IGX

MASSWORKS GRANTEE USER MANUAL

Contents

Introduction **3**
IGX Overview 3
Current IGX Contact Information 3
System Requirements **4**
Internet Connection 4
Internet Access 4
Enabling Cookies 4
Multiple Browser Windows 4
Adobe Acrobat DC 4
System Login Page **5**
URL 5
IGX Portal Home Login Page Sections 5
Welcome/Announcements 5
IGX Portal Login Section 5
Logging in to the IGX Portal 5
Trouble Shooting Issues Logging in to the IGX Portal 6
Person Information **11**
Profile 12
Organizations 13
Home **14**
Tabs 14
Home 14
Administration 14
Searches 14
Icons 15
Dashboard 15
My Tasks 15
My Opportunities 16
Grant Opportunities **17**
Starting a Grant Opportunity 17
Working on a Grant Opportunity 17
The Document Landing Page 17
Grant Opportunity Forms 18
Forms 18
Tools 20
Status Options 24
Related Documents 26
Administration **27**

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Organization & Person 27
Person Search 27
Searches 29
Grants Applications 29
Compliance Reviews 30
Activity Reports 30
Invoices 31
Assistance Requests 31
Organization Details 32

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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 drill down through new reporting panels for funding account information, program budgets, and even view staff performance information.

- **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	

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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 insure 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://eohed.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

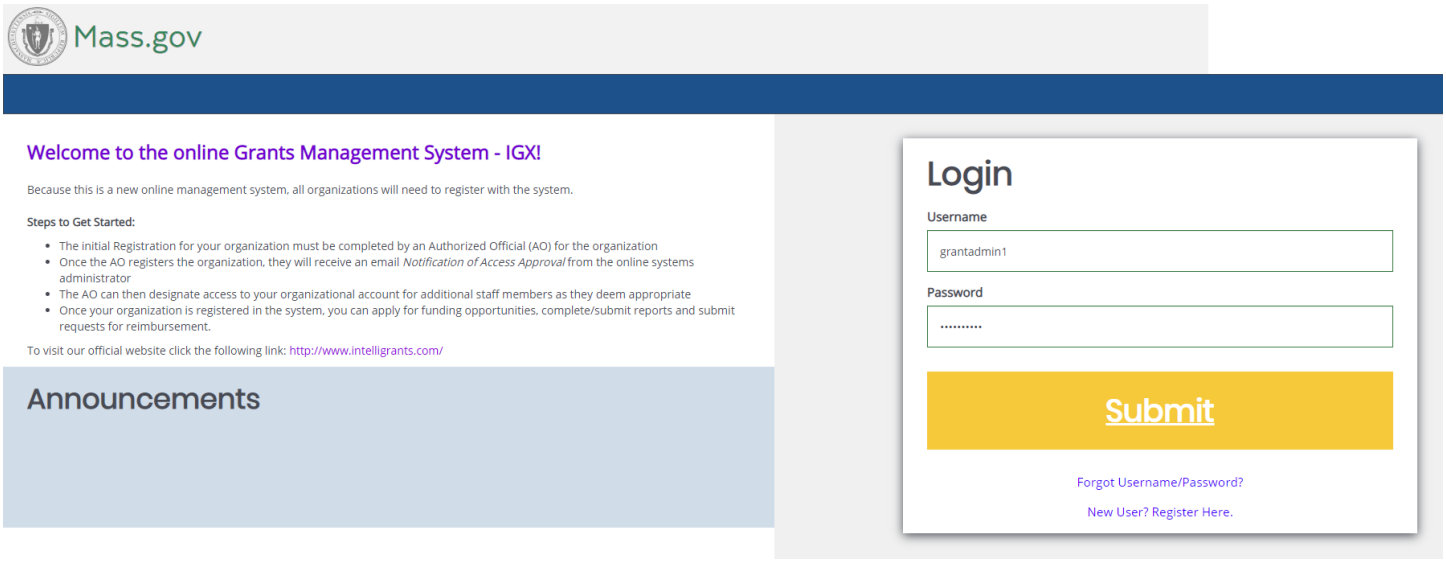

Figure 1 The Login Page

The IGX portal login page is organized into **Public Reports**, **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 **User Name** 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 error messages being generated by the system.

Logging in to the IGX Portal

User Name

The user name 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.

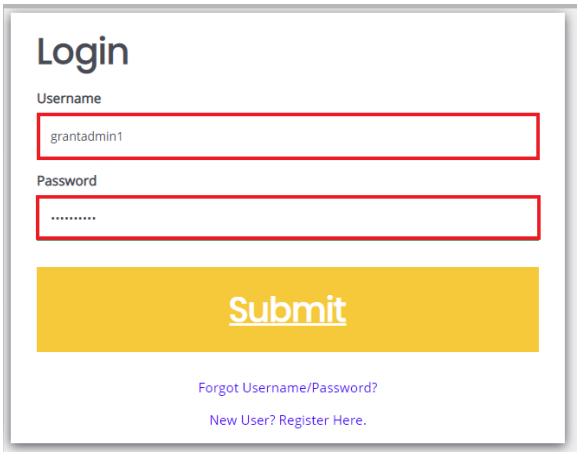

Figure 2 The Username and Password fields

Trouble Shooting Issues Logging in to the IGX Portal

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.

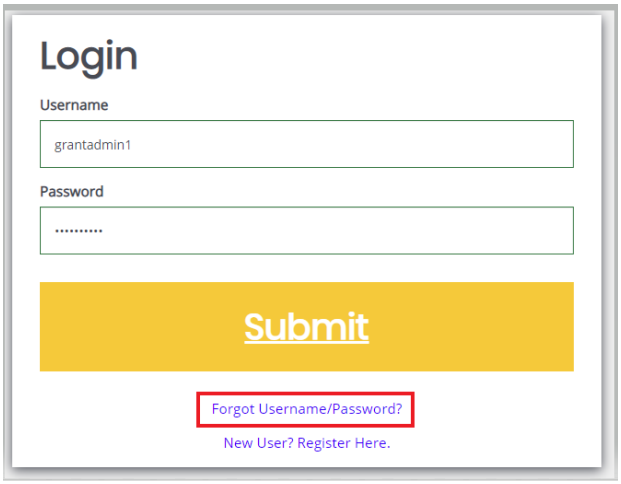

Figure 3 The Forgot Username/Password link

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

Figure 4 The Forgot Password link

3) Enter the email address and click on the ***Email*** button. An email will be sent to that email address with the user's username.

4) The user can follow the instructions in the ***"Forgot Password"*** section to allow them to log into the system.

"Locked Out"

Once a user has exceeded 3 login attempts for the portal, they are "locked out". The user may use the ***Forgot Password*** link to request a temporary password at any point. Instructions for using the "Forgot Password" link are provided below.

Forgot Password

The IGX portal allows the user to request a temporary password be generated and sent to their email address. To do so, complete the following steps:

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

Figure 5 The Forgot Password menu

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 error messages being generated by the system.

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.

Figure 6 The Password and Confirm Password fields

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? Register Here*** link.

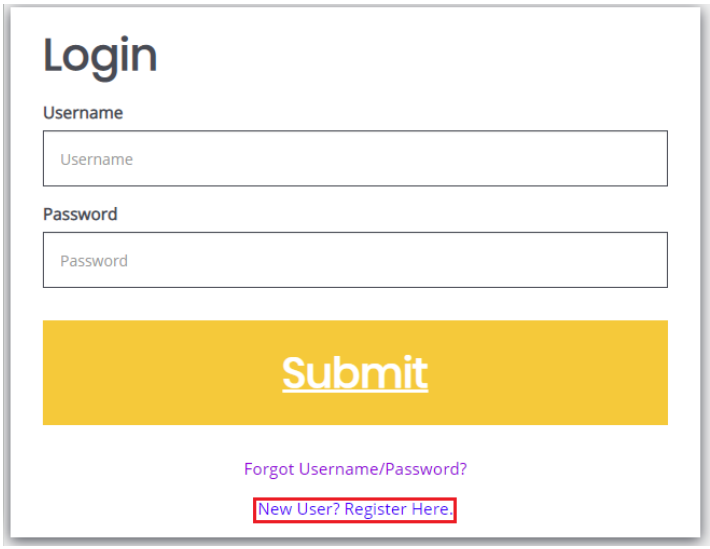

Figure 7 The New User? Register Here! link

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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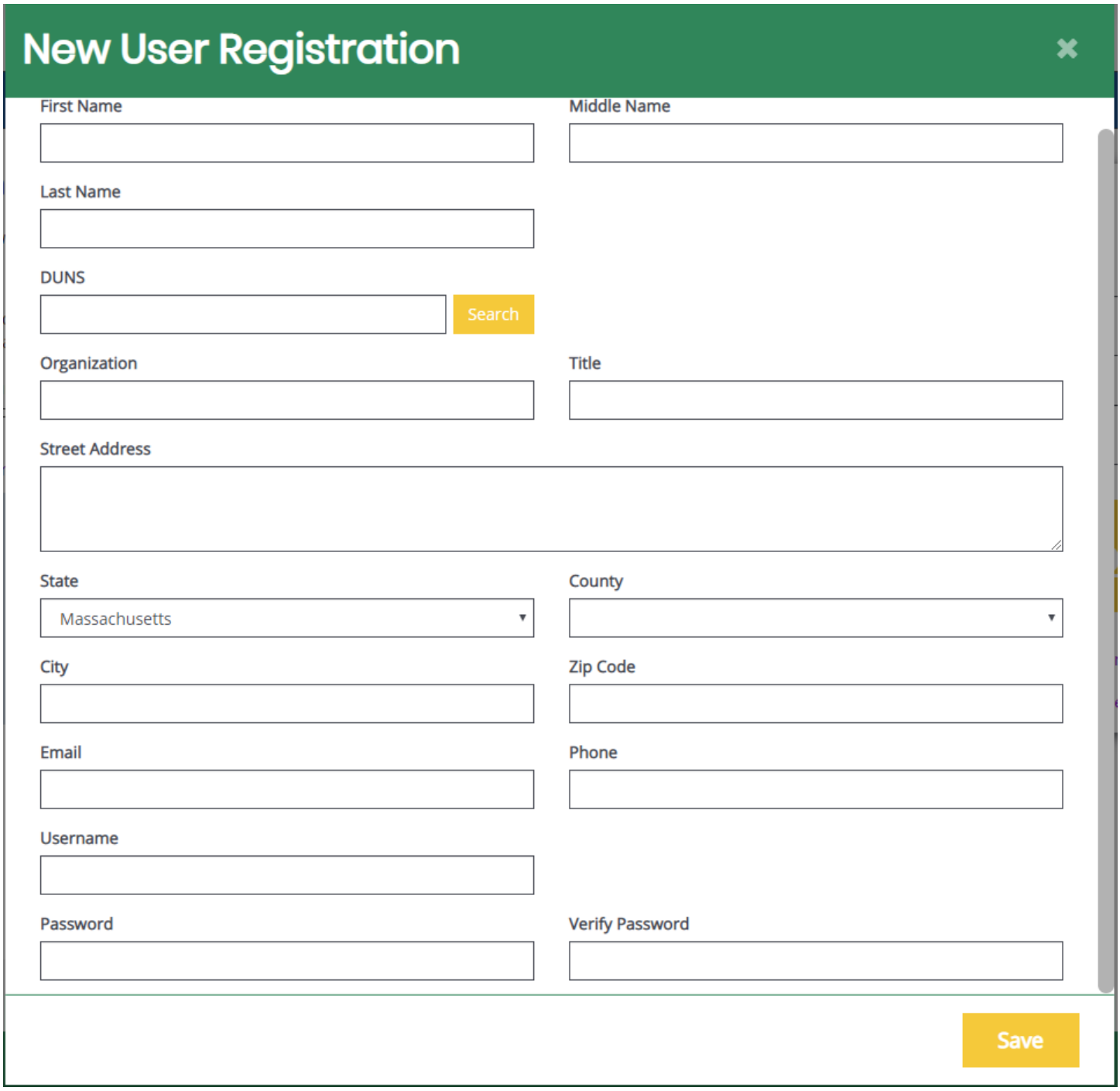

Figure 8 The New User Registration form

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.
DUNS (Required) – the DUNS number for the organization the user is registering with. Enter in the DUNS number and click ***Search*** to locate the DUNS number for that organization.

Organization (Required) – the name of the organization the registering user wants to register under.
Title – the position title of the registering user.
Street Address (Required) – the street address of the organization 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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Person Information

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

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Profile

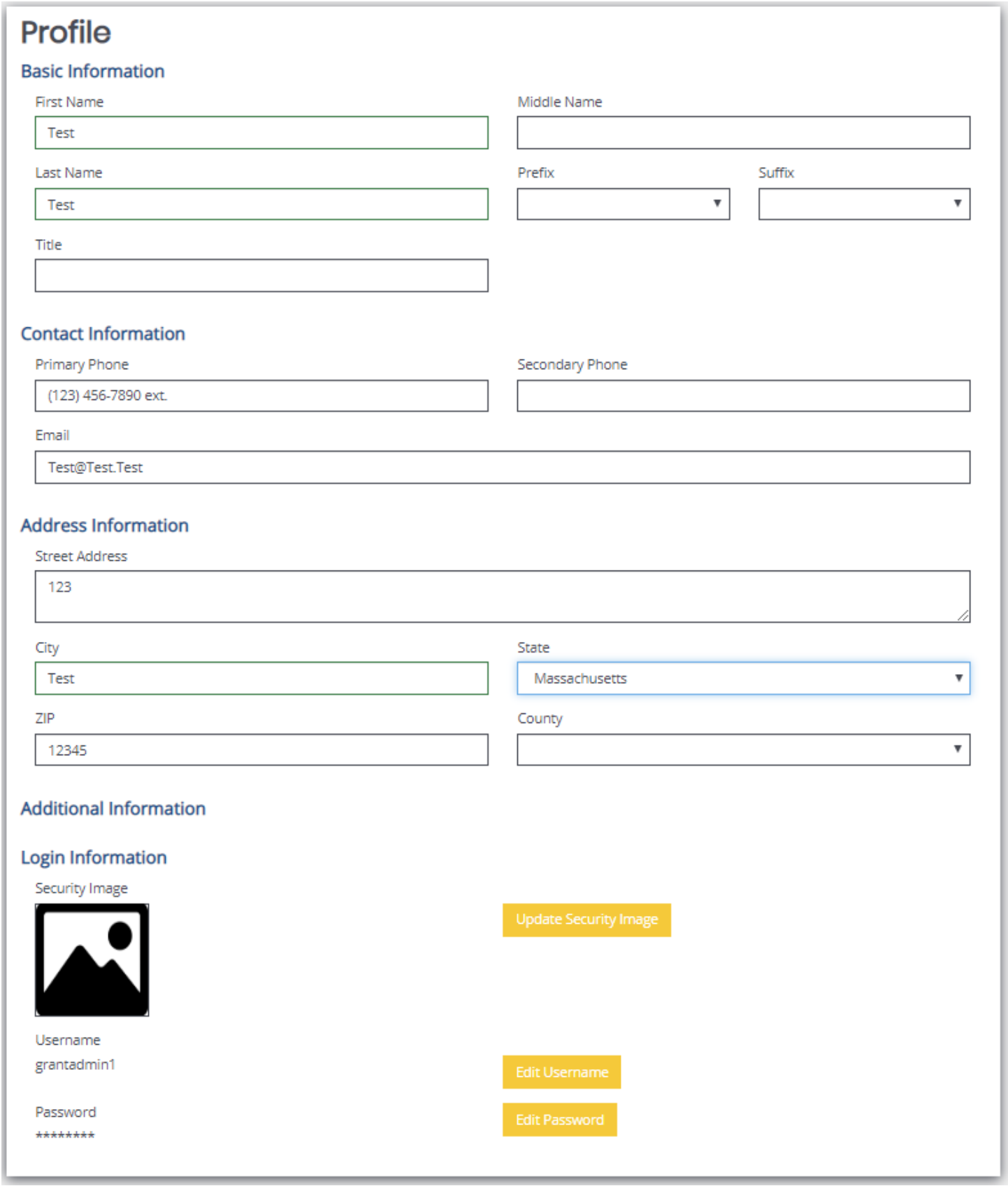


Figure 9 The Profile page

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.
Primary Phone – the primary phone number for the individual.
Secondary Phone – the optional secondary phone number for the individual.
Email – the email address of the individual.

Address Information Legend

Street Address – the street address for the individual.
City – the city the individual's street address is in.
State – the dropdown menu of the state the individual's street address is in.
Zip – the zip code the individual's street address is in.
County – the dropdown menu of the county the individual's street address is in.

Additional Information Legend

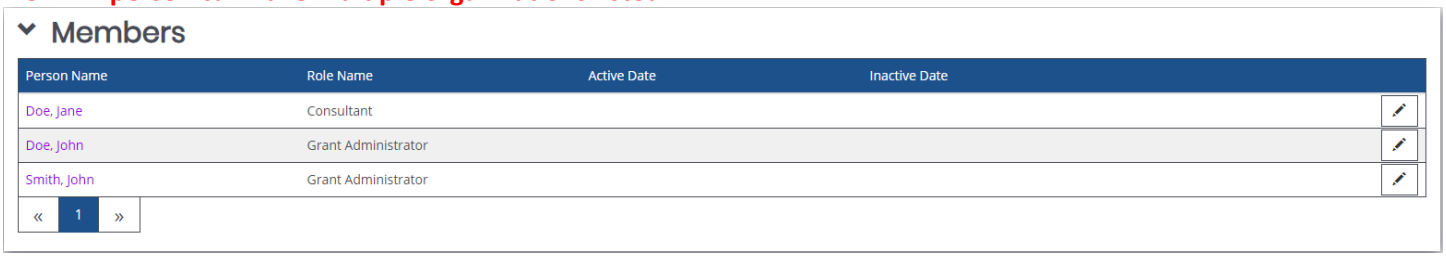
Security Image – an optional security image to implement as an additional security measure.

Username – a label containing the username of the individual and a button that allows the individual to update the username.

Password – a label containing the current password of the individual and a button that allows the individual 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.



Home

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

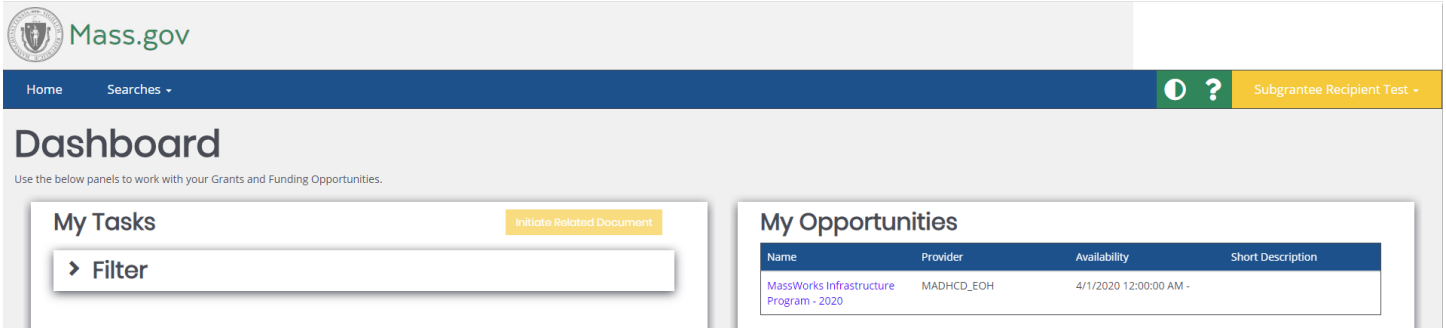


Figure 10 The Home Dashboard

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 access administrative functions for that organization. The user can access this link from anywhere in the system.

Menu Options

- Organization & Person

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

- Grants Applications
- Compliance Reviews
- Activity Reports
- Invoices
- Assistance Requests
- Organization Details

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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.

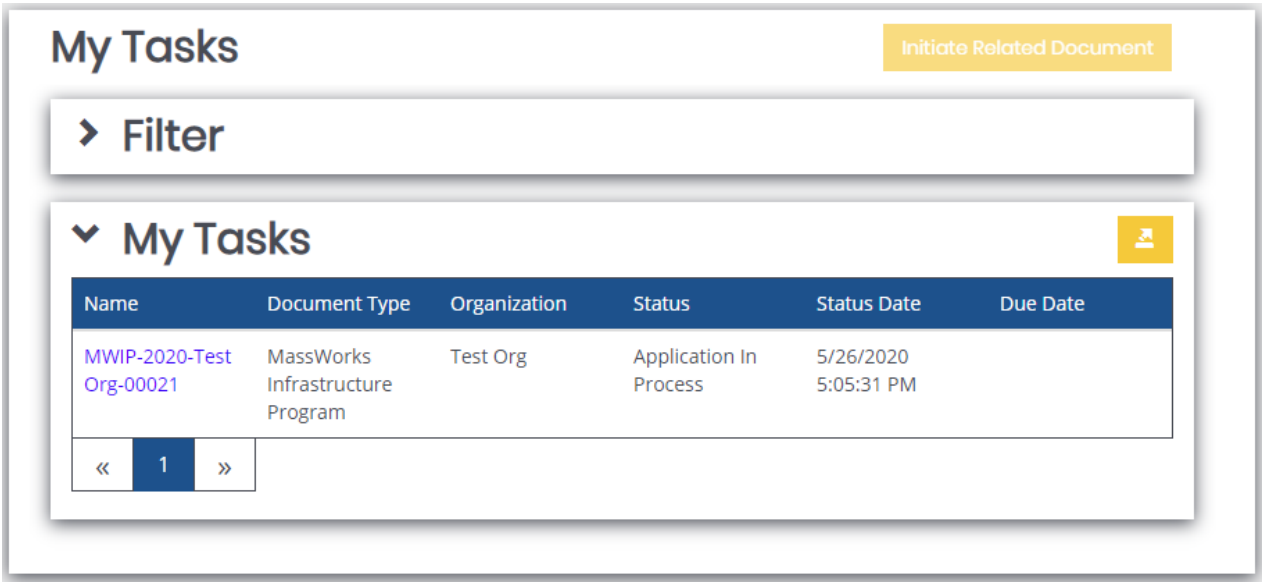

Figure 11 The My Tasks Area

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.

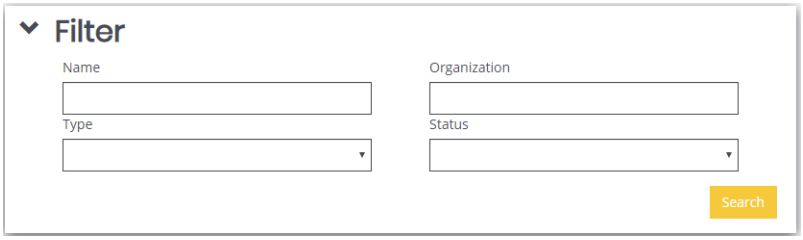

Figure 12 The My Tasks Filter screen

My Opportunities

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

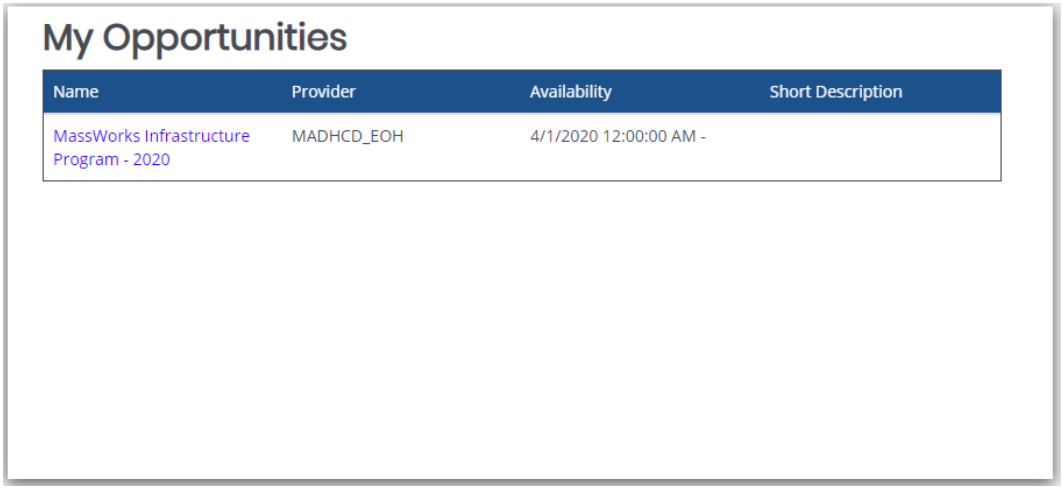

Figure 13 The My Opportunities screen

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Grant Opportunities

Starting a Grant Opportunity

To start a grant opportunity, please follow these instructions:

1) Click on the grant opportunity name in the **Name** column. This brings up a menu with more information and the **Agree** or **Decline** buttons.

Figure 14 The Grant Opportunity screen

2) Click on the ***Agree*** button.

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.

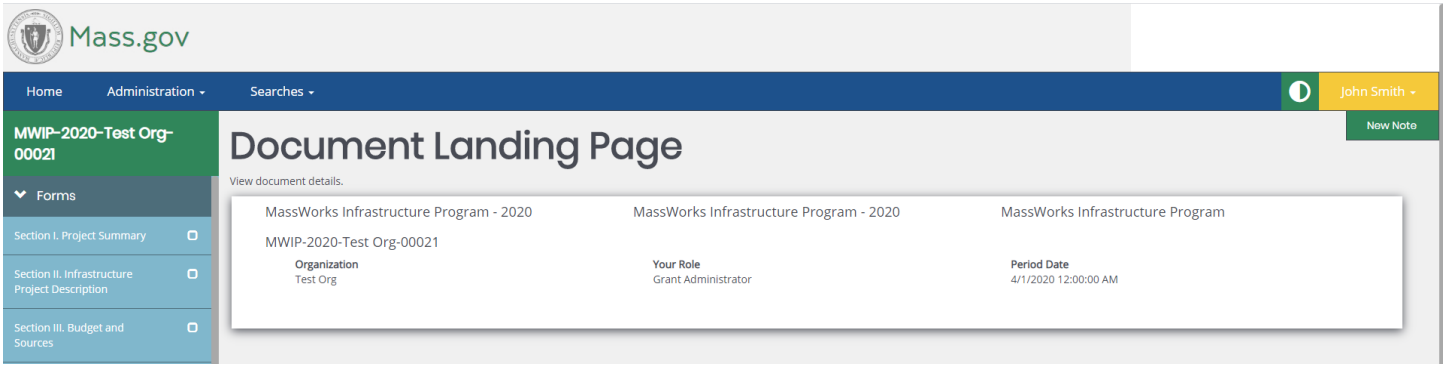

Figure 15 The Application Document Landing Page screen

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.

Figure 16 The Arrow Menu Options screen

Legend

Forms – the list of forms. Usually forms without sections are listed first, then the form list is broken in to 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, with the first section visible being the default form location.

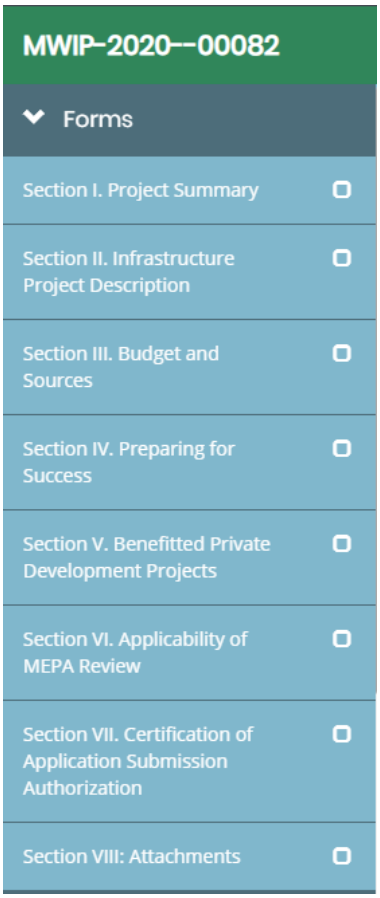

Figure 17 The Forms Menu screen

Clicking on a form link in any section will bring up that form for the user to fill in.

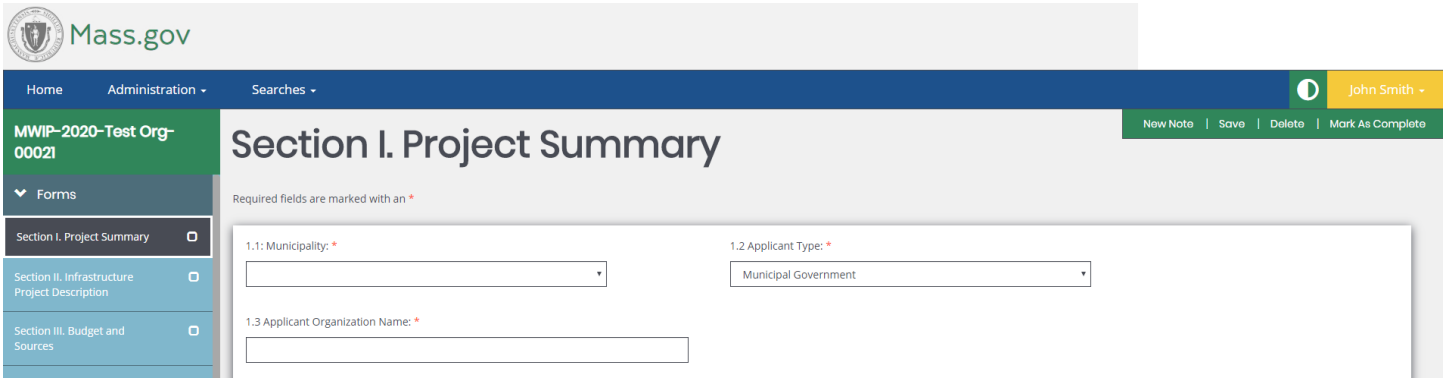

Figure 18 The Project Milestone Schedule Form example

Form Options

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

Figure 19 The Function buttons

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.

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

Mark as Complete – allows the user to mark application as complete and move to the next process step.

Tools

The **Tools** section contains a list of customized tools available to the user depending on the role assigned to the user.

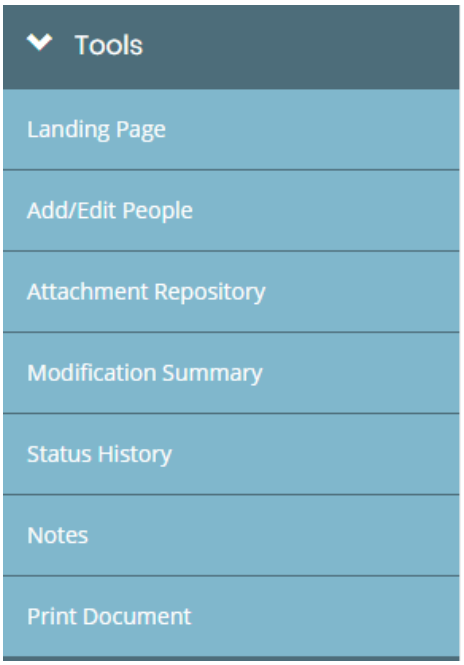

Figure 20 The Tools Menu list

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.

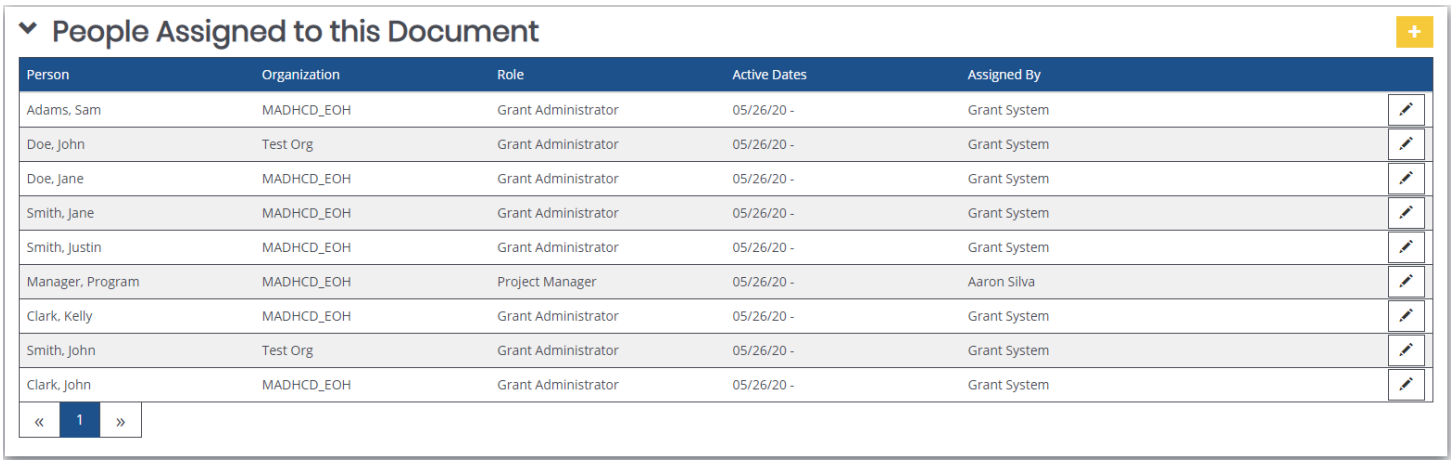

Figure 21 The Add/Edit People menu

Adding/Assigning People to the Document

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) Select the **Person** and/or **Role** options from the drop-down menus and click the ***Search*** button.
3) Select a Document Role and add an Active Date for specific individual(s) and click the ***Save*** button.

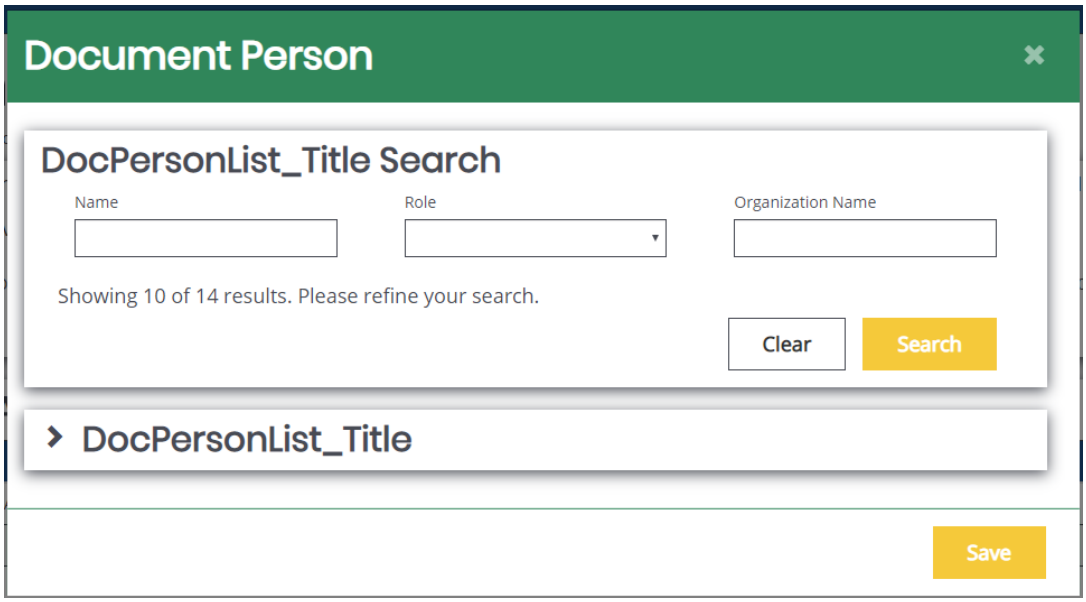

Figure 22 The Document Person screen

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) Select a role from the **Role** drop-down list and click the ***Save*** button.
   Optional: Update the Active Date field.

Attachment Repository

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

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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.

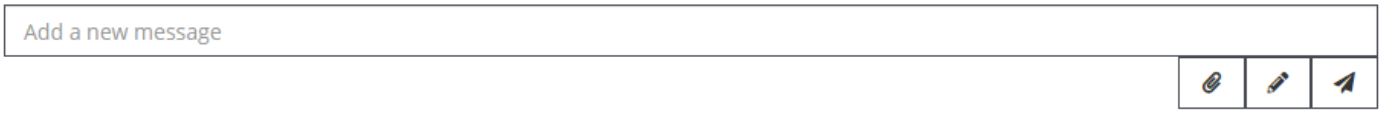

Figure 23 The Notes tool

Adding a New Note

Please use these instructions to create a note.

1) Click on the ***New Note*** button.
2) Fill in the field.
3) Click on the ***Paperclip*** icon to add a note (optional).
4) Click on the ***Paper Airplane*** icon to SAVE the note.

Additional Fields

Icon	Name	Description
	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.

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Figure 24 The Notes 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** and **Delete** tool buttons.

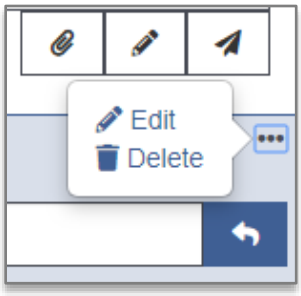

Figure 25 The Edit and Delete icons

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

Figure 26 The Note Formatting screen

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.

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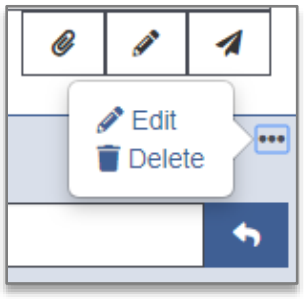

Figure 27 The Edit and Delete icons

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.

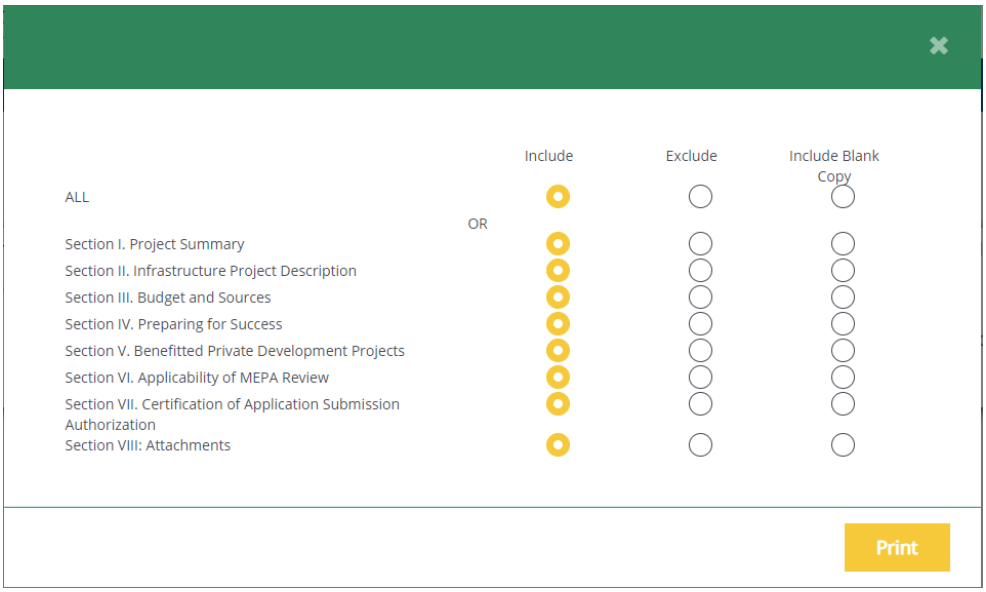

Figure 28 The Print Form Options screen

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.

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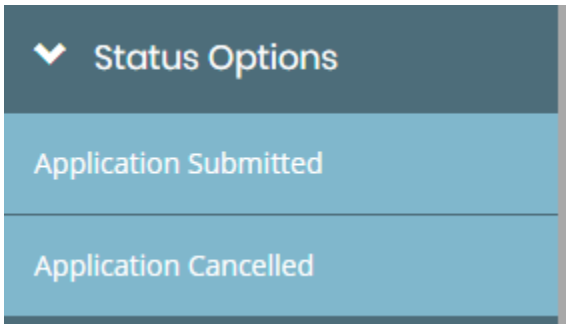

Figure 29 The Status Options screen

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 Report

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 report link in the **Related Documents** section.
4) Click on the report link in the 2nd column. This will bring up the **Document Landing Page** for the report.

Starting a Report

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

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Administration

The **Administration** tab is organized to show dropdown selections for the ***Organization & Person*** section.

Organization & Person

When a user hovers over the **Organization & Person** text the **Organization Search** tool is available.

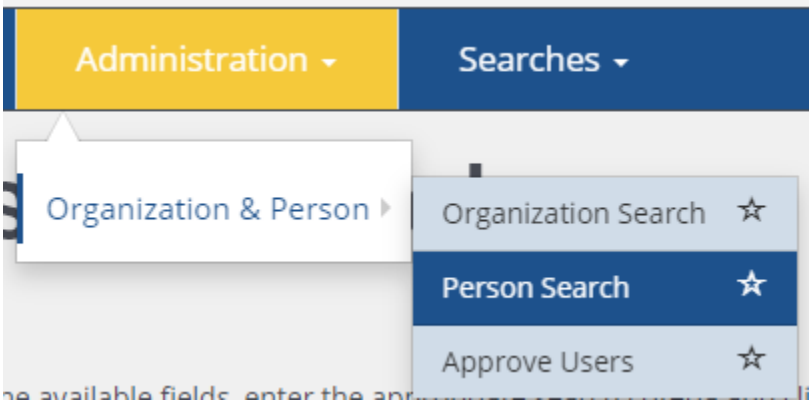

Figure 30 The Person Search menu

Person Search

The **Person Search** tool is useful for viewing information about users in the IGX portal.

To locate a person in the IGX portal, please follow these instructions:

1) Go to **Administration → Organization & Person → Person Search.** OPTIONAL: Enter data in the **Persons** search fields.

2) Click the ***Search*** button and the search results pull up a list of users.

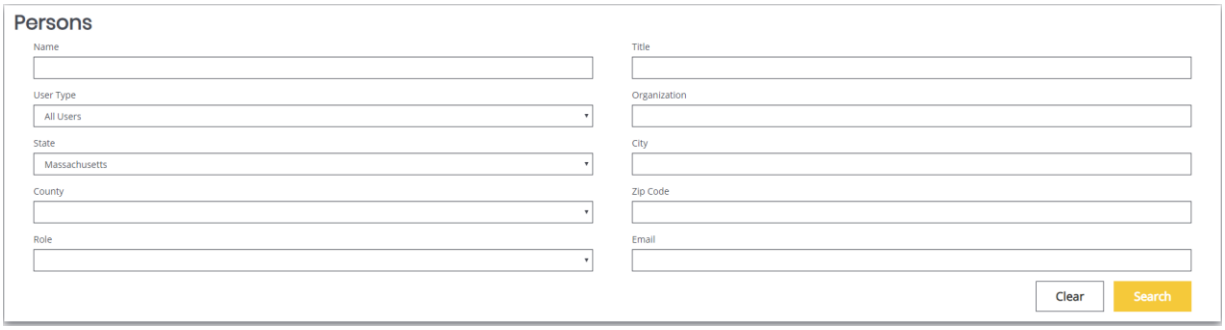

Figure 31 The Persons Person Search form

Legend

Name– a text field to enter the name (or part of the name) of the user.
Title – a text field to enter the title (or part of the title) of the user.
User Type – a drop-down list of user types.
Organization – a text field to enter the name (or part of the name) of the organization.
City – a text field to enter the name (or part of the name) of the city.
State (Required) – the state drop-down selection for the state of the user's organization.
County (Required) – the county drop-down selection for the county of the user's organization.

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Zip Code (Required) – the zip of the user's organization.
Role – a drop-down menu to select a role for the user.
Email (Required) – the email address of the user.

NOTE: This list can be exported to an excel spreadsheet ready for download using the *Export to Excel* button.

Organization Search

The **Organization Search** tool is useful for viewing information about users in the IGX portal.

To locate a person in the IGX portal, please follow these instructions:

1) Go to **Administration → Organization & Person → Organization Search.** OPTIONAL: Enter data in the **Organization** search fields.

2) Click the ***Search*** button and the search results pull up a list of users.

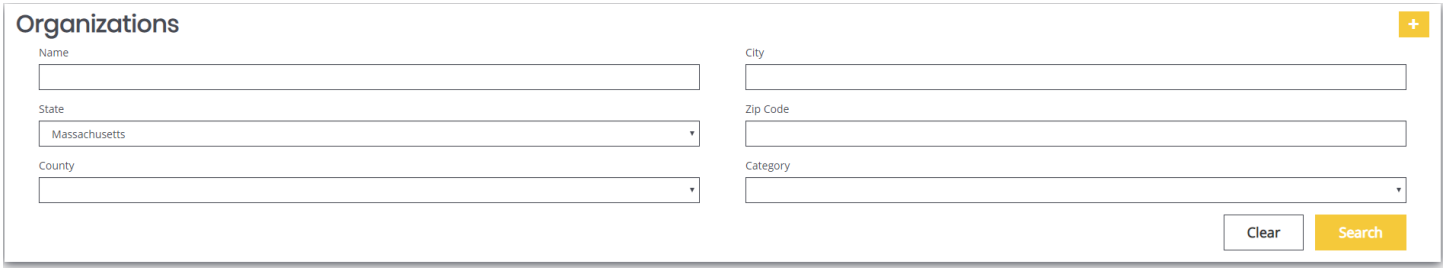

Figure 32 The Organization Person Search form

Legend

Name– a text field to enter the name (or part of the name) of the user.
City – a text field to enter the name (or part of the name) of the city.
State (Required) – the state drop-down selection for the state of the user's organization.
Zip Code (Required) – the zip of the user's organization.
County (Required) – the county drop-down selection for the county of the user's organization.

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.

Grants Applications

To use this search tab, please follow these instructions:

1) Go to **Searches → Grants 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.

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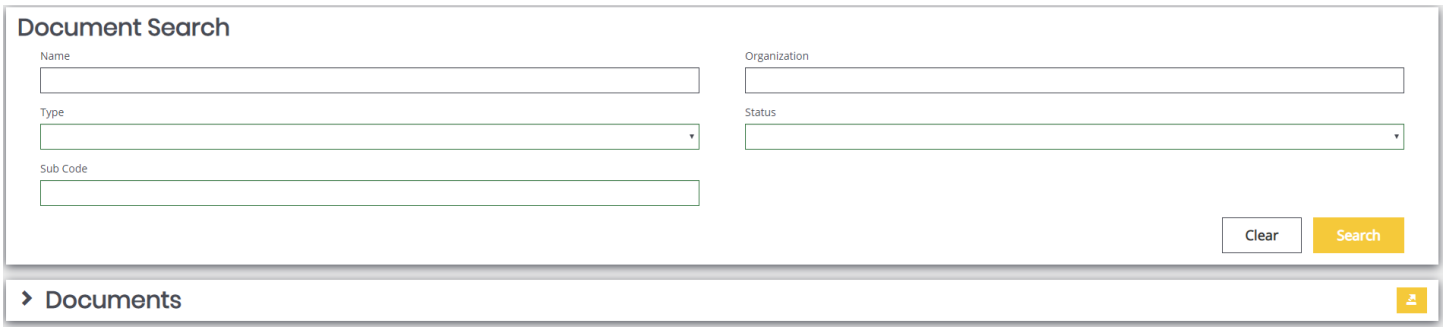

Figure 32 The Grants Applications Search Tab screen

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.

Compliance Reviews

To use this search tab, please follow these instructions:

1) Go to **Searches → Compliance Reviews**.
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.

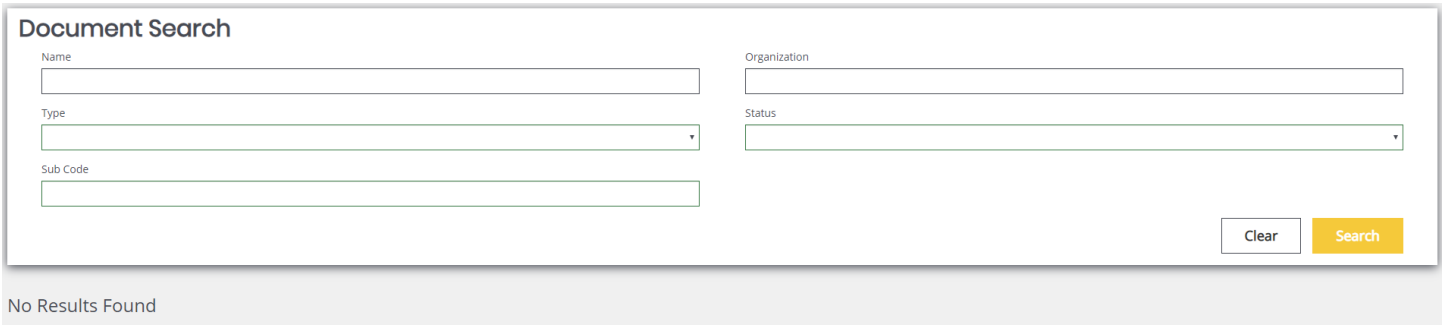

Figure 33 The Compliance Review Search Results (No Results Found) screen

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.

Activity Reports

To use this search tab, please follow these instructions:

1) Go to **Searches → Activity Reports**.
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.

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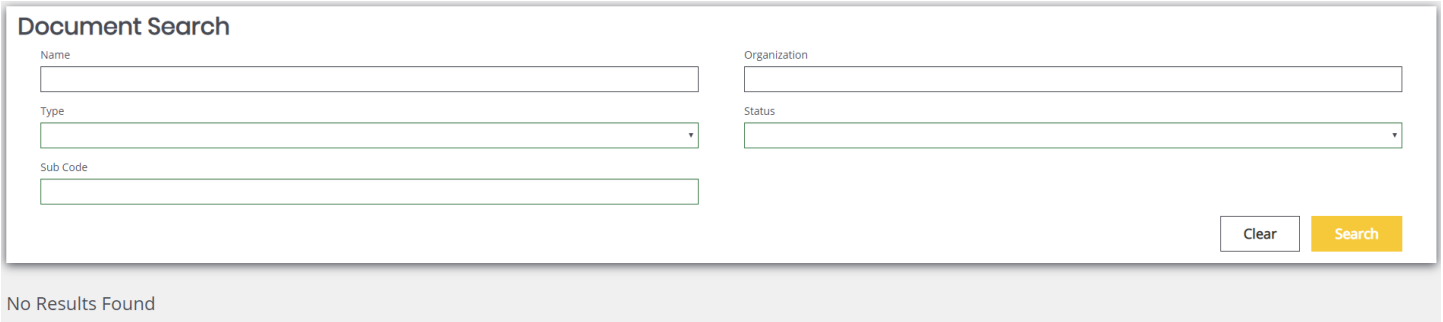

Figure 34 The Compliance Review Search Results (No Results Found) screen

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.

Invoices

To use this search tab, please follow these instructions:

1) Go to **Searches** → **Invoices**.
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.

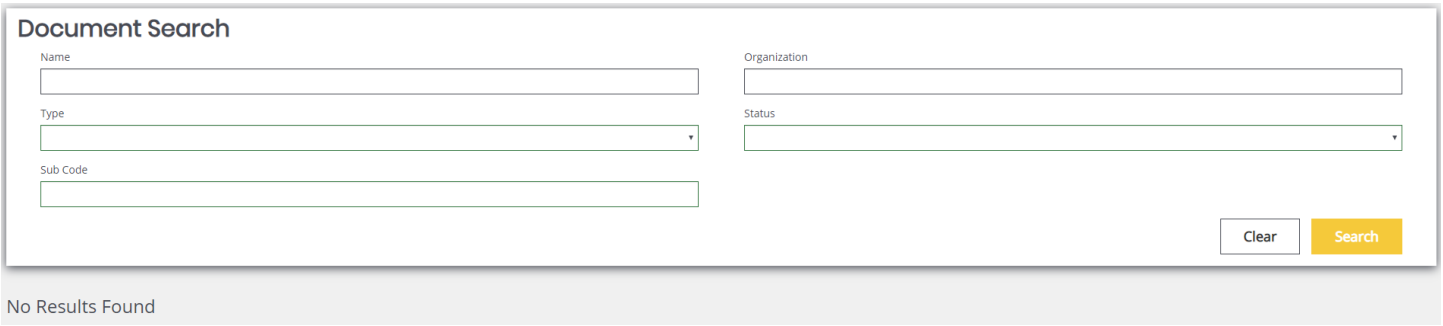

Figure 35 The Compliance Review Search Results (No Results Found) screen

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.

Assistance Requests

To use this search tab, please follow these instructions:

1) Go to **Searches** → **Application/Grant**.
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.

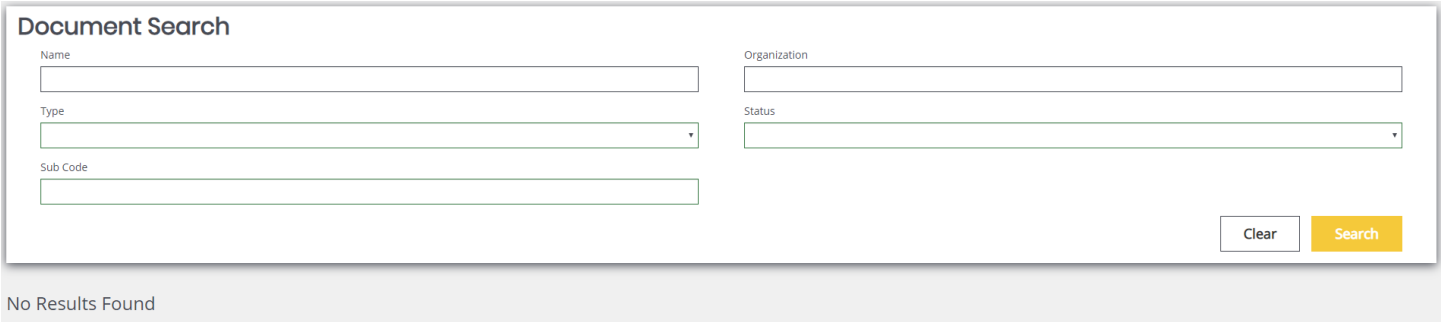

Figure 36 The Compliance Review Search Results (No Results Found) screen

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.

Organization Details

To use this search tab, please follow these instructions:

1) Go to **Searches** → **Organization Details**.
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.

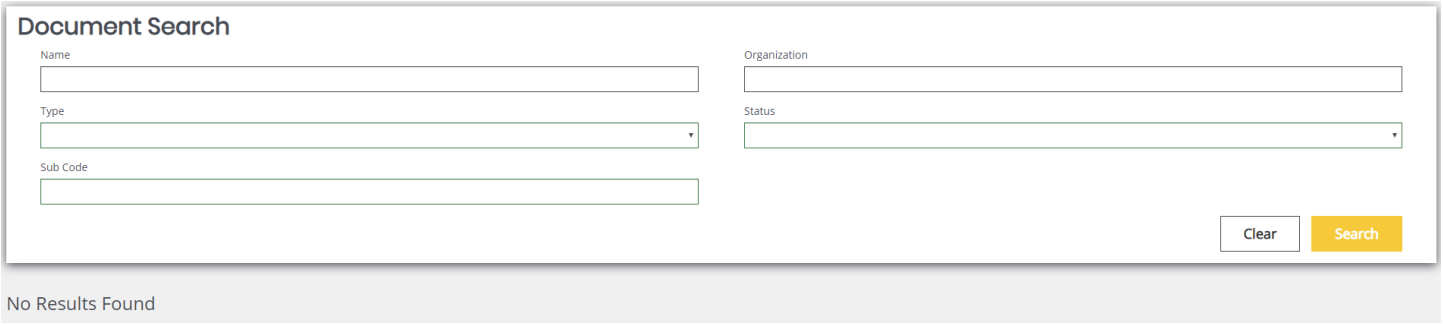

Figure 37 The Compliance Review Search Results (No Results Found) screen

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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