

Agate Software

Partnership Profile User Guide

June 2013

Table of Contents

1. CREATING A PARTNERSHIP PROFILE	3
1.A. LOGIN.....	3
1.B. VIEW OPPORTUNITIES	3
1.C. CREATE PARTNERSHIP PROFILE.....	4
2. COMPLETING YOUR PARTNERSHIP PROFILE	6
2.A. PARTNERSHIP PROFILE MENU.....	6
2.B. FORMS MENU	7
2.B.1 ORGANIZATION TYPE FORM	7
2.B.2 SAVING A FORM.....	9
2.B.3 FORM NAVIGATION	10
2.B.4 FORMS MENU FEATURES.....	12
3. SUBMITTING YOUR PARTNERSHIP PROFILE	15
3.A. PARTNERSHIP PROFILE MENU.....	15
3.B. CHANGE THE STATUS	16
4. ACCESS YOUR PARTNERSHIP PROFILE	19
4.A. MY TASKS	19
4.B. SELECT YOUR PARTNERSHIP PROFILE	20

1. Creating a Partnership Profile

1.a. Login

To access MATT 2.0, enter <https://mshda-matt.org/Login2.aspx?APPTHEME=MIMSHDA> into the address bar of a web browser. The page looks like the image below.



The screenshot shows the login page for the MSHDA Activity Tracking Tool MATT 2.0. At the top left is the MSHDA logo with the tagline "Investing in People. Investing in Places." and the text "Michigan State Housing Development Authority". Below the logo is a navigation bar with "IntelliGrants Home". The main heading reads "Welcome to the MSHDA Activity Tracking Tool MATT 2.0". To the right is a login form with fields for "Username" and "Password", a "LOGIN" button, and links for "New User?" and "Forgot Password?". Below the login form is a "Select System" section with a "Root" dropdown menu set to "MIMSHDA" and a "Sub" dropdown menu. A paragraph of text explains that the system is closed and requires authorization through MSHDA, and provides contact information for the helpdesk at 1-800-820-1890. The background of the page features a blurred image of a person's hands typing on a laptop keyboard.

1.b. View Opportunities

The Home screen is the first screen seen after logging into MATT 2.0. From the Home page, users can initiate a Partnership Profile.

Click the "View Opportunities" button located in the View Available Opportunities section.

1.c. Create Partnership Profile

After clicking on the "View Opportunities" button all available opportunities are displayed. Search for the Partnership Profile Rev022013 and click on the "Create Partnership Profile" button.

Partnership Profile Rev022013 for Christine's Test Org

Offered By:
MIMSHDA

Partnership Profile Availability Dates:
11/02/2012-open ended

Partnership Profile Period:
not set

Partnership Profile Due Date:
not set

Description:

[CREATE PARTNERSHIP PROFILE](#)

2. Completing your Partnership Profile

 [Back](#)

Partnership Profile Menu

Document Information: [PP-1003-00010](#)

 [Details](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Partnership Profile	Christine's Test Org	Authorized Official	Profile In Progress	N/A - N/A N/A

View, Edit and Complete Forms

Select the **View Forms** button below to view, edit, and complete forms.

[VIEW FORMS](#)

Change the Status

Select the **View Status Options** button below to perform actions such as submitting applications or request modifications.

[VIEW STATUS OPTIONS](#)

Access Management Tools

Select the **View Management Tools** button below to perform actions such as adding people to this document or viewing the document history.

[VIEW MANAGEMENT TOOLS](#)

Examine Related Items

Select the **View Related Items** button below to view related items such as claims, messages, etc.

[VIEW RELATED ITEMS](#)

Perform Administrative Tasks

Select the **View Administrative Tasks** button below to perform actions such as completing a review, generating a contract, requesting modifications, etc.

[VIEW ADMINISTRATIVE TASKS](#)

2.a. Partnership Profile Menu

After creating the Partnership Profile, the Partnership Profile Menu is displayed. Click on the "View Forms" button located in the View, Edit and Complete Forms section.

 [Back](#)

Partnership Profile Menu

Document Information: [PP-1003-00010](#)

 [Details](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Partnership Profile	Christine's Test Org	Authorized Official	Profile In Progress	N/A - N/A N/A

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Examine Related Items

Select the **View Related Items** button below to view related items such as claims, messages, etc.

[VIEW RELATED ITEMS](#)

Perform Administrative Tasks

Select the **View Administrative Tasks** button below to perform actions such as completing a review, generating a contract, requesting modifications, etc.

[VIEW ADMINISTRATIVE TASKS](#)

2.b. Forms Menu

After clicking the "View Forms" button, the Partnership Profile Forms Menu is displayed. This menu includes all forms that need to be completed in order to submit the Partnership Profile for review.

2.b.1 Organization Type Form

Click on the first form, "Organization Type" in the menu and select the appropriate type for your organization. The Organization Type form should be completed first. The values saved in this form will determine which of the other forms are required for the particular organization.

SHOW HELP

 [Back](#)







Partnership Profile Menu - Forms


Please complete all required forms below.

Document Information: [PP-1003-00010](#)

 [Details](#)

Forms

Status	Page Name	Note	Created By	Last Modified By
Partnership Profile Forms				
	Organization Type			
	Organization Information			
	Financial Information			
	Narrative			
	Required Attachments			
	Legislative Information			

 [Top of the Page](#)

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The organization types include: Housing Counseling, Non-Profit, Government, Vendor/Contractor and TA Provider. If you do not know your organization type please contact your MSHDA Specialist.



 [Back](#)

Document Information: [PP-1003-00010](#)

 [Details](#)

You are here: > [Partnership Profile Menu](#) > [Forms Menu](#)

ORGANIZATION TYPE

- Housing Counseling
- Non-Profit
- Government
- Vendor/Contractor
- TA Provider

Navigation Links

Status	Page Name	Note	Created By	Last Modified By
	Organization Type			
	Organization Information			
	Financial Information			
	Narrative			
	Required Attachments			
	Legislative Information			

2.b.2 Saving a Form

After selecting your organization type in the Organization Types form click the "Save" button at the top right hand corner of the screen. . The values saved in this form will determine which of the other forms are required for your type of organization.



 [Back](#)

Document Information: [PP-1003-00010](#)

 [Details](#)

You are here: > [Partnership Profile Menu](#) > [Forms Menu](#)

ORGANIZATION TYPE

- Housing Counseling
- Non-Profit
- Government
- Vendor/Contractor
- TA Provider

Navigation Links

Status	Page Name	Note	Created By	Last Modified By
	Organization Type			
	Organization Information			
	Financial Information			
	Narrative			
	Required Attachments			
	Legislative Information			

2.b.3 Form Navigation

2.b.3.a Navigation Links

After saving the Organization Types form, the Navigation Links will become available at the bottom of the form. Use these navigation links to navigate directly to any form in the menu.



 [Back](#)

Document Information: [PP-1003-00010](#)

 [Details](#)

You are here: > [Partnership Profile Menu](#) > [Forms Menu](#)

ORGANIZATION TYPE

- Housing Counseling
- Non-Profit
- Government
- Vendor/Contractor
- TA Provider

Navigation Links

Status	Page Name	Note	Created By	Last Modified By
	Organization Type			
	Organization Information			
	Financial Information			
	Narrative			
	Required Attachments			
	Legislative Information			

2.b.3.b Forms Menu breadcrumb

The Forms Menu breadcrumb navigates back to the Partnership Profile Forms Menu. The Forms Menu breadcrumb is always available at the top of all forms.



 [Back](#)

Document Information: [PP-1003-00010](#)

 [Details](#)

You are here: > [Partnership Profile](#) [Menu](#) > [Forms Menu](#)

ORGANIZATION TYPE

- Housing Counseling
- Non-Profit
- Government
- Vendor/Contractor
- TA Provider

Navigation Links

Status	Page Name	Note	Created By	Last Modified By
	Organization Type			
	Organization Information			
	Financial Information			
	Narrative			
	Required Attachments			
	Legislative Information			




2.b.4 Forms Menu Features

2.b.4.a Icons



After you have saved one of the forms, it will display a record of who saved the form, and when. Also, the icon next to the form will change to indicate that it has been saved or if there are any errors on the page.

The icon below shows that the page has been saved.

Navigation Links







Status	Page Name	Note	Created By	Last Modified By
	Organization Type		Offical , OPAL 6/5/2013 3:37:45 PM	
	Organization Information			
	Financial Information			
	Narrative			
	Required Attachments			
	Legislative Information			

The icon below shows that there is an error on page.

Status	Page Name	Note	Created By	Last Modified By
Partnership Profile Forms				
	Organization Type			
	Organization Information			
	Financial Information		Stars Admin 6/7/2013 3:13:26 PM	
	Narrative			
	Required Attachments			
	Legislative Information			

The icons below show that the forms have not been saved and are editable.







Forms

Status	Page Name	Note	Created By	Last Modified By
Partnership Profile Forms				
	Organization Type			
	Organization Information			
	Financial Information			
	Narrative			
	Required Attachments			
	Legislative Information			

2.b.4.b Created and Modified

After a form has been saved, the forms menu displays the username and date/time stamp of the user that first saved the form in the Created by column. The Last Modified By column displays the username and date/time stamp of the user that last modified the form.

Navigation Links


Status	Page Name	Note	Created By	Last Modified By
	Organization Type		Offical , OPAL 6/5/2013 3:37:45 PM	
	Organization Information		Offical , OPAL 6/5/2013 4:01:00 PM	Offical , OPAL 6/5/2013 4:02:41 PM
	Financial Information		Offical , OPAL 6/5/2013 4:04:05 PM	
	Narrative		Offical , OPAL 6/5/2013 4:05:08 PM	Offical , OPAL 6/5/2013 4:05:33 PM
	Required Attachments		Offical , OPAL 6/5/2013 4:08:45 PM	
	Legislative Information		Offical , OPAL 6/5/2013 4:09:48 PM	

3. Submitting your Partnership Profile

3.a. Partnership Profile Menu

Navigate to the Partnership Profile Menu by clicking on the Partnership Profile name link. The Partnership Profile name link is displayed at the top of every form, in the Task List on the Home screen and in the Partnership Profile search tab results.

[SAVE](#) [PRINT VERSION](#) [ADD NOTE](#) [CHECK GLOBAL ERRORS](#)

 **Page Information**
The information has been saved.

[Back](#)

Document Information: [PP-1003-00010](#)

[Details](#)

You are here: > [Partnership Profile Menu](#) > [Forms Menu](#) > Partnership Profile Forms

Task List

My Tasks

Export Results to Screen Sort by: -- Select -- [GO](#)

Application	Christine's Test Org	HRA-2013HOA2013-1003-00003	Application in Progress	5/21/2013
Application	Christine's Test Org	HRA-2013HOA2013-1003-00004	Application in Progress	6/3/2013
Application	Christine's Test Org	HRA-2013HOA2013-1003-00005	Application in Progress	6/5/2013
Application	Christine's Test Org	HRA-2013HOA2013-1003-00006	Application in Progress	6/5/2013
Partnership Profile	Christine's Test Org	PP-1003-00010	Profile In Progress	6/5/2013

[CLOSE TASKS](#)

Partnership Profile tab search tab

 [Back](#)

Partnership Profile Search

For more detailed instructions, select the **Show Help** button.

Partnership Profile Types

Partnership Profile Name

Person

Status

Organization

Export Results to Results Per Page Sort By

Number of Results 12

Results

DocumentType	Organization	Name	CurrentStatus
Partnership Profile	DM Testing Config	PP-dm_testing_config-00039	Profile Expired
Partnership Profile	Angie's test agency	PP-Angie's test agency-00041	Profile Expired
Partnership Profile	DMB Agency	PP-456-00042	Profile Expired

3.b. Change the Status

From the Partnership Profile Menu, click the "View Status Options" button located in the Change the Status section.

 [Back](#)

Partnership Profile Menu

Document Information: [PP-1003-00010](#)

 [Details](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Partnership Profile	Christine's Test Org	Authorized Official	Profile In Progress	N/A - N/A N/A

View, Edit and Complete Forms

Select the **View Forms** button below to view, edit, and complete forms.

[VIEW FORMS](#)

Change the Status

Select the **View Status Options** button below to perform actions such as submitting applications or request modifications.

[VIEW STATUS OPTIONS](#)

Access Management Tools

Select the **View Management Tools** button below to perform actions such as adding people to this document or viewing the document history.

[VIEW MANAGEMENT TOOLS](#)

Examine Related Items

Select the **View Related Items** button below to view related items such as claims, messages, etc.

[VIEW RELATED ITEMS](#)

Perform Administrative Tasks

Select the **View Administrative Tasks** button below to perform actions such as completing a review, generating a contract, requesting modifications, etc.

[VIEW ADMINISTRATIVE TASKS](#)

Click the Apply Status button under the Profile Submitted status name to submit the Partnership Profile.

Click the Apply Status button under the Profile Cancelled status name to cancel the Partnership Profile.



Investing in People.
Investing in Places.

MSHDA Michigan State
Housing Development Authority

Home Applications Partnership Profiles Grants Progress Reports MMS Progress Reports FSR's

Administration | Organization(s) | Profile | Logout

SHOW HELP

 [Back](#)

Partnership Profile Menu - Status Options

Select a button below to execute the appropriate status push.

Document Information: [PP-1003-00010](#)

 [Details](#)


Possible Statuses

PROFILE SUBMITTED

[APPLY STATUS](#)

PROFILE CANCELLED

[APPLY STATUS](#)

 [Top of the Page](#)

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4. Accessing your Partnership Profile

The Partnership Profile can be accessed from the Home screen and from the Partnership Profile tab search page.

4.a. My Tasks

To access the Partnership Profile from the Home screen click the "Open Tasks" button located in the My Tasks section.

Scroll through the tasks to locate the Partnership Profile. Click on the Partnership Profile Name link (circled below). This link navigates to the Partnership Profile Menu.

My Tasks

Export Results to Sort by:

Application	Christine's Test Org	HRA-2013HOA2013-1003-00003	Application in Progress	5/21/2013
Application	Christine's Test Org	HRA-2013HOA2013-1003-00004	Application in Progress	6/3/2013
Application	Christine's Test Org	HRA-2013HOA2013-1003-00005	Application in Progress	6/5/2013
Application	Christine's Test Org	HRA-2013HOA2013-1003-00006	Application in Progress	6/5/2013
Partnership Profile	Christine's Test Org	PP-1003-00010	Profile In Progress	6/5/2013

4.b. Partnership Profile Search Tab

Click on the Partnership Profile tab near the top of the home screen.



Instructions:
Select the **SHOW HELP** button above for detailed instructions on the following.
> Applying for an Opportunity
> Using System Messages
> Understanding your Tasks
> Managing your awarded grant
> Click [Here](#) to access MATT V1

Hello OPAL, please choose an option below.

View Available Opportunities

You have 7 Opportunities available.
Select the **View Opportunities** button below to see what is available to your organization.

[VIEW OPPORTUNITIES](#)

My Inbox

You have 4 new messages.
Select the **Open Inbox** button below to open your system message inbox.

[OPEN INBOX](#)

My Tasks

You have 8 new tasks.
You have 0 tasks that are critical.
Select the **Open Tasks** button below to view your active tasks.

[OPEN TASKS](#)

Top of the Page

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Use the search criteria fields to filter the list of Partnership Profiles returned or leave the search criteria fields blank to return all Partnership Profiles for your organization. Click the "Execute" button to execute the Partnership Profile search.

[Back](#)

Partnership Profile Search

For more detailed instructions, select the **Show Help** button.

Partnership Profile Types

Partnership Profile Name

Person

Status

Organization

Export Results to Screen Results Per Page 20 Sort By -- SELECT -- ASCENDING

Click on the Partnership Profile Name link (circled below). This link navigates to the Partnership Profile Menu.

[Back](#)

Partnership Profile Search

For more detailed instructions, select the **Show Help** button.

Partnership Profile Types

Partnership Profile Name

Person

Status

Organization

Export Results to Screen Results Per Page 20 Sort By -- SELECT -- ASCENDING

Number of Results 12

Results

DocumentType	Organization	Name	CurrentStatus
Partnership Profile	DM Testing Config	PP-dm_testing_config-00039	Profile Expired
Partnership Profile	Angie's test agency	PP-Angie's test agency-00041	Profile Expired
Partnership Profile	DMB Agency	PP-456-00042	Profile Expired