IGX

AGENCY PROJECT DIRECTOR MANUAL

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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 register for portal. It also allows users to initiate, complete, and submit applications.

- **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 in order 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.

Adobe Acrobat DC

Adobe Acrobat DC (Adobe Acrobat Reader) is used to view PDF (Portable Document Format) documents. The system will automatically generate grant documents in PDF format using information that has been saved into the various narrative and budget pages. Using Adobe Acrobat DC, the user may choose to view, print, or save these documents. Users who do not have this software installed on their systems will need to download it from www.adobe.com.

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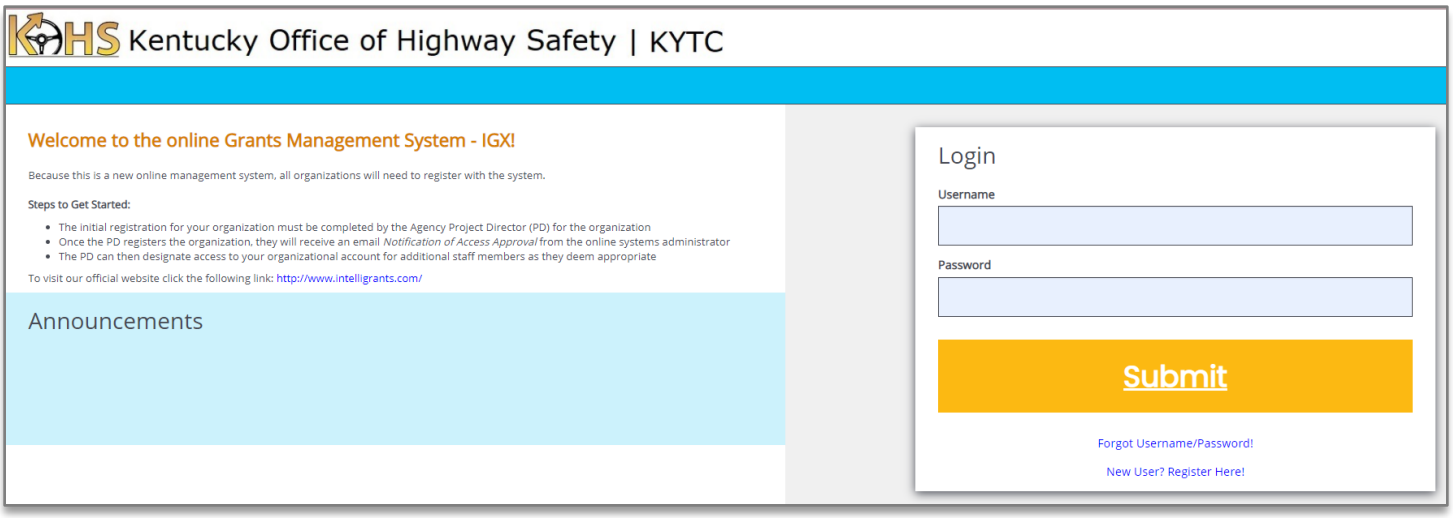
System Login Page

URL

To access the IGX portal, type the following into the address bar of the web browser and press ***Enter***.
https://kohs.intelligrants.com/

NOTE: The IGX portal does not save the username and password. This option may be available for some browsers.

IGX Portal Home Login Page Sections



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

Welcome/Announcements!

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

IGX Portal Login Section

The IGX portal login process requires a user to enter in a **Username** and **Password** to login.
NOTE: The password field is case sensitive and will not recognize characters of the wrong case. Precision when entering the username into the username field will decrease the risk of system error messages.

Logging in to the IGX Portal

Username

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

Password

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

Submit Button

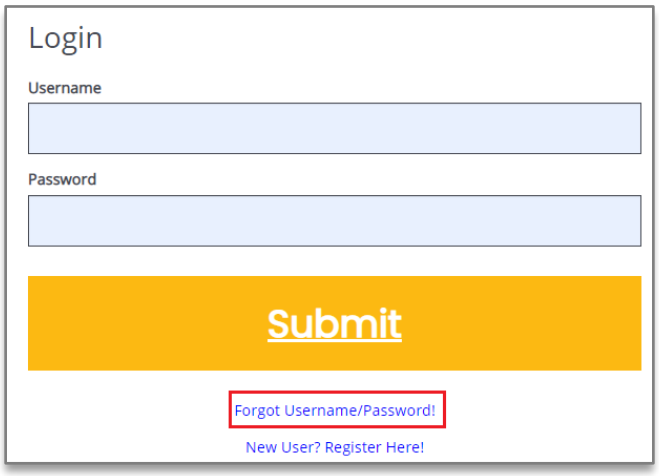
Push the ***Submit Button*** to login onto the IGX Portal.

Trouble Shooting Issues IGX Portal Login Issues

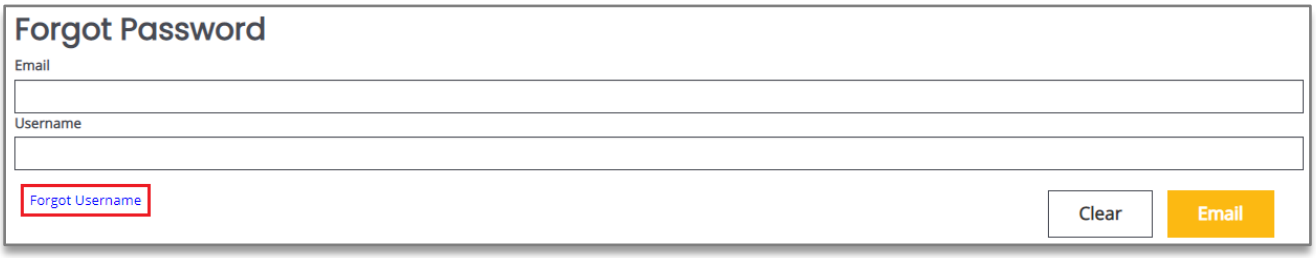
Forgot Username

The IGX portal allows the user to request the retrieval of their username. To do so, complete the following steps:

1) Click on the ***Forgot Username/Password!*** link.



2) Click on the ***Forgot Username*** link.



3) Enter the email address and click the EMAIL button to request the username.
4) The user can follow the instructions in the ***"Forgot Password"*** section to allow them to log into the system.

"Locked Out"

A user is "locked out" when they have exceeded a specific number of attempts to login. The user may use the ***Forgot Password*** link to request a temporary password at any point using the "Forgot Password" link instructions (below).

Forgot Password

The IGX portal allows users to request a temporary password by email. To do so, complete the following steps:

1) Click on the ***Forgot Username/Password!*** link.
2) Enter the username and the email address. Click the EMAIL button. A temporary password will be sent to the email address supplied.

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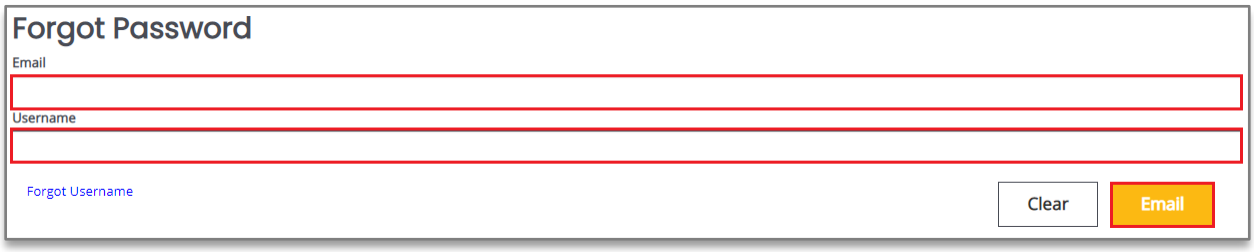


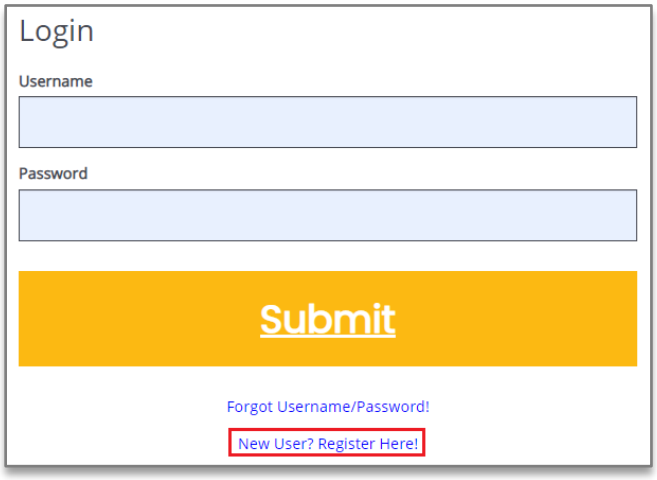
3) Once the user has received a temporary password, they will need to login.
NOTE: The password field is case sensitive and will not recognize characters of the wrong case. Precision when entering the username into the username field will decrease the risk of system error messages.

4) At that point, the user will be brought directly to the **Profile** page and requested to create a new password. The user can use the Edit Password button at the bottom of the page to update the password. When the user clicks on the ***Edit Password*** button, the **Password** and **Confirm Password** fields are available.

New User

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

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



2) Fill in the required fields (*) and any optional fields desired and click on the ***Save*** button.
NOTE: Users registering by the *New User* link will need to be approved by pre-existing IGX portal users.

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

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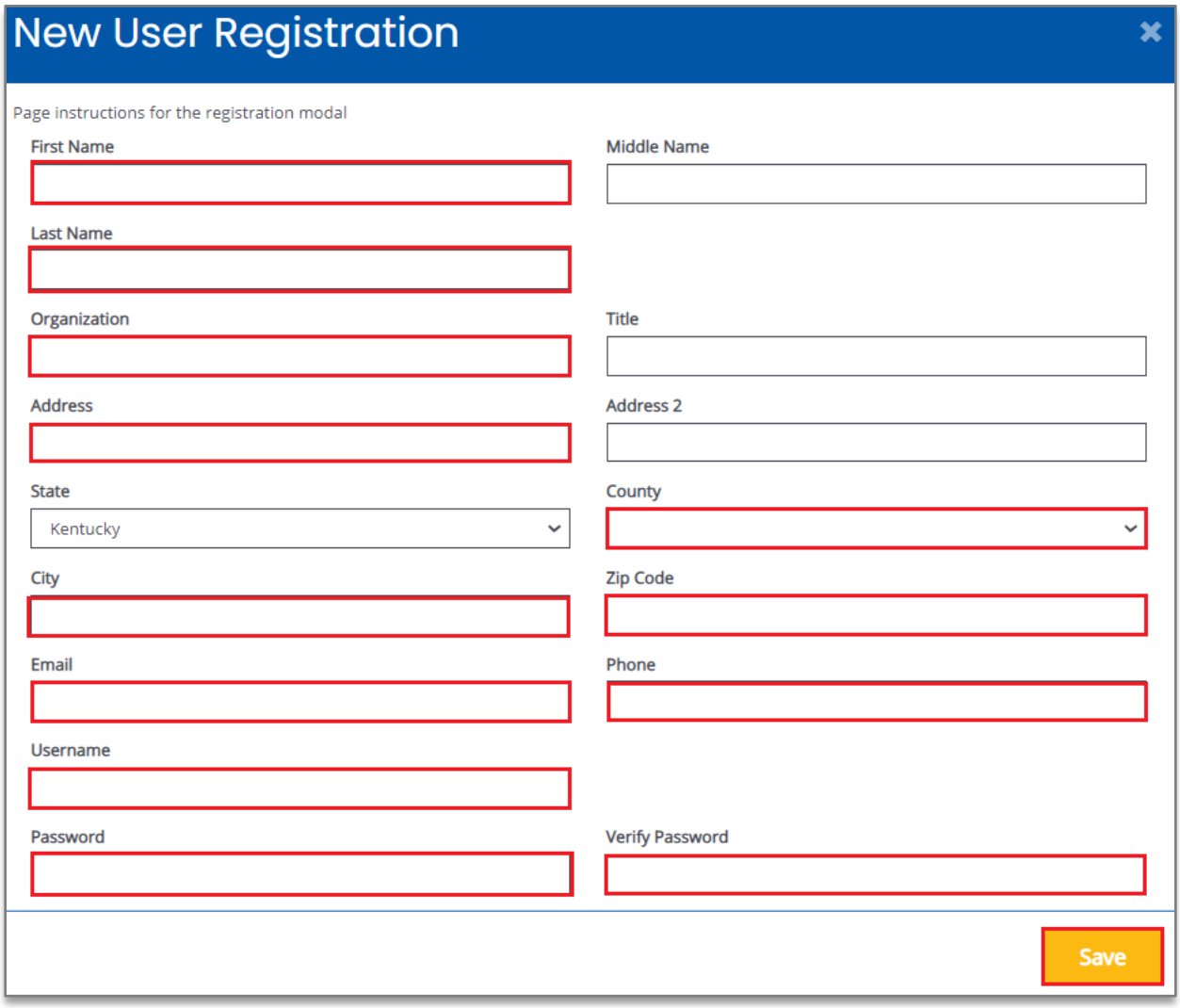

Legend

First Name (Required) – the first name of the registering user.
Middle Name – the middle name of the registering user.
Last Name (Required) – the last name of the registering user.
Organization (Required) – the name of the organization the registering user wants to register under.
Title – the position title of the registering user.
Address (Required) – the street address of the organization the user is registering for.
Address 2 – a second street address for the organization that the user is registering for.
State (Required) – the state drop-down selection for the state of the registering user's organization.
County (Required) – the county drop-down selection for the county of the registering user's organization.
City (Required) – the name of the city of the registering user's organization.
Zip Code (Required) – the zip of the registering user's organization.
Email (Required) – the email address of the registering user.
Phone (Required) – the phone number of the registering user.
Username (Required) – the username the registering user wishes to register for.
Password/Verify Password (Required) – the password the registering user wishes to register for.

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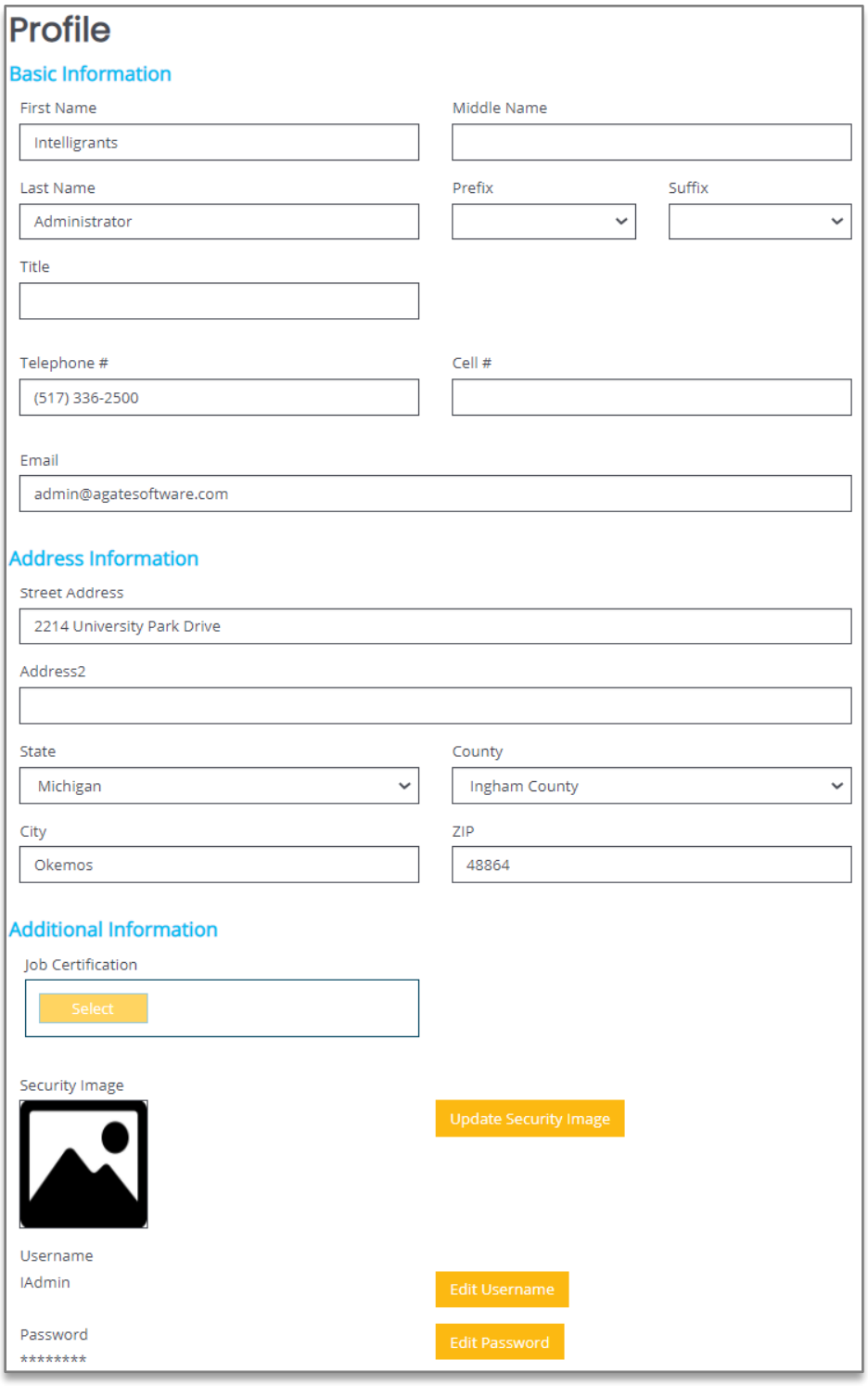
User Information

Profile

Once a person logs into the system, their **Profile** page and a list of organizations the individual belongs to is visible.



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.
Telephone # – the primary phone number for the individual.
Cell # – the optional cell phone number for the individual.
Email – the email address of the individual.

Address Information Legend

Street Address – the street address for the individual.
Address2 – a 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.

Additional Information Legend

Job Certification – a repository for uploading personal certification forms.
Security Image – an optional security image to implement as an additional security measure.
Username – a label containing the individual's username and a button to allow the individual to update the username.
Password – a label containing the individual's current password and a button to update the password.

Organizations

This section contains a table with the label for the role the individual has in that organization, the active date field, the inactive date field, and the name of the person who assigned that individual to the organization.
NOTE: A person can have multiple organizations listed.

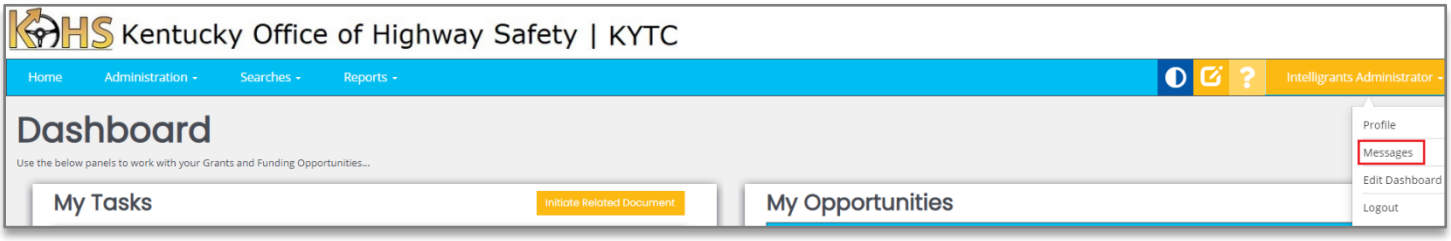
Messaging

Under the **Profile** section, there is a messaging section where the user can create 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 checkbox(s), 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. In this example, it is labeled "IA Testing".
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. Click on the row of a specific email to open it up for review.

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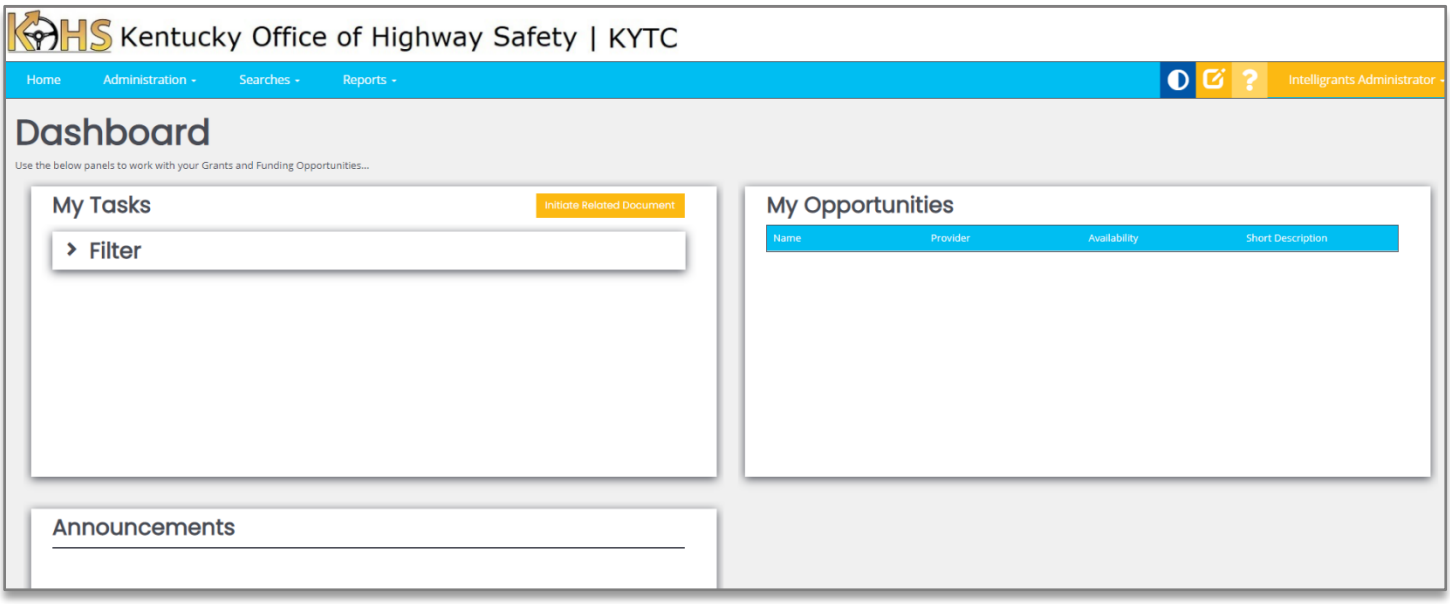
Home

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.

Administration

This is a navigation link that will allow the user to complete some organization functions. The user can access this link from anywhere in the system.

Searches

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

Menu Options

- Grant Applications
- Reimbursement Claims
- Monitoring Reports
- Assistant Requests

Icons

Theme Setting	This button switches the theme visible from black and white to color and vice versa.
Help	Clicking this button allows general help tips to display about the current item selected.
Name	Clicking on the user's name allows the user to access the **Profile**, **Messages**, **Edit Dashboard**, and **Logout** links.

Dashboard

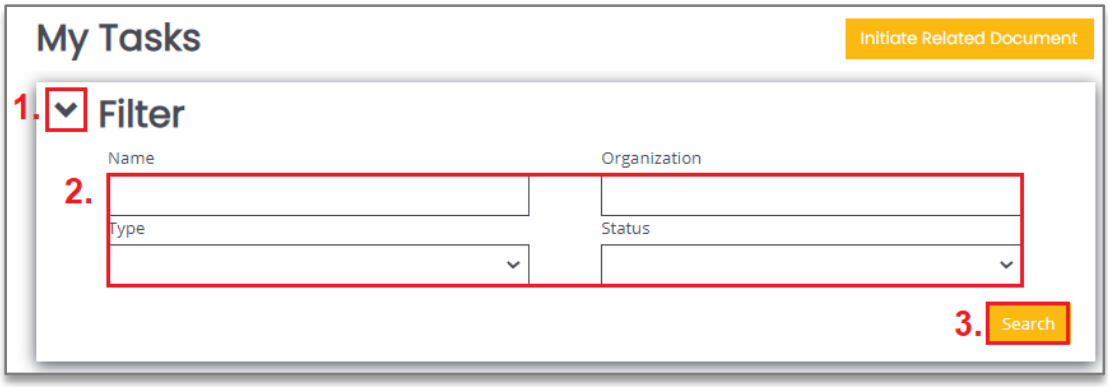
My Tasks

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

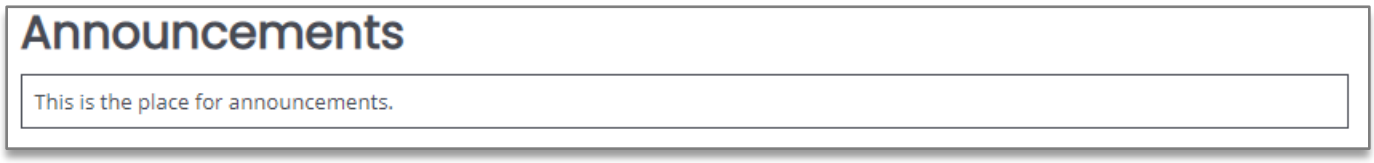
To use the **My Tasks** Filter to on a list of tasks assigned to the user, please follow these instructions:

1. Click on the **>** sign next to the **Filter** header.
2. Enter data into any of the fields and/or select an option from the **Type** drop-down.
3. Click the SEARCH button. This will bring up a list of documents in the **My Tasks** section.



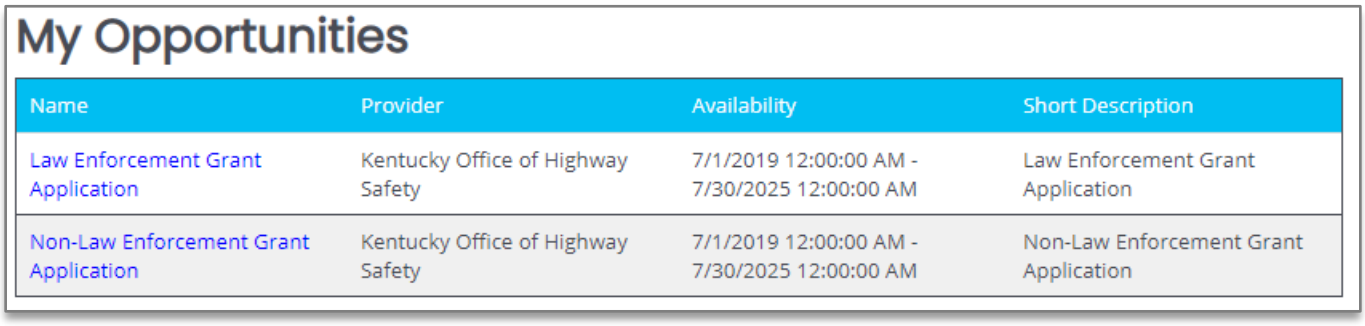
Announcements

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 Opportunities

The **My Opportunities** area allows the user to start grant opportunity documents (usually applications).



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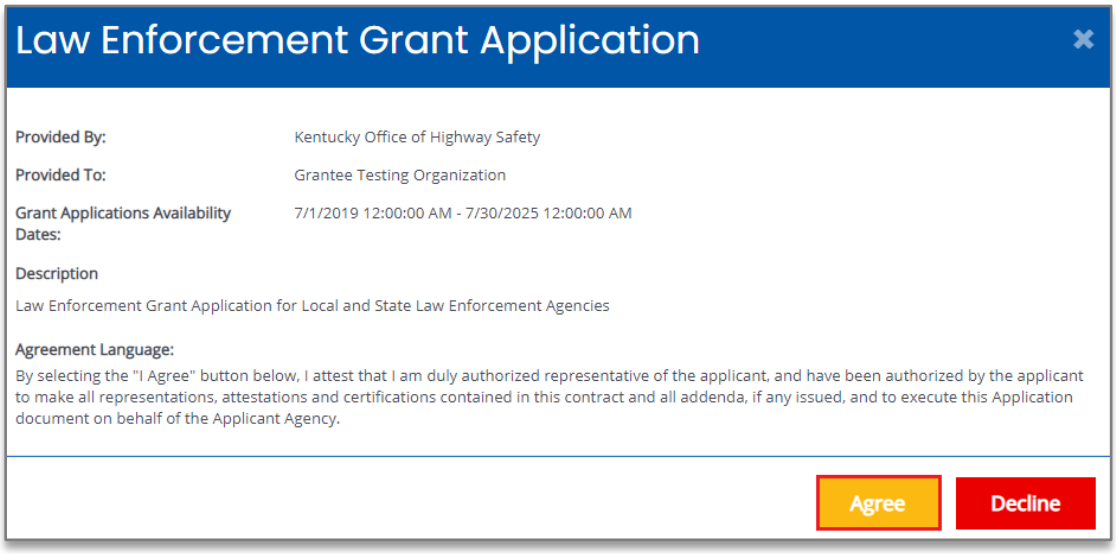
Grant Opportunities

Starting a Grant Opportunity

To start a grant opportunity, please follow these instructions:

1) Login to the portal in a role that can start applications.
2) Click on the grant opportunity name in the **Name** column to bring up a menu with more application information.
3) Click on the AGREE button to start the application.



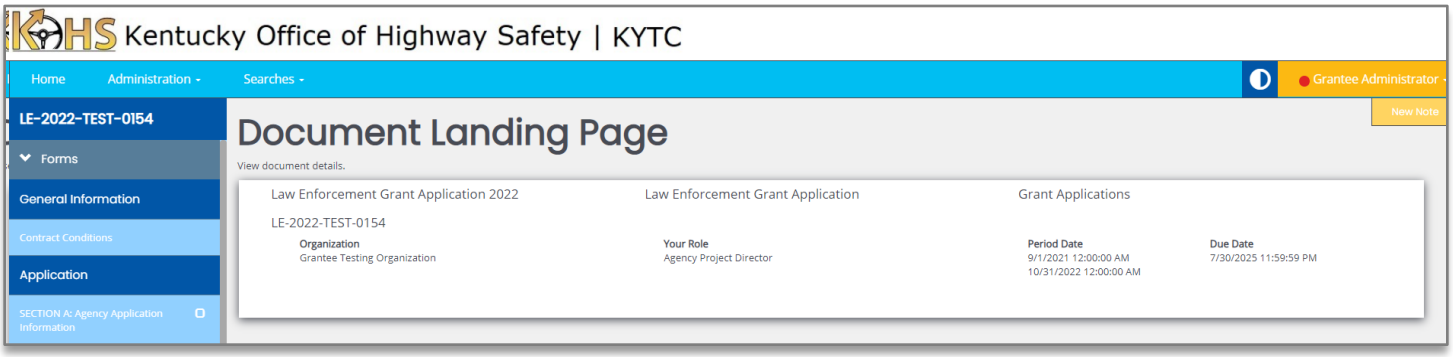
Working on a Grant Opportunity

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

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

The Document Landing Page

The Document Landing Page contains several sections and the **New Note** button.

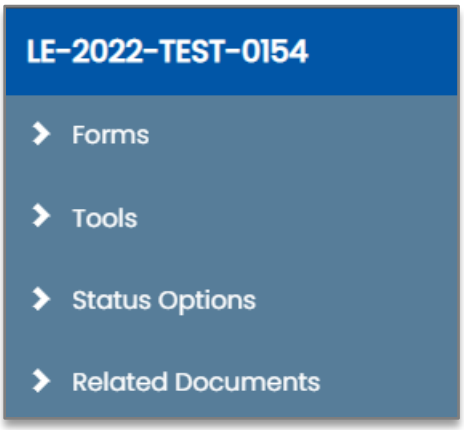


Application Link

The number listed above the **Forms** header is the application number. It also functions as a link to bring the user back to the **Document Landing Page**.

Forms Menu

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



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 current status of the application.

Related Documents – a list of related documents (primarily reports) associated with the application.

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**.

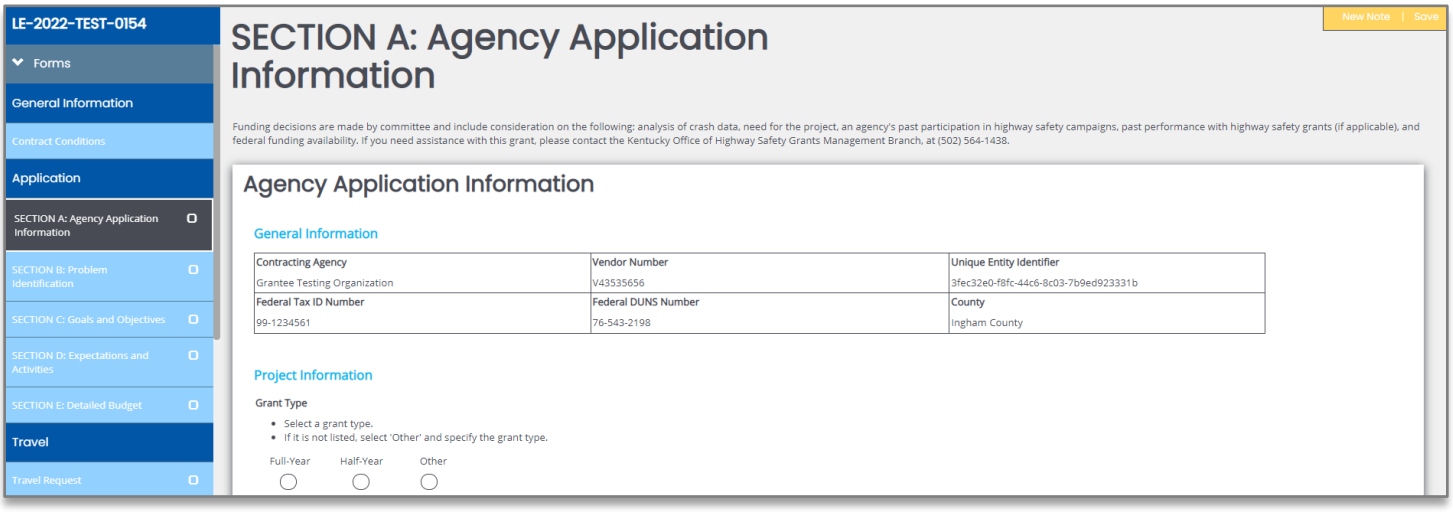
New Note Button

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

Grant Opportunity Forms

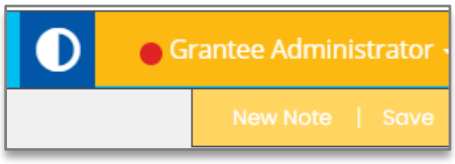
Forms

The list of forms is usually divided into sections. Clicking on a form link in any section will bring up that form for the user to fill in.



Form Options

There are additional tools in the purple banner on the right side of the screen.



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 form.
Add (not shown)– 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 (not shown) – allows the user to delete the instance of the form that is visible to the user. Clicking DELETE clears out the fields on the form (including any uploaded attachments).

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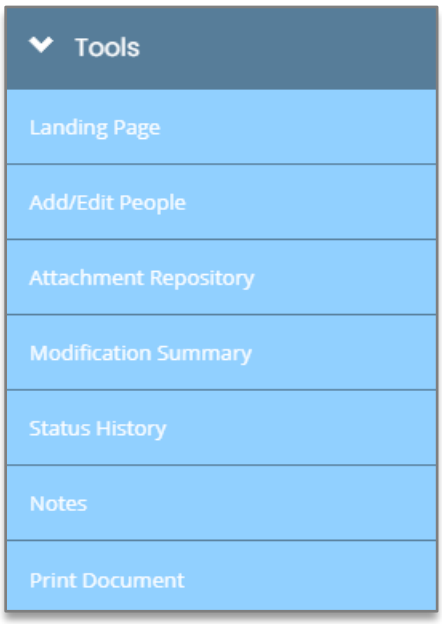
Tools

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

Landing Page

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

Document Add/Edit People

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

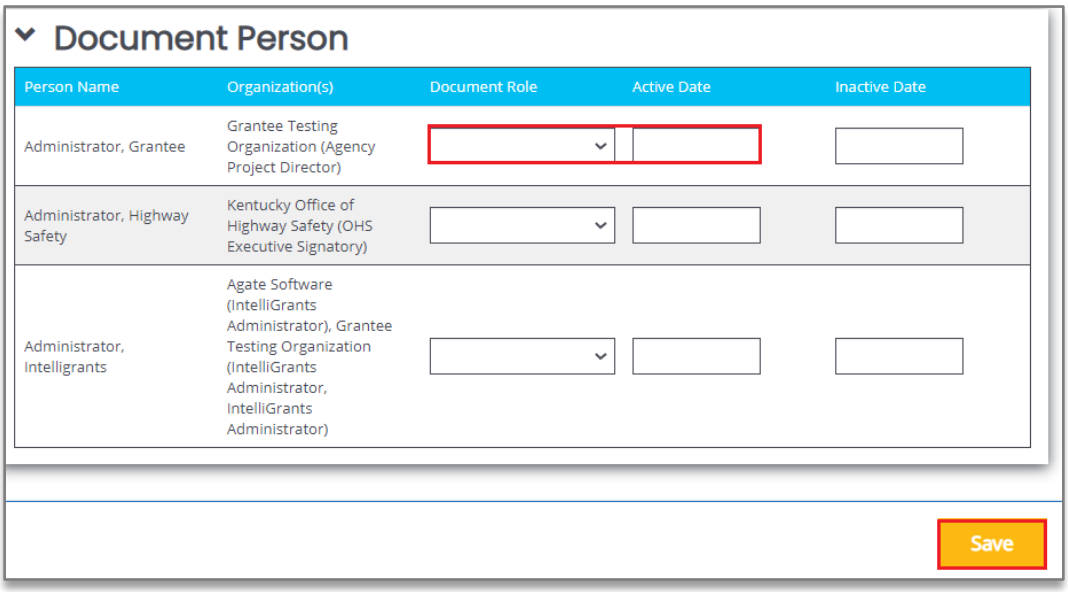
Adding/Assigning People to the Document

NOTE: Not all roles can add individuals to specific documents.

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

1) Click on the ***Plus Sign*** button on the **People Assigned to this Document** row.
2) Include information in the **Name**, **Role**, and/or **Organization Name** field(s) and click SEARCH.

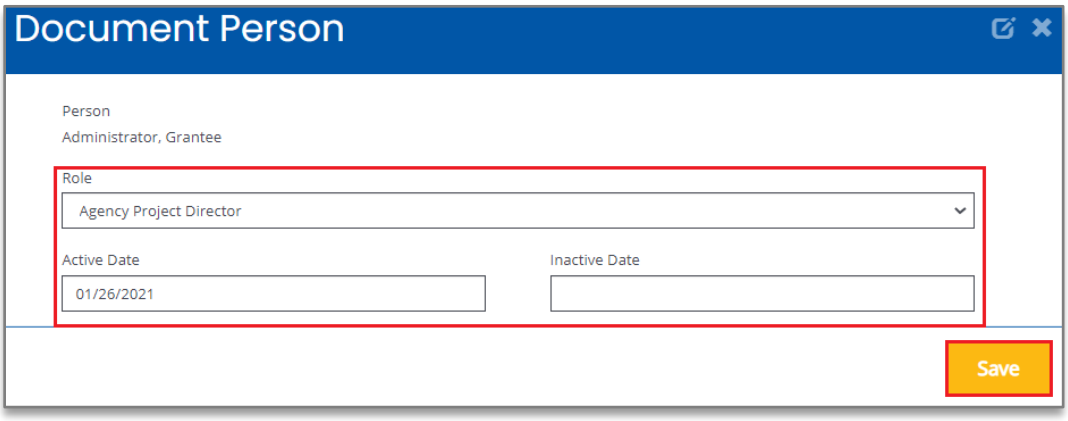
3) For adding the specific user(s) to a document, select a **Document Role** option and click the SAVE button.
NOTE: This will automatically assign today's date. Please use the calendar tool in the Active Date field to select a different date.



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 ***Pen*** button on the right side.
2) Make any updates and click the SAVE button.

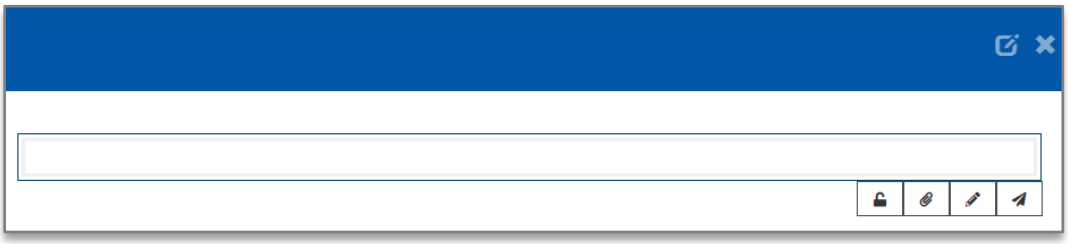


Attachment Repository
This tool allows the user to view files that have been added as attachments throughout the document.

Document Modification Summary
This tool allows the user to view and/or download the modification summary.

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.

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 and fill in the field.
2) Click on the ***Paperclip*** icon to add a note (optional).
3) Click on the ***Paper Airplane*** icon to SAVE the note.

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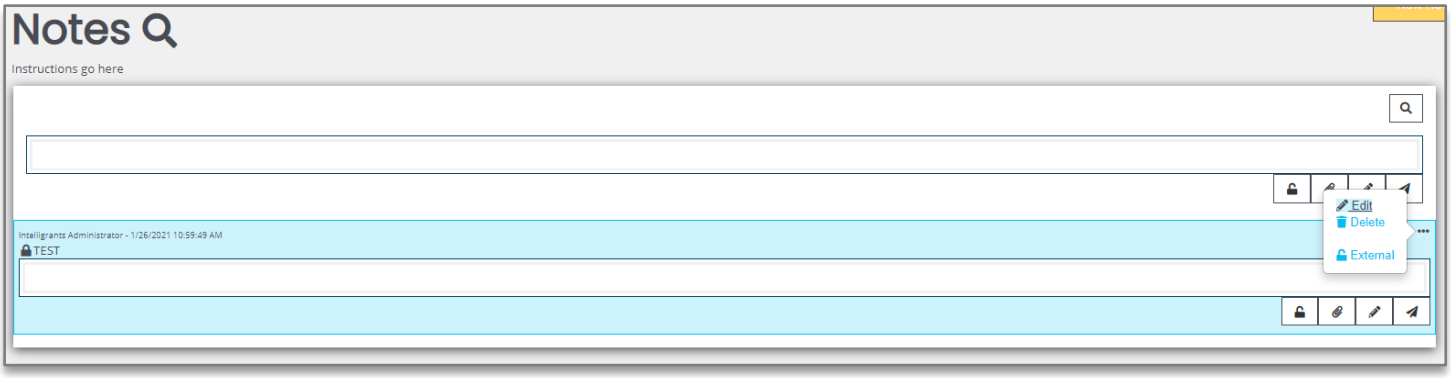
Additional Fields

Icon	Name	Description
	Internal Note	This tool locks this note into the form as an internal note. The internal notes are only visible to members within the same 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

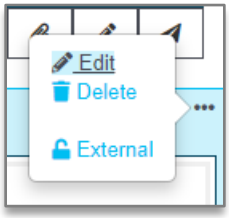
Once a note is created, it ends up in the ***Notes*** area of the **Tools** menu.
To access the note, please follow these instructions:

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

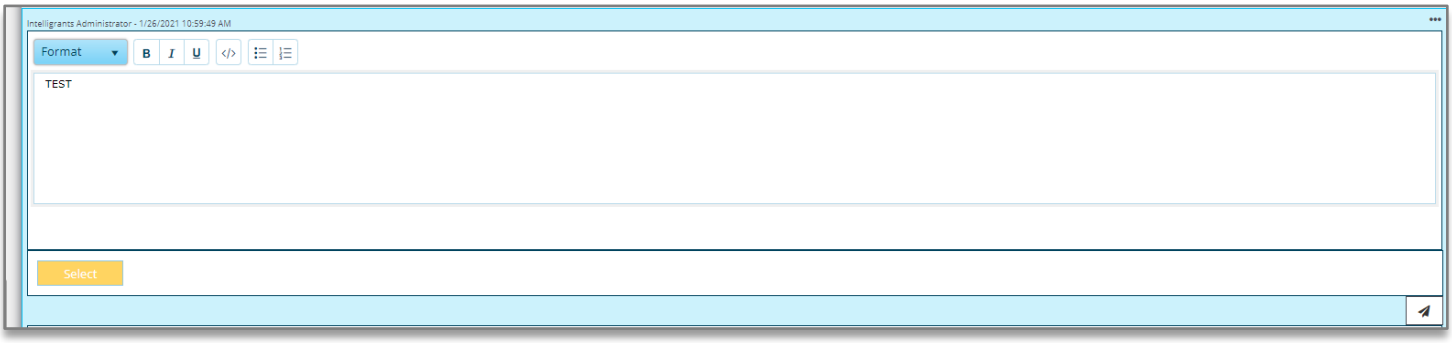


Updating a Note

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



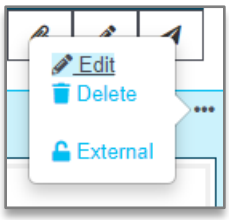
4) Click on the ***Edit*** tool to edit the text field.



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

Deleting a Note

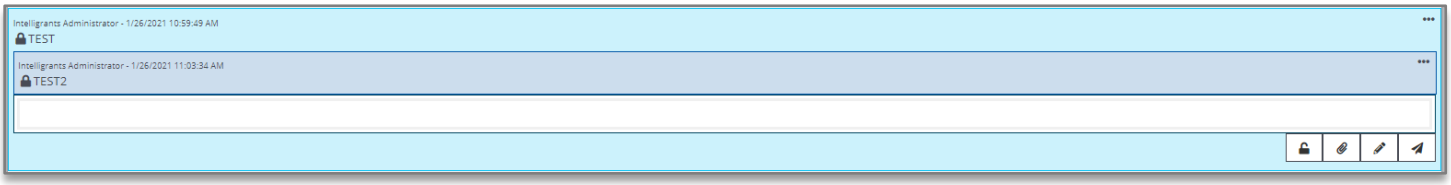
1) Click in the **Forms** section to minimize that section.
2) Click on the ***Notes*** link in the **Tools** section.
3) Click on the … icon. This brings up the **Edit, Delete** and **External/Internal** tool buttons.



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

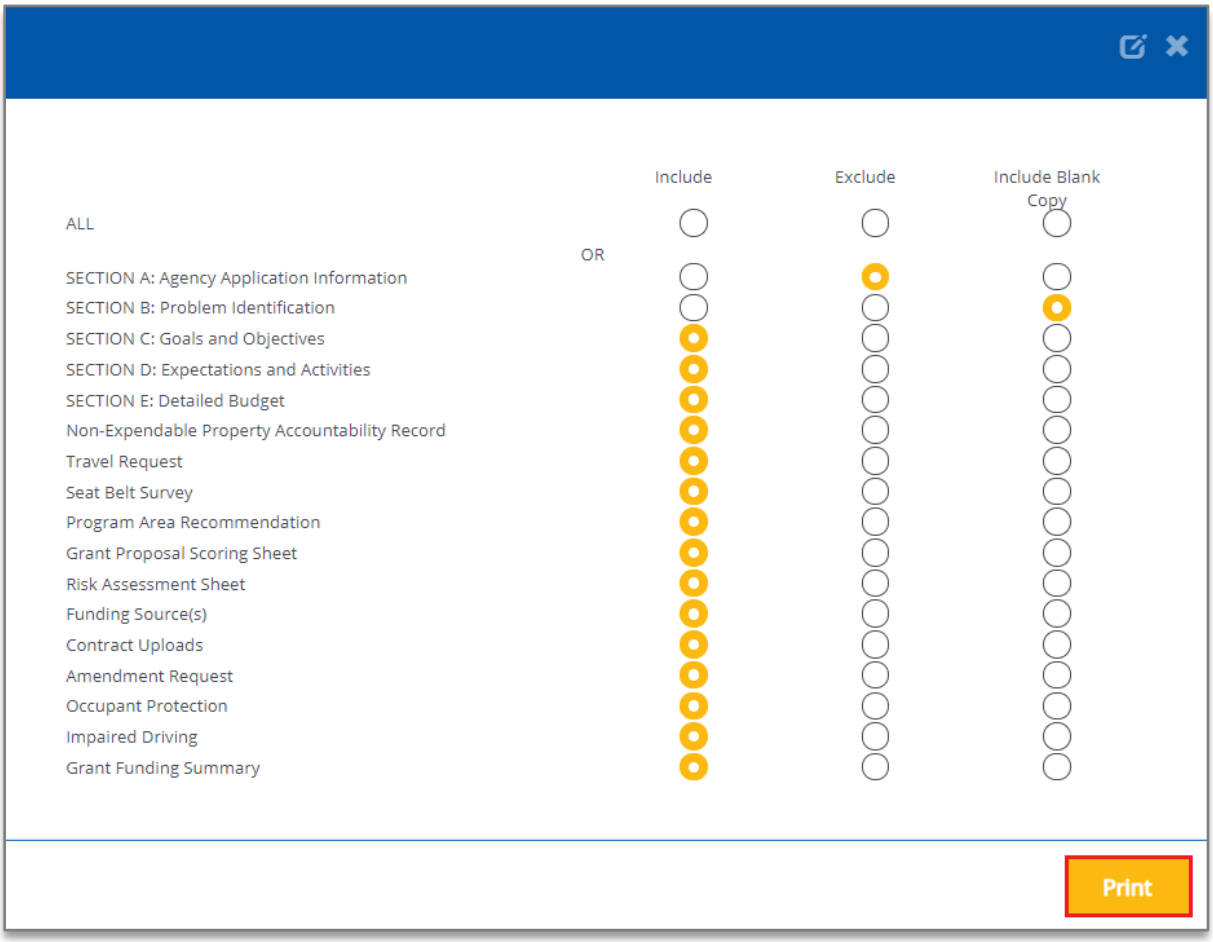
Replying to a Note

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 icon.



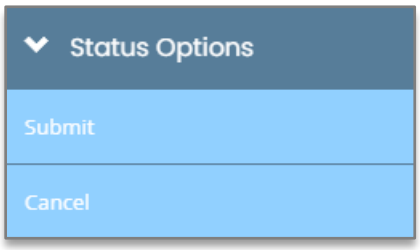
Print Document

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.



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.



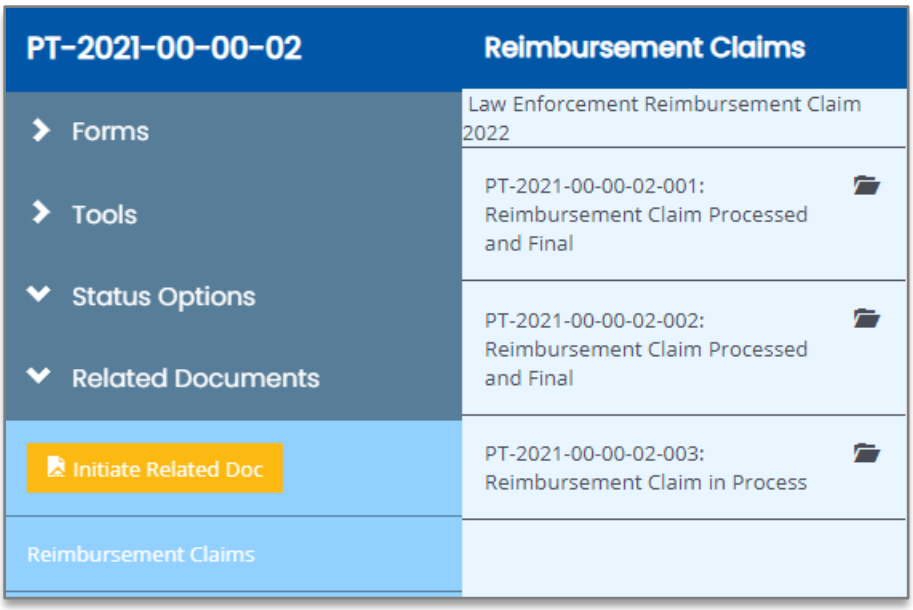
Related Documents

The **Related Documents** section is where the user can access documents (such as reports) that are related to the application/contract.

Accessing a Related Document

To access a report, please follow these instructions:

1) Navigate to the grant.
2) Close the **Forms**, **Tools**, and **Status Options** sections.
3) Click on the link in the **Related Documents** section.
4) Click on the link in the 2nd column. This will bring up the **Document Landing Page** for the report.



Starting a Related Document

Click on the ***Initiate Related Doc*** button (either in the **Related Documents** section or in the **My Tasks** area of the **Dashboard**).

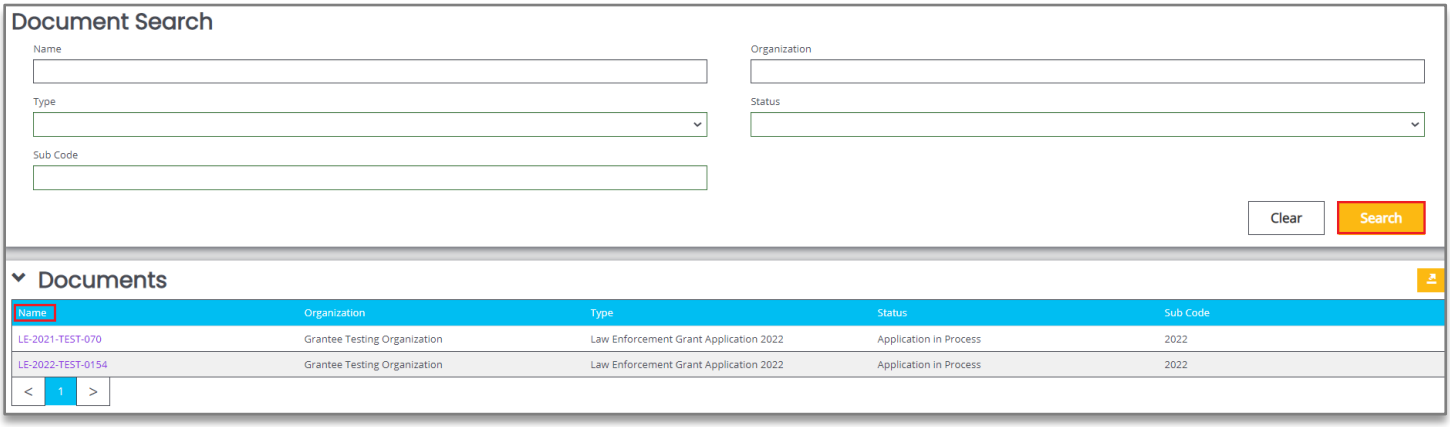
Searches

The **Searches** tab is used to quickly locate specific documents. Different types of searches have their own search sections set up. The sections below explain how to use these search sections.

Grant Applications

To use this search tab, please follow these instructions:

1) Go to **Searches → Grant Applications.**
2) OPTIONAL: Enter in search parameters. Click the CLEAR button to clear out search parameters.
3) Click the SEARCH button.
4) Click on the name of a specific document in the **Name** column.



Legend

Name – A text field for the name of the document.
Organization – A text field for the name of the organization that created the document.
Type – A drop-down list to select the type of document from.
Status – A drop-down list to select a specific document status from.
Sub Code – A text field to enter the sub code of the document in.

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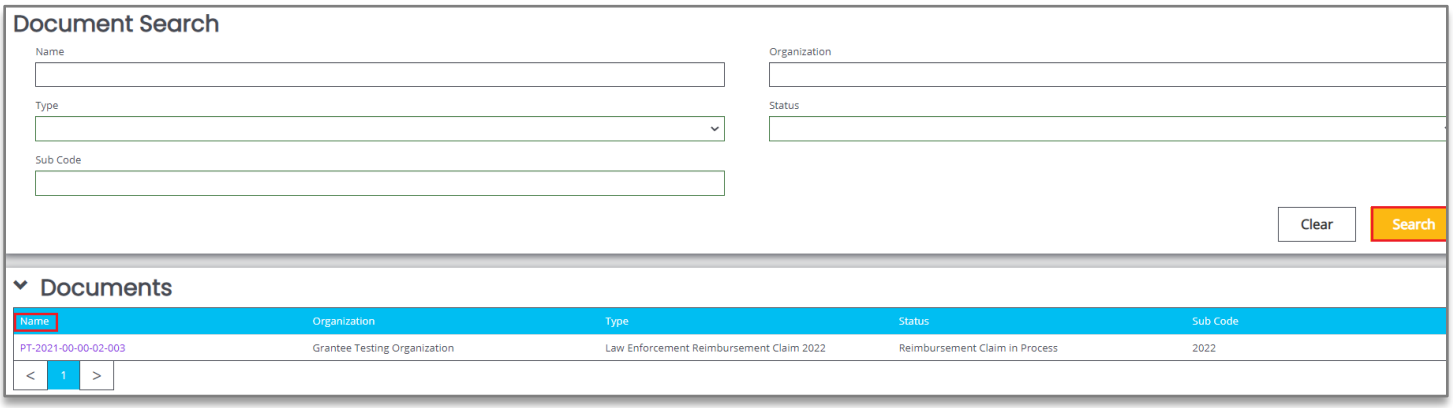
Reimbursement Claims

To use this search tab, please follow these instructions:

1) Go to **Searches → Reimbursement Claims**.
2) OPTIONAL: Enter in search parameters. Click the CLEAR button to clear out search parameters.
3) Click the SEARCH button.
4) Click on the name of a specific document in the **Name** column.



Legend

Name – A text field for the name of the document.
Organization – A text field for the name of the organization that created the document.
Type – A drop-down list to select the type of document from.
Status – A drop-down list to select a specific document status from.
Sub Code – A text field to enter the sub code of the document in.

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Assistance Requests

To use this search tab, please follow these instructions:

1) Go to **Searches → Assistance Requests**.
2) OPTIONAL: Enter in search parameters. Click the CLEAR button to clear out search parameters.
3) Click the SEARCH button.
4) Click on the name of a specific document in the **Name** column.