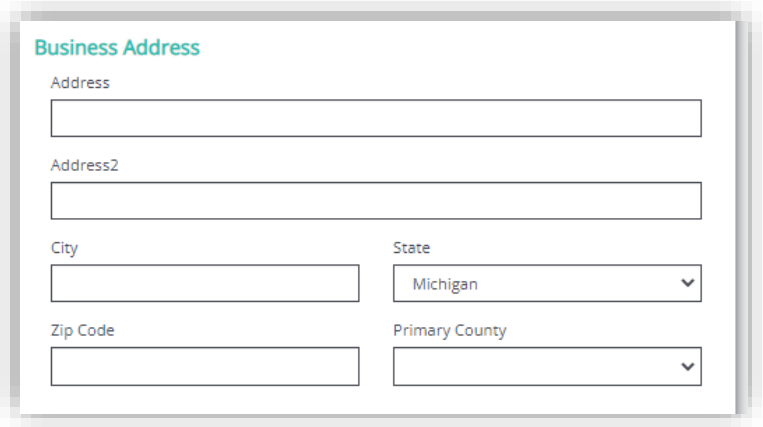
**Board President/ Chair Person Name –** a text field for board president/chair person's name

**Board Person Email –** a text field for board person's email

**Additional Counties Served –** a text field for additional counties served

*Business Address Section*

A section for including address information about the organization.




## Business Address Legend

**Address** – a text field for entering the business address of the organization.

**Address2** – a text field for entering a secondary business address for the organization.

**City** – a text field for entering the city that the organization is in.

**State** – a drop-down list containing all 50 states to select from.

**Zip Code** – a text field for including the zip code for the organization.

**County** – a drop-down list containing the available counties for the state.

## Organization Members

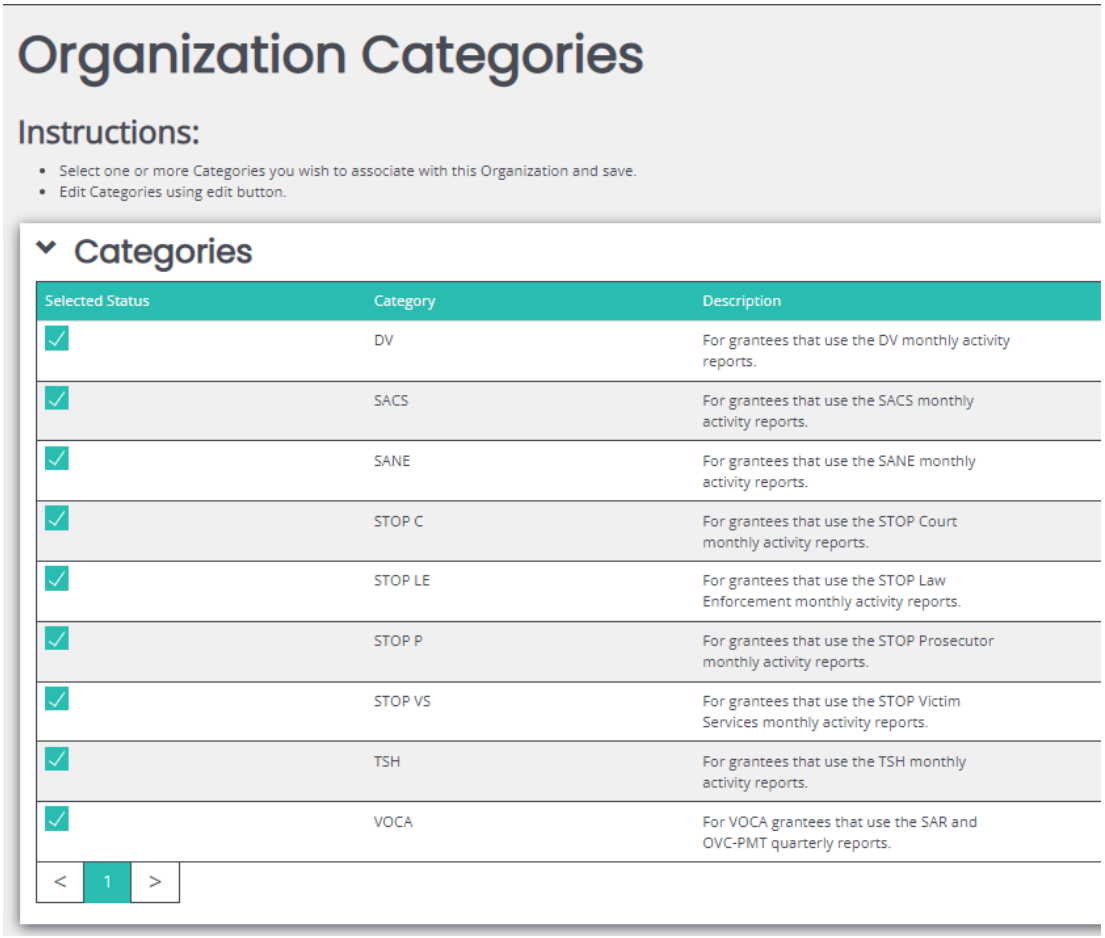
This area contains a list of members in the organization.

*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.

## Organization Categories

This area allows the user to set the categories the organization is assigned to. This determines the types of grant reports are available to the organization. Grantees that need the VAWA Activity Reports should have the correct Category selected here to ensure the monthly report is created for the organization.



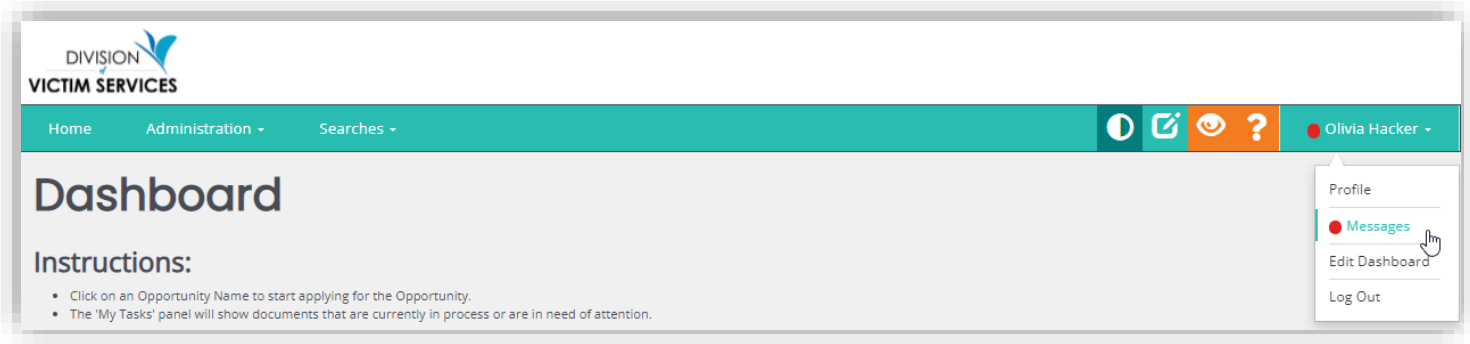
# Messaging

Under the **Profile** section, there is a messaging section where the user can send and receive messages.

## Inbox

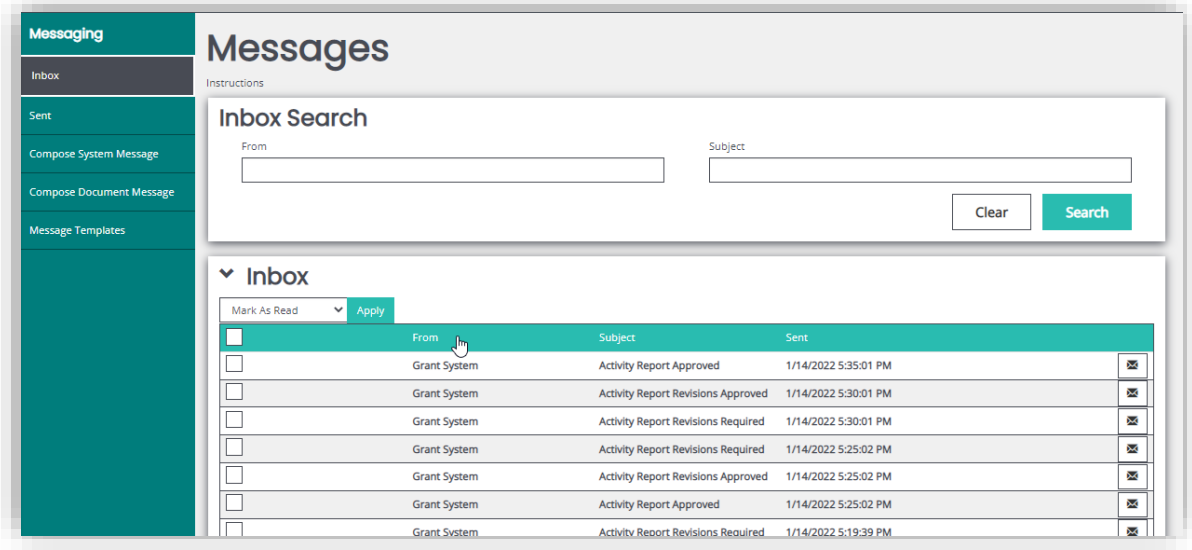
To access the inbox, please follow these instructions:

1) Click on the ***Name*** link at the top of the page on the right side. In this example, it is labeled "IA Testing".
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.

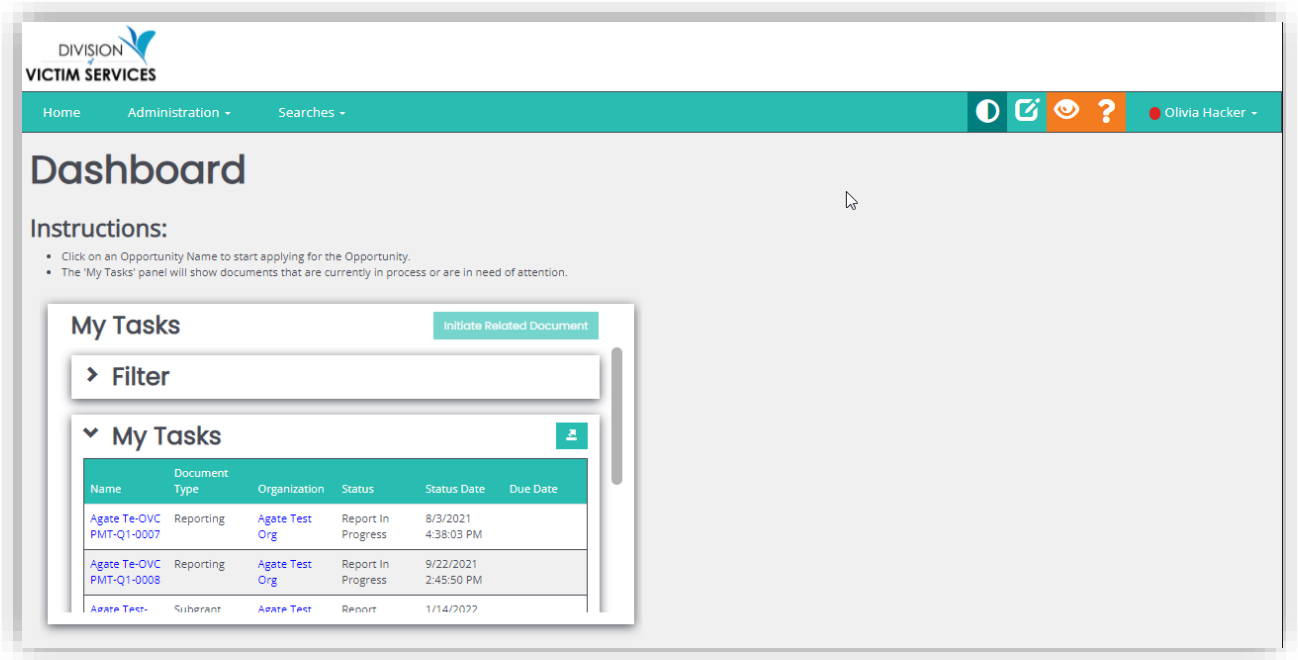
## Sent

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*** one the right side of the screen for a specific email.

# Home

The **Home** page is the home page for IGX portal users. From here, the rest of the system can be navigated.




## Tabs

### Home

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

### Searches

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

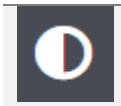
*Menu Options*

- Reporting – access to your organizations monthly or quarterly reports
- Subgrant Award Reports

# Buttons

## Button Information

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

| BUTTON | NAME | DESCRIPTION |
|---|---|---|
|  | **Theme Setting** | This button switches the theme visible from black and white to color and vice versa. |
|  | **Contact Info** | Clicking this button allows the user to access portal-specific contact information. |
|  | **Training** | Clicking this button allows the user to access training materials. |
|  | **Help** | Clicking this button allows general help tips to display about the current item selected. |
| | **NAME** | This link allows the user to access the **Profile**, **Messages**, **Edit Dashboard**, and **Logout** links.<br>**NOTE: When there is a red circle in this space, that means there is a message available for the user.** |

## Navigation Buttons

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

| BUTTON | NAME | DESCRIPTION |
|---|---|---|
|  | **Add** | This button allows the user to ADD and item to the portal. |
|  | **Edit** | This button allows the user to EDIT an item in the portal. |
|  | **Delete** | This button allows the user to DELETE an item in the portal. |
|  | **Export** | This button allows the user to EXPORT a specific file to their computer. |
|  | **Multiple Forms Saved** | This button lets the user know that there are additional secondary options available when the user hovers over the link. |
|  | **Flag** | This button lets the user know that a form has been flagged for review. |
|  | **Error** | This button lets the user know that a form has at least 1 error on it. |

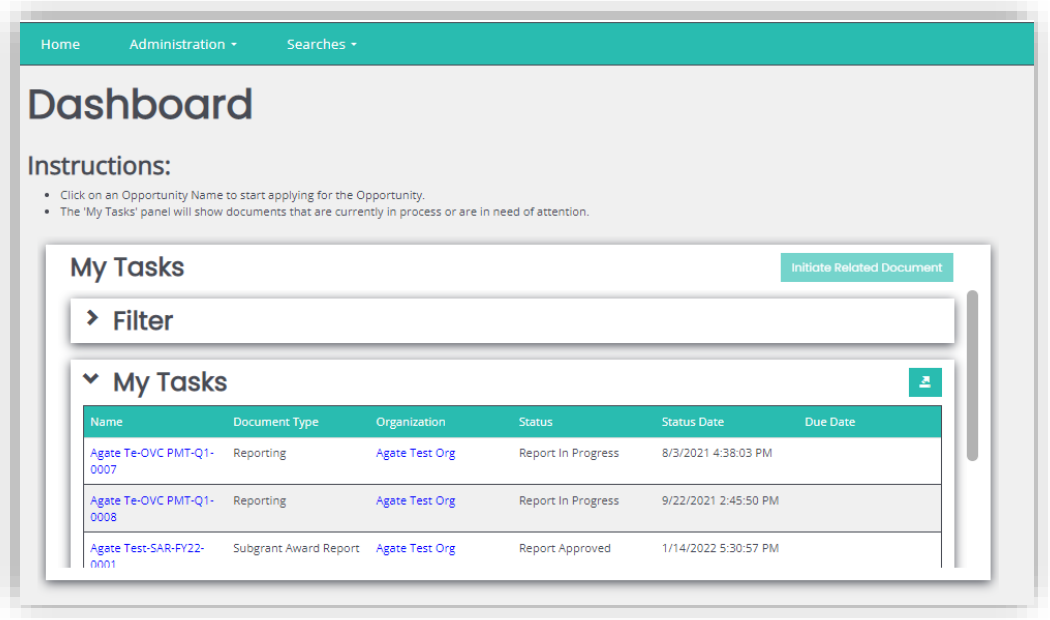
# Dashboard

## Announcements

The **Announcements** area is an area that allows the user access to announcements from the portal designers. These announcements can include (but are not limited to) training dates, news updates, or web site links.

## My Tasks

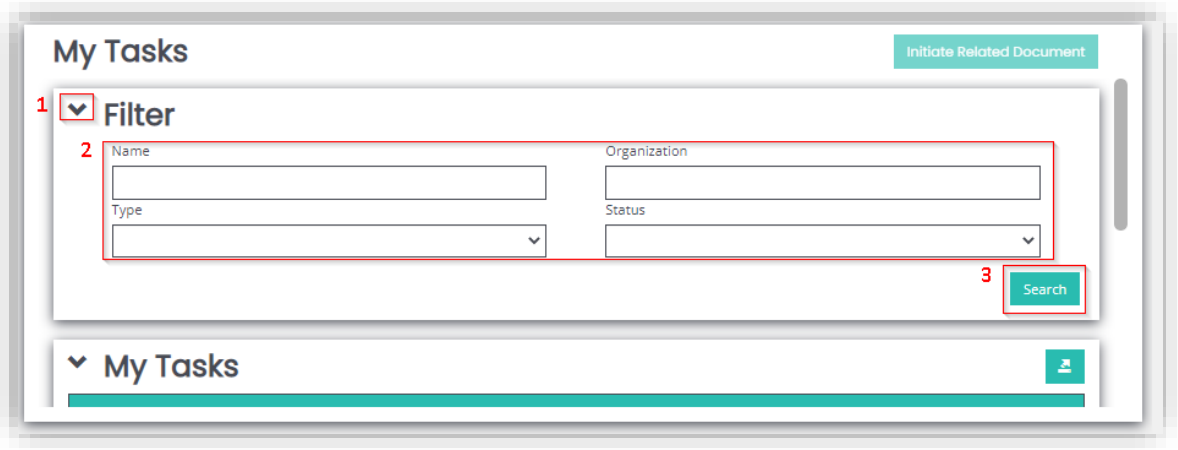
The **My Tasks** area is an area that defines the tasks assigned to the user. It also gives the user a way to initiate a related document (like a report or requisition). This area can be filtered using the **Filter** function.




### *Using the My Tasks Filter*

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

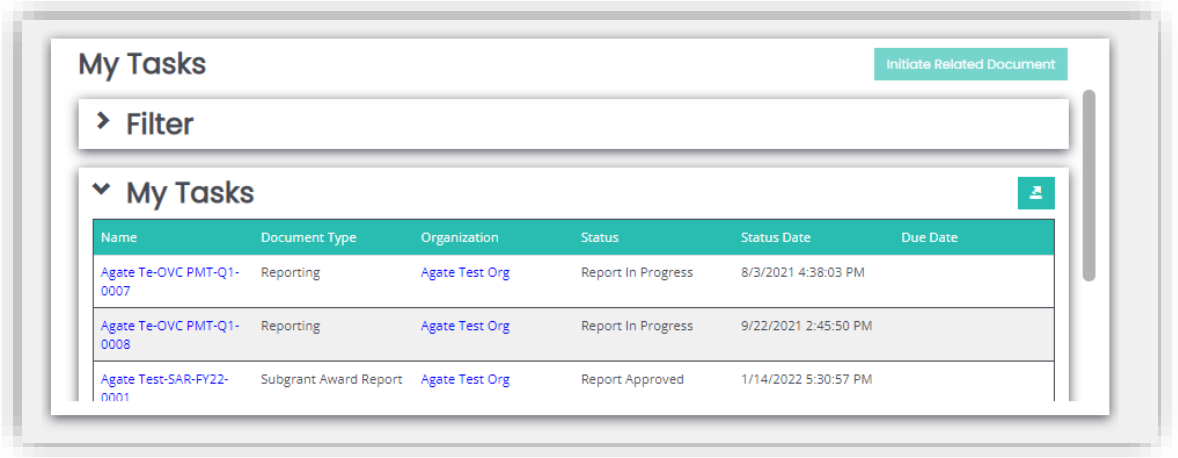
1) Click on the **>** sign next to the **Filter** header.
2) Enter data into any of the fields (partial or full **Name/Org** and/or select an option from the **Type/Status** drop-downs).
3) Click the **SEARCH** button.




4) This brings up a panel of results. Click on the link in the **Name** column to access a task.

**NOTE: Clicking on the button in the Info column will bring up a message of what the document still needs completed.**

*My Tasks breakdown*




## Legend

**Info** - Icons in this column have more information on tasks assigned to the document.

**Name** – a hyperlink connecting this page to a specific document.

**Document Type** – a label field describing the type of the document the task is.

**Organization** – a hyperlink connecting this page to the organization.

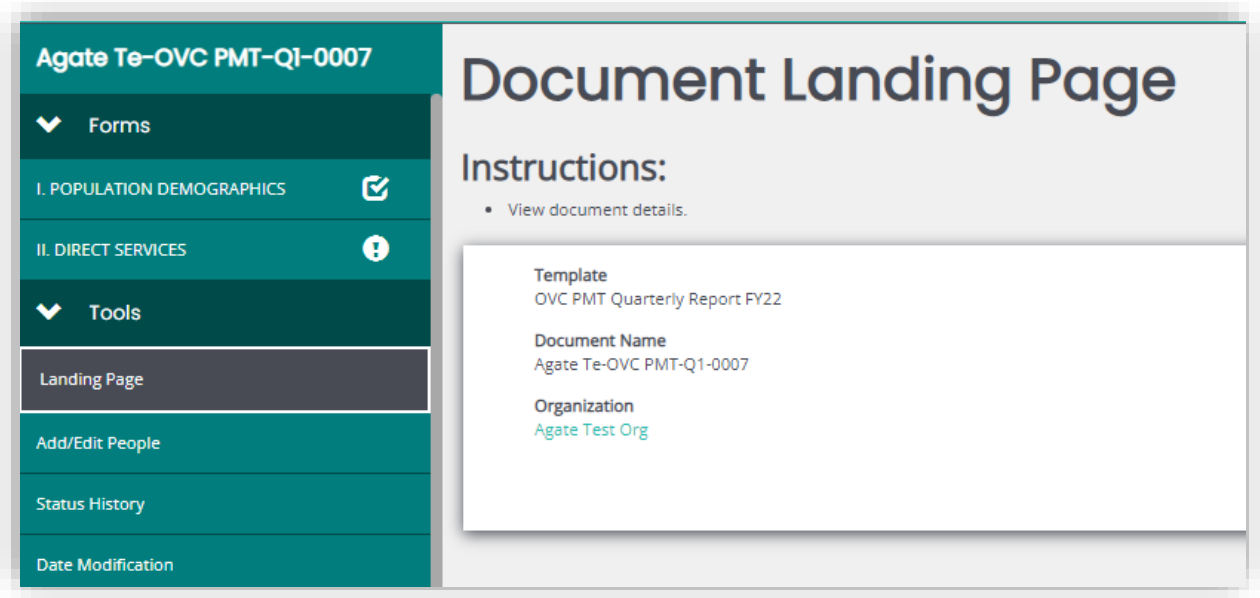
**Status** – a label field for the status of the document.

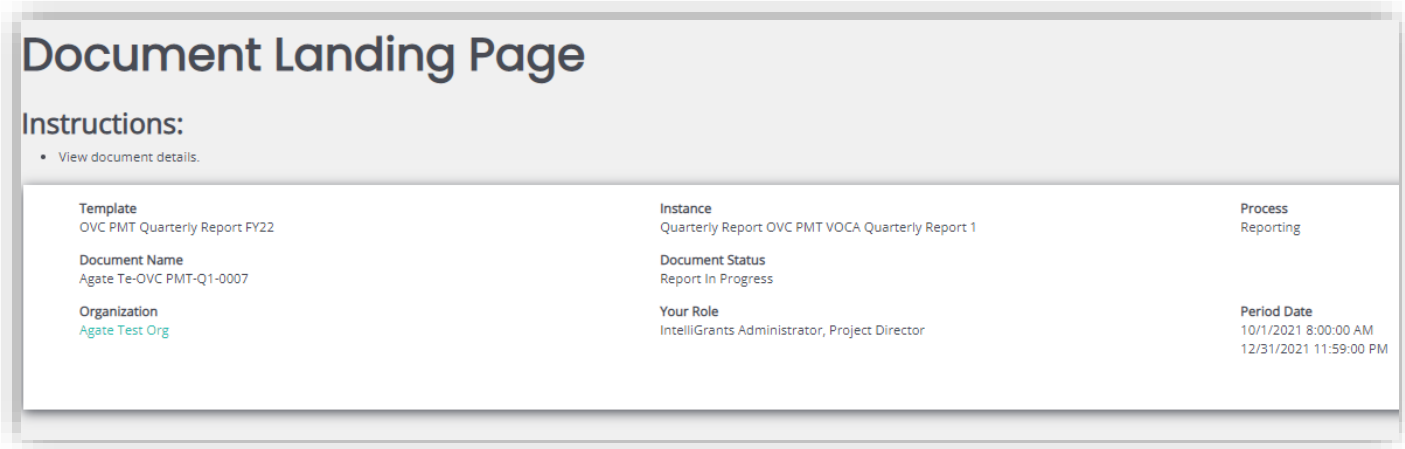
**Status Date** – a label date and time field for the document.

**Due Date** – a label date and time field for the due date of the document.

## The Document Landing Page

Select the **Name** link in the My Tasks panel to go to that document. This will open the Document Landing Page of the document. Document Landing Page represents the overview of the current document, with the access to the Forms Menu to the left (a list of the document's forms and other helpful document-related tools) and information about the document's properties to the right in a panel. The landing page gives useful information about the current document being viewed, including the Template type, the Instance of the template (for example, the quarter of the current document), the Document Name and Status, Organization name (and link to go to the Organization Information page), the logged in user's role, and the Period dates.

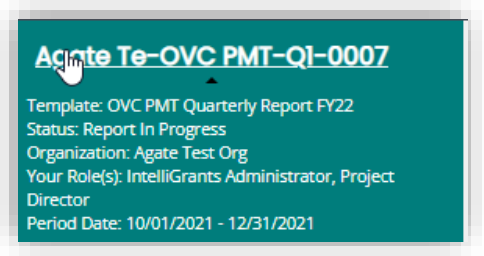


*Document Name Link*

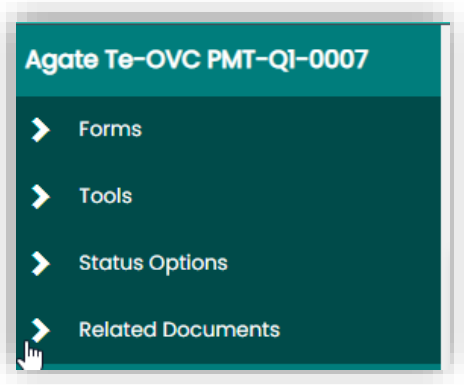
The number listed above the **Forms** menu is the Document Name or Document Identifier. It also functions as a link to bring the user back to the **Document Landing Page**.

**NOTE: Hovering over the application number or the button next to the application number provides more information to the user.**




*Forms Menu*

The **Forms Menu** is divided into sections with the **Forms** section(s) containing a list of forms available to the user to complete, the **Tools** section, the **Status Options** section, and the **Related Documents** section. There are drop-down arrows next to each section header that allows the forms or tools to be hidden or shown.




**Legend**

**Forms** – the list of forms. Usually forms without sections are listed first, then the form list is broken into sections.

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

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

**Related Documents** – a list of related documents to this current document.

### *Document Details*

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

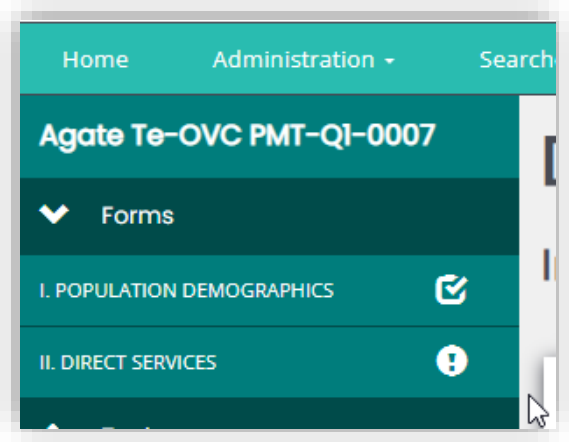
### *New Note Button*

The **NEW NOTE** button in the upper right-hand corner allows a user to leave a note for other users.

# Grant Opportunity Forms

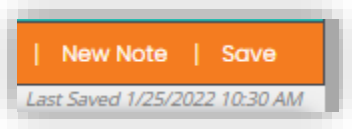
## Forms

The list of forms contains the forms that are available to be complete.




*Form Options (Header)*

Upon selecting a Form name link in the Forms Menu, the form contents, and fields to be complete will display. The form save options are available at the upper right-hand corner from within the form.

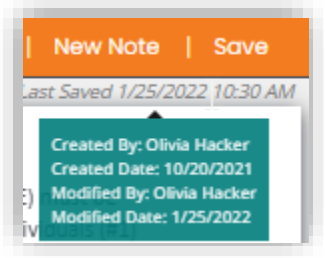



Legend

**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 information input on the form.

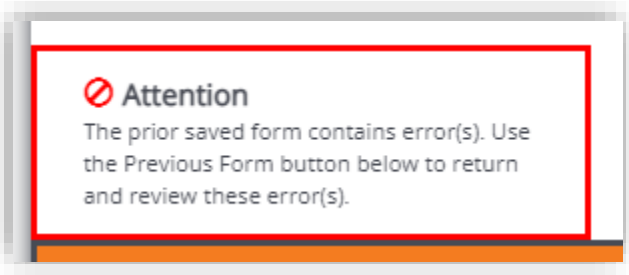



**Last Saved** – this tell the user when the form was last saved. Hovering the cursor over this information gives more details about who created the form and when, and the last modification date and who modified it last.

*Form Options (Footer)*

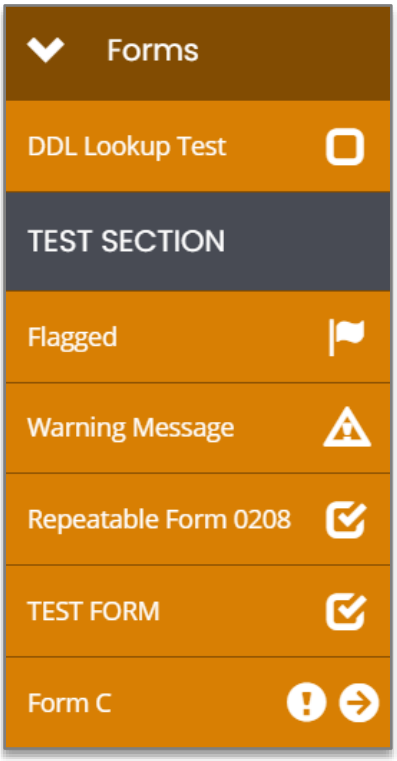
At the bottom of the page, “Next Form” and “Previous Form” navigation buttons are available to assist with navigation. Upon selection of one of these options, the current page will be saved, and the next or previous page will display.  the form is saved but has errors and still needs to be completed.


If errors are on the page that was saved, a pop-up error will display in the bottom of the screen to remind the user that




*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.



## Legend

**Blank Square** – This icon indicates that the form has not been saved yet.

**Flag** – This icon indicates that the form has been saved and flagged as incomplete.

**Triangle with an exclamation point inside** – This icon is a warning that there is a field on the form that is incomplete.

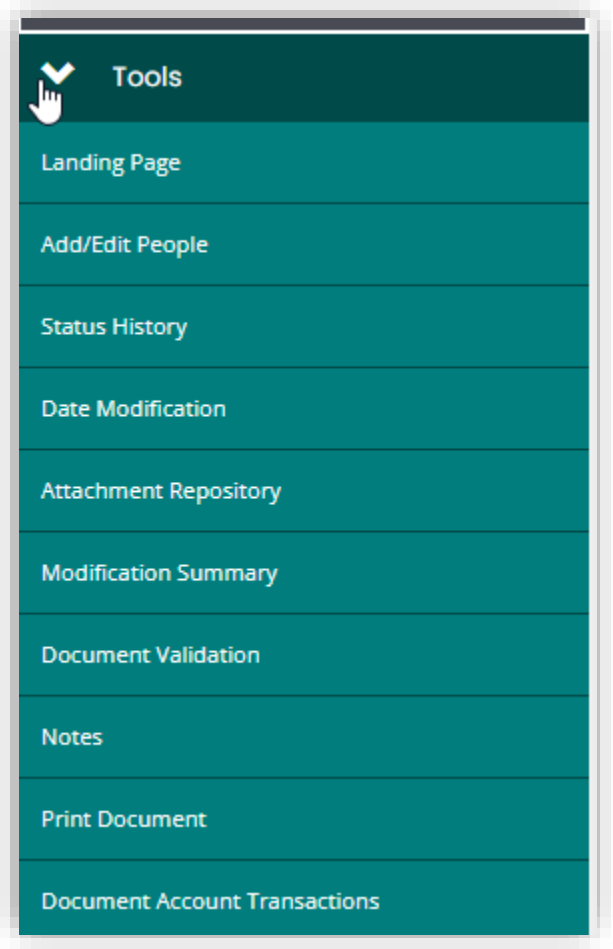
**Square with a Checkbox** – This icon indicates that the form has been filled out fully and saved.

**Circle with an exclamation point** – This icon indicates that the form has been saved 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.




### Legend Summary

**Landing Page** – the default application 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.

**Date Modification** – allows the user to access a list of document modifications and their dates.

**Attachment Repository** – allows the user to access a list of stored attachments.

**Modification Summary** – allows the user to access a summary of modifications for a 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.

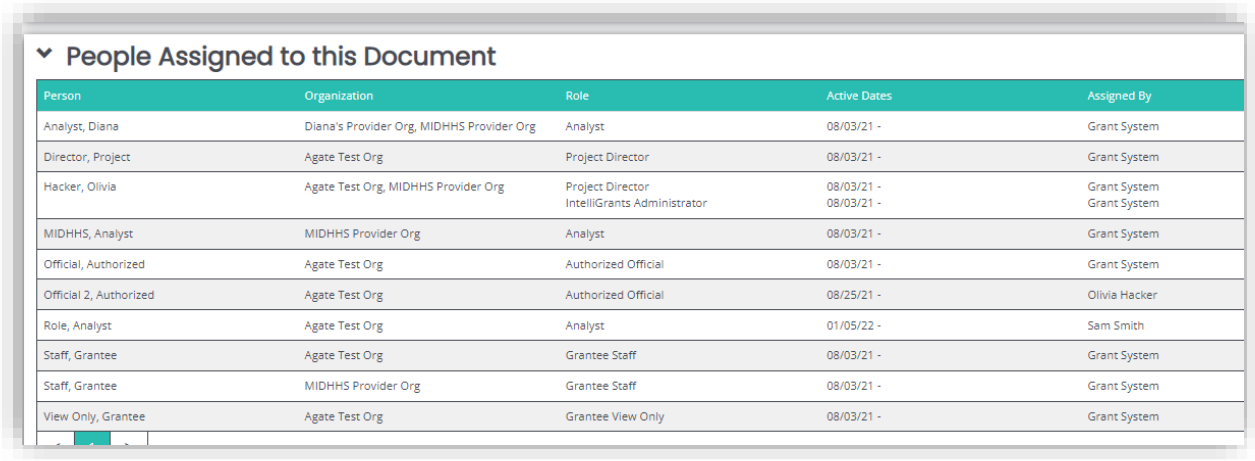
**Document Account Transactions** – allows the user to access account transactions for that document.

### *Landing Page*

Clicking on this link returns the user to the **Document Landing Page**.

### *Add/Edit People*

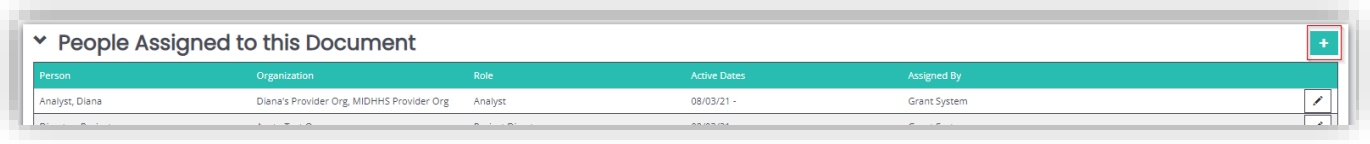
This tool allows authorized users to add/edit people assigned to the document.



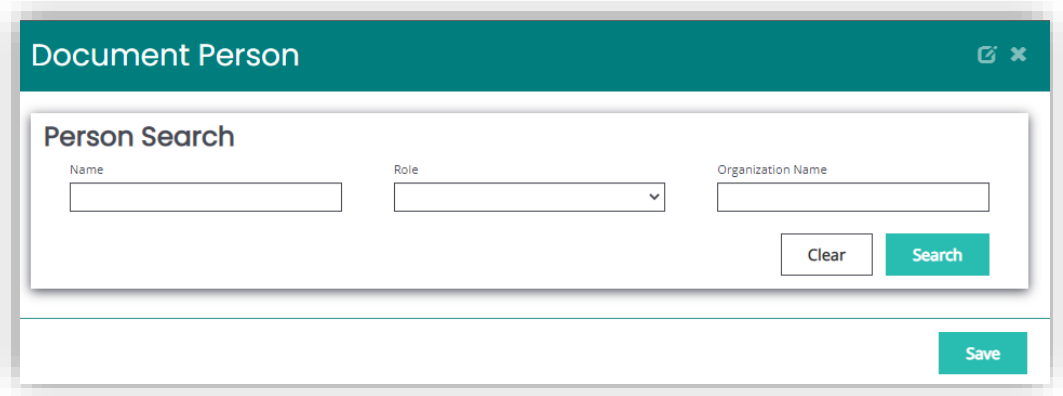

## Adding/Assigning People to the Document

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

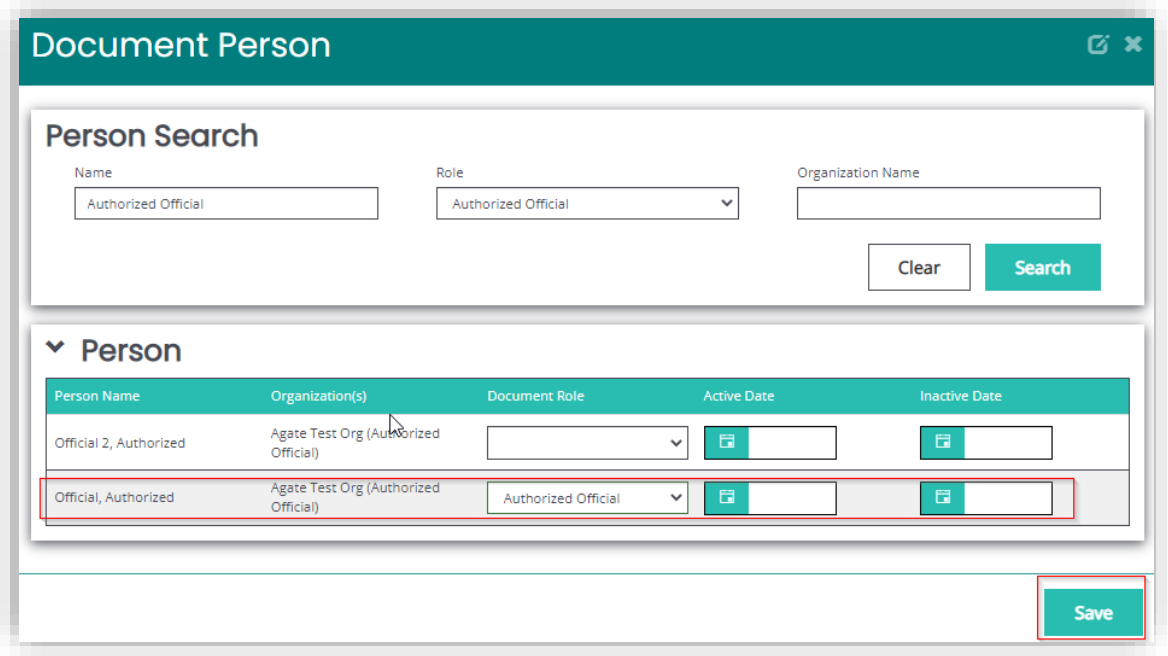
1) Select on the PLUS SIGN button on the **People Assigned to this Document** row.




2) Enter information in the **Name**, **Role**, and/or **Organization Name** field(s) and click SEARCH.



3) For adding the specific user(s) to a document, select a **Document Role** option and click SAVE. If known, enter an active and inactive date.

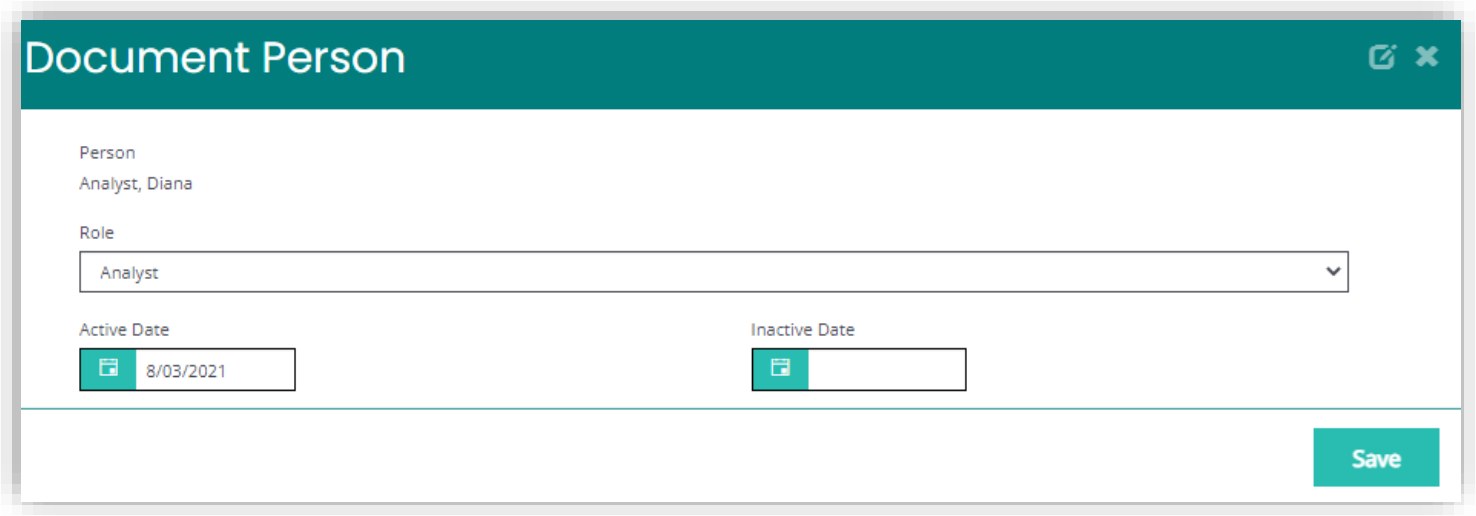



**NOTE: This will automatically assign today's date. Please use the calendar tool in the Active Date field to select a different date.**

### Editing People Assigned to the Document

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

1) Click on the pencil icon on the right side.
2) Make any updates and click **SAVE**.
3) Entering an inactive date will prevent this user from accessing the current document.




#### *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 field for status notes.

#### *Date Modification History/Summary*

This tool allows the user to view the date modification history for the document – including the **Modification Date/Time/Person**, **Due Date**, and **Period Date**.

#### *Attachment Repository*

This tool allows the user to view/upload/download files that have been added as attachments to the document.

#### *Document Validation*

This tool allows the user to view a table containing a list of errors to be corrected for a specific document. The table includes the name of the form the error is on, the error message, and whether the error prevents pushing the document to the next status.

*Notes*

This tool allows the user to add/edit notes.


## Adding a New Note

Please use these instructions to create a note.

1) Click on the NEW NOTE button.
2) Fill in the field.
3) Click on the paperclip button to add a note (optional).
4) Click on the paper airplane button to SAVE the note.

## Additional Fields

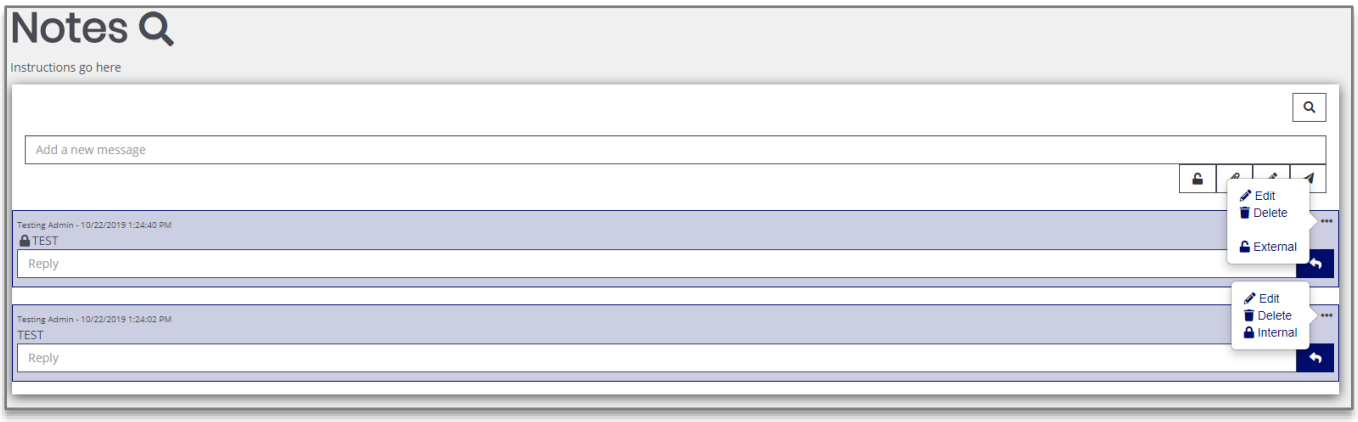
| Button | Name | Description |
|---|---|---|
| | Internal Note | This tool locks this note into the form as an internal or external note. The internal notes are only visible to members within the same organization. External nots are visible to members outside the organization. |
| | Attachment(s) | 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 ends up in the ***Notes*** area of the **Tools** menu.

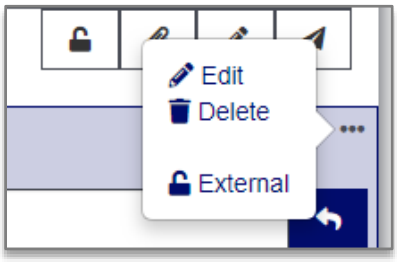
To access the note, please follow these instructions:

1) Click in the **Forms** section to minimize that section.
2) Click on the ***Notes*** link in the **Tools** section.

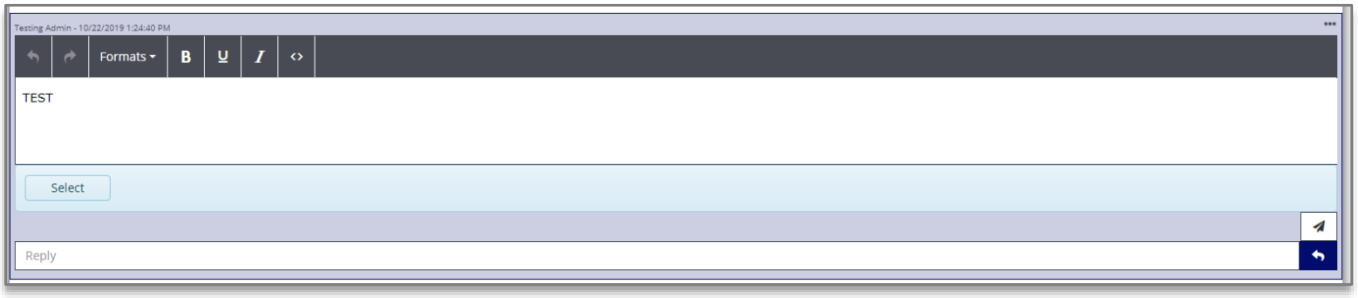


## Updating a Note

1) Click in the **Forms** section to minimize that section.
2) Click on the ***Notes*** link in the **Tools** section.
3) Click on the … button. This brings up the **Edit, Delete** and **External/Internal** tool buttons.



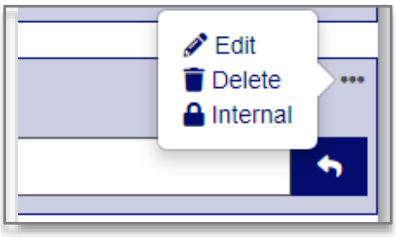

4) Click on the ***Edit*** tool to edit the text field.




5) Click in the text field to adjust the formatting and/or the contents of the note.
6) Click the paper airplane button to save the updates to the note.

## Deleting a Note

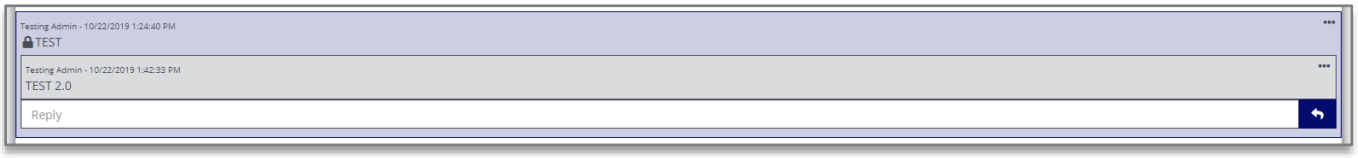
1) Click in the **Forms** section to minimize that section.
2) Click on the ***Notes*** link in the **Tools** section.
3) Click on the … button. This brings up the **Edit, Delete** and **External/Internal** tool buttons.




4) Click on the DELETE button to delete the note.

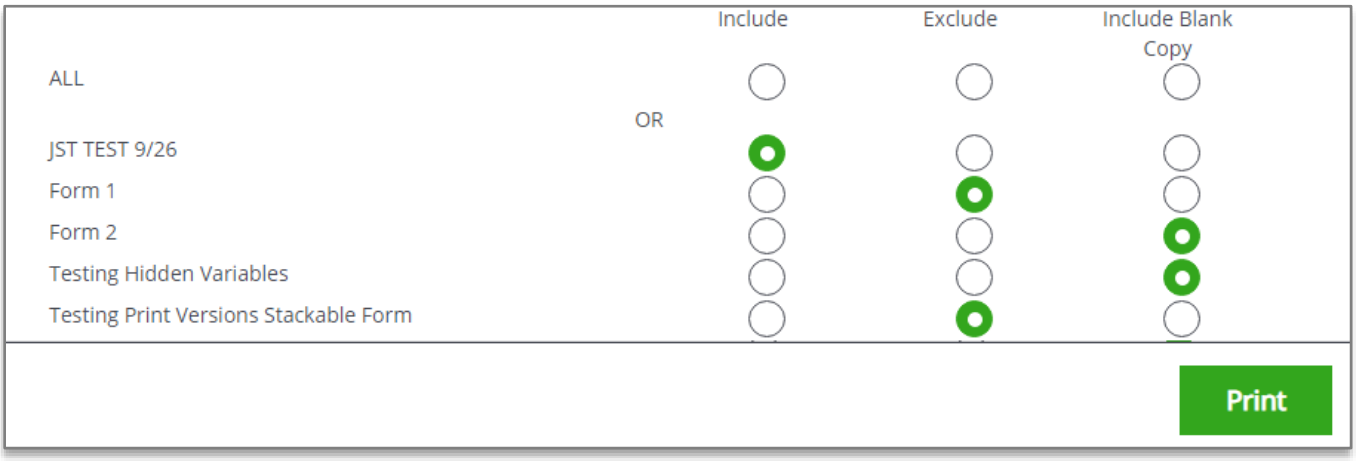
## Replying to a Note

1) Click in the **Forms** section to minimize that section.
2) Click on the ***Notes*** link in the **Tools** section.
3) Add a response to the **Reply** section and click on the airplane button.



*Print Document*

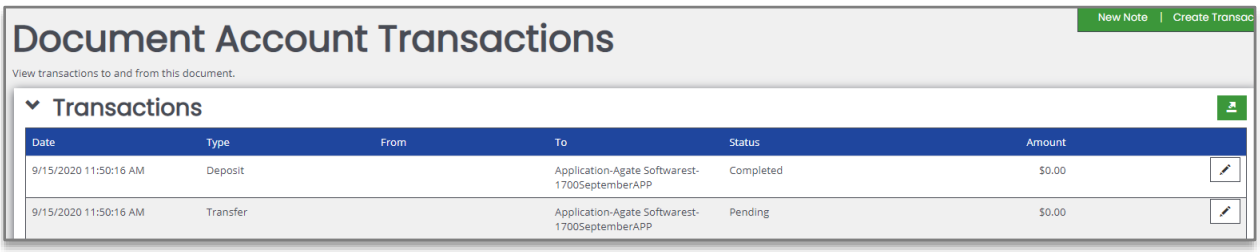
This tool allows the user to create a PDF version of the document to save onto the user's computer and/or print out. Each form has the option of being included in the printout (with both questions and answers), excluded in the printout, or including a blank version of that form.




*Document Account Transactions*

This tool allows the user to create and update transactions associated with this document.

**NOTE: A list of transactions can be exported using the export button on the right side of the Transactions header.**

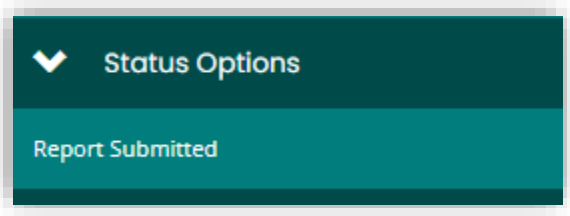



## Legend

**Date** – a label field indicating the transaction date.
**Type** – a label field indicating the transaction type.
**From** – a label field indicating the account the transaction is from.
**To** – a hyperlink field connecting back to the account the transaction transferred the funds to.
**Amount** – a label field indicating the amount of money in the transaction.
**Balance** – a label field indicating the current balance in the account listed in the "To" field.
**Status** – a label field indicating the status of the transaction.
**Person** – a label field indicating the name of the user who completed the transaction.

## Status Options

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



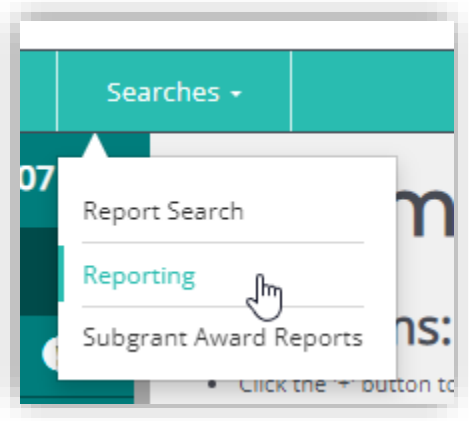
# Searches

The **Searches** tab is used to quickly locate specific documents. Different types of searches have their own search sections.

## Reporting or Subgrant Award Reports search

To use this search tab, please follow these instructions:

1) Go to **Searches** → **Reporting or Subgrant Award Reports**.




2) Enter in search parameters (Optional). Click the CLEAR button to clear out search parameters and click SEARCH.
   **NOTE: Search results can be exported by clicking on the green arrow over a line button.**
3) Click on the name of a specific document in the **Name** column.

### Legend

**Name** – A text field for the name of the document.

**Sub Code** – A text field to enter the sub code of the document in.

**Type** – A drop-down list to select the type of document from.

**Status** – A drop-down list to select a specific document status from.

**Organization** – A text field for searching for the name of the organization that created the document.

**Person** – A text field for searching for the name of a user assigned to the document.