

E-Grants IGX Overview

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IGX Updates

- Upgrade Status
 Go Live Still TBD
- Active Documents
 - 2 Most Recent Application Templates
- Historical Documents
 - Access current E-Grants for Read Only Application Templates
- RTAP Application
 - Plan to open a new 2025 RTAP Application later this year after Go-Live
- New Security Requirement Disable user accounts that haven't been used for 6 months.

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2024 Planning Applications



E-Grants IGX Overview

- Profile
- System Navigation
- Reimbursement Processing
- Documents Functionality Changes

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User Menu Options



First, click on your name on top right of the **Home Page** to view menu options.

Next, click on **Profile** to view your profile, Organization profile, and Organization Members information.

ARIZANA **Profile - Person Information**

	ARIZONA — DEPARTMENT OF — TRANSPORTATION	E-GRANTS	ART	SH/	ARED DEV
Home Se	arches +			0 🔍 🗘 🔩 🗐	? 🛑 LOGGED IN AS: Matt AOA -
Organization Inf	formation Porcon	Information			Save
🗸 🗸 Matt Test Org					
Organization Informati	ion	o organization role information.			
Organization Members	Profile		Organization	ns	+
Additional Information	Basic Information		Matt Test Org		
	First Name	Middle Name	Role Name	Active Date Inad	tive Date Assigned By
	Matt Last Name	Prefix Suffix	AGENCY Organization Administrator	5/22/2023	Garrison, Matthew
Email	AOA	✓			
mgarrison@agatesoftware.com	Title				
	AGENCY Organization	Administrator			
Address Information					
Default Address	Contact Information	n			
Address 2	Primary Phone	Secondary Phone			
	(111) 111-1111				
City State	Cell	SMS Opt-Out			
Default City Arizona					
ZIP Code County	Fax	WebSite			
12345 Maricopa	County				
	Email				
Login Information					
Update Secu	By de	fault, your profile	information	will be dis	played first.

Username

MattAOA

Password

Edit Username

Edit Password

5



Acronym MTO COG/MPO 12345 Vendor # 125125 Address Code

Unique Entity ID 6789

Abbreviation

Type Tribal

Organization Information

Person Information	Oraanizatio	on Informatio	n	
Matt AOA				
Organization	Instructions:			
Information	 From this page, you can edit the or To view current organization members 	ganization's General Information, Contact Inform pers or add a new organization member, click th	nation, and Business Address. e option for "Organization Members" i	n the left side navigation.
✓ Matt Test Org	To edit a organization's currently de	esignated category, click the option for "Organiz	ation Categories" in the left side naviga	ation.
Organization Information	Information			
Organization Members			ř.	
-	General Information		Business Address	
	Name	DBA	Address	
	Matt Test Org	МТО	Default Address	
	TAX ID		Address2	
			City	State
	DUNS#		Default City	Arizona
	Contact Information		ZIP Code	County
	Primary Phone	Email	12345	Maricona County
	(111) 111-1111	mgarrison@agatesoftware.com		mancopa county

Only the Organization Administrator role will have the SAVE button on the top right.



Organization Members

Person Information	Organiz	ation Mem	nbers							
Matt AOA	Ŭ									
Organization Information	Instructions:									
✓ Matt Test Org	 Use the available sear To add a new member 	Use the available search criteria to filter the members table. To add a new member, click the Add New button and follow the instructions.								
Organization Information	You can limit system	access by setting the Active/Inactive date	25.							
Organization Members	Members S	Search								
Additional Information 🛛 🗁 🔿	Name		Role		~	Active			~	
	✓ Member	'S					Clear	Search		
	Person Name	Role Name	Active Date	Inactive Date	Last Modified By	Last Modified By Date				
	AA, Matt	AGENCY Attorney AGENCY Grant Writer	05/22/23 02/22/24	11/20/23	Garrison, Matthew Garrison, Matthew	02/22/24 02/22/24			/	
	AAO, Matt	AGENCY Authorized Official	05/21/23		AOA, Matt	02/26/25		32	/	
	AFO, Matt	AGENCY Financial Officer	05/22/23	12/18/23	System, Grant	12/18/23			/	
	AOA, Matt	AGENCY Organization Administrator	05/22/23		Garrison, Matthew	05/22/23				

Organization Administrators: Click on Pencil icon to update Active Date and Inactive Date for users. Enter an Inactive Date to remove a users access.



Organization Members

ARI — DEPAR TRANSF		Edit Person				SHA	RED DEV
Home Searches - Person Information Matt AOA Organization Information Matt Test Org	Organiz Instructions: Use the available served To add a new memb You can limit system	Name AA, Matt Role AGENCY Grant Writer AGENCY Attorney	Active Date 02/22/2024 05/22/2023	Inactive Date	+ Save	9 (†) 9 [LOGGED IN AS: Matt AC
Organization Information Organization Members Additional Information	Members S	Search	Role		Acti	Nve Both	Clear Search
	Member Person Name AA: Matt AAO, Matt AFO, Matt	Role Name AGENCY Attorney AGENCY Grant Writer AGENCY Authorized Official AGENCY Financial Officer	Active Date 05/22/23 02/22/24 05/21/23 05/22/23	Inactive Date 11/20/23 12/18/23	Last Modified By Garrison, Matthew Garrison, Matthew AOA, Matt System, Grant	Last Modified By Date 02/22/24 02/22/24 02/26/25 12/18/23	

Organization Administrators:

Agate is recommending to only keep one role active at a time. Click on the Plus Sign to change a member's role.



Organization Members

ARIZ	ZONA	E_CD	ANITE	En Carrier		
- DEPAR TRANSF	TMENT OF	Edit Person			≅ ×	
Home Searches -		Name				• •
Person Information	0	AA, Matt				
	Organiz	Role	Active Date	Inactive Date		
Matt AOA	J	AGENCY Grant Writer	02/22/2024	MM/DD/YYYY	+	
Organization Information	Instructions:	AGENCY Attorney	05/22/2023	11/20/2023		
❤ Matt Test Org	Use the available seaTo add a new member	AGENCY Authorized Official	03/27/2025	MM/DD/YYYY		
	You can limit system				Save	
Organization Members	Members				Jave	
Additional Information 💼 🖨	Name		Role		Active	
					✓ Both	

Organization Administrators: After you click on the **Plus Sign**, an extra line will appear. Select new **Role**, enter an **Inactive Date** for previous **Role**, and then Click **SAVE**.



Additional Information

rrint Save Add	à
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T BISOTI III OTTIGUOTT	Additional l	nformation				
Matt AOA	Additional					
Organization Information	Instructions 1. Please list the addresses for the orga	nization, department, or sub-organization name ie. the name of the unit	applying.			
❤ Matt Test Org	 If multiple units are applying or are A Use the ADD button to enter addition 	DOT grantees, please ensure all are listed. nal addresses.				
Organization Information			Person Information	Address*		
Organization Members			Matt AOA			
Additional Information 🗂 🗁			Organization Information			
	ADDITIONAL ADDRESSES		✓ Matt Test Org	City*	State* Arizona Zipcode* 12345	ddress Type* Contract Address
			Organization Information	County*	Maricopa V	Mailing Address
	Name*		Organization Members			Remittance Address
	hume	Matt Test Org 13 of 100				
	Acronym*	МТО				
	Relationship to Organization*	Department ~		CERTS & AS	SSURANCES	
	If other, please explain the relationship					
				Brows	sse Drag files Here	
					Last Date of Evention:	

Agencies can enter additional addresses for their organization and select the **Address Type**. Also, **Certs and Assurances** documents can be uploaded here.

Last Attorney Signature Date:



Home Page Dashboard



Click on your profile name on the top right, then click on Edit Dashboard



Dashboard Panel Types

The three types of panels you can add are:

1. Announcements

Messages posted by ADOT Transit

2. My Opportunities

- > Open Session Applications
- Apply on this panel.
- 3. My Tasks
 - List of applications currently in process.
 - > List of reimbursements currently in process.
 - Can initiate a reimbursement request from this panel.

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Can Search for documents.



Dashboard Format Options

My Opportunities and **My Tasks** Panels formatting options are Standard, Tall, Wide, and Jumbo.

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Recommended Dashboard Settings:

Filter						
My Tasks						2
Name	Document Type	Organization	Status	Status Date	Due Date	
2023-PA-MTO-00011	Planning Application	Matt Test Org	Application in Process	3/25/2025 9:21:55 AM		
5307/5339-2022-MTO-00006	5307/5339 Application	Matt Test Org	Application In Process	9/5/2023 2:58:41 PM		
5307/5339-2023-MTO-00002	5307/5339 Application	Matt Test Org	Notice of Award	5/24/2023 1:30:24 PM		
		A CONTRACTOR OFFICE	Annalise in Process	9/9/2024 10:33:36 AM		
5307/5339-2023-MTO-00003	530775339 Application	Matt Test Org	Application in Process	0.57014 (0.5535 AM		
s307/5339-2023-MTO-00003	5-907/5-339 Apprication	Matt les Urg	My Opportu	nities		
S307/S339-2023-MTO-00003	5.307/5.339 Appreason	nost rex org	My Opportui Filters My Opp	nities		
S307/5339-2023-MTO-00003	5307/5339 Appication	Nott les Org	Application in Process My Opportui Filters Wy Opp Name	nities ortunities Provider	Availability	Description
S307/5339-2023-ATTO-00003	5307/5339 Appication	Nott let Org	My Opportui Filters My Opp Name 53075339 Application	ortunities Proder Apot Multimodel Panning Division	Availability 3/14/2023 12/00/00 AM - 12/31/2025 11:59:00 PM	Description

My Tasks - Wide

My Opportunities - Standard



Edit Dashboard



Click on Add Panel, a pop-up window will appear.

Select the Panel you would like to add to your Dashboard. Then click on SAVE

Smith 1234

in Process

4-17-51 DA



Edit Dashboard



If you want to remove a panel, click on the red X on the top right corner of the panel.

You can also click on the Settings icon to switch to a different panel.



Dashboard Arrange Panels

vly Tasks						Add Panel Reset	Save
> Filter						×× /	
👻 My Ta	sks				Z		
Name	Document Type	Organization	Status	Status Date	Due Date		
2023-PA-MTO- 00011	Planning Application	Matt Test Org	Application in Process	3/25/2025 9:21:55 AM			
5307/5339-2022- MTO-00006	5307/5339 Application	Matt Test Org	Application In Process	9/5/2023 2:58:41 PM			
5307/5339-2023- MTO-00002	5307/5339 Application	Matt Test Org	Notice of Award	5/24/2023 1:30:24 PM			
				Micon	a structure it i a a		
Announce	ments		¢ ×	му Орр	ortunities	¢	×
Welcome to the ADC Click on the top right and Training Materia	T E-Grants Portal! Training Materials i II.	con to access User I	Manual	> Filte	ərs]"
				Y My	Opportuni	ties	11

5307/5339

Availability

3/14/2023 12:00:00 AM

While editing your panel, you can rearrange your panels on the screen by clicking anywhere on the panel and dragging to the desired location on the screen.

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Click SAVE on top right corner to keep changes.



SYSTEM NAVIGATION





Left Panel Document Navigation

Hover your mouse over the Document Name to view document details.



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ARIZANA **Application Left Panel Navigation** - DEPARTMENT OF ---TRANSPORTATION

M

_	5310-2023\2024- МТО-00043	5310-2023\2024- MTO-00043	Ę
Γ	✤ Forms	REGIONAL MOBILITY MANAGEMENT	Ð
Ľ	✓ 5310 Application	PROGRAM INFORMATION	Ð
	ADOT Coordinated Mobility Program Guidebook Web	REGIONAL MOBILITY	E) M
		PROJECT REQUEST	Đ
	INFORMATION	VEHICLE REQUEST 🛛 ! 🌖	E
	SUMMARY OF		Ð
	PROJECT AND FUNDING	LOCAL MATCH	Ð
	CIVIL RIGHTS	REQUIRED CERTIFICATION AND DOCUMENTS	
	COORDINATION OF TRANSPORTATION C SERVICES	✓ Agreement	
	OTHER CAPITAL-	Grant Agreement / Exhibits	A
		Grant Agreement 🛛 🗹	st
	Preventive Maintenance)	Signature Page for Grant Agreement	A
		Attorney 💽	м
	REQUEST	Determination	D
	REGIONAL MOBILITY MANAGEMENT	Upload 🕑	S. / N

5310-2023\2024-Print Document MTO-00043 Document Messages C Status Options C hibit B 5310 Related hibit C Responsibility Documents hibit D Procurement 🛛 🗹 Initiate Related Doc hibit E Civil Rights C **C Reimbursement Request** hibit G Insurance R' 60 . Tools

hibit A

Inding Page /Edit People atus History achment Repository dification Summary ument Validation

Forms Section

Tools Section

Status Options Section

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Related Documents Section

ARIZONA DEPARTMENT OF -TRANSPORTATION Form Navigation



Click on the form name to open the form.

	Home Searches	5	
	5310-2023\2024- MTO-00043	SUMMARY OF PROJECT AND FUNDING	
	✓ Forms	REQUEST(S) Q	
	✓ 5310 Application		
	ADOT Coordinated Mobility	2	
	Program Guidebook Web Link		
	PROGRAM INFORMATION		
7	SUMMARY OF PROJECT AND FUNDING REQUEST(S)		
	CIVIL RIGHTS		

Some forms will have multiple pages, Click on the Folder\Arrow icon to view page selection options.

Click on the Form Name\Page Number to open the form.

Click on the Folder\Arrow icon again to collapse the panel.



5310 MTO	-2023\2024- -00043	
*	Forms	
>	5310 Application	
>	Agreement	
♥ :	Tools	
Landin	g Page	
Add/Ed	it People	
Status I	History	
Attachr	nent Repository	
Modific	ation Summary	
Docum	ent Validation	
Notes	0	
Print D	ocument	
Docum	ent Messages 🛛 🖾	

Tools Navigation

Important Tools for Organizations:

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> Add/Edit People

Print Document



Instructions:

- · Click the '+' button to add a user to this document.
- · Click the 'pencil' button to edit a users active/inactive dates on this document.

People Assigned to this Document

Person O		Organi	ization	Role		Active Date	<u>'</u> S	Assigned By				
Webinar, Authorized Official			Webin	ar Agency	AGENCY Aut Official	thorized	11/18/24 -		Andrew Butterworth	n.	1	
Webin Organ Admir	Webinar, Agency Organization Administrator			Webin	ar Agency	AGENCY Or Administrat	ganization or	11/19/24 -		Andrew Butterworth	1	/
м	•	1	۲	H								

+

This window will appear when you click on the Add/Edit People in the Left Panel



Document Add People

Person	Organization	Role	Active Dates	Assigned By	Add User From Organization
Webinar, Authorized Official	Webinar Agency	AGENCY Authorized Official	11/18/24 -	Andrew Butterwo <mark>rth</mark>	
Webinar, Agency Organization Administrator	Webinar Agency	AGENCY Organization Administrator	11/19/24 -	Andrew Butterworth	1

When you click on the Plus Sign icon, a menu list will appear with options to Add User from Organization or Invite an Existing User.



Add User from Organization

Document	Person		∞ ×
DocPerson Name	List_Title Sea	organ	ization Name
		Clear	Search
			Save

Enter the search criteria for the <u>existing</u> E-Grants user from <u>your organization</u> that you would like to add.



Invite Existing User

Document Person	×	Invitation Saved
Email Address Assign Roles Role Active Date Inactive Date		If you entered a valid email address, your invitation has been sent. You will receive a confirmation email if your invitation is accepted.
• • • • • • • • • • • • • • • • • • •	Save	

Enter the email address for the existing E-Grants user you would like to invite to your document. Select the role you would like for them to accept.

Click Save.

Another pop-up window will appear, confirming an invitation email has been sent.

Click OK.



Invite Existing User - Email

You have been invited to work with Matt Test Org by Matt AOA on their 5310 Application 2023

 document
 External
 Inbox ×

 ←
 Reply
 ←
 Forward

websites@agatesoftware.com

8:21 AM (2 minutes ago) 🔥 🥎

to me 👻

You have been invited to work with Matt Test Org by Matt AOA on their 5310 Application 2023 document. Please select this link to accept the invitation. Acceptance Link. This link will only be valid for 48 hours.

The user you invited will receive this email.

They should click on the Acceptance Link with 48 hours to accept the invitation.





When the user you invited clicks on the Email Acceptance Link, they will be taken to the E-Grants System and receive this pop-up window.

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They will click on OK to accept the invitation.



Invite Existing User

People Assigned to this Document

Person	Organization	Role	Active Dates	Assigned By	
Ohde, Diane	ADOT Multimodal Planning Division	AGENCY Organization Administrator	04/07/25 -	Matt AOA	1
Webinar, Authorized Official	Webinar Agency	AGENCY Authorized Official	11/18/24 -	Andrew Butterworth	/
Webinar, Agency Organization Administrator	Webinar Agency	AGENCY Organization Administrator	11/19/24 -	Andrew Butterworth	1

The invited user is now added to the document Add/Edit People list.

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Document Edit People

Instructions:

- Click the '+' button to add a user to this document.
- Click the 'pencil' button to edit a users active/inactive dates on this document.

1 copio	Document Person		≥ ×		
Person				Assigned By	
Webinar, Authorizec Official	Person Webinar, Authorized Official			Andrew Butterworth	1
Webinar, Agency	Role			Andrew Butterworth	
Organization Administrator	AGENCY Authorized Official		~		
H A 1	Active Date	Inactive Date			
	11/18/2024	MM/DD/YYYY			
A pop-u				ncil icon.	
			Save		

ARIZANA **Application & Reimbursement Tools Menu** DEPARTMENT OF -TRANSPORTATION

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			Version	5 MM			
			1.00.00	Include	Include with Attachments 🕑	Exclude	Include Blank Copy
			Select All	0	0	0	0
	Landing Page		PROGRAM INFORMATION	0	0	0	0
			SUMMARY OF PROJECT AND FUNDING REQUEST(S)	Ō	Ō	0	Ō
			CIVIL RIGHTS	0	0	0	0
	Add/Edit People		TRAINING PROGRAM	Ō	Ō	0	Ó
			COORDINATION OF TRANSPORTATION SERVICES	0	0	0	0
	Charles and the second		OPERATING REQUEST	0	0	0	0
	Status History		VEHICLE REQUEST	0	0	0	0
			VEHICLE INVENTORY	0	0	0	0
	200 (2) - 021 - 025 (1)		LOCAL MATCH	0	0	0	0
	Attachment Repository		REQUIRED CERTIFICATION AND DOCUMENTS	0	0	0	0
			Civil Rights Review	0	0	0	0
Modification	The second second second second		Grant Agreement	0	0	0	0
	Modification Summary		Signature Page for Grant Agreement	0	0	0	0
	5359		Attorney Determination	0	0	0	0
	The second s		Upload	0	0	0	0
	Document Validation		Exhibit A	0	0	0	0
			Exhibit B 5310	0	0	0	0
			Exhibit C Responsibility Matrix	0	0	0	0
	Notes	•	Exhibit D Procurement	0	0	0	0
			Exhibit E Civil Rights	0	0	0	0
			Exhibit F DBE	0	0	0	0
	Print Document		Exhibit G Insurance	0	0		
	Document Messages			_			
						Include	Inclu
						\bigcirc	Attach

Print Documents under Tools Menu in the Left Panel.

Select the form options you would like to print, then click on Print button.



AX

Print



Exhibit D Procurement	Ć
Exhibit E Civil Rights	Ć
Exhibit F DBE	ø
Exhibit G Insurance	Ø
Exhibit H Tribal Others	ଟ
> Tools	
✤ Status Options	
Application In Progress	

Related Documents

Change Document Status

C	⊖ ×
Ś	Are you sure that you want to change the status from
	Application Modifications Required to Application In Progress?
	Please enter any notes in regards to this status change
ents	Cancel

Left Panel under Status Options, click on **Application in Progress** status option.

- Notes are not required.
- Click the **OK** button on the pop-up window.



REIMBURSEMENT PROCESSING



Option 1 - Initiate Reimbursement Request

y Tasks					Initiate Related Docum
> Filter					
✓ My Task	S				2
Name	Document Type	Organization	Status	Status Date	Due Date
5310-2023\2024-Salt Di	iver 5310 Application	Salt River Rima-Maricona	Application In Progress	3/13/2024 8-25-20 AM	

From your Dashboard Page, My Tasks section, click on Initiate Related Document to initiate a new reimbursement request.



Option 2 - Initiate Reimbursement Request



On your application or from another reimbursement request for the same application year, navigate to the bottom of the left side panel. Click on Initiate Related Doc to initiate a new reimbursement request.

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Initiate Related Doc



Reimbursement Request

Click on **Initiate Related Doc** to Initiate a Reimbursement Request Click on **Proceed button**, and the system will initiate and open a new reimbursement request. 35



Initiate Reimbursement Request

Initiate Related Document	Initiate Related Document	e ×
Instructions: • Select a parent document and available related document. • Use the Create button to initiate the related document. Document Identifier	Instructions: • Select a parent document and available related document. • Use the Create button to initiate the related document. Document Identifier Search parent documents by identifier	
Search parent documents by identifier	Parent Document	
Parent Document	5311-2024-Salt Kiver Pima-Marcopa -00029	¥
5311-2022-Salt River Pima-Maricopa -00016	Available Documents	~
5311-2022-Salt River Pima-Maricopa -00016		
5311-2024-Salt River Pima-Maricopa -00029		
		Create

If you have more than one active application you are reimbursing for, you will need to select the application from the Parent Document drop down menu.

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The system will automatically select the next available reimbursement instance.

Click Create and the system will generate and open a new reimbursement request.

ARIZONA DEPARTMENT OF -TRANSPORTATION Reimbursement Processing

Initiate Re							
Instructions: Select a parent document and available related document. Use the Create button to initiate the related document. Document identifier							
Search parent docu							
Parent Document	Error Creating Document						
5310-2023\2024-M	Additional Reimbursement Requests can	~					
Available Documents	not be initiated until previous ones have been processed for payment.						
Reimbursement Re		~					
ок							
		Create					

Only one reimbursement can be processed at a time.

Click on **OK**, then click on the **X** to close the **Create** pop-up window.

The system will send you an email to let you know when your reimbursement has been processed. 37



DOCUMENT FUNCTIONALITY CHANGES

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Adding Rows to a Table

LOCAL MATCH				
Match Amount	Name of Match Contributor	Contribution Source	Please Describe	
\$ 5,000	Match Contributor 17 of 150	Donations ~	Donation of Funds	+
Total: \$5,000				

Click on the Plus Sign to add another row.

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Removing Rows from a Table

LOCAL MATCH				
Match Amount	Name of Match Contributor	Contribution Source	Please Describe	
\$ 5,000	Match Contributor 17 of 150	Donations 🗸	Donation of Funds	+ -
\$	0 of 150	~		+
Total: \$5,000				

40

Click on the minus button next to the row you want to remove.



Attaching Backup Documentation



Option 1 - Click on the Browse button to select a file from a folder

Option 2 - Drag your backup document from your File Explorer Window to a spot within the box where it says "Drag Files Here"



ATTACH BACK-UP DOCUMENTATION	Browse		
	page (83).pdf 43.55 KB	× + -	
ATTACH BACK-UP DOCUMENTATION	Browse	✓ Done	
	Test File.pdf File(s) uploaded successfully.	× + -	
	Test File - Copy.pdf File(s) uploaded successfully.	×	

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After attaching backup documentation, it will look something like this.

Use the Plus and Minus signs to remove and add rows.

ARIZANA - DEPARTMENT OF -TRANSPORTATION **Questions? THANK YOU!**

E-Grants questions can be directed to:

Diane Ohde at dohde@azdot.gov