



# IntelliGrants

System for Administering Grants Electronically

IntelliGrants Subgrantee User Manual

Version 1.0

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## IntelliGrants System Requirements

Indiana IntelliGrants was designed so that the vast majority of computer users will be able to use the system with little or no changes to their computer environment. The four requirements mentioned below are common computer elements that should be already present on most computers.

### Operating System

Indiana IntelliGrants was designed for use on the two most common computer operating systems: Windows and Macintosh. It has not been tested on nor is it supported for use on other operating systems, such as Linux or Unix. Users accessing the system from a Macintosh environment are required to have MacOS 7.5 or higher, running on a PowerPC processor. Windows users are required to have a computer running Windows 95 or higher.

### Web Browser

This system was designed to be compatible with common up-to-date web browsers including Internet Explorer V.11 and above, Firefox, Google Chrome, and Safari.

### Adobe Acrobat Reader

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 is saved into various narrative and budget pages. When using Adobe Acrobat Reader you may choose to view, print, or save these documents. Adobe Acrobat Reader can be downloaded for free at [www.adobe.com](http://www.adobe.com).

## Accessing IntelliGrants

To access the IntelliGrants site, enter [indianaintelligrants.intelligrants.com](http://indianaintelligrants.intelligrants.com) into the address bar of a web browser and press enter. The page looks like the image below.

**Note:** IntelliGrants does not save the username and password. This option *may* be available with some web browsers.



Welcome to IntelliGrants, your home for grants administered by the Indiana Criminal Justice Institute! Click the [Portal Home](#) tab at top to see more information about funding availabilities. Please enter your username and password at right to submit an application. If you are new to IntelliGrants, click [New User](#) to create an account. Login information does not transfer from the former Egrants system.

**Login**

Username

Password

[New User?](#) [Forgot Password?](#)

## Bookmark/Favorites

IntelliGrants may be bookmarked, or added, to the favorites menu.

After accessing the **IntelliGrants Login** page, on the web browser menu bar:

1. From the toolbars at the top of the page, select the **Favorites** menu.
2. Select the **Add to Favorites** link to bring up the **Add a Favorite** menu.
3. Rename the site, if desired, and click on the **Add** button.

## Adding IntelliGrants to List of Trusted Sites

Adding the ICJI IntelliGrants website to the list of trusted sites will help minimize issues accessing/browsing the site. These settings may need to be implemented by your IT staff. Here are instructions for Internet Explorer:

1. From the toolbars at the top of the page, select the **Tools** menu.

2. Select **Internet Options**, then select the **Security** tab.
3. Click on the **Trusted sites** icon, and click on the **Sites** button.
4. In the **Add this website to the zone:** field, enter: \*.in.gov and click on the **Add** button.
5. Click on the **Close** button and then click **OK**.

## Subgrantee User Types

There are five types of Subgrantee security roles:

- **Subgrantee Administrator**
- **Subgrantee Project Director**
- **Subgrantee Fiscal Agent**
- **Subgrantee Staff**
- **Subgrantee Viewer**

These roles have different security levels needed to access the **My Applications/Grants**, **My Program Reports**, and **My Fiscal Reports** tabs. Once a **Subgrantee Administrator** is identified and a new user account is created for the organization, the **Subgrantee Administrator** can select and enter the organization's staff member names and roles into IntelliGrants.

**Note:** User access can be assigned or removed throughout a project's lifecycle.

The five security roles are summarized below:

### Subgrantee Administrator

- Creates new user accounts, and manages (edits/deletes) user account information.
- Views/Check statuses of and/or initiates Applications/Grants, Program Reports, and Fiscal Reports.
- Enters/updates information and uploads attachments on Applications/Grants, Program Reports, and Fiscal Reports.
- Downloads attachments from Applications/Grants, Program Reports, and Fiscal Reports.
- Submits Applications/Grants, Program Reports, and Fiscal Reports.
- Manages the Organization Documents, Organization Accounts, and Organization Document Availability sections.

### Subgrantee Project Director

- Views/Check statuses of and/or initiates Applications/grants, Program Reports, and Fiscal Reports.
- Enters/updates information and uploads attachments on Applications/Grants, Program Reports, and Fiscal Reports.
- Downloads attachments from Applications/Grants, Program Reports and Fiscal Reports.
- Submits Applications/Grants, Program Reports, and Fiscal Reports.

- Manages the Organization Documents, Organization Accounts, and Organization Document Availability sections.

## Subgrantee Fiscal Agent

- Monitors status of Applications/grants, Program Reports, and Fiscal Reports.
- Downloads attachments from Applications/Grants, Program Reports, and Fiscal Reports.
- Signs Grant Agreements (if applicable).

## Subgrantee Staff

- Monitors status of Applications/grants, Program Reports, and Fiscal Reports.
- Enters/updates information/attachments on Applications/Grants, Program Reports, and Fiscal Reports.
- Downloads attachments from Applications/Grants, Program Reports and Fiscal Reports.

## Subgrantee Viewer

- Views Applications/Grants, Program Reports, and Fiscal Reports.

**Note:** User access cannot be granted to Contractors.

## System Access

There are two ways to access IntelliGrants:

1. Request access to IntelliGrants via the **IntelliGrants Login** page and get approved by an ICJI IntelliGrants system administrator.

**-OR-**

2. When an organization already has an IntelliGrants account, the new user can obtain access from the organization's **Subgrantee Administrator**. This is the preferred way to access IntelliGrants – it is quicker and provides greater security for the organization's records.

## Subgrantee Administrator Access

1. To gain access to IntelliGrants as a **Subgrantee Administrator**, first create a new user account. From the IntelliGrants login page click "**New User?**" located in the **Login** section.


A screenshot of the IntelliGrants login interface. It features a light blue header with the word "Login" in green. Below the header, there are two input fields: "Username" and "Password". A blue "LOGIN" button is positioned below the password field. At the bottom of the form, there are two links: "New User?" and "Forgot Password?".

**Note:** If you are already registered as an IntelliGrants Subgrantee, please use that login information to access the system.

2. Fill in the **Contact Information** field as required. All items marked with an \* are required.
  - a. The **Username** field can consist of letters and numbers
  - b. Your password must contain at least 1 upper case letter, at least 1 number and must be at least 7 characters long
  - c. The fields **Password** and **Confirm Password** must match.
  - d. Special characters are allowed to be used in the password
3. Click on the **Save** button.

After saving the new user information, the account will be validated by an ICJI IntelliGrants system administrator. If attempting to access the system before validation, the following message will appear:



 **Page Error(s)**  
Your account has not yet been validated.

When access has been granted, an e-mail confirming that the account has been validated will be sent to the user. If the account is set up as a **Subgrantee Administrator**, the user will now be able to create additional user accounts for the organization.

**Note:** Users are not able to access documents created *prior* to the date they are activated/assigned to an organization. For access to documents dated before a user's activation date, a **Subgrantee Administrator or Subgrantee Project Director** must assign the user to each individual document using the **Add/Edit People** option located within each document. On the document's main menu under the **Management Tools** menu, click on the **Management Tools** button and select the **Add/Edit People** link.

## Viewer Access

The preferred method for gaining access to IntelliGrants is to have the organization's **Subgrantee Administrator** add new users to the system.

To add other members to an organization as a **Subgrantee Administrator**:

1. Select the **My Organization(s)** link.
2. Select the **Organization Members** link.
3. Select the **Add Members** link.

**Organization - Agate Test**

Follow the instructions listed below to add/remove/modify organization members.

[Organization Information](#) | **[Organization Members](#)** | [Organization Documents](#)

### Organization Members

Administrators with the authority to add members to your organization can follow these steps:

- 1. To add a member to your organization, select the **Add Members** link below.
- 2. If a member has already added his/her information in the system, you can search for the member.
- 3. If you need to add a member's information into the system, select **New Member**.
- For more detailed instructions, select the **Show Help** button above.

[Current Members](#) | **[Add Members](#)**

Sort By:   Results Per Page

| <input type="checkbox"/>            | Person                                       | Role                        | Active Dates | Active Documents | Assigned By | Modified By |
|-------------------------------------|--|-----------------------------|--------------|------------------|-------------|-------------|
| <input checked="" type="checkbox"/> | <a href="#">AgateUser_SubGrantee Admin</a>   | SubGrantee Administrator    | 8/29/2017    | 85               | Multi User  | 8/29/2017   |
| <input checked="" type="checkbox"/> | <a href="#">AgateUser_SubGrantee ProjDir</a> | SubGrantee Project Director | 8/29/2017    | 23               | Multi User  | 8/29/2017   |
| <input checked="" type="checkbox"/> | <a href="#">AgateUser_SubGrantee Staff</a>   | SubGrantee Staff            | 8/29/2017    | 23               | Multi User  | 8/29/2017   |
| <input checked="" type="checkbox"/> | <a href="#">AgateUser_SubGrantee Viewer</a>  | SubGrantee Viewer           | 8/29/2017    |                  | Multi User  | 8/29/2017   |

4. The **Person Search** field appears. Type the first or last name of the person to be added and select **Search**. The results appear below.

5. Place a check in the box next to the person to add. Select a role, enter an active date (retro or current date in which you would like the person to see the grant documents), and click on the **Save** button. Then select the **Current Members** link, and confirm that the person added is shown with the rest of the organization's member names.

6. If the person's name does not come up in the search results, then select the **New Member** button.

7. Enter member information for the new user and click the **Save & Add to Organization** button.

## Organization - Agate Test

Follow the instructions listed below to add/remove/modify organization members.

[Organization Information](#) | [Organization Members](#) | [Organization Documents](#)

### Add/Edit Members

Administrators with the authority to add members to your organization can follow these steps:

Please complete the information below. All required fields are marked with an \*.

|             |                             |       |        |       |                  |
|-------------|-----------------------------|-------|--------|-------|------------------|
| Name        | Prefix                      | First | Middle | Last  | Suffix           |
|             | Mr.                         | Jason |        | Adams |                  |
| Title       | Project Director            |       |        |       |                  |
| Email       | email@email.com             |       |        |       |                  |
| Username    | jadams                      |       |        |       |                  |
| Password    | .....                       |       |        |       | Confirm Password |
| Date Active | 4/17/2018                   |       |        |       | Date Inactive    |
| Role        | SubGrantee Project Director |       |        |       |                  |

The fields below are populated with the Organization information by default. However, you may edit the information in any of the fields. This information may also be edited by the person you are creating the profile for from their My Profile page.

|          |                        |            |         |
|----------|------------------------|------------|---------|
| Address  | 555 University Park Dr |            |         |
| City     | Okemos                 | State      | Indiana |
| County   | Adams County           | Zipcode    | 55555   |
| Phone #1 | (555) 555-5555         | Phone #2   |         |
| Fax      |                        | Cell Phone |         |
| Website  |                        |            |         |

## User Contact Information

### Updating User Profile

Maintaining up-to-date user information is important, especially when ICJI needs to contact a user regarding time sensitive matters. IntelliGrants allows users to easily add, delete, or edit user information. This may be done quickly and easily in IntelliGrants.

**Note:** In the event of a forgotten password, the e-mail address is required and must match the one listed in the contact information.

**Note:** When an incorrect e-mail address is in the contact information, notifications from the system will not be received. ICJI is not responsible for emails sent to a wrong email address.

Update the profile at any time:

1. From the **My Home** page, select the **My Profile** link.
2. Update the form with current information and click on the **Save** button.

#### Contact Information

|              |                            |       |                  |          |         |
|--------------|----------------------------|-------|------------------|----------|---------|
| Name         | Prefix                     | First | Middle           | Last     | Suffix  |
|              | ▼                          | Jason | *                | AdamsCJI | ▼       |
| Display Name |                            |       |                  |          |         |
| Organization | INCJI *                    |       |                  |          |         |
| Title        |                            |       |                  |          |         |
| Address      | 555 *                      |       |                  |          |         |
| City         | Okemos *                   | State | Indiana ▼        | Zipcode  | 55555 * |
| County       | De Kalb County ▼ *         |       |                  |          |         |
| Phone #1     | (555) 555-5555 *           |       | Phone #2         |          |         |
| Fax          |                            |       | Cell Phone       |          |         |
| Email        | jadams@agatesoftware.com * |       |                  |          |         |
| Website      |                            |       |                  |          |         |
| Username     | jadamscji *                |       |                  |          |         |
| Password     |                            |       | Confirm Password |          |         |

#### Organization Information

| Organization | Role                               | Active Dates            | Assigned By   |
|--------------|------------------------------------|-------------------------|---------------|
| INCJI        | IntelliGrants Administrator (MAIN) | 08/14/2017 - open ended | HuffCJI, Sean |

#### Change My Home Page Picture


To change your profile photo on the home page, please do the following:

- Select the Browse button below.
- Navigate to the picture you would like to upload then select the Open button.
- The file name of your picture will appear in the text box (only .jpg and .gif images allowed).
- Return to the top of the page and select the Save button.
- Your picture should now appear on the home page and in the Preview area.

File Name

Choose File No file chosen

#### Preview Image



To revert your image to the default, check the box below next to Revert Image then select the save button at the top of the page. Follow the instructions on the left to upload another image.

☐ Revert Image

## Updating Another User's Contact Information

An organization's *Subgrantee Administrator* or *Subgrantee Project Director* may edit another user's contact information as follows:

1. Select the **My Organization(s)** link at the upper right hand corner of the screen.
2. Select the **Organization Members** link.

### Organization - Agate Test

Follow the instructions listed below to add/remove/modify organization members.

[Organization Information](#) | [Organization Members](#) | [Organization Documents](#)

### Organization Members

Administrators with the authority to add members to your organization can follow these steps:

- 1. To add a member to your organization, select the **Add Members** link below.
- 2. If a member has already added his/her information in the system, you can search for the member.
- 3. If you need to add a member's information into the system, select **New Member**.
- For more detailed instructions, select the **Show Help** button above.

[Current Members](#) | [Add Members](#)

Sort By: -----SELECT----- -----SELECT----- Results Per Page 20 GO

| <input type="checkbox"/>            | Person                                       | Role                                   | Active Dates         | Active Documents | Assigned By | Modified By |
|-------------------------------------|--|--|----------------------|------------------|-------------|-------------|
| <input checked="" type="checkbox"/> | <a href="#">AgateUser_SubGrantee Admin</a>   | SubGrantee Administrator               | <div>8/29/2017</div> | 85               | Staff Team  | 8/29/2017   |
| <input checked="" type="checkbox"/> | <a href="#">AgateUser_SubGrantee ProjDir</a> | <div>SubGrantee Project Director</div> | <div>8/29/2017</div> | 23               | Staff Team  | 8/29/2017   |
| <input checked="" type="checkbox"/> | <a href="#">AgateUser_SubGrantee Staff</a>   | <div>SubGrantee Staff</div>            | <div>8/29/2017</div> | 23               | Staff Team  | 8/29/2017   |
| <input checked="" type="checkbox"/> | <a href="#">AgateUser_SubGrantee Viewer</a>  | <div>SubGrantee Viewer</div>           | <div>8/29/2017</div> |                  | Staff Team  | 8/29/2017   |

1

3. Next, select the name of the person whose contact information you desire to change.
4. Update the information accordingly and click on the **Save** button.

**Note:** If an organization's *Subgrantee Administrator* or *Subgrantee Project Director* selects the checkboxes on the **Organization Members** page and then selects the **Save** button this will delete members from their organization page.

## Updating Organization Information

When an organization's contact information changes, it is important to update the system.

An organization's *Subgrantee Administrator* or *Subgrantee Project Director* may edit the organizations information as follows:

1. Select the **My Organization(s)** link at the upper right hand corner of the screen.
2. Update the Organization Information you desire to change.
3. Update the information accordingly and click on the **Save** button.

## Organization - Agate Test

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

**Organization Information** | [Organization Members](#) | [Organization Documents](#)

### Organization Information

|            |                  |       |                           |
|------------|------------------|-------|---------------------------|
| Name       | Agate Test *     |       |                           |
| Legal Name | Agate Test *     |       |                           |
| FEIN       | 123456789 *      |       |                           |
| DUNS #     | 11-222-3333 *    |       |                           |
| PSID       |                  |       |                           |
| Address    | 123 Main St *    |       |                           |
| City       | Okemos *         | State | Indiana * Zipcode 55555 * |
| County     | Adams County *   |       |                           |
| Phone      | (555) 555-5555 * | Fax   |                           |
| Email      |                  |       |                           |
| Website    |                  |       |                           |
| Type       | K-12 *           |       |                           |

## Deactivating a User

A **Subgrantee Administrator** can deactivate a member of his/her organization. To deactivate a user:

1. Select the **My Organization(s)** link at the upper right hand corner of the screen.
2. Select the **Organization Members** link.
3. Using the drop-down calendar, set the second **Active Dates** field to the date on which the user will no longer have access.
4. Then click the **Save** button

| Person  | Role                 | Active Dates | Active Documents | Assigned By | Modified By |
|---|----------------------|--------------|------------------|-------------|-------------|
| <input checked="" type="checkbox"/> <a href="#">User</a><br><a href="#">AgencyAdministrator</a> | Agency Administrator | 3/12/2015    | 9                |             |             |
| <input checked="" type="checkbox"/> <a href="#">Test Bill</a>                                   | Agency Official      | 11/12/2015   | 5                |             |             |

**Note:** It is the Subgrantee's responsibility to remove old users from Intelligrants. ICJI is not responsible for any actions taken by an unauthorized subgrantee user that was not removed from Intelligrants.

## My Home Page

After logging in to IntelliGrants, a user is brought to the **My Home** page. From this page, the user can navigate the IntelliGrants system and access grants, reports, messages, and more.

- The IntelliGrants system features four tabs across the top of the screen that allow access to the **My Home** page, **My Applications/Grants** page, **My Program Reports** page, and **My fiscal Reports** page. Depending on their security settings, a user may or may not be able to access all of these tabs.
- The **My Home** page features the **View Available Proposals** section, the **My Inbox** section, and the **My Tasks** section.

**Note:** Applications can be started through the **View Available Opportunities** section.

- Depending on a person's security settings, there may be times when only the **My Inbox** (e-mail/messages) appears on the **My Home** page.
- When there are no active tasks to perform, the **My Tasks** section does not appear on the **My Home** page.

## A. Searching for Documents

The **My Applications/Grants**, **My Program Reports**, **My Fiscal Reports** tabs allow the user to search for documents in the system. Search fields and functionality are the same for all the tabs. This example will search for an Application/Grant, but the steps are the same for all document types.

To view an application by Application/Grant type, Application/Grant name, person, status, organization, or by fiscal year:

1. Select the **My Applications/Grants** tab.
2. Add any filter criteria by populating specific fields or making specific selections from drop-down menus. Click on the **Search** button to generate the search results.

From the list of applications, select the one to view by selecting the name.

## B. Viewing Funding Opportunities

The **View Available Proposals** section is only visible to Subgrantees and lists available application(s) that Subgrantees can apply for and submit to ICJI.

To view available funding opportunities:

1. Select the **View Opportunities** tab.



**Note:** Clicking the **Not Interested** button related to the opportunity will hide it from the **My Opportunities** section. Clicking the **Reset My Opportunities** button will allow any hidden opportunities to reappear in the **My Opportunities** section.

### My Opportunities

To apply for an item listed below, select the **Apply Now** button below each description.

RESET MY OPPORTUNITIES

Provider: 
Document Instance: 
Due Date (From - To):  - 

FILTER

**Comprehensive Opioid Abuse Site-based Program (CARA) 2017 for Agate Test**  
Offered By:  
INGRT\_CJI

Applications Availability Dates:  
01/01/2017-open ended

Applications Period:  
01/01/2018-12/21/2018

Applications Due Date:  
01/01/2018

Description:

APPLY NOW

NOT INTERESTED

**Criminal History Improvement Program (NCHIP) 2015 for Agate Test**  
Offered By:  
INGRT\_CJI

**Note:** For instructions on initiating an application, please see page 20.

## C. Accessing My Inbox

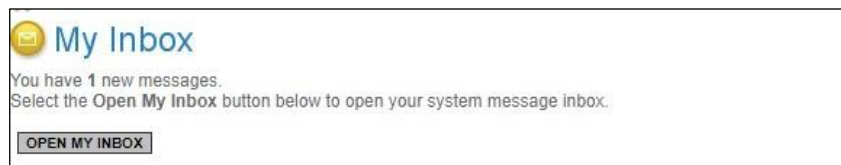
E-mail messages appear both in IntelliGrants in the **My Inbox** section and at the e-mail address listed in the IntelliGrants contacts information.

For example, an e-mail may be sent upon submission of an Application, an Application being denied, or an Application being approved. These messages keep users informed and serve as a reminder when certain tasks require action.

**Note:** To receive timely messages, it is important to maintain an active e-mail address in the IntelliGrants system (See user manual Contact Information section). An incorrect e-mail address (or an e-mail inbox that is full) will prevent users from receiving important ICJI grants-related messages.

The **View My Inbox** section allows access to system e-mail/messages. To see messages, select the **Open My Inbox** button.

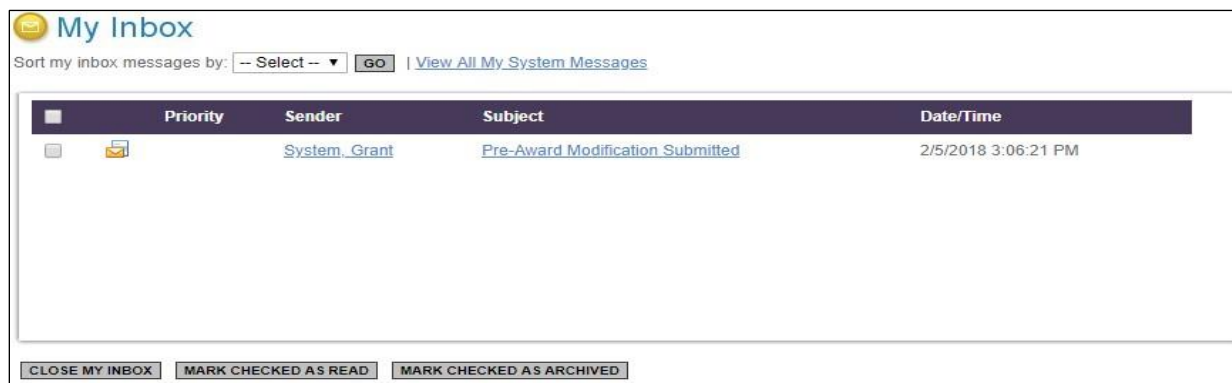




## I. Viewing E-mail/Messages

All new messages (unread), if any, are displayed in the **Inbox**:

- Sort messages by priority, sender, subject, and date/time.
- Select the **View All My System Messages** link to see all messages dating back to when system access was approved.
- View a message's priority status or the date/time message stamp.
- View a specific message by selecting its subject link.
- Select a sender's name to reply to a message.
- Check box at left of message and click **Mark Checked as Read** to mark a message as read.



## II. Searching for E-mail/Messages

To search for a message, select the **View All My System Messages** link. From the **System Messages** page, enter a keyword and click on the **Search** button. A list of messages that match the search criteria will appear.

The following tasks can also be performed from this menu:


- Sort search results by priority, sender, subject, date/time, or status.
- View all messages going back to when system access was approved and their priority status.
- Select a sender's name to reply to a message. A Subgrantee can communicate with their Grant Manager from this menu.

## D. Accessing and Completing My Tasks (Active Tasks)

The **View My Tasks** section appears on the **My Home** page when there are tasks that require action.

- Some of the tasks may be designated critical, meaning the due date for an application or document is approaching or has passed. The due dates for these tasks will be indicated in red text.
- To access documents requiring action, select the **Open My Tasks** link and then click on the name of a document to go to that document's menu.
- When there are no active tasks, the **View My Tasks** section is not visible on the **My Home** page.

**Note:** To access all applications that are assigned to the user, see user manual searching for Documents section.




Welcome SubGrantee Admin  
SubGrantee Administrator  
[Change My Picture](#)

**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


Hello SubGrantee Admin, please choose an option below.



### View Available Proposals

You have 56 opportunities available.  
Select the View Opportunities button below to see what is available to your organization.


[VIEW OPPORTUNITIES](#)



### My Inbox

You have 1 new messages.  
Select the Open My Inbox button below to open your system message inbox.

[OPEN MY INBOX](#)



### My Tasks

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

| Info | Document Type | Organization               | Name                                       | Current Status         | Date Received | Date Due |
|------|---------------|----------------------------|--|------------------------|---------------|----------|
|      | Applications  | <a href="#">Agate Test</a> | <a href="#">CARA-2017-00006</a>            | Application in Process | 12/21/2017    |          |
|      | Applications  | <a href="#">Agate Test</a> | <a href="#">CARA-2017-00007</a>            | Application in Process | 12/21/2017    |          |
|      | Applications  | <a href="#">Agate Test</a> | <a href="#">DVPT-2017-Agate Test-00001</a> | Application in Process | 10/12/2017    |          |

## Initiating an Application

During a grant cycle's application period, the **View Available Proposals** section appears on the **My Home** page. When the Application period is over, this grant opportunity is no longer visible.

### Initiating an Application

To initiate an application:

1. Click on the **My Home** button at the top of the page.
2. Click on the **View Opportunities** button in the **View Available Proposals** section.



3. This will bring up a list of Opportunities to apply for. You can use the **Filter** section to minimize the number of documents to choose from.

4. To initiate an application, select the **Apply Now** button for a specific application.  
**Note:** The *Subgrantee Administrator* and *Subgrantee Project Director*, are the only roles authorized to initiate a document.

**Note:** You can access Request for Proposals (RFP) for a particular grant on ICJI's website.

## Forms Menu

The **Forms Menu** is where the majority of work is completed within the system. This section contains the forms necessary to complete before submitting an application.



## Status Changes

The **Status Changes** section allows a *Subgrantee Administrator* or *Subgrantee Project Director* to change an applications status.



## Management Tools

The **Management Tools** section allows a *Subgrantee Administrator* and/or *Subgrantee Project Director* certain administrative responsibilities such as the ability to add/edit people to a proposal (attach users to an application) and view an application's status history.

1. Click on the **Management Tools** button in the **Management Tools** section.



2. This will bring up a list of management tools to choose from.

## Management Tools



### CREATE FULL PRINT VERSION

Select the link above to create a printable version of the document.



### CREATE FULL BLANK PRINT VERSION

Select the link above to create a blank printable version of the document.



### ADD/EDIT PEOPLE

Select the link above to perform actions such as adding people, changing a security role, or altering people's active dates on this document.



### STATUS HISTORY

Select the link above to view the status history of this document.



### CHECK FOR ERRORS

Select the link above to check the entire document for errors.



### VIEW MODIFICATION HISTORY

Select the link above to view various modifications that people have made to specific pages in the document.



### ATTACHMENT REPOSITORY

Select the link above to view all attachments in this document.

#### Create Full Print Version

Allows user to download a printable version of the document for reading and/or saving.

#### Create Full Blank Print Version

Allows user to download a blank form/template version (PDF).

#### Add/Edit People

Allows users to view, change and assign roles to people associated with a particular document.

#### Status History

Provides a history of the documents (applications) status changes.

#### Check for Errors

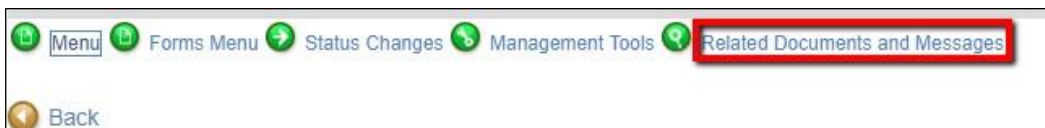
Directs user to the Global Errors page, which will display all of the current errors on a particular document.

#### Attachment Repository

Displays a consolidated list of uploaded attachments for the entire document.

## Related Documents and Messages

The **Related Documents and Messages** section is where documents such as Program Reports, Fiscal Reports, and related messages are found. It is also used to initiate documents like the Program Reports and Fiscal Reports.



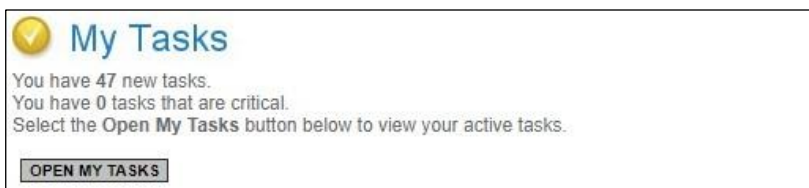
**Related Documents**

Sort search results by:  Filter by Document Type:

| Document Type  | Name   | Current Status            | Period Date / Date Due | Created By   | Last Modified By                                     |
|----------------|--|---------------------------|------------------------|--|--|
| Fiscal Report  | <a href="#">Initiate a/an Fiscal Report 2018</a> |                           |                        |  |  |
| Program Report | <a href="#">Initiate a/an Program Report</a>     |                           |                        |  |  |
| Program Report | <a href="#">COVER-2016-00002-PR1</a>             | Program Report in Process | N/A - N/A<br>N/A       | SubGrantee Admin<br>AgateUser<br>1/9/2018 9:31:29 AM | SubGrantee Admin<br>AgateUser<br>1/9/2018 9:31:29 AM |

## Returning to an In-Progress Application

Following initiation of an application, a new task appears under the **My Tasks** section on the My Home page.



When logging out of IntelliGrants and returning later to continue working on an application:

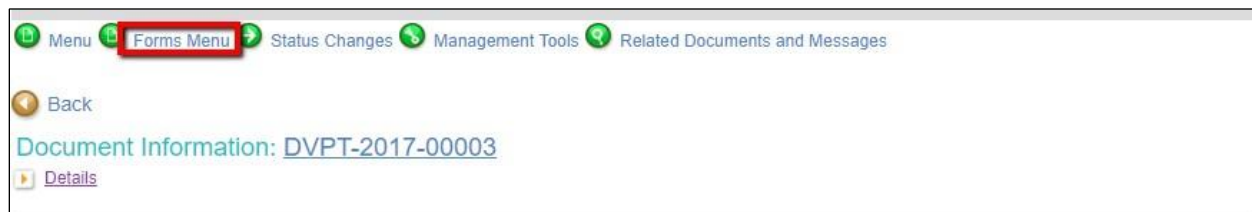
1. Go to top left of the screen, and select the **My Home** button.
2. In the **My Tasks** section, select the **Open My Tasks** button to return to a proposal initiated by the organization.
3. This will bring up a list of active applications. Click on the hyperlink of a specific application listed in the **Name** column.

| Export Results to <span>Screen</span>                              |   | Sort by: <span>-- Select --</span> | <span>GO</span>        |      |
|--|---|------------------------------------|------------------------|------|
| Document Type  | Organization                            | Name                               | Current Status         | Year |
| Congestion Mitigation and Air Quality Improvement Application 2017 | <a href="#">Agate Testing LPDO Inc.</a> | <a href="#">CMAQ-2017--00097</a>   | Application in Process | 2017 |
| Congestion Mitigation and Air Quality Improvement Application 2017 | <a href="#">Agate Testing LPDO Inc.</a> | <a href="#">CMAQ-2017--00098</a>   | Application in Process | 2017 |

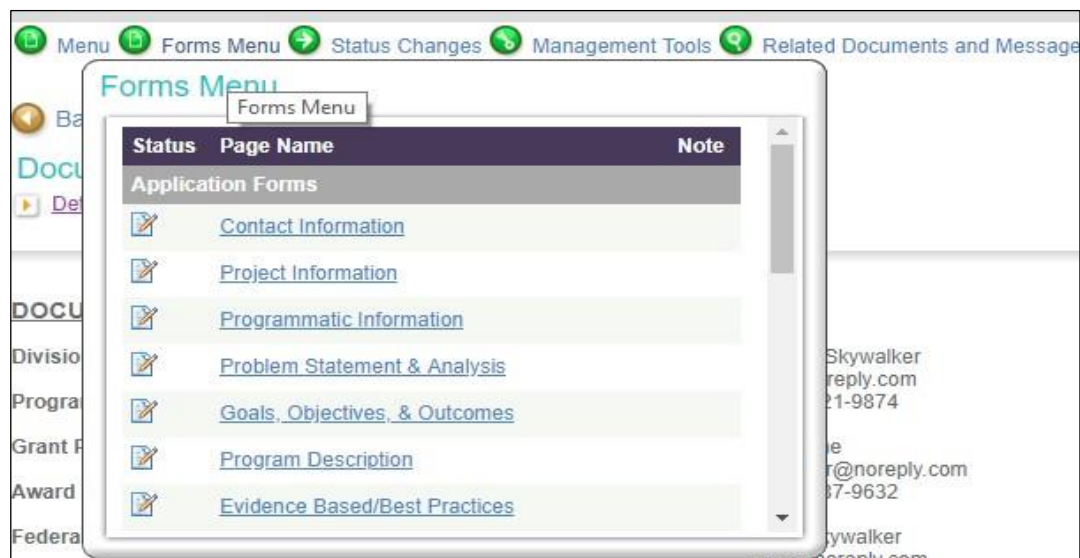
## Forms Completion

On the Forms Menu of a specific document, the forms that must be completed before submitting the document. The following sections go through the information necessary to complete an application.



1. To access a form, select/hover over the **Forms Menu** button.



2. Select the name of the form to view, edit, and complete the form.



## Status

This will display a different icon based on the status of the form. When the icon on the far left of the menu is a stop sign  that indicates the page has an error on it. When the icon is a pencil  that indicates the page has been saved at least once and is being edited or is complete.

## Page Name

Displays the name of the form / hyperlink / PDF Download. Click on this hyperlink to be directed towards the task, action, or data collection form.

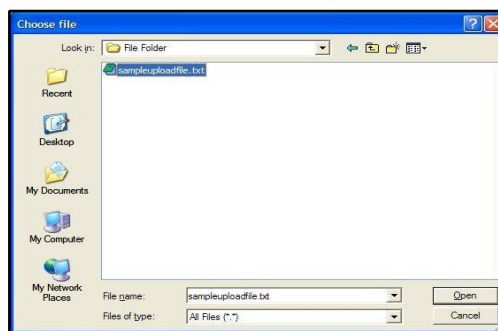
## Uploading Attachments

The following file types are allowed: bmp, doc, docx, gif, jpg, pdf, png, ppt, tif, txt, wpd, xls, xlsx. Please ensure that there are no special characters in the file name.

1. To locate and upload a file, select **Browse**.



2. Go to the folder that contains the file, select the file, and click on the **Open** button.



3. After the page reloads, select the **Save** button.

## Printing (PDF)

On many pages a **Print Version** button is available that automatically creates a printable Portable Document Format (PDF) version. This dynamic PDF can be printed, or saved to a computer.





## Copy and Paste Restrictions

Be cautious when using the copy and paste function of most word processing programs (e.g., MS Word) to transfer text into IntelliGrants form fields or narrative text boxes.

- The IntelliGrants system does not recognize some characters and formatting, such as tables, graphs, photographs, bullets, and some tabs.
- Also, be aware of the different character limits of text boxes—attempting to copy and paste text that is longer than the allotted space returns an error message.
- The character limit is located at the bottom left of a text box.
- To avoid copy/paste errors, first copy and paste the text into Notepad or equivalent program. Notepad has similar formatting requirements to IntelliGrants textboxes.

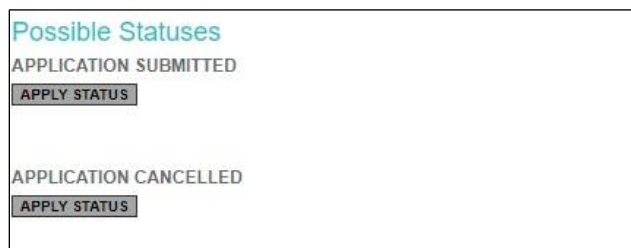
## Submitting an Application

The *Subgrantee Administrator* or *Subgrantee Project Director* are the only roles in the system that are able to submit an application or cancel an application. Once all forms have been completed and no changes need to be made to the application the *Subgrantee Administrator* or *Subgrantee Project Director* can submit an application.

1. Select the **Status Changes** button to see which possible statuses are available.



2. This will bring up a list of possible statuses to choose from.



## Signing the Grant Agreement

Once, an application has been approved by the ICJI Board of Trustees a Grant Agreement will be created by the Grant Manager. This Agreement requires signatures from particular individuals within an agency. The individuals selected as signatories will receive a notification in their **My Task**.

Along with Grant Agreement signatures, the grantee must also select the reporting frequency (quarterly or monthly fiscal/program reports). Once the reporting period has been selected, it must remain consistent throughout the life of the grant.

**GRANT AGREEMENT**

If advance payment of all or a portion of the grant funds is permitted by statute or regulation, and the State agrees to provide such advance payment, advance payment shall be made only upon submission of a proper claim setting out the intended purposes of those funds. After such funds have been expended, Grantee shall provide State with a reconciliation of those expenditures. Otherwise, all payments shall be made thirty five (35) days in arrears in conformance with State fiscal policies and procedures. As required by IC §4-13-2-14.8, all payments will be by the direct deposit by electronic funds transfer to the financial institution designated by the Grantee in writing unless a specific waiver has been obtained from the Indiana Auditor of State.

**Special Conditions**

The Grantee shall file the annual financial report required by IC 5-11-1-4 in accordance with the State Board of Accounts Uniform Compliance Guidelines for Examination of Entities Receiving Financial Assistance From Governmental Sources. The Grantee should use the information in Exhibit D as a guide to complete this annual financial report. Specifically the source of the funds; the formal federal grant program name and CFDA number if applicable; and classification of the funding as fee for service or not is documented here. All grant documentation should be retained and made available to the State Board of Accounts if and when requested. The State agree to complete the information in Exhibit D.

**Guidelines**

The Grantee shall submit to the State written progress reports via the State's electronic grants management system until the completion of the Project. These reports shall be submitted on a monthly or quarterly basis and shall contain such detail of progress or performance on the Project as is requested by the State. The frequency of the reports is to be determined at the onset of the grant and shall maintain consistent throughout the life of the grant. Grantee is further required to report information directly into PMT (Performance Measure Tool) that the federal government supplies. Information must be submitted into PMT quarterly and will include both quantitative (numeric responses) and qualitative (narrative responses). Failure to submit any report in a timely fashion may be considered a material breach, at the discretion on the State.

Please select reporting frequency:\* ☐ Monthly ☐ Quarterly  
 NOTE: Selection applies to both Fiscal and Programmatic Reports. Once selection is made, it cannot be altered for the life of this grant.

|                          |                    |      |
|--------------------------|--------------------|------|
| <input type="checkbox"/> | Project Director   | Date |
| <input type="checkbox"/> | Fiscal Agent       | Date |
| <input type="checkbox"/> | Contact            | Date |
| <input type="checkbox"/> |                    | Date |
| <input type="checkbox"/> | Executive Director | Date |

## User Management

The *Subgrantee Project Director* and *Subgrantee Administrator* are responsible for ensuring that documents are assigned to the correct users. *Subgrantee Staff* may assist the *Subgrantee Project Director/Subgrantee Administrator* with completing required forms. User access can be assigned or removed throughout a project's lifecycle.

### Assigning User Access to Documents

To view the IntelliGrants documents, or to assist with completing forms, a user must be linked to the documents. To add a user to a document:

1. Search for the desired document using the appropriate search tab for the type of document you wish to modify user access, then navigate to the document.
2. Hover over the **Management Tools** button.



3. Then, select the **Add/Edit People** link.



- a. Type the name, or part of the user's name (at least 3 characters), in the **Person Search** field, and click the **Search** button.
- b. From the list of results, select the box in the column next to the desired person.
- c. Select a role for the user along with an appropriate Active Date.
- d. Click the **Save** button to complete adding the user to the document.

Document Information: [COVER-2016-00002](#)

[Details](#)

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**Person Search**

Enter a name or partial name:

---

**People Found**

| Person   | Organization(s)                            | Role         | Active Dates | Assigned By |
|--|--|--------------|--------------|-------------|
| <input type="checkbox"/> Jason AdamsCJI<br><a href="#">Email</a> | INCJI (IntelliGrants Administrator (MAIN)) | -- Select -- | 3/12/2018    |             |

4. Repeat this process to add additional users, if necessary.
5. Return to **Add/Edit People** to confirm that all users have been added correctly.

## Removing User Access to Documents

To remove a user from a document:

1. Navigate to the respective document.
2. Hover mouse over the **Management Tools** button.



3. Then, select the **Add/Edit People** link.



4. Edit the second box **Active Dates** to display an end date. The user will not be able to access the document before a specified start-date (first field) or after a specified end-date (second field).
5. Click on the **SAVE** button.

| <input type="checkbox"/> Person   | Organization(s)                            | Role         | Active Dates  | Assigned By |
|---|--|--------------|---|-------------|
| <input checked="" type="checkbox"/> Jason AdamsCJI<br><a href="#">Email</a> | INCJI (IntelliGrants Administrator (MAIN)) | -- Select -- | 3/12/2018<br><div style="border: 2px solid red; width: 100px; height: 20px;"></div> |             |
| <input type="checkbox"/> Jacob TropfCJI<br><a href="#">Email</a>            | INCJI (IntelliGrants Administrator (MAIN)) | -- Select -- | 3/12/2018<br><div style="border: 2px solid red; width: 100px; height: 20px;"></div> |             |

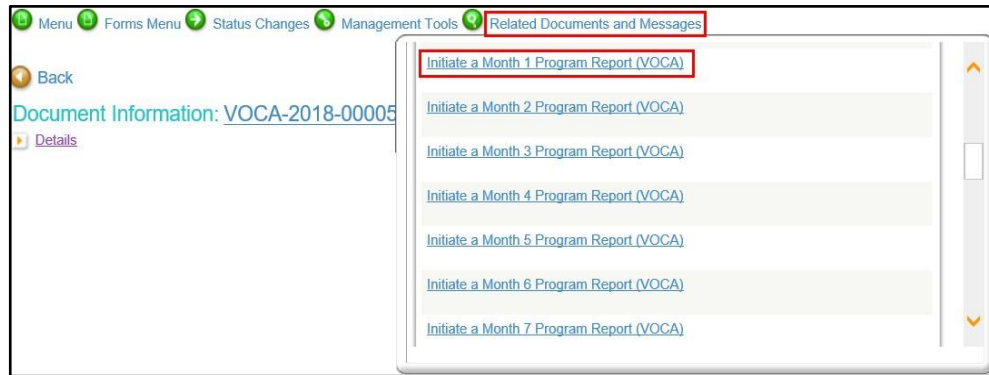
## Programmatic, Fiscal, and Inventory Reports

The *Subgrantee Administrators* and *Subgrantee Project Directors* are responsible for initiating and submitting monthly or quarterly Program and Fiscal Reports. *Subgrantee Staff* may assist the *Subgrantee Project Director/Subgrantee Administrator* with completing required reports but may not submit.

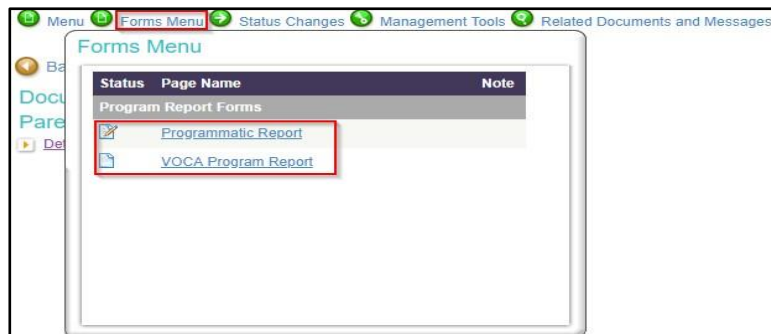
### Programmatic Reports

To initiate a Program Report, the grant MUST be in *Grant Executed* status. The *Subgrantee Administrators/Subgrantee Project Directors* will need to search for the grant using the Applications/Grants search tab, as the grant will not be in the **My Tasks** list.

1. Navigate to an Executed Grant, the *Subgrantee Administrators/Subgrantee Project Directors* will need to click the **Related Documents and Messages** tab to initiate a Program Report.



2. After report initiation, the *Subgrantee Administrator, Subgrantee Project Director, and Subgrantee Staff* will be able to complete all corresponding programmatic report forms under the **Forms Menu** tab.



3. When the form is complete and the Program Report is ready for submission, the Program Report can be submitted by clicking the **Submit** button under the **Status Changes** tab.



## Fiscal Reports

To initiate a Fiscal Report, the grant MUST be in *Grant Executed* status. The *Subgrantee Administrators/Subgrantee Project Directors* will need to search for the grant using the **Applications/Grants** search tab, as the grant will not be in the **My Task** list.

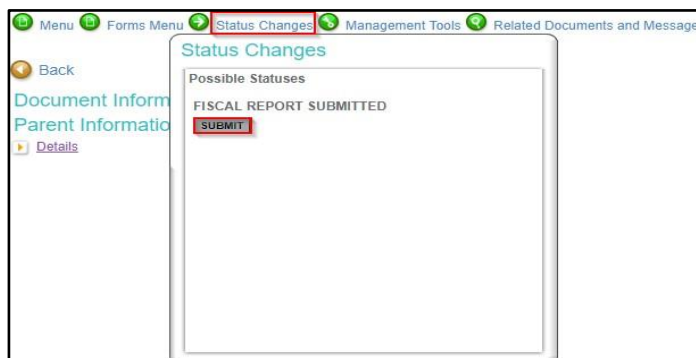
1. Navigate to an Executed Grant, the *Subgrantee Administrators/Subgrantee Project Directors* will need to click the **Related Documents and Messages** tab to initiate a Fiscal Report.



2. After report initiation, the *Subgrantee Administrator, Subgrantee Project Director, and Subgrantee Staff* will be able to complete all corresponding fiscal report forms under the **Forms Menu** tab.



3. When the forms are complete and the Fiscal Report is ready for submission, the Fiscal Report can be submitted by clicking the **Submit** button under the **Status Changes** tab.



## Inventory Report

If requesting reimbursement for equipment valued at \$500 or more per unit, the Inventory Form must be completed. This form can be found within the Fiscal Report Forms section of the **Forms Menu**.



**Note:** All fields within a row are required to be completed for each piece of equipment.

| INVENTORY REPORT   |                  |           |  |                         |                       |              |
|--|------------------|-----------|--|-------------------------|-----------------------|--------------|
| <b>Instructions:</b> <ul style="list-style-type: none"> <li>Use the SAVE button to save information.</li> <li>Save at least every 30 minutes to avoid losing data.</li> <li>To return to your Fiscal Report, click the Forms Menu link above.</li> <li>Item Cost is the price an individual piece of equipment, at the time of original purchase, regardless of the proportion funded with grant dollars.</li> </ul> |                  |           |  |                         |                       |              |
| <b>INDIVIDUAL PURCHASES OF \$500.00 OR MORE</b>  |                  |           |  |                         |                       |              |
| Description of Equipment   | Number/ID Number | Item Cost | % Claimed on Grant                                   | Amount Claimed on Grant | Location of Equipment | Manufacturer |
| Printer  |                  |           | 100.00%  | \$4,992.50              |                       |              |
| <b>Total:</b>  |                  |           |  |                         |                       |              |
| <i>By signing below, I certify that I have reviewed and validated the information in this document. I attest to the accuracy of the information in this document and I certify that it accurately represents the actual costs expended during the reporting period.</i>  |                  |           |  |                         |                       |              |
| <input type="checkbox"/> Subgrantee Administrator  |                  |           | <input type="checkbox"/> Subgrantee Project Director |                         |                       |              |
| Signature:   |                  |           | Signature:   |                         |                       |              |
| Title:   |                  |           | Title:   |                         |                       |              |
| Date Signed:   |                  |           | Date Signed:   |                         |                       |              |

Electronic signatures by a *Subgrantee Administrator* and a *Subgrantee Project Director* are required on the Inventory Report in order to submit the Fiscal Report.



## Program Modification Request

The *Subgrantee Administrator*, *Subgrantee Project Director*, and *Subgrantee Staff* are able to initiate a Program Modification Request. The Grant MUST be in *Grant Executed* status to start the Program Modification Request process.

### Requesting a Program Modification

The *Subgrantee Administrator*, *Subgrantee Project Director*, or *Subgrantee Staff* will need to search for the grant using the **Applications/Grants** search tab, as the grant will not be in the **My Task** list.

**My Applications/Grants**

Use the search functionality below to find a specific Application/Grant.

Search Applications/Grants

Application/Grant Types: -- Select --

Application/Grant Name:

Status: Applications: Grant Executed

Year:

SEARCH CLEAR

Export Results to: Screen Sort by: -- Select -- GO

Number of Results 1

| Document Type                                  | Organization | Name            | Current Status | Year |
|--|--------------|-----------------|----------------|------|
| 2018 Victims of Crime Act Formula Grant (VOCA) | Agate        | VOCA-2018-00005 | Grant Executed | 2018 |

- Once the grant has been selected, the *Subgrantee Administrator*, *Subgrantee Project Director*, or *Subgrantee Staff* will need to click the **Apply Status** ("Program Modification Request in Process") button under the **Status Changes** link.

Menu Forms Menu Status Changes Management Tools Related Documents and Messages

Back

Document Information

Details

**Status Changes**

Possible Statuses

PERSONNEL NAME CHANGE REQUESTED

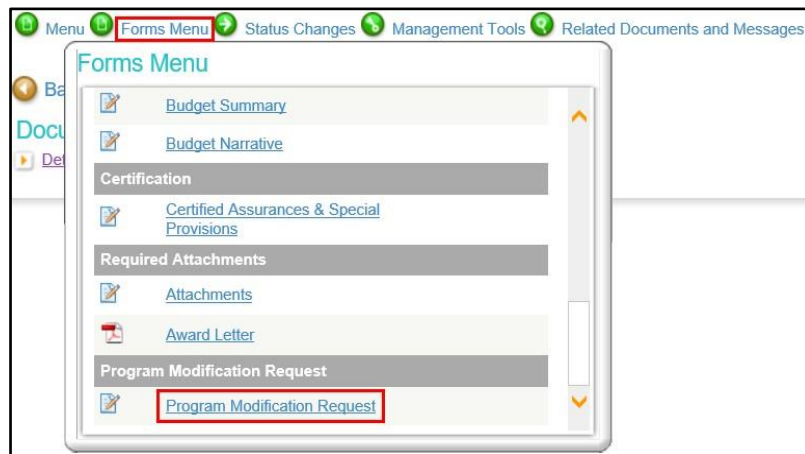
APPLY STATUS

PROGRAM MODIFICATION REQUEST IN PROCESS

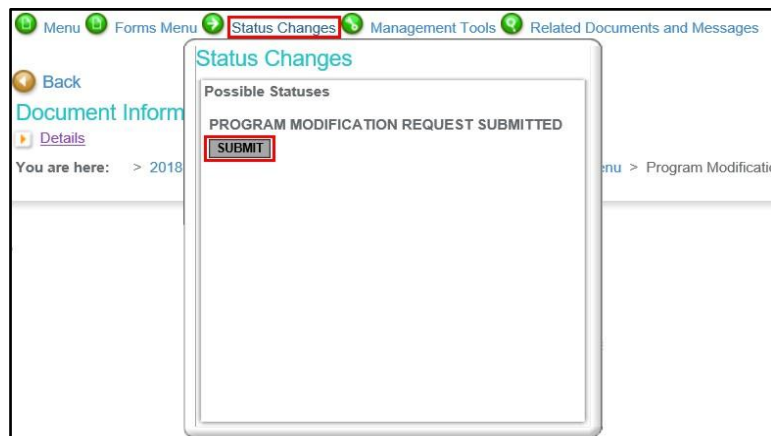
APPLY STATUS

- After changing the status of the document, the Program Modification Request form will need to be completed. This form is located under the **Forms Menu**.





3. Upon completion of the Program Modification Request form, click the "Submit" button under the Status Change link.



4. Upon approval of the Program Modification Request, the appropriate budget and/or programmatic pages can be modified to reflect the modification. After completing the modifications, click the **Apply Status** button under the **Status Changes** link.

## Personnel Name Change

The *Subgrantee Administrator*, *Subgrantee Project Director*, and *Subgrantee Staff* are able to initiate a Personnel Name Change Request. The Grant MUST be in *Grant Executed* status to start the Personnel Name Change Request process. A Personnel Name Change Request is completed only when there is no change in funding as a result in hiring of new staff due to employee turnover.

### Requesting a Personnel Name Change

The *Subgrantee Administrator*, *Subgrantee Project Director*, or *Subgrantee Staff* will need to search for the grant using the **Applications/Grants** search tab, as the grant will not be in the **My Tasks** list.

**My Applications/Grants**  
Use the search functionality below to find a specific Application/Grant.

Search Applications/Grants

Application/Grant Types: -- Select --

Application/Grant Name:

Status: Applications: Grant Executed

Year:

SEARCH CLEAR

Export Results to: Screen Sort by: -- Select -- GO

Number of Results: 1

| Document Type                                  | Organization | Name            | Current Status | Year |
|--|--------------|-----------------|----------------|------|
| 2018 Victims of Crime Act Formula Grant (VOCA) | Agate        | VOCA-2018-00005 | Grant Executed | 2018 |

- Once the grant has been selected, *Subgrantee Administrator*, *Subgrantee Project Director*, or *Subgrantee Staff* must click the Apply Status button under the Status Changes link.

Menu Forms Menu Status Changes Management Tools Related Documents and Messages

Back Document Information Details

**Status Changes**

Possible Statuses

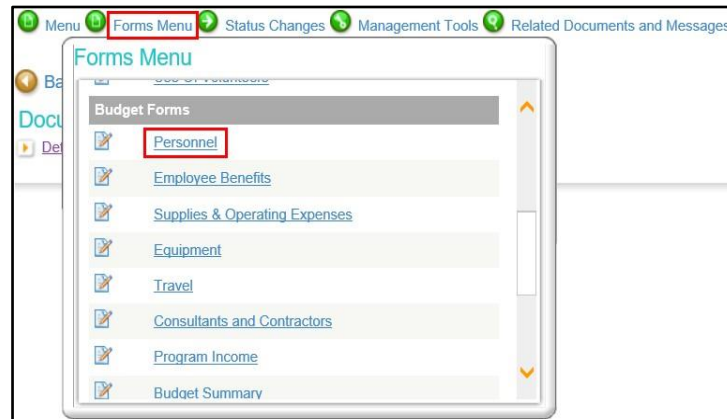
PERSONNEL NAME CHANGE REQUESTED

APPLY STATUS

PROGRAM MODIFICATION REQUEST IN PROCESS

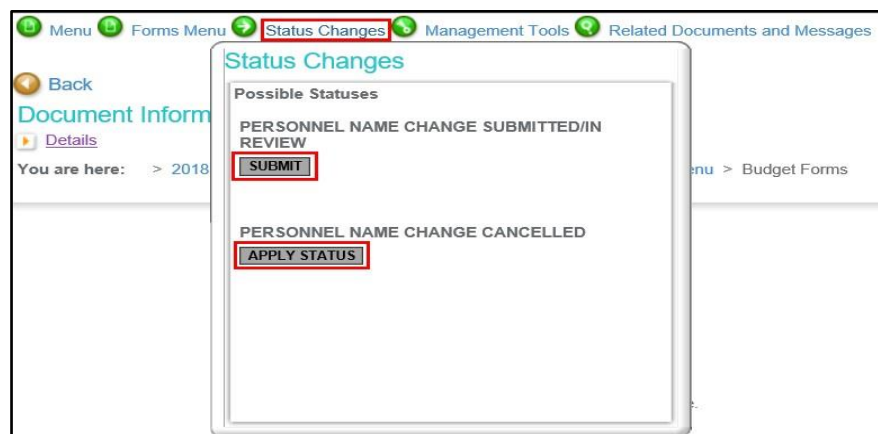
APPLY STATUS

- After changing the status of the document, the name fields on the Personnel form can be edited. This form is located under the **Forms Menu**.



3. After updating the Personnel form, click the **Submit** button OR *Personnel Name Change Cancelled* by selecting the **Apply Status** button.

**Note:** By cancelling the name change, the changes will be disposed of.



After submission, your request will go to your ICJI Program/Grant Manager for review.