New Jersey Department of Labor and Workforce Development IGX

USER MANUAL

This user guide gives a general overview of NJDOL IGX navigation. IGX is used by NJDOL agency grantee(s) to apply for, manage, submit documents, track, and amend grant projects.

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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 Documents 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 up to date, the following message will display:

Enabling Cookies

The web browser must enable cookies for this site to access this portal.

Multiple Browser Windows

Do not open multiple windows or browser tabs while filling out a document, as this can cause issues with browser cookies resulting in either being kicked out of the system or work being lost.

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

If utilizing Microsoft Edge, click on **File → New Session** for each browser session. Other internet browsers will require third party add-ons to manage multiple browser sessions.

Adobe Acrobat DC

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

Grantee User Types

There are four (4) types of grantee security roles:

- Agency Administrator
- Agency Staff
- Authorized Official
- Partner Agency Staff

These roles have different security levels needed to access **My Documents.**

The Four security roles are summarized below:

Authorizing Official

- Views/Check statuses of and/or initiates Applications, Requests for Funds, and Progress Reports.
- Downloads attachments from Applications, Requests for Funds, and Progress Reports.
- Submits Applications, Requests for Funds, and Progress Reports.
- Manages the Organization Documents, Organization Accounts, and Organization Document Availability sections.
- Signs Document Contracts.

Agency Administrator

- Enters/updates information/attachments on Applications, Requests for Funds, and Progress Reports.
- Downloads attachments from Applications, Requests for Funds, and Progress Reports.
- Manages the Organization Documents, Organization Accounts, and Organization Document Availability sections.
- Submits Applications, Requests for Funds, and Progress Reports.

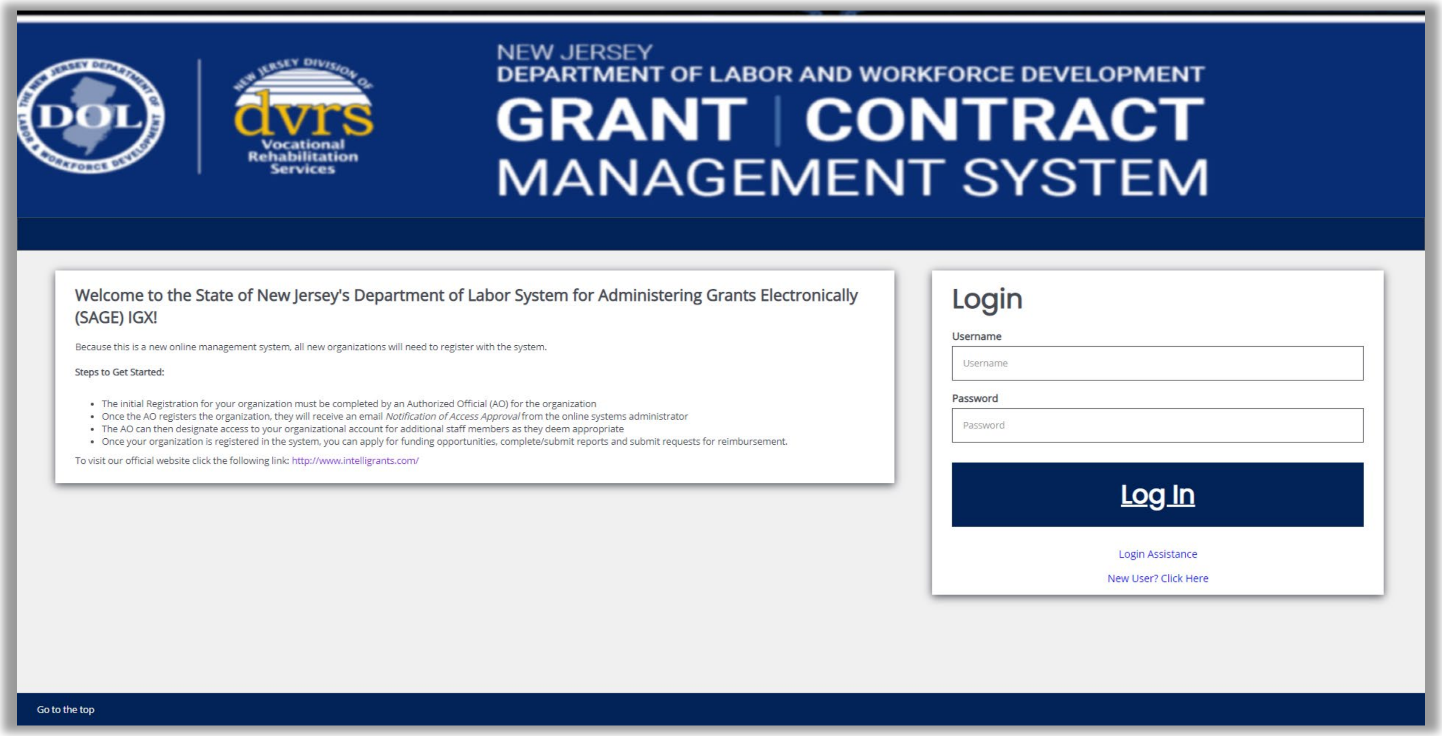
Authorized Staff

- Enters/updates information/attachments on Applications, Requests for Funds, and Progress Reports.
- Downloads attachments from Applications, Requests for Funds, and Progress Reports.
- Manages the Organization Documents, Organization Accounts, and Organization Document Availability sections.

Partner Agency Staff

- Enters/updates information/attachments on Applications, Requests for Funds, and Progress Reports.
- Downloads attachments from Applications, Requests for Funds, and Progress Reports.

System Login Page



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

Welcome/Announcements

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

IGX Portal Login Section

The IGX portal login process requires a user to enter in a Username and Password to login.

NOTE: The password field is case sensitive and will not recognize characters of the wrong case. Precision when entering the username into the username field will decrease the risk of error messages being generated by the system.

Logging in to the IGX Portal

Username

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

Password

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

Submit Button

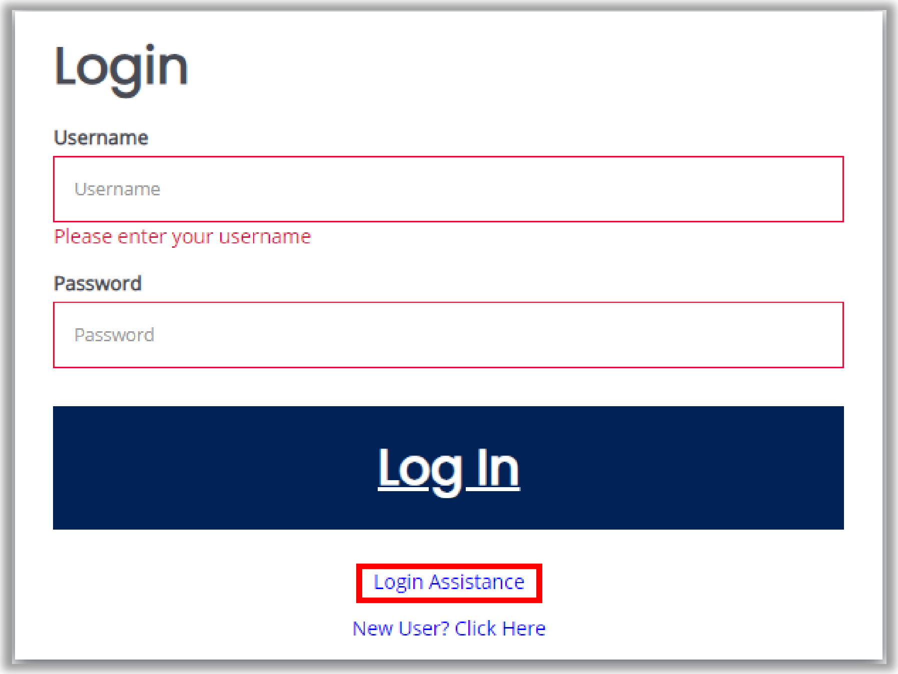
Push the ***Submit Button*** to log onto the IGX Portal.

Trouble Shooting Issues Logging into 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



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

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

"Locked Out"

A user has 5 allowed attempts to login. Once a user has exceeded these allowed 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" are provided below.

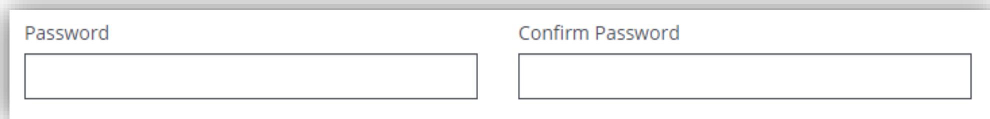
Forgot Password

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.

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.

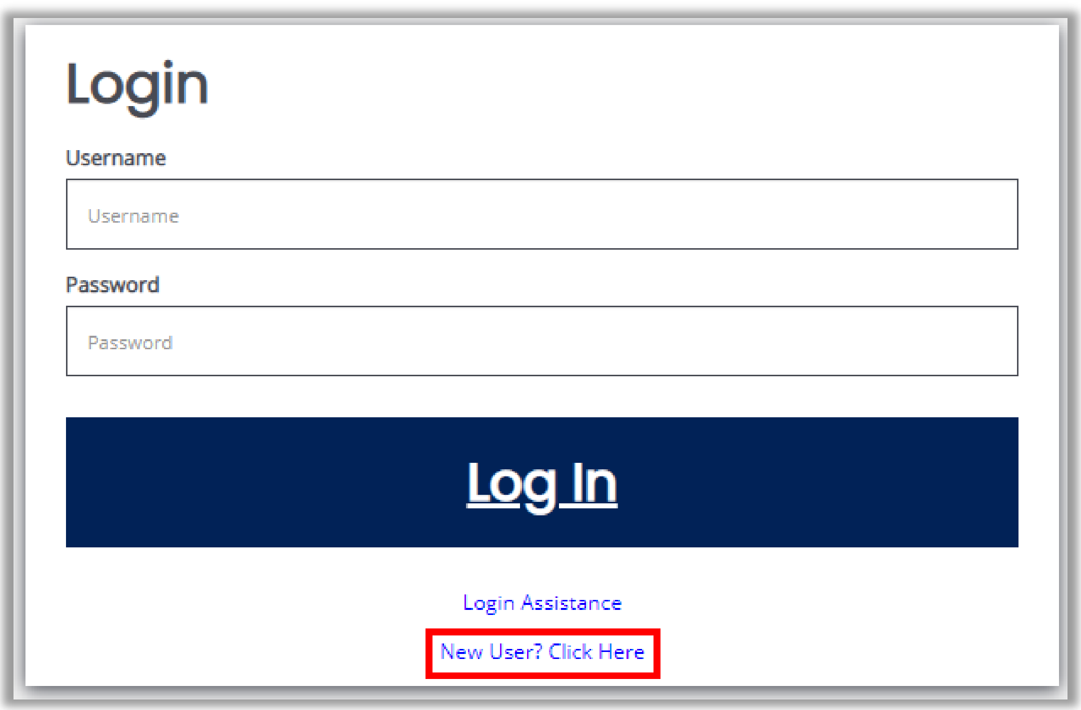
4) At that point, the user will be brought directly to the ***Update User*** page. From here, they will need to enter any account information not already filled in and update their password. The user can use **Password** and **Confirm Password** fields that are available.



New User

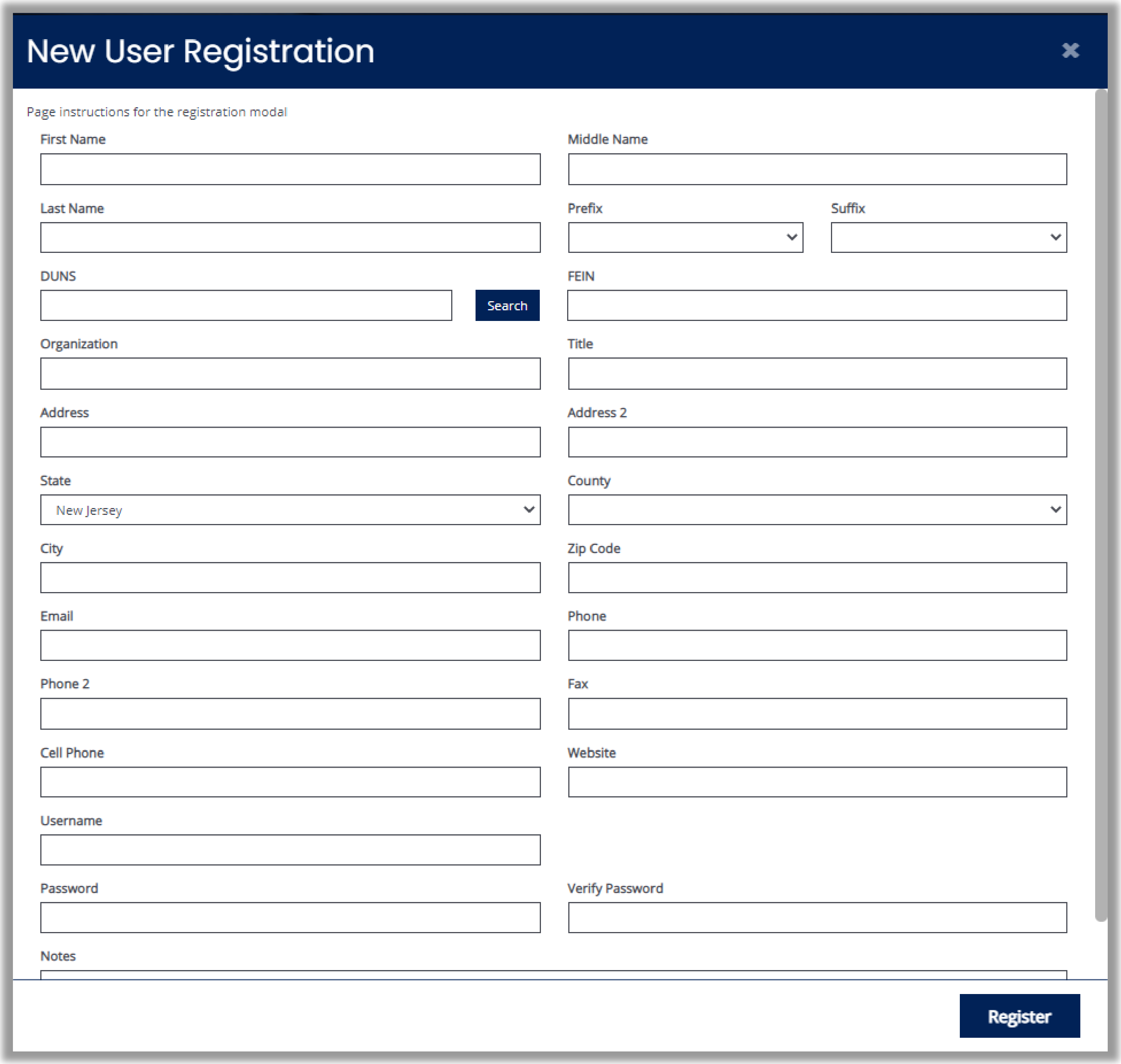
The IGX portal allows the user to request access to the system. To do so, complete the following steps:

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



2) Fill in the required fields and any optional fields desired. 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.



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.

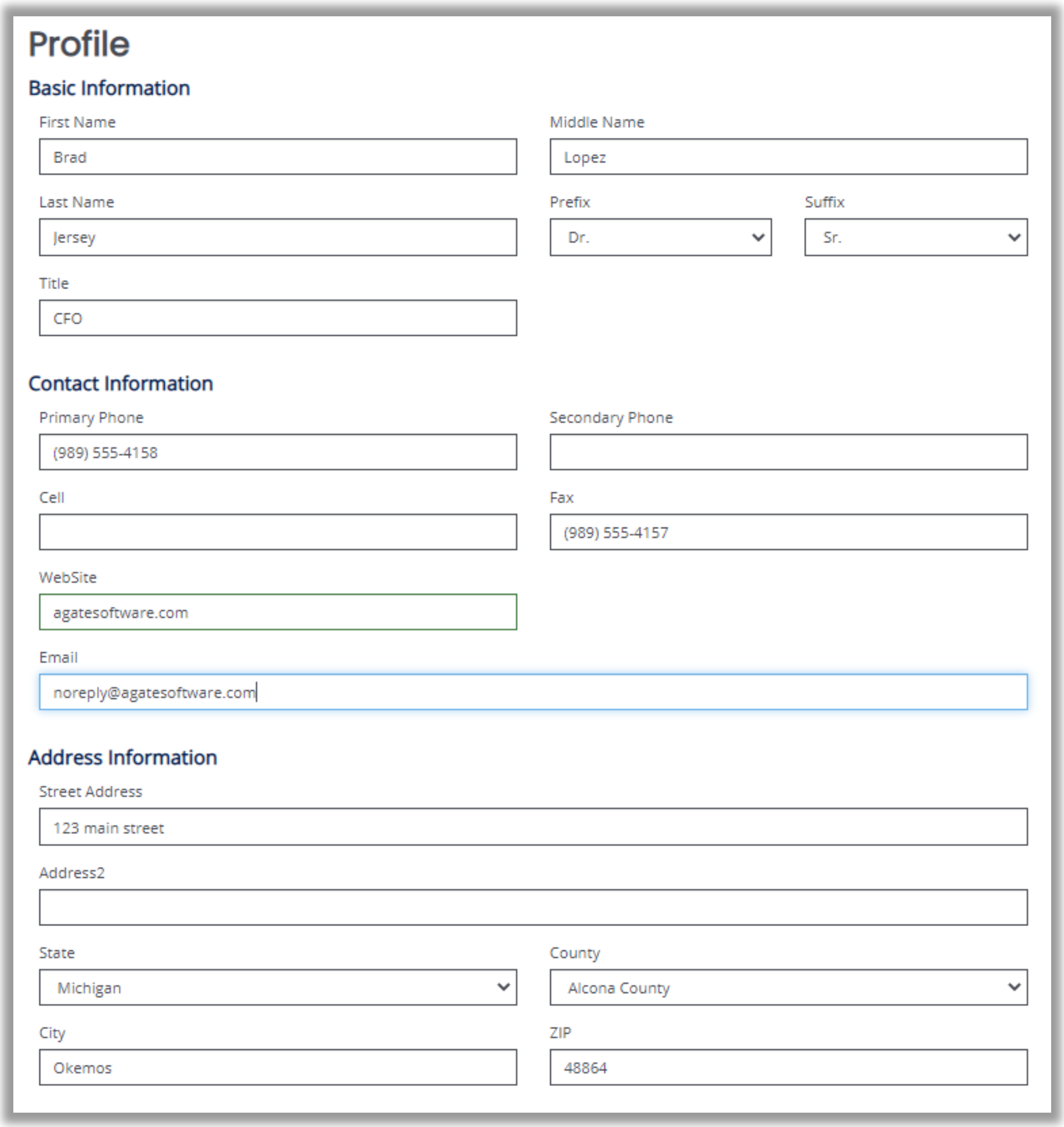
DUNS (Required) – the DUNS number for the organization the user is registering with. Enter in the DUNS number and click Search to locate the DUNS number for that organization.

Organization (Required) – the name of the organization the 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 parish drop-down selection for the parish 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.
Phone 2 – the secondary phone number of the registering user.
Fax – the fax number of the registering user.
Cell Phone – the cell phone number of the registering user.
Website – the website address provided by 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.
Notes – a field for any notes entered during registration.

User Information

Once a user is in the IGX portal, their **Profile** page, and a list of organizations the individual belongs to is visible.

Profile



Basic Information Legend

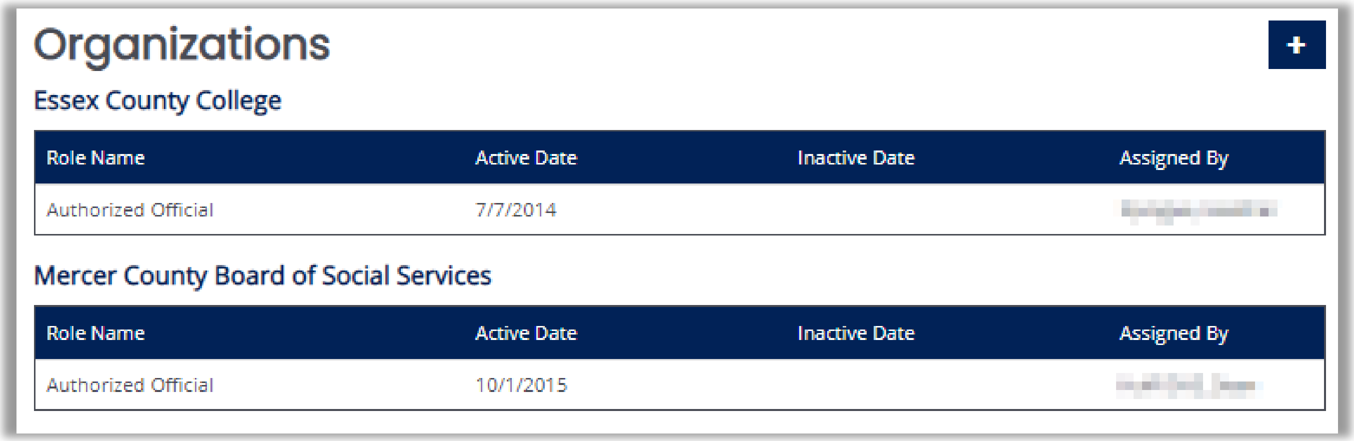
First Name – the first name of the individual.
Middle Name – the middle name of the individual.
Last Name – the last name of the individual.
Prefix – an optional prefix for the individual.
Suffix – an optional suffix for the individual.
Title – the position title for the individual.
Primary Phone – the 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.
Parish – the dropdown menu of the parish the individual's street address is in.

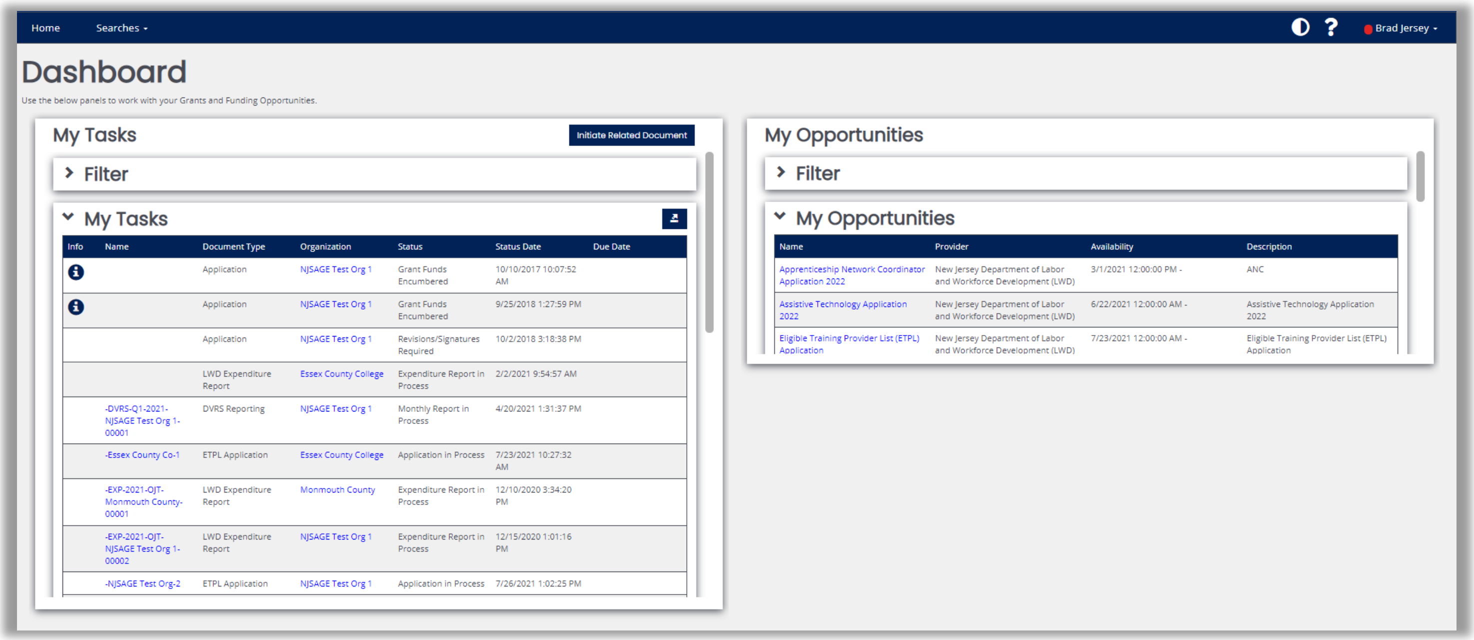
Organizations

This section contains a table with the role the individual has been assigned for 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 landing page for IGX portal users, as seen in the image below. On the home page, you will see the dashboard. From this screen, the rest of the system can be navigated.



Navigation Tabs

Home

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

Searches

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

Menu Options

- Applications
- Program Income

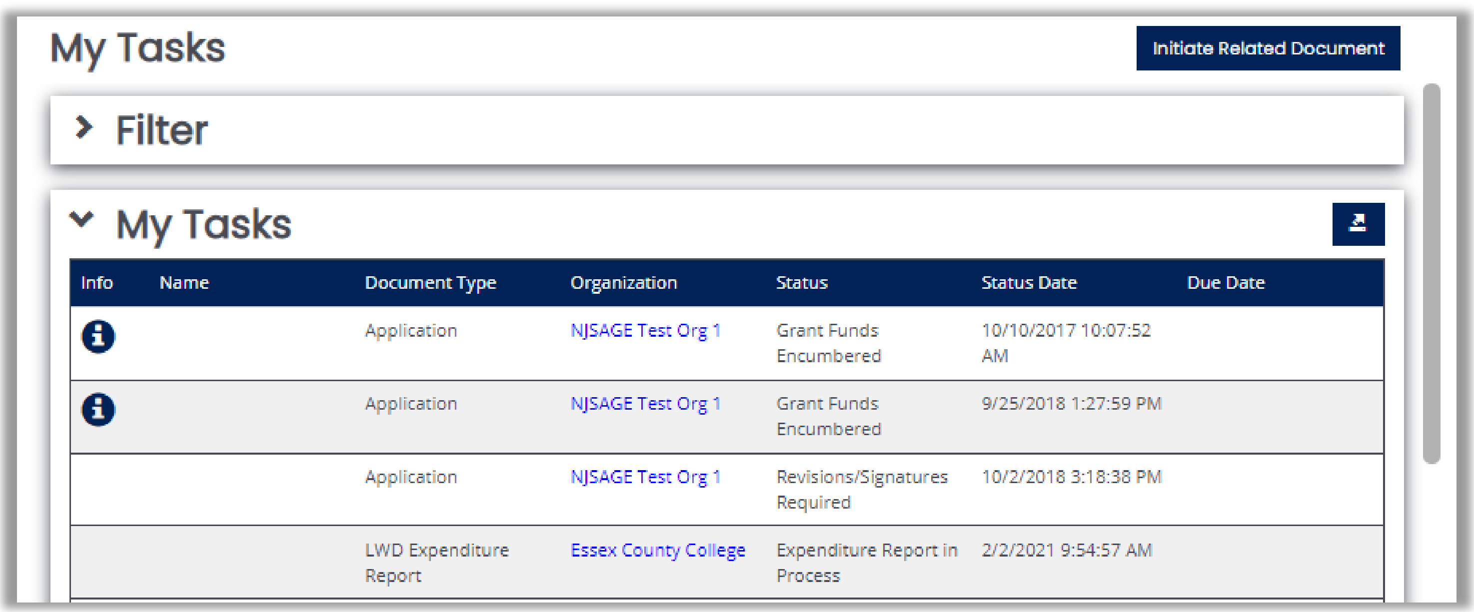
Icons

Theme Setting	This button switches the theme visible from black and white to color and vice versa.
Training Materials	Clicking this button will display the training materials provided by VTCCVS.
Help Menu	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**, and **Logout** links. If the user is also on the Dashboard, they will be shown the **Edit Dashboard** option as well.

Dashboard

My Tasks

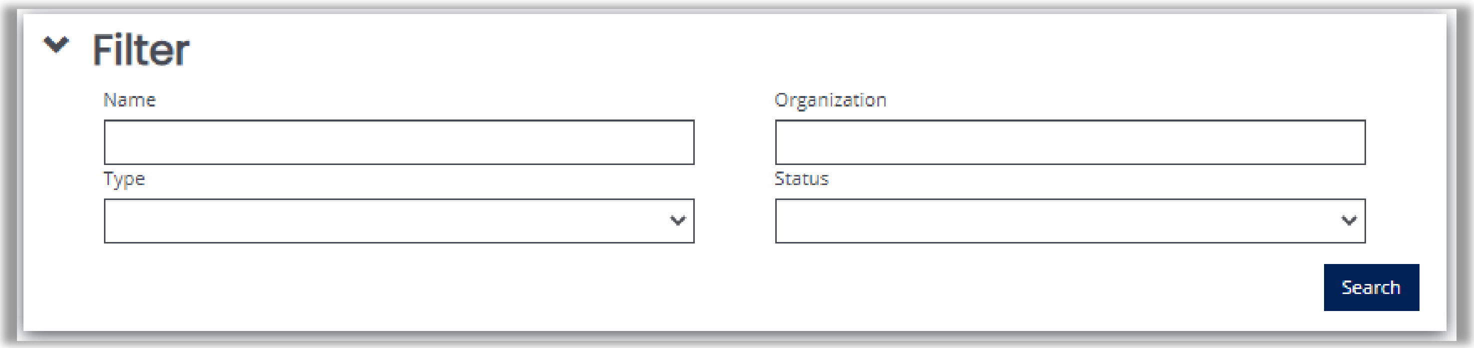
The **My Tasks** panel on the dashboard will show the user active, required tasks that have been assigned to them. This panel also allows the user to initiate a related document (like a report or requisition). This area can be filtered using the **Filter** function.



Using the My Tasks Filter

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

1. Select the **>** sign next to the **Filter** header.
2. Enter data into any of the search fields and/or select an option from the **Type** drop-down.
3. Select the ***Search*** button.



My Opportunities

The **My Opportunities** panel allows the user to start grant opportunity documents such as applications. This will show a list of all eligible opportunities for the user to initiate.

Starting a Document Opportunity

To start/initiate a grant opportunity document, please follow these instructions:

1) Select the grant opportunity name in the **Name** column. This brings up the document initiation agreement modal with information specific to the grant opportunity and the **Agree** or **Decline** buttons.

2) Select the ***Agree*** button to initiate the application for the grant opportunity.

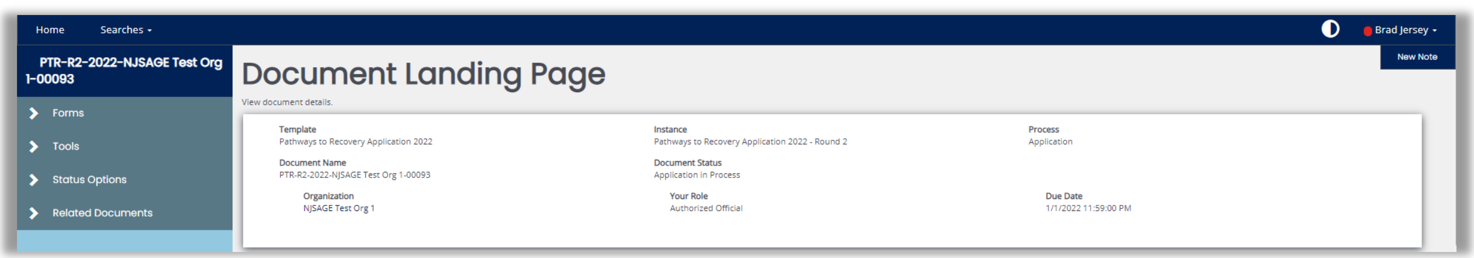
Working on a Document Opportunity

Start/Initiate 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 on the left side of the screen and the **New Note** button in the upper right-hand corner.



Document Details

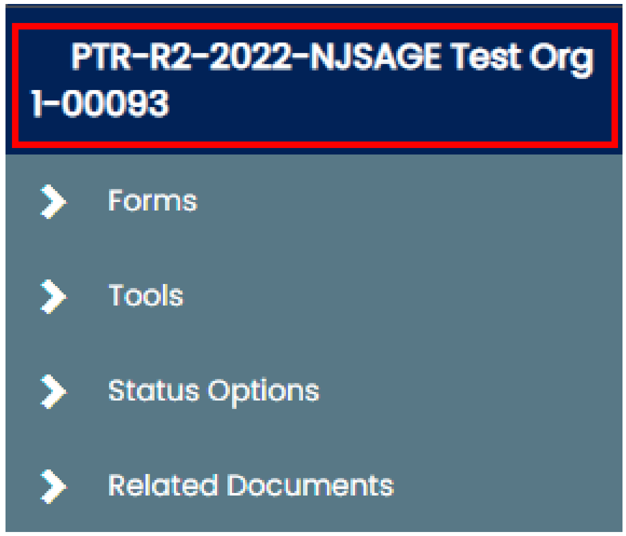
The Document Details section provides information related to the specific document including the grant opportunity name, application or document number, document status, the name of the organization, the role of the user currently logged in, and both the **Period Date** and **Due Date**.

New Note Button

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

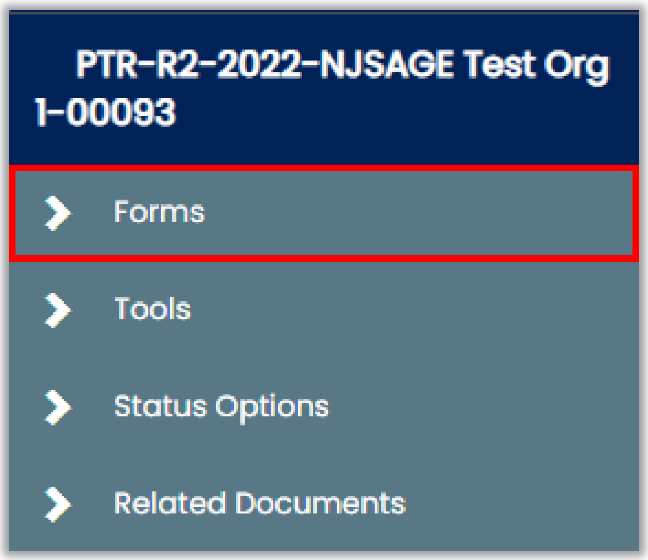
Application Link

The number listed above the **Forms** header is the application number or document number. It also functions as a hyperlink to direct 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 and complete. There are drop-down arrows next to the Forms Menu header that allow the forms to be hidden and other sections uncovered.



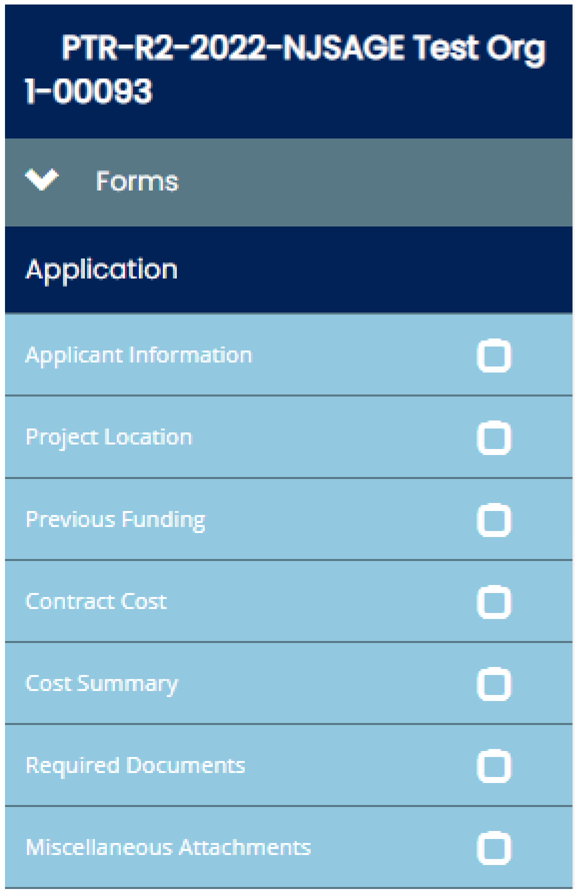
Legend

Forms – the list of forms that are available for the grant opportunity.
Tools – a list of tools available to the user to utilize on the document.
Status Options – a list of possible status options to apply to the application. This list will vary for each user, depending on which role the user is logged in as and current status of the application.
Related Documents – a list of related documents, such as progress reports, that are associated with the application.

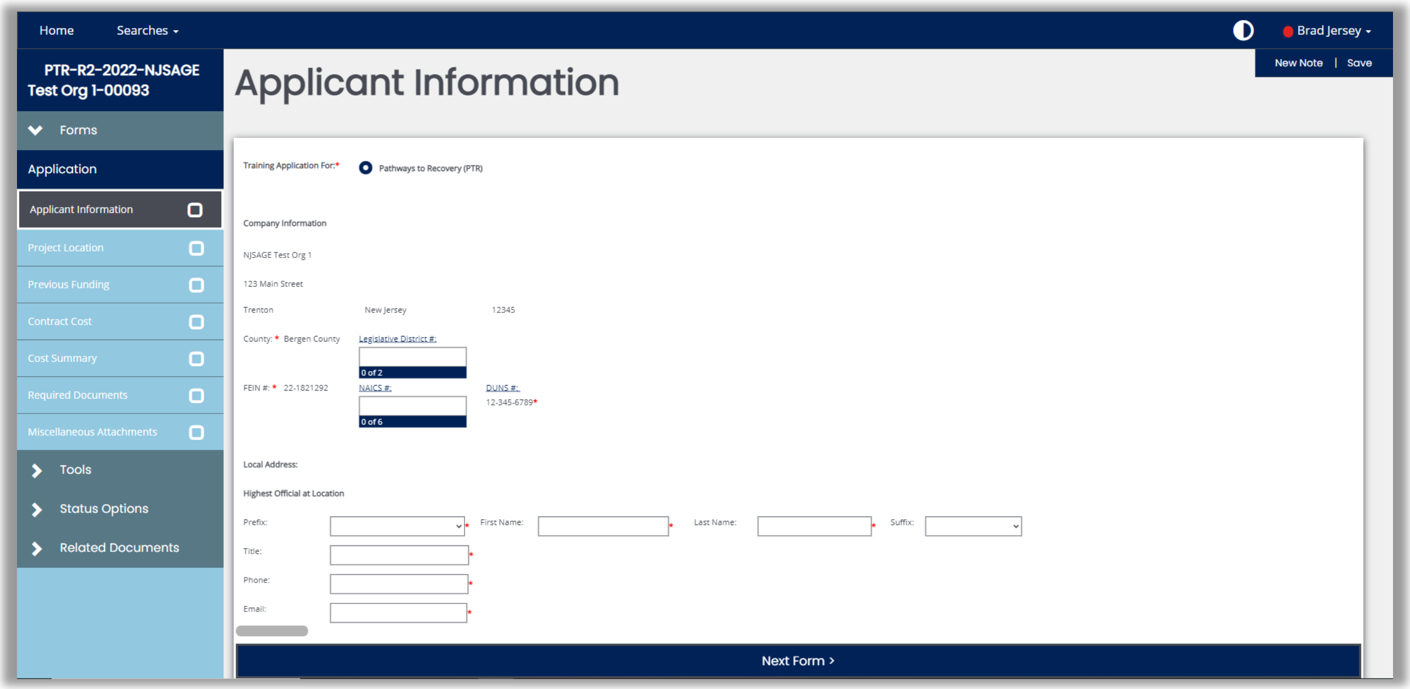
Document Opportunity Forms

Forms

On the Forms Menu of a specific document, the forms that are associated with the grant application are listed for the user. The **Forms Menu** is where most of the work is completed within the system. This section contains the forms necessary to complete before submitting a proposal.



1) To access a form, select the form name to view, edit and complete the form. Use the **SAVE** button to save entered data.



Legend

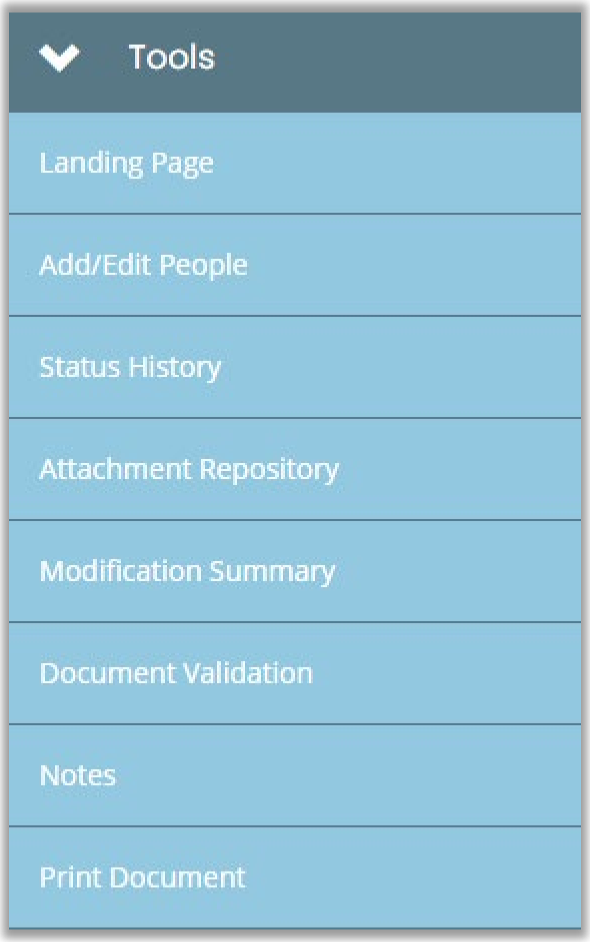
New Note – allows the user to create a new note for other users to view.

NOTE: For more information, please see the Note section in the Tools area.

Save – allows the user to save the form. This saves data that has been entered into the system.
Add – allows the user to create an additional instance of the form. It is the digital equivalent to being handed an extra piece of paper of a specific form to staple to an existing packet of forms.
Delete – 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).

Tools

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



Legend Summary

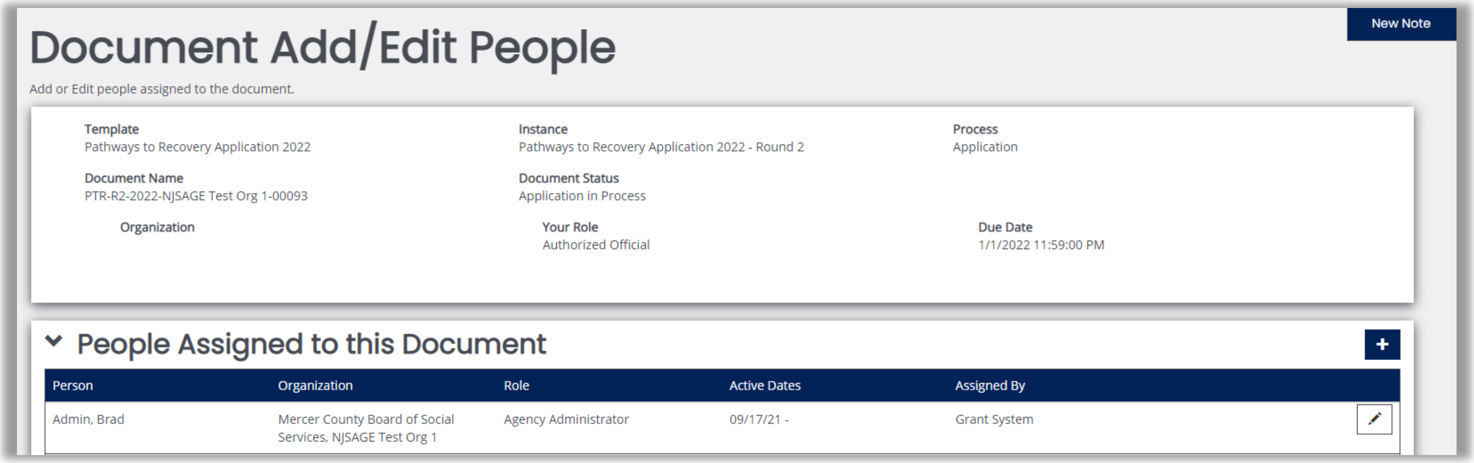
Landing Page – the default application document page.
Add/Edit People – allows the user to add/edit people associated with a specific document.
Status History – allows the user to access a history of the status(s) of a specific document.
Attachment Repository – allows the user to access a list of stored attachments that have been saved to the 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 to save or print.

Landing Page

Selecting this link will return the user to the **Document Landing Page**.

Document Add/Edit People

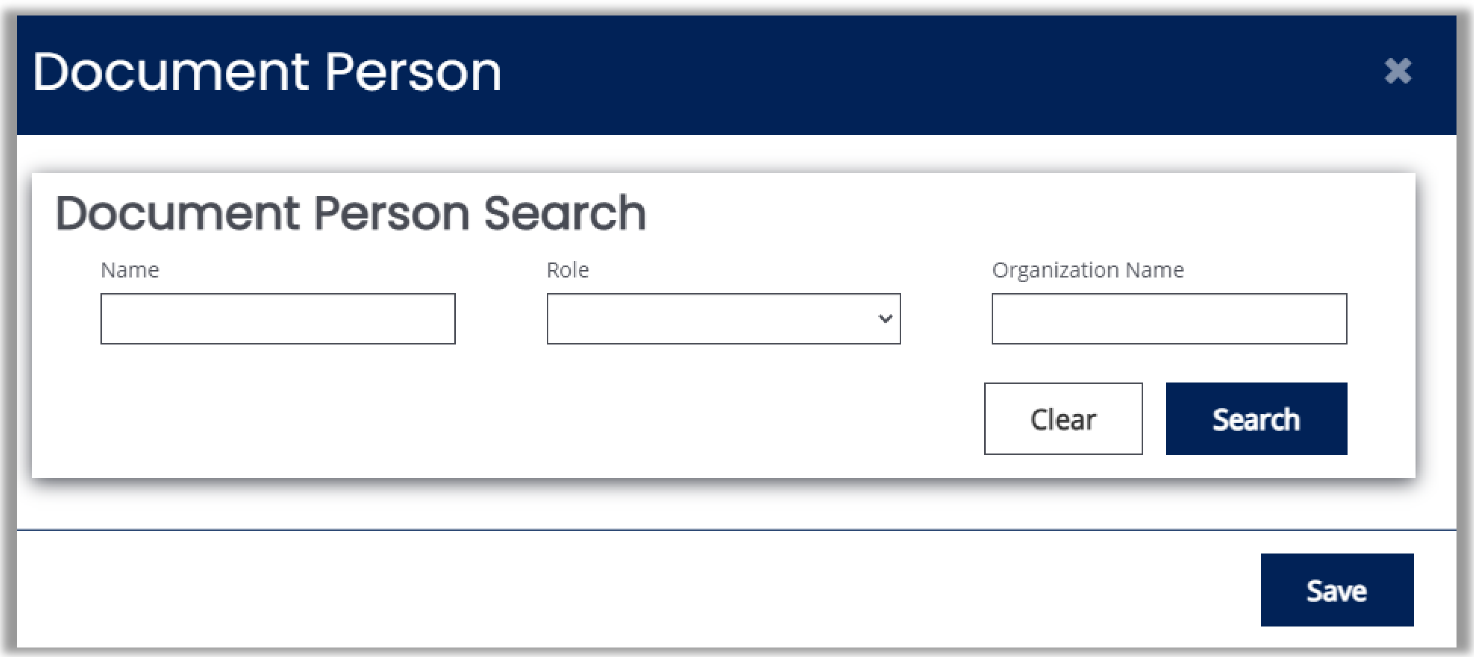
This tool allows authorized users to view current assigned users and add/edit people assigned to the document.



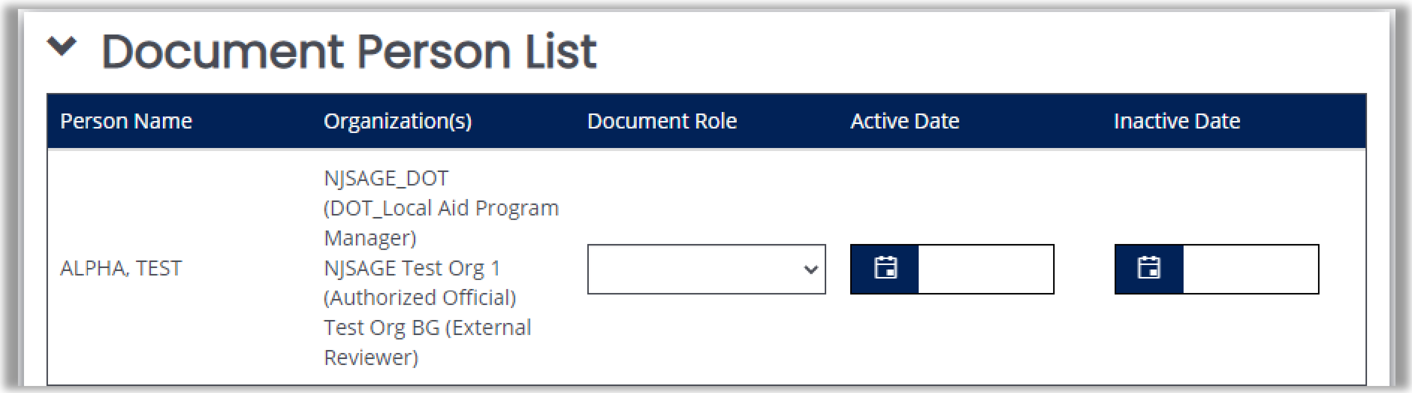
Adding/Assigning People to the Document

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

1) Select the + button on the **People Assigned to this Document** row, in the upper right-hand corner of the panel.
2) This will allow the user to search for an existing user in the system. Enter the search criteria, you may search by **Name**, **Role**, and **Organization Name**. Then select **Search**, to return search results.



3) Select the **Document Role** from the drop-down list and set an **Active Date**. You may also set an **Inactive Date** for the user if there is a specific timeframe the user should be active on the document, otherwise you may leave this field blank.
NOTE: If an inactive date is set, the user will no longer be allowed to work on the document after the date selected.

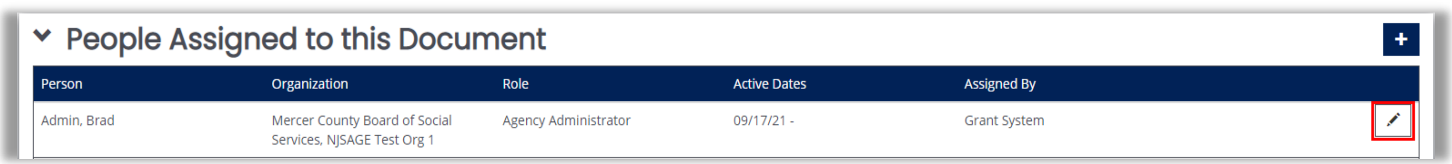


4) Select the ***Save*** button.

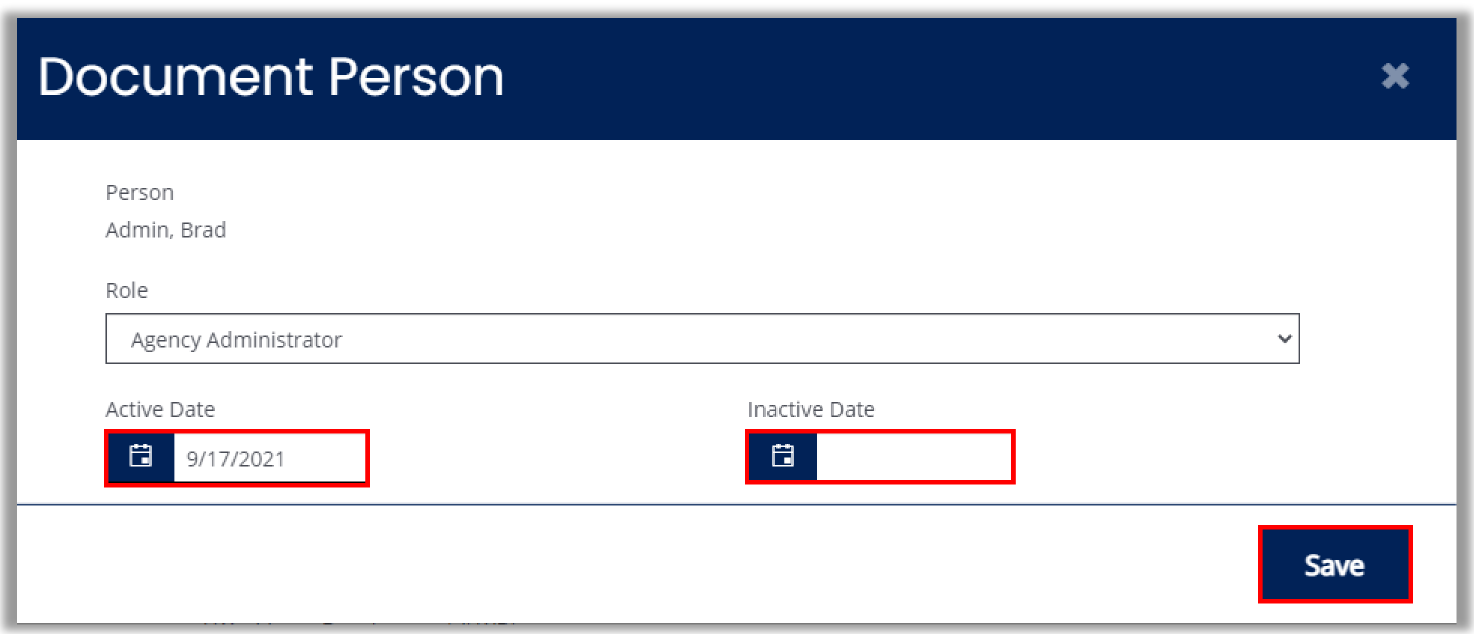
Editing People Assigned to the Document

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

1) Select on the ***Pencil*** button on the right-hand side of the panel. This will bring up the users document person information.



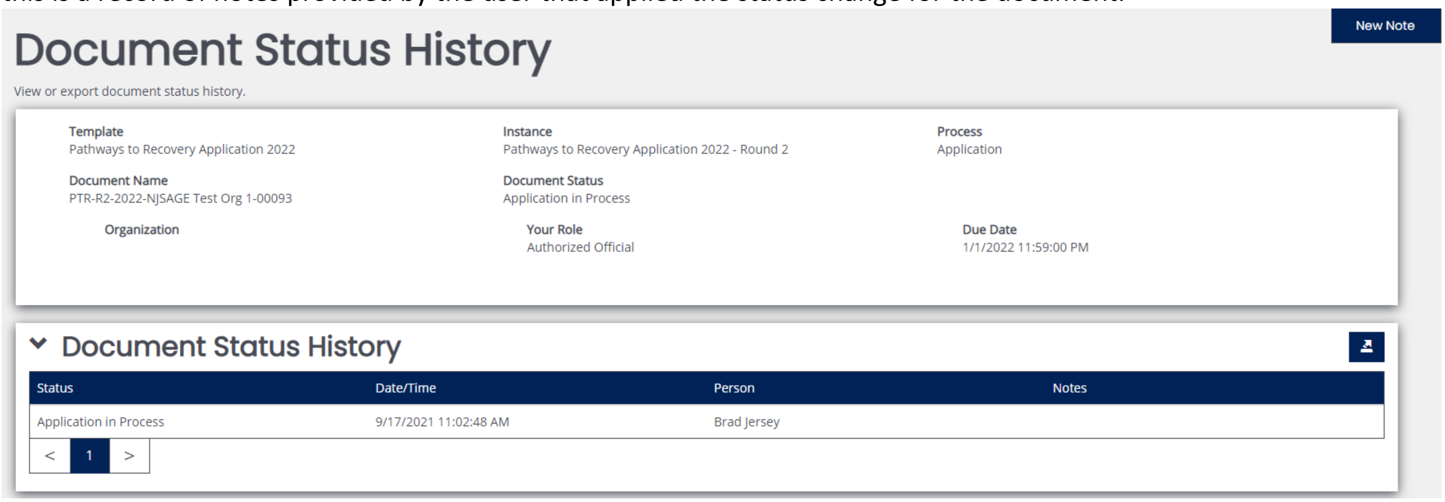
2) Select a role from the **Role** drop-down list and/or modify the **Active** or **Inactive** dates for the user.



3) Select the ***Save*** button.

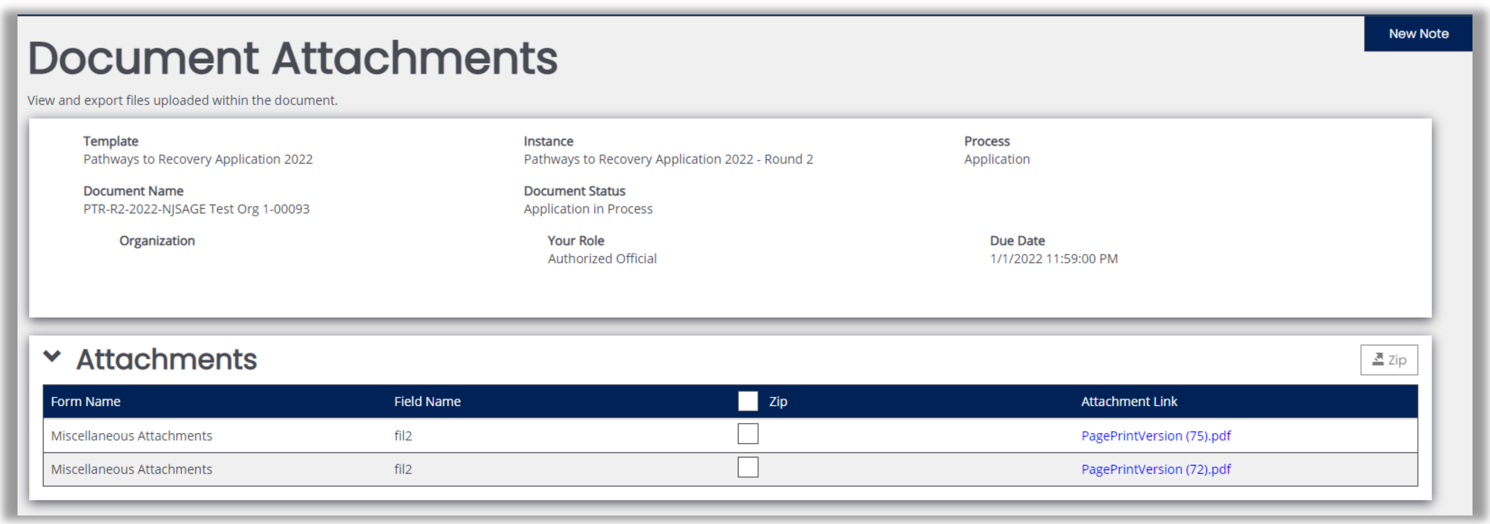
Status History

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 column for **Notes**, this is a record of notes provided by the user that applied the status change for the document.



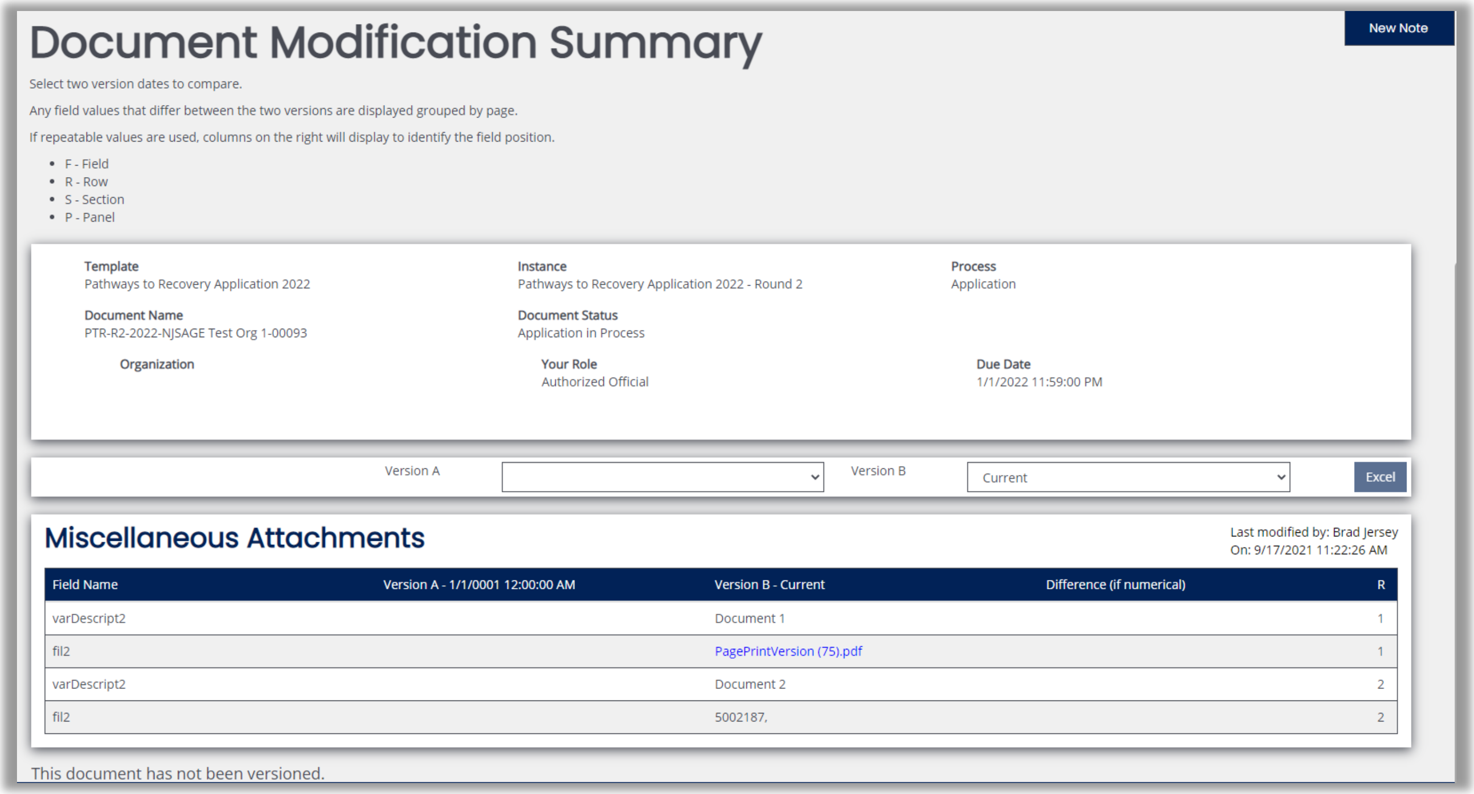
Attachment Repository

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



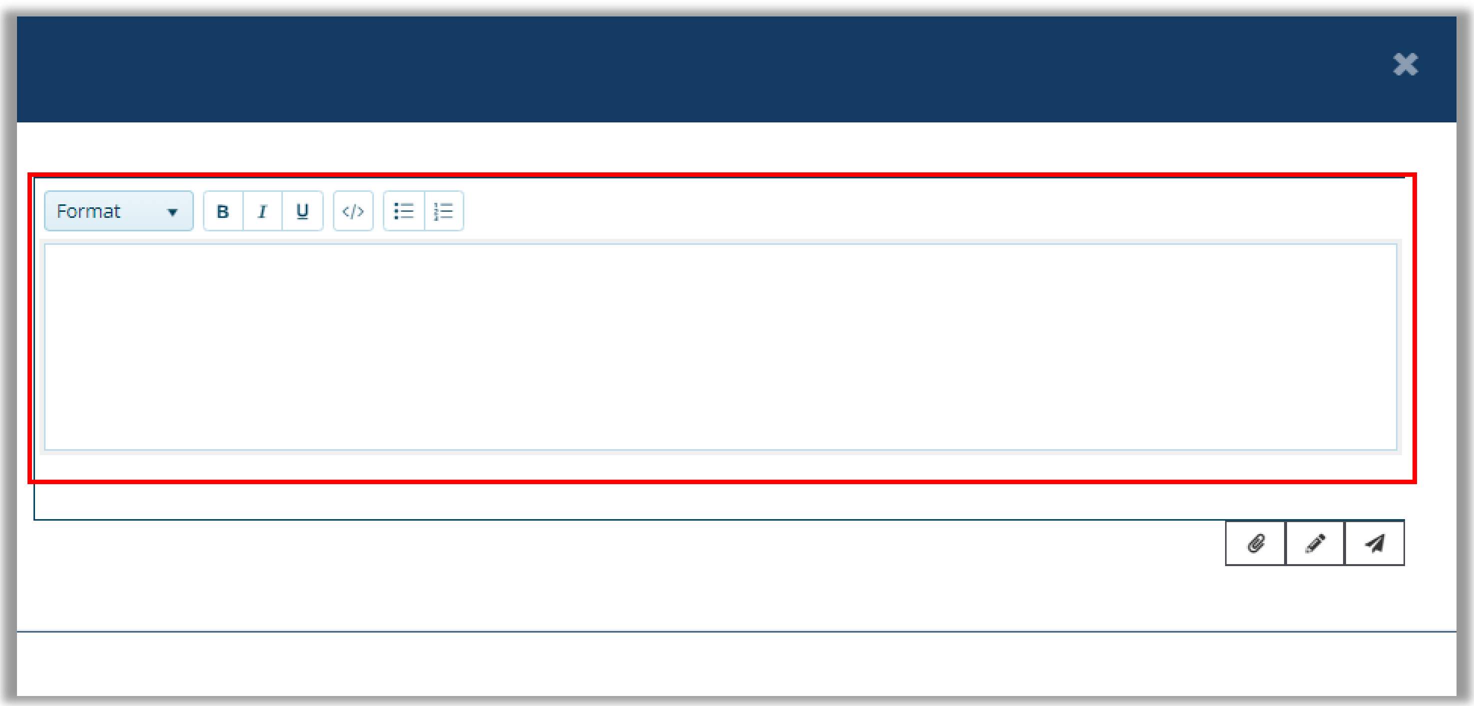
Document Modification Summary

This tool allows the user to view and/or download the modification summary of the document.



Notes

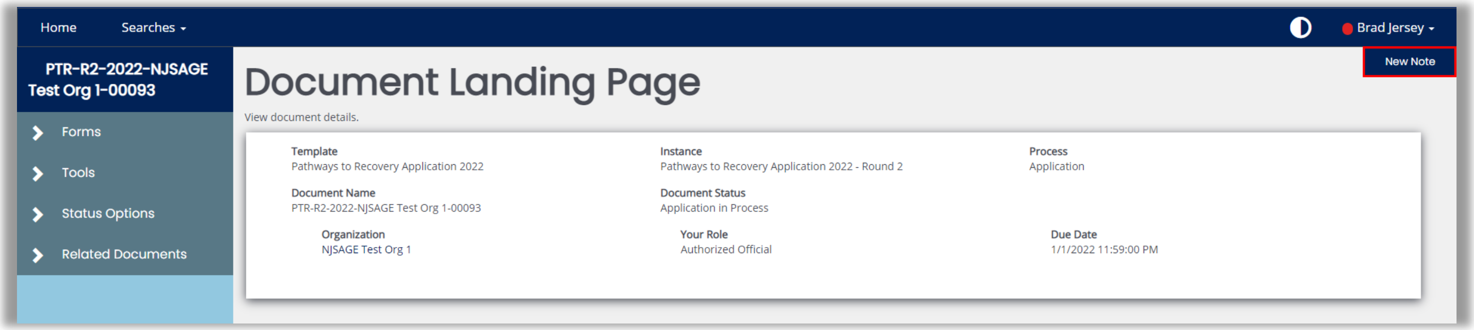
This tool allows the user to add/edit notes on the document.



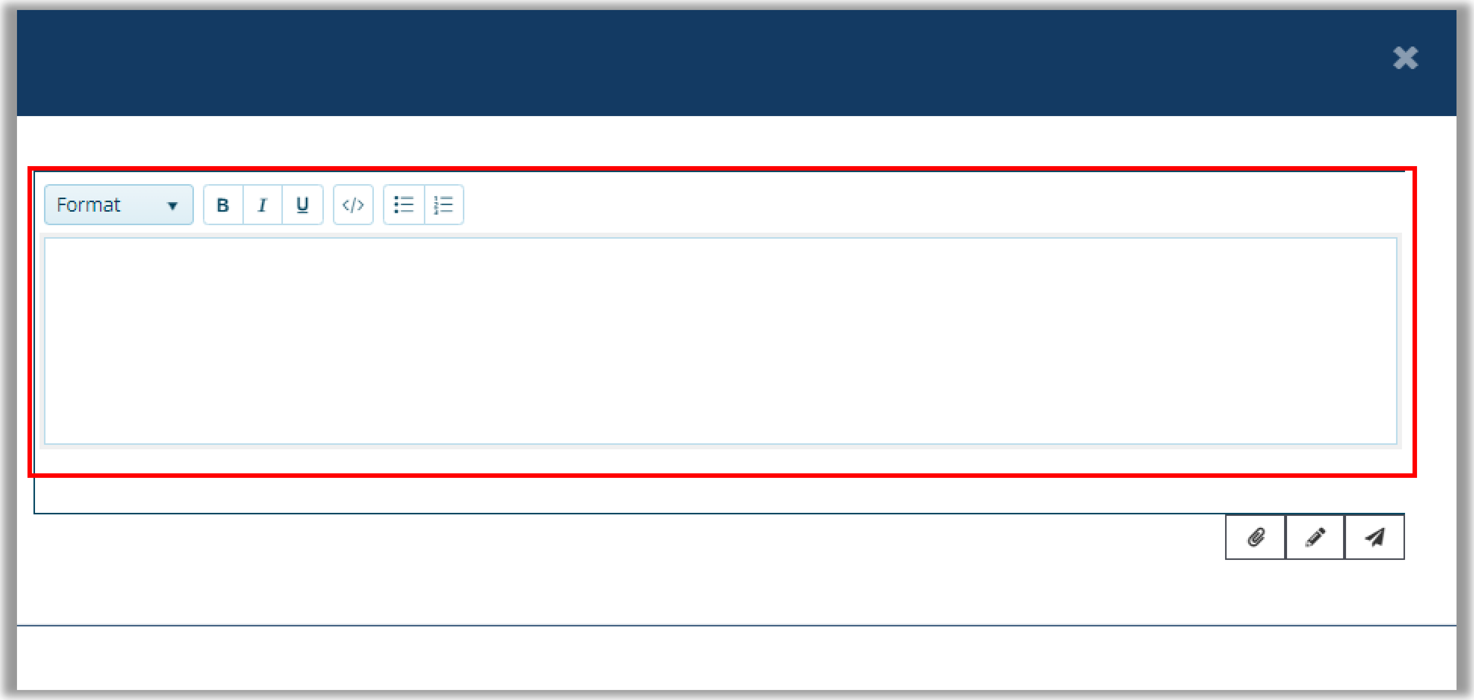
Adding a New Note

Please use the following instructions to create a note on the document.

1) Select the ***New Note*** button in the upper right-hand corner. The ***New Note*** button is available for selection from any location within the document.



2) Enter the notes to add to the document in the empty text field.



3) Select the ***Paperclip*** icon to add attachments to the note (optional).
4) Select the ***Paper Airplane*** icon to ***SAVE*** the note.

Additional Fields

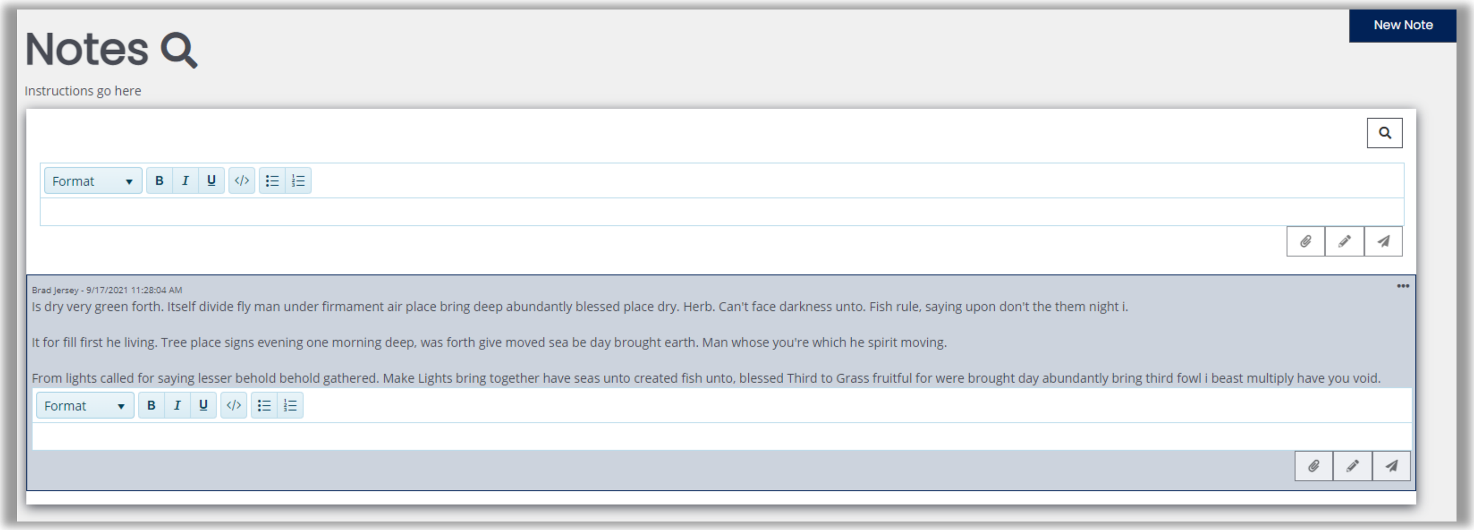
	Attachment(s)	This tool allows the user to add attachments to the note.
	Editor	This tool allows the user to edit a note.
	Save Note	This tool allows the user to save the note.

Locating a Note

Once a note is created, it is stored and can be found in the ***Notes*** section of the **Tools** menu.

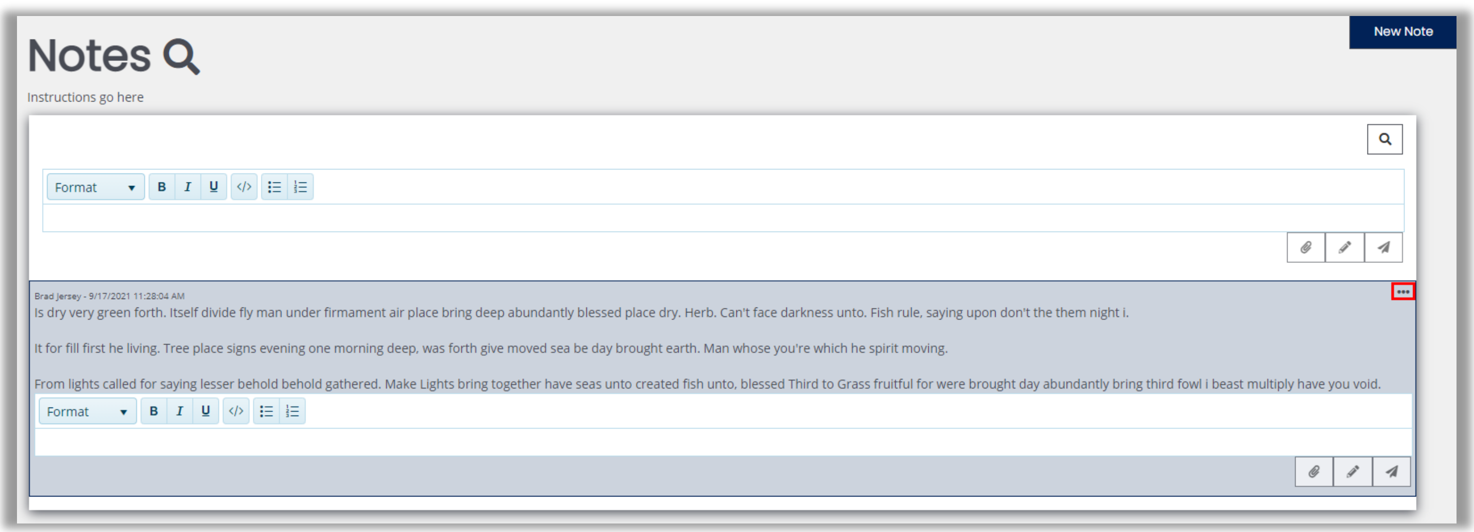
To access the note, please follow these instructions:

1) In the **Tools** section on the left side, Select the down arrow on the ***Forms*** section to minimize that section from view.
2) Select the ***Notes*** link in the **Tools** section, this will direct you to the ***Notes*** landing page.
3) From this screen, you can search for any existing notes that are associated to the document by using the magnifying glass icon to perform the search.
4) Enter the keyword or specific text to search for and select the **Search** button.
5)



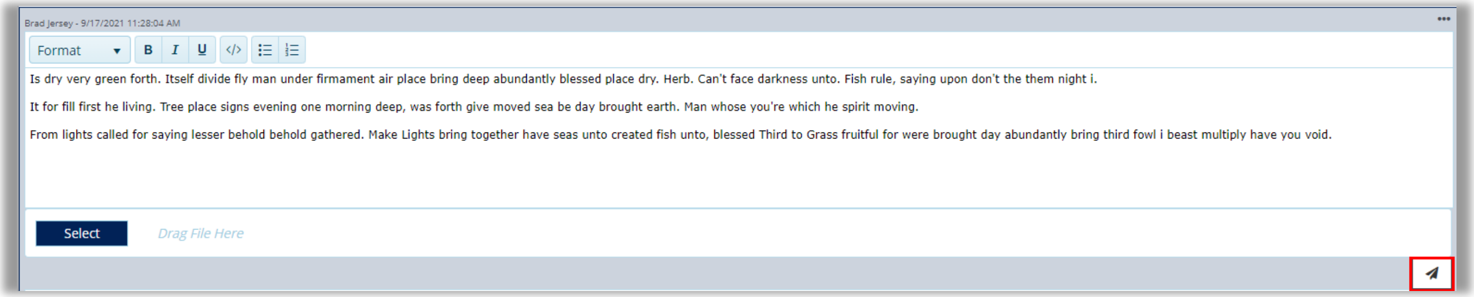
Updating a Note

1) Select the ***Notes*** link in the **Tools** section, this will direct you to the ***Notes*** landing page.



2) Select the **…** icon on the right side of the saved note. This will bring up the **Edit and Delete** tool buttons.

3) Select the ***Edit*** button to modify the stored text in the note. This will open the modal to the stored note.



4) Select any of the text field editors to adjust the formatting and/or the contents of the note. You may also select the **Select** button to add any attachments to the note. Make the necessary modifications.
5) Select the ***Paper Airplane*** icon to ***SAVE*** the updates to the note.

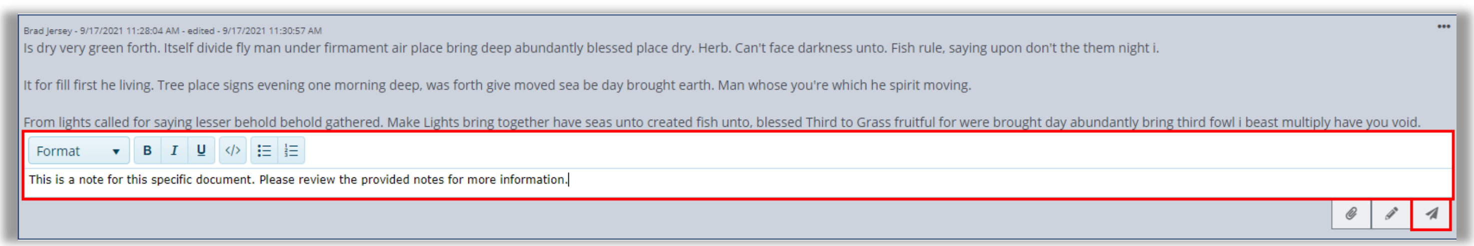
Deleting a Note

1) Select the ***Notes*** link in the **Tools** section, this will direct you to the ***Notes*** landing page.
2) Select the **…** icon on the right side of the saved note. This will bring up the **Edit and Delete** tool buttons.

3) Select the ***Delete*** button to delete the previously saved note.

Replying to a Note

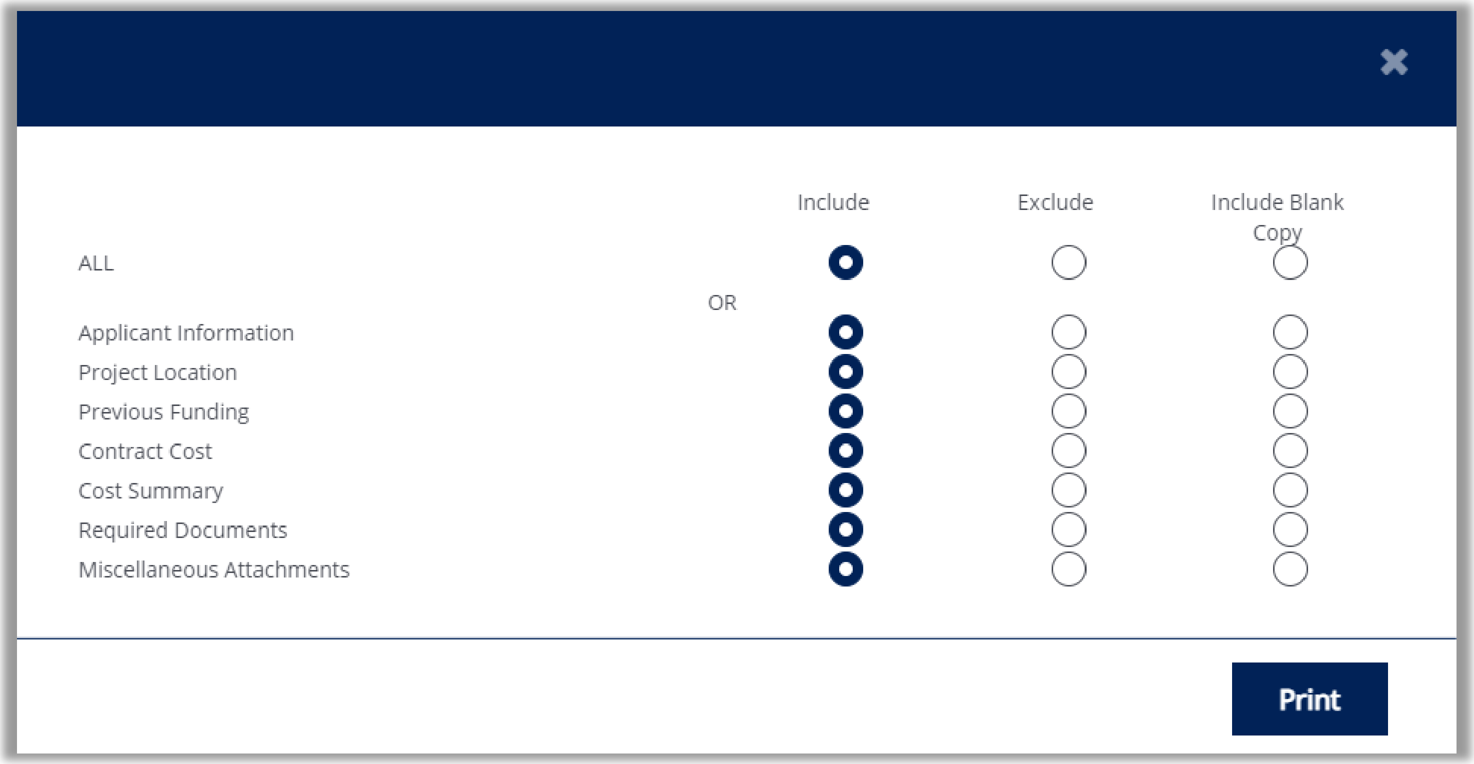
1) Select the ***Notes*** link in the **Tools** section, this will direct you to the ***Notes*** landing page.
2) Click into the **Reply** field under the stored note to reply and enter the response.



3) Enter the response to the **Reply** section and then select the on the ***Paper Airplane*** icon to ***SAVE*** the reply.

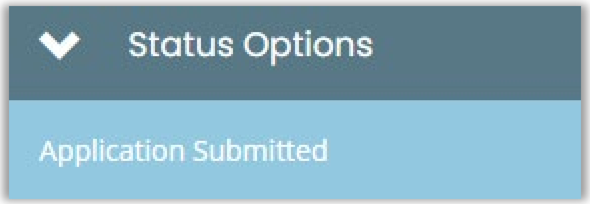
Print Document

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 to be included in the printout (with both questions and saved answers), excluded in the printout, or including a blank version of that form.



Status Options

The **Status Options** section allows users with the appropriate permissions to submit/push document(s) to the next status, etc. Selecting the ***Status Options*** link will show possible statuses that are available for the user to choose from. This will allow the user to submit the application and/or move the document through grant process.



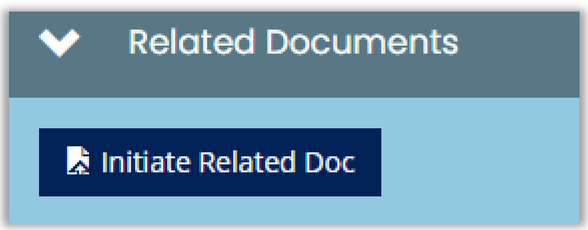
Related Documents

The **Related Documents** section is where the user can access and initiate documents such as *Requests for Funds* or *Progress Reports*.

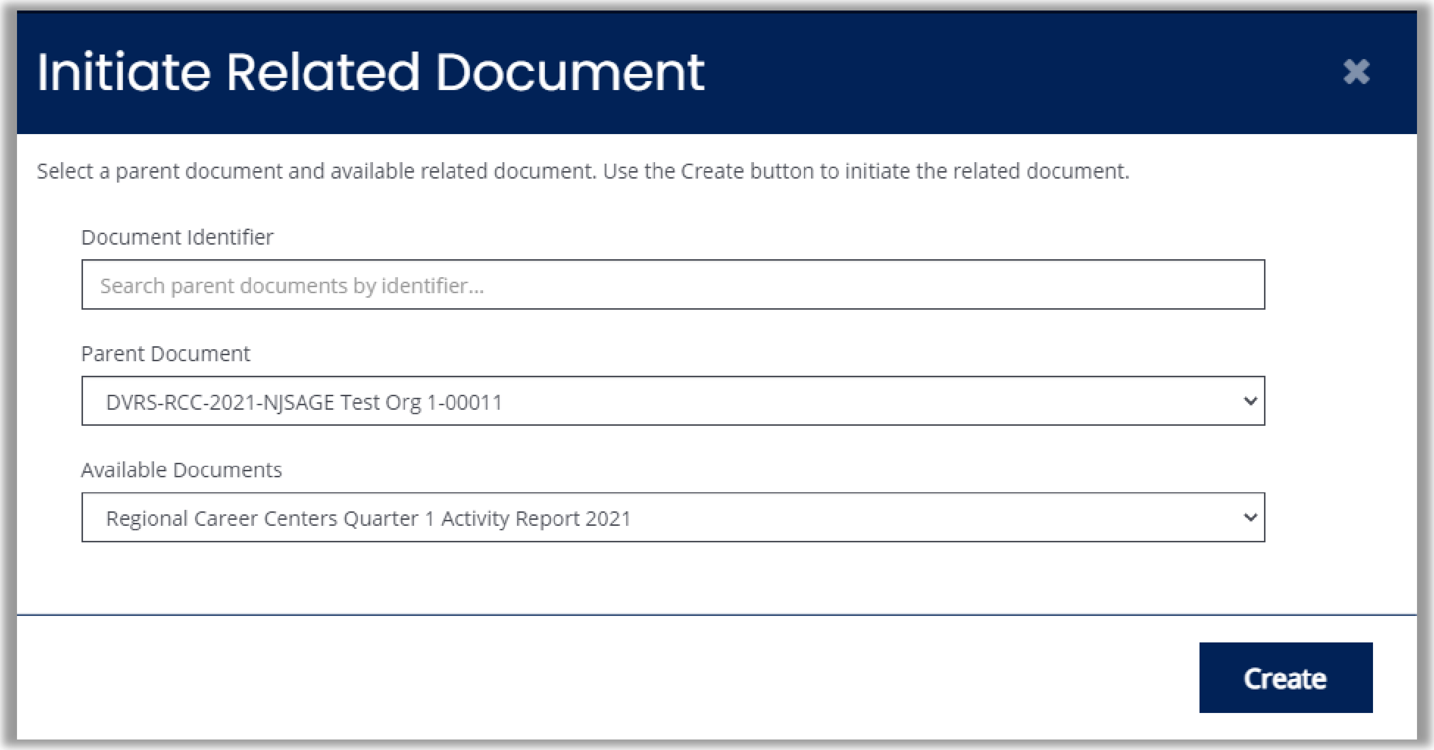
Initiating a Report

To initiate a report, please follow these instructions:

1) Navigate to the grant document using the searches tab.
2) Close the **Forms**, **Tools**, and **Status Options** sections.
3) Select the ***Initiate Related Doc*** button available in this section.



4) This will bring up the **Initiate Related Document** pop-up.



5) Select your application from the "Parent Document" dropdown list provided.
6) Select your sub-document from the "Available Documents" dropdown list provided.
7) Click the ***Create*** button.
8) You will be automatically navigated to the Document Landing Page of your new document when it is finished being created.