



NEW JERSEY
DIVISION OF
HIGHWAY TRAFFIC SAFETY

New Jersey Division of Highway Traffic Safety
SAGE
Applicant Manual
VERSION 2

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Introduction

Overview

This user guide is to assist applicants with the use of the NJDHTS SAGE application, including technical requirements, user assignment, application initiation, and application submission.

Contact Information

The SAGE Portal 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	

Roles

The SAGE Portal allows users to be assigned specific roles within the system to complete their tasks. The role of an individual can be found on the **Home** page in the welcome panel.

- **The functions a specific user will be able to view or complete depends on the role(s) that a user is assigned.**
 - Functions may include (but not limited to) filling in forms (including uploading files), initiating reports, and pushing the document from one status to the next status.
- A user may have multiple roles within the system.
 - These roles may be for the same organization, or different organizations. Not all systems allow a user to be assigned to multiple organizations.
 - That user will also have multiple logins with separate usernames and passwords for each role.

There are two security roles defined for NJDHTS SAGE users:

Authorized Official

Agency Administrator

These roles have different security access to work on the applications and reports. Once the Authorized Officials are identified and their new user accounts created, the Authorized Officials will select and enter their own organization's staff names to access NJDHTS SAGE. The organization's staff entered by the Authorized Officials will be assigned to the Agency Administrator security level role. Each security role is summarized below:

NOTE: Authorized Officials will be assigning their staff in NJDCA Green SAGE and that information will be applicable to NJDHTS SAGE.

Authorized Officials will be able to:

- Edit and delete user account information for Agency Administrators (Project Directors and Financial Officers)
- Enter, update and delete information on applications
- Download and attach files to the applications
- Submit applications, for the various applications available to NJDHTS SAGE, with printable access to agreement terms and conditions
- Check on the status of each application

Agency Administrators (Project Directors and Financial Officers) will be able to:

- Initiate and submit grant applications, progress reports and reimbursement requests
- Enter, update and delete information on applications, progress reports and reimbursement requests
- Download and attach files to applications, progress reports and reimbursement requests

- Modify applications, progress reports and reimbursement requests with status of Modifications Required
- Check on the status of applications, progress reports and reimbursement requests

Authorized Official - Usually someone in the Mayor's office for a municipality or Freeholders office for a county. This person may also be the President or CEO of the organization.

Agency Administrator - This is the person who is in charge of the grant, usually referred to as the Project Director. This person works on the day to day implementation of the grant. This is the individual responsible for programmatic reporting. Finance Officers (CFO or Treasurer) are also in this role and are responsible for grant reimbursement requests.

In order to receive continued funding or to enter into new grant agreements, **it is important that your contact information be as up-to-date as possible**. By keeping your user record and organization record current with all of the latest changes, NJDHTS SAGE staff will be able to contact you appropriately when the need arises.

If you are a member of a county or municipality then you must update your contact information in the New Jersey Department of Community Affairs (NJDCA) SAGE system. You may access this site here:

<https://dcasage.intelligrants.com/Portal.asp>

System Requirements

The system was designed so that most computer users will be able to 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 Internet Explorer, Firefox, Safari, Android, and Chrome.

Adding as a bookmark/favorite menu

If using Internet Explorer, here instructions on how to bookmark the site. To do so:

- 1) Select **Favorites** → Select **Add to Favorites**.
- 2) This will prompt a menu including the name and URL of the site.
- 3) Rename the site (if desired), and click on the **Add** button.

Adding to the list of Trusted Sites

If using Internet Explorer, it is recommended that the site home page be added to the list of trusted sites. To do so:

- 1) Select **Tools** → Select **Internet Options** → Select **Security** → Select **Trusted Sites**.
- 2) In the "Add this website to the zone:" field, enter the following:
<https://njsage.intelligrants.com/Login.aspx?APPTHEME=NJSAGE>
- 3) Click **Add** → Click **Close** → Click **OK**.

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 need to have multiple windows open please insure that the user is using a separate browser session instead.

If utilizing Internet Explorer, 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.

System Login Page

URL

To access SAGE Portal, type the following into the address bar of the web browser and press **Enter**.

<https://njsage.intelligrants.com/Login.aspx?APPTHEME=NJSAGE>

NOTE: SAGE Portal does not save the username and password. This option may be available for some browsers.

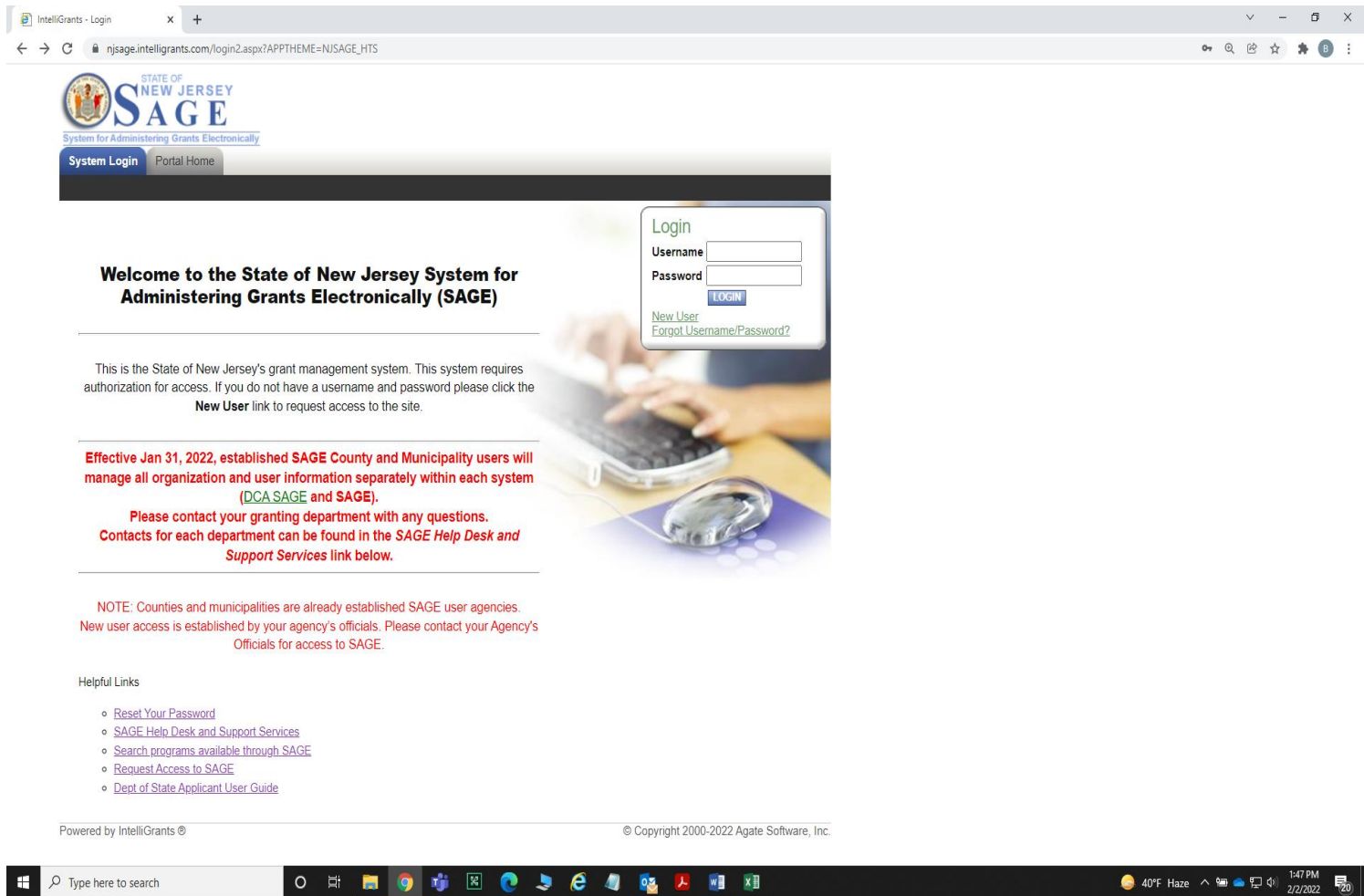


Figure 1 The Login Page

“Locked Out”

- Once a user has exceeded the number of login attempts for the portal, they are “locked out” for 15 minutes. That means that they need to wait 15 minutes before attempting to re-login to the system.
- The user may also use the **Forgot Password** link to request a temporary password at any point. Instructions for the “Forgot Password” link are provided below.

Forgot Password

SAGE 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 Password? link.

- 2) Enter the username and the email address. Click on the RESET MY PASSWORD AND E-MAIL ME THE NEW ONE button. A temporary password will be sent to the email address supplied.

The screenshot shows the SAGE system interface. At the top is the State of New Jersey logo and the text 'STATE OF NEW JERSEY SAGE System for Administering Grants Electronically'. Below this are buttons for 'System Login' and 'Portal Home', and a 'SHOW HELP' link in the top right. A 'Back' link is on the left. The main heading is 'Forgot Your Password?'. Below it, a message says 'Please enter the following information to reset your password.' and another says 'You will be e-mailed a new password if a matching e-mail address is found.' There are two input fields: 'Please enter your username' and 'Please enter your e-mail address', both marked with a red asterisk. A green link 'Forgot Username?' is next to the username field. Below the fields is a blue button labeled 'RESET MY PASSWORD AND E-MAIL ME THE NEW ONE'. At the bottom, there is a 'Top of the Page' link, a footer 'Powered by IntelliGrants ®', and a copyright notice '© Copyright 2000-2018 Agate Software, Inc.'

- 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 Link** and requested to create a new password. They will need to generate a new password and enter it into the **Password** and **Confirm Password** fields in the middle of the page, then click on the **Save** button.

New User

SAGE Portal allows the user to request access to the system. To do so, complete the following steps:

- 1) Click on the New User link.
- 2) Fill in the required fields (*) and any optional fields desired, and click on the **Save** button.
- 3) **NOTE: Users registering by the New User link will need to be approved prior to being allowed to access the site. Users registering for SAGE Portal need to be approved by your Agency Authorized Official or an HTS Regional Supervisor.**

IntelliGrants - New User Register X

njsage.intellisgrants.com/Module/NJSAGE/Registration2.aspx

System Login Portal Home

Back

Registration

The 'Username' field must consist of all letters and numbers and must be between 5 and 20 characters long.

The 'Password' fields must consist of all letters and numbers and must be between 7 and 20 characters long.

Contact Information

Federal Employer Tax ID Number (FEIN) *

Granting Department/Agency *

Name *

Prefix First Middle Last Suffix

Organization *

Title

Address *

City * State New Jersey * Zipcode *

County *

Phone #1 * Phone #2

Fax Cell Phone

Email *

Website

Username *

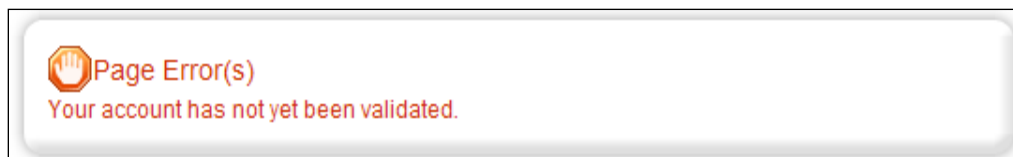
Password * Confirm Password *

Top of the Page

Type here to search

40°F Haze 1:51 PM 2/2/2022

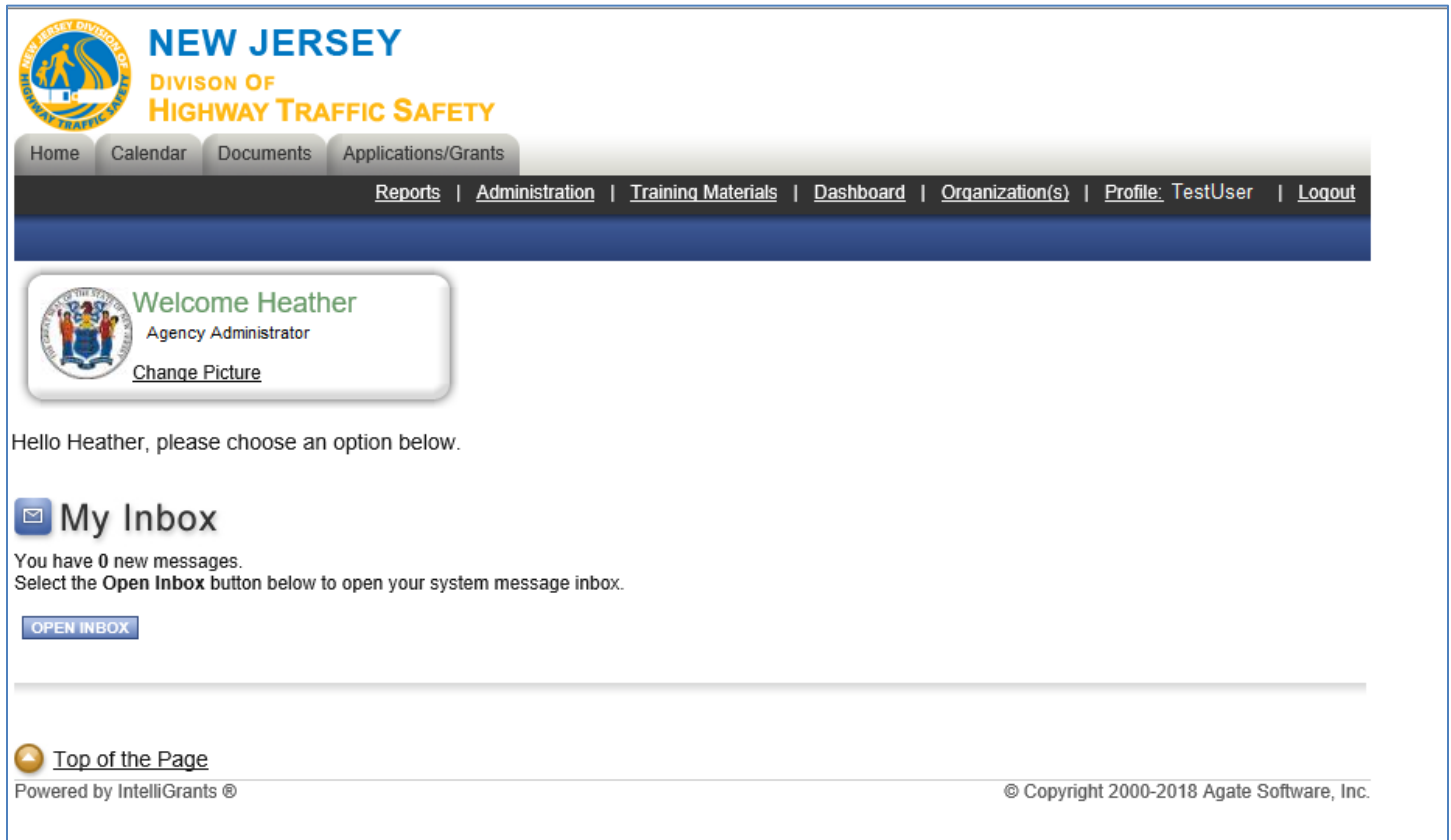
- 4) If a user attempts to access the system before they have been approved, the following message will display:



NOTE: Users are not able to access documents created prior to the date that they are added to the organization. Please follow the instructions found in the Add/Edit people section of the Access Management Tools area to add the user to specific document(s).

Home

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



Tabs

Home

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

Documents

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

Links

NOTE: Access to specific links is dependent on the role of the user.

Reports

This is a navigation link that will direct the user to the **Reports** menu. It contains various reports available to that organization and is used to view/export system information in various formats.

Training Materials –

This is a navigation link that will direct the user to the **Training Materials** menu. It contains various training documents that can be utilized to learn the Highway Traffic Safety system.

Organization

This is a navigation link that will direct the user to the **Organization** page to complete the following functions:

- 1) Updating organization specific information.
- 2) View / Access Organization Documents. Organization documents will display a list of initiated documents, initiated progress reports, and initiated reimbursement requests for the user's organization.

Profile

This is a navigation link that will direct the user to their user profile. This page can be utilized to update profile information and to change the password.

Logout

This is a navigation link that will log the user out of the system, and directs the user to a logout confirmation page.

Additional Features

Welcome Panel

The **Welcome Panel** will display the user's chosen picture, a welcome greeting which includes the user's first name, and the user's current system role assigned to that login.

NOTE: Users may also utilize the Change Picture link to choose a different picture than the one that currently displays in the Welcome Panel.

Instructions

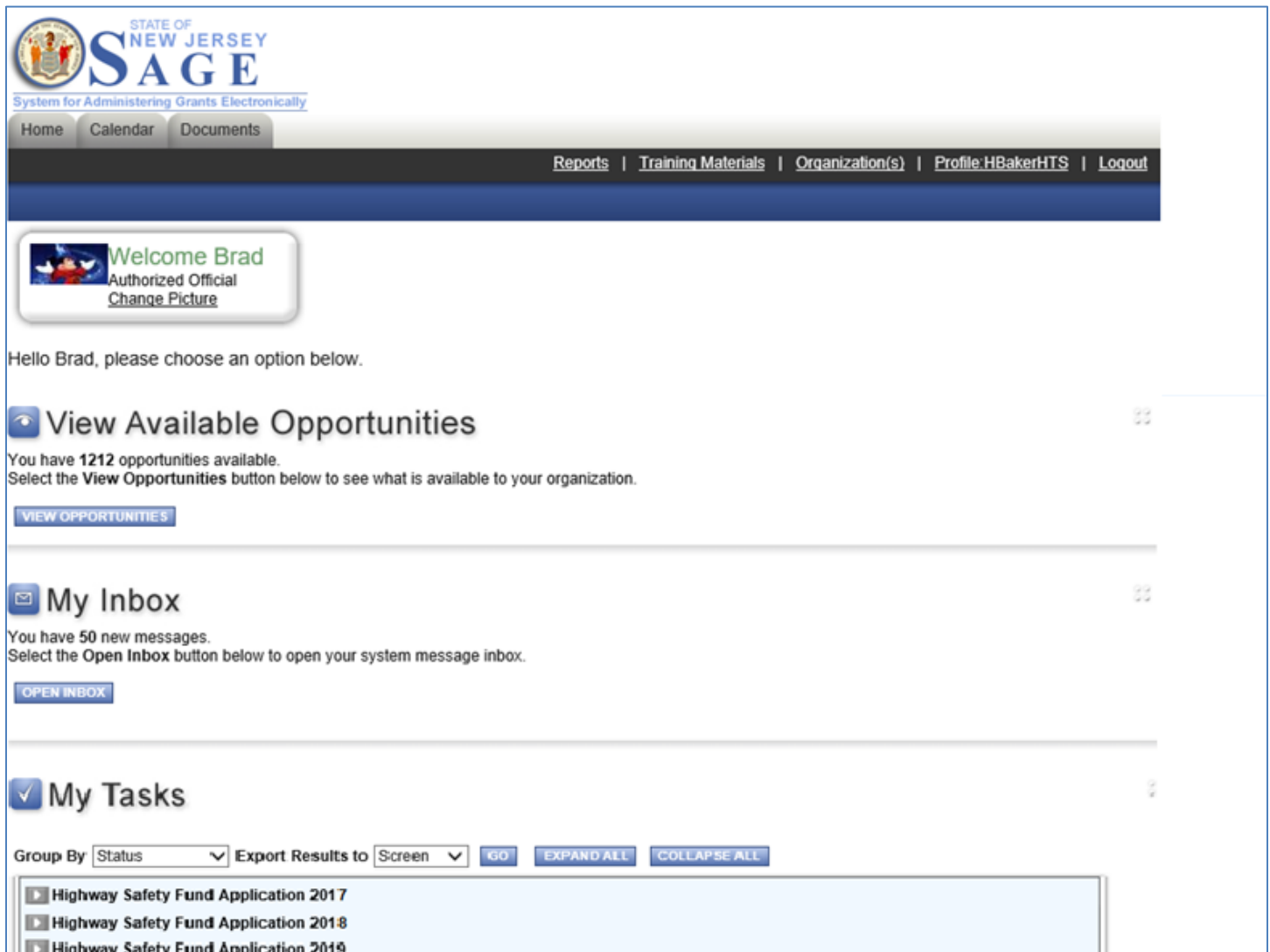
As like many locations within the system, this page has an **Instructions** section offering additional information on completing specific tasks.

Home Page Sections

Initiating an Application/Using the View Available Opportunities

The **View Available Opportunities** section is where all the grant proposals available for the organization to apply for are found.

- 1) Click the **View Opportunities** button to see what is available to the organization.



STATE OF NEW JERSEY SAGE
System for Administering Grants Electronically

Home | Calendar | Documents

Reports | Training Materials | Organization(s) | Profile: HBakerHTS | Logout

Welcome Brad
Authorized Official
[Change Picture](#)

Hello Brad, please choose an option below.

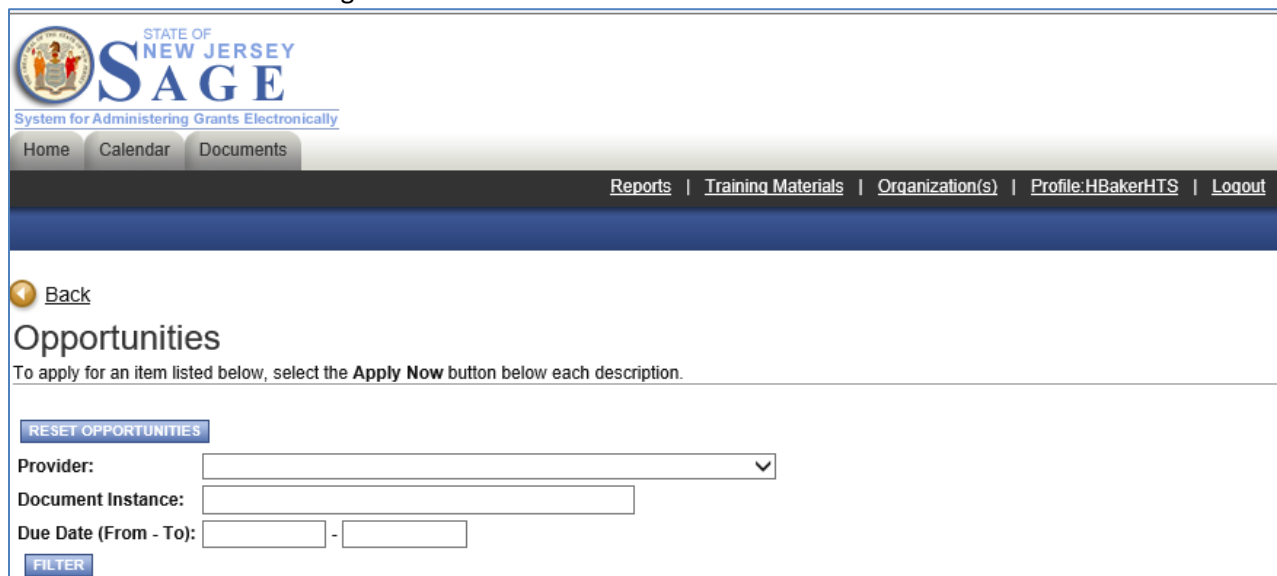
View Available Opportunities
You have 1212 opportunities available.
Select the **View Opportunities** button below to see what is available to your organization.
[VIEW OPPORTUNITIES](#)

My Inbox
You have 50 new messages.
Select the **Open Inbox** button below to open your system message inbox.
[OPEN INBOX](#)

My Tasks
Group By: Status | Export Results to: Screen | [GO](#) | [EXPAND ALL](#) | [COLLAPSE ALL](#)

- ▶ Highway Safety Fund Application 2017
- ▶ Highway Safety Fund Application 2018
- ▶ Highway Safety Fund Application 2019

- 2) Click on the **Filter** button to generate a list of search results.



STATE OF NEW JERSEY SAGE
System for Administering Grants Electronically

Home | Calendar | Documents

Reports | Training Materials | Organization(s) | Profile: HBakerHTS | Logout

[Back](#)

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

[RESET OPPORTUNITIES](#)

Provider:

Document Instance:

Due Date (From - To): -

[FILTER](#)

- 3) Users can click on the **Apply Now** button to start a document. Users can click on the **Not Interested** button to hide an opportunity from view.

Abstinence Education Program 2017 for NJSAGE Test Org 1
Offered By:
NJDOH

Application Availability Dates:
01/01/2016-open ended


Application Period:
08/01/2016-open ended

Application Due Date:
not set


Description:
Abstinence Education Program 2017


[APPLY NOW](#) [NOT INTERESTED](#)

- 4) Once a opportunity has been started, it can be accessed using either the **My Tasks** section of the **Home** page, or the Tab Section tab at the top of the screen.

 **My Tasks**

Group By Status Export Results to Screen [GO](#) [EXPAND ALL](#) [COLLAPSE ALL](#)


 Highway Safety Fund Application 2017

 Highway Safety Fund Application 2018

 Highway Safety Fund Application 2019

My Inbox

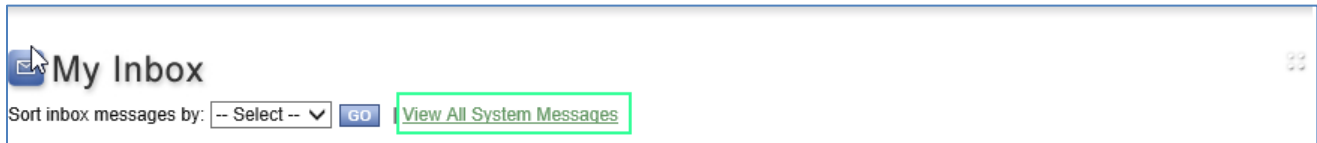
The **My Inbox** section of the home page is where all the notifications sent to the user are found. From here, the messages can be read, or messages can be composed. At first glance, the **My Inbox** section will display the number of new messages that are currently in the user's inbox.

 **My Inbox**

You have 50 new messages.
Select the **Open Inbox** button below to open your system message inbox.

[OPEN INBOX](#)

To expand the **Inbox** section, click the **Open My Inbox** button. For further system functionality, navigate to the **System Messages** page by clicking the **View All System Messages** link.



My Tasks

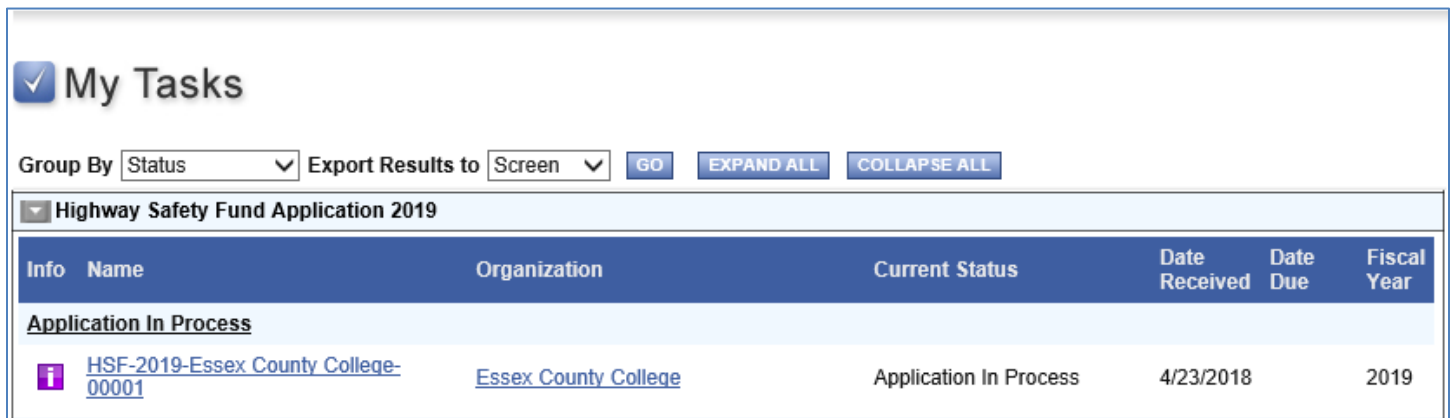
The **My Tasks** section of the **Home** page is where find the task(s) / actions that require the user's attention are found. Links within the tasks are a shortcut to other locations within the system. At first glance, the **My Tasks** section will display the number of new task(s), additional information about the task(s), and the number of task(s) that are critical.

- 1) To expand the **My Tasks** section, click the **Open My Tasks** button.



- 2) To find out more information about the task, hover over the icon in the **Info** column of the task.

NOTE: The user can click on the person with a paper icon to navigate to a Task Check List page with a breakdown of subtask(s) required to complete the Task.




- 3) To continue working on a task, click on the link found in the **Name** column of the task.

Application/Grant Search

Application/Grant Search

Application/Grant Search

- 1) Click on the **Application/Grant Search** tab.
- 2) Add any search filters (**optional**) and click the **Search** button. If no search results are generated, follow the *User Unable to View Document* instructions below.



NEW JERSEY
DIVISION OF
HIGHWAY TRAFFIC SAFETY

[Home](#) | [Calendar](#) | [Documents](#) | [Applications/Grants](#)

[Reports](#) | [Administration](#) | [Training Materials](#) | [Dashboard](#) | [Organization\(s\)](#) | [Profile:HBakerHTS](#) | [Logout](#)

[Back](#)

3) To access the document, click on the **Document Name** link listed in the **Name** column.

NOTE: Hovering over a specific link may bring up a textbox containing additional information.

[Back](#)

Application/Grant Search

Use the search functionality below to find a specific

Search Documents

Application/Grant #

Grant Program

Organization

Vendor #

County

State

Status

Fiscal Year

Grants Management Officer (GMO)/
Program Management Officer (PMO)

Assigned Grant Staff

Date Last Status Change

Budget Period

Project Period

SEARCH

CLEAR

HTS Federal Highway Safety Grant 2012

HTS Federal Highway Safety Grant 2013

HTS Federal Highway Safety Grant 2014

HTS Federal Highway Safety Grant 2015

HTS Federal Highway Safety Grant 2016

HTS Federal Highway Safety Grant 2017

HTS Federal Highway Safety Grant 2018

HTS Federal Highway Safety Grant 2019

HTS Mobilization 2012

HTS Mobilization 2012 Click It Or Ticket

HTS Mobilization 2012 Drive Sober or Get Pulled Over

HTS Mobilization 2012 Drive Sober or Get Pulled Over Year End Crackdown

HTS Mobilization 2013 Click It Or Ticket

HTS Mobilization 2013 Drive Sober or Get Pulled Over Statewide Labor Day Crackdown

HTS Mobilization 2013 Drive Sober or Get Pulled Over Year End Crackdown

HTS Mobilization 2014 Click It or Ticket

HTS Mobilization 2014 Distracted Driving Crackdown

HTS Mobilization 2014 Drive Sober or Get Pulled Over Statewide Labor Day Crackdown

HTS Mobilization 2014 Drive Sober or Get Pulled Over Year End Crackdown

HTS Mobilization 2015 Click It or Ticket

HTS Mobilization 2015 Distracted Driving Crackdown

HTS Mobilization 2015 Drive Sober or Get Pulled Over Statewide Labor Day Crackdown

HTS Mobilization 2015 Drive Sober or Get Pulled Over Year End Holiday Crackdown

HTS Mobilization 2016 Click It or Ticket

HTS Mobilization 2016 Drive Sober or Get Pulled Over Statewide Labor Day Crackdown

HTS Mobilization 2016 Drive Sober or Get Pulled Over Year End Holiday Crackdown

HTS Mobilization 2017 Click It or Ticket

HTS Mobilization 2017 Distracted Driving Crackdown

HTS Mobilization 2017 Drive Sober or Get Pulled Over Statewide Labor Day Crackdown

[Top of the Page](#)

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User Unable to View Document

- 1) If the user is expecting to see a specific document but is unable to view it, please click on the **Clear** button to clear the search results filters prior to clicking the **Search** button again.
- 2) If the user has completed step 1, but is still not able to view the document, it may be that the user needs to be logged in with the correct role. Please see the *Roles* section to confirm that the user has the correct role to complete the task.
NOTE: The user may need to reach out to other members of the organization and/or other agencies to be assigned the correct role.
- 3) If the user has completed steps 1 and 2, but is still not able to view the document, it may be that the user needs to be added to the document. They will need to contact HTS Regional Supervisor of their organization to be added to the document.

Document Menu

The **Document Menu** page is the main page for all documents in the system. From here, the user can navigate to all the tasks and tools needed.

- 1) Navigate to a specific document following the instructions listed in the *Application/Grant Search* section.
- 2) This will bring up additional options shown in the screenshot below.

 [Back](#)

All Documents Search

Use the search functionality below to find a specific Document

Search Documents

Document Type

Document Name

Status

Organization

Year

Export Results to Sort by:

Document Type	Organization	Name	Current Status	Year
<input type="button" value="v"/> Highway Safety Fund Application 2019				
Highway Safety Fund Application 2019	Essex County College	HSF-2019-Essex County College-00001	Application In Process	2019

Document Information

This provides a link that will return the user to the current screen, from anywhere within the document.

Details

This is an expandable section that, once expanded, will display current information about the user and the document, such as the document type, the user organization, the current user role, the status, and the fiscal year.








Menu

This is the default screen for the item. Clicking on this link will return the user to the default screen.

Forms Menu

From the **Document Menu** page, hover over or click on the **Forms Menu** link. This will direct the user to the **Forms Menu**.








Forms

Status	Page Name	Note	Created By	Last Modified By
	Type of Improvement		Brad Jersey 4/24/2018 11:15:14 AM	
Highway Safety				
	Project Location		Brad Jersey 4/24/2018 11:15:41 AM	Brad Jersey 4/24/2018 11:15:56 AM
	Scope Of Work		Brad Jersey 4/24/2018 11:16:31 AM	
	Total Estimated Cost of Improvement		Brad Jersey 4/24/2018 11:17:08 AM	
	Highway Safety Fund Data Sheet		Brad Jersey 4/24/2018 11:17:35 AM	
	Applicant Information		Brad Jersey 4/24/2018 11:18:07 AM	Brad Jersey 4/24/2018 11:21:07 AM
	Signature Page		Brad Jersey 4/24/2018 11:43:47 AM	

Forms Menu Information

Status Icons

This will display a different icon based on the status of the form.


Icon	Description
	Blank Page
	Page with Pencil
	Multiple Pages
	Review
	Global Error(s)
	Adobe Page
	Internet Explorer

Page Name

This is a link that will display the name of the form / link / PDF Download. Click on this link to be directed towards the task, action, or data collection form.

Note

This will display an Icon that indicates that a user has left a note on the form.

Icon	Description
	Notepad

Created By








- **For single page items** - this field will list the person who first saved the page, along with a date and time stamp.
- **For multiple page items, PDFs, and URLs** - this field will be left blank.

Saved By

- **For single page items** - this field will list the person who most recently saved the page, along with a date and time stamp.
- **For multiple page items, PDFs, and URLs** - this field will be left blank.


Sections

Forms are organized into sections with a section header at the top of the section.


Forms				
Status	Page Name	Note	Created By	Last Modified By
	Type of Improvement		Brad Jersey 4/24/2018 11:15:14 AM	
Highway Safety				
	Project Location		Brad Jersey 4/24/2018 11:15:41 AM	Brad Jersey 4/24/2018 11:15:56 AM
	Scope Of Work		Brad Jersey 4/24/2018 11:16:31 AM	
	Total Estimated Cost of Improvement		Brad Jersey 4/24/2018 11:17:08 AM	
	Highway Safety Fund Data Sheet		Brad Jersey 4/24/2018 11:17:35 AM	
	Applicant Information		Brad Jersey 4/24/2018 11:18:07 AM	Brad Jersey 4/24/2018 11:21:07 AM
	Signature Page		Brad Jersey 4/24/2018 11:43:47 AM	

Successfully Completing a Form

After navigating to a data collection form, complete the form. The user may do this by entering all the data on the form, and clicking the **Save** button. Then the form will either display the **Page Information** notification indicating a successful save, or a **Page Error(s)** notification. Continue entering data and saving the page until the user receives the **Page Information** notification and has completed the form.


Page Error(s)

- Agency is a required field.
- DUNS Number is a required field.
- Project Title is a required field.
- Project Director is a required field.
- Street Address is a required field.
- Phone is a required field.
- Fax is a required field.
- Email is a required field.
- The State is a required field.
- The Zip Code is a required field.
- Printed Name is a required field.


Page Information
 The information has been saved.

Automatically Populated Fields

On some forms, calculations are automatically completed, and information is copied over from other forms.

Name of Grantee:	Essex County College
Organization Address Essex County College 303 University Avenue Newark, NJ 07102 Phone: 973-877-3006	
Email Address:	jefferies@essex.edu
Federal Tax Identification Number:	221821292
Vendor Number:	221821292-04 ▼ *
Vendor Unit:	ESSEX CO COLLEGE ON-CAMPUS CONTINUING EDUCATION
Vendor Unit Address	303 UNIVERSITY AVE NEWARK, NJ 07102
Application Initiation Date:	04/23/2018
Program:	Highway Safety Fund Application 2019

Repeatable Rows (with SAVE function)

In some locations, rows will continue to repeat, allowing the user to enter in additional information as needed.

- 1) Fill in the available row(s) and click the **Save** button.
- 2) After the page has been saved, additional rows will become available. This process can be repeated by filling in the available rows, and clicking the **Save** button.

Document Title:	Document Title 1	Attachment:	4222-Chrysanthemum.jpg	Browse...	<input type="checkbox"/> DELETE
Document Title:	Document Title 2	Attachment:	4222_2-Desert.jpg	Browse...	<input type="checkbox"/> DELETE
Document Title:		Attachment:		Browse...	

Repeatable Rows (Button)

In some locations, rows will continue to repeat, allowing the user to enter in additional information as needed.

- 1) Fill in the available row(s) and click the **Plus Sign** icon next to the header to add a row.

ATTACHMENTS

Instructions:

- All required fields are marked with an *.
- Use the **Save** button to save text and calculate data on each page.
- Hit **Save** before you proceed to another page.
- Save at least every 30 minutes to avoid losing data.

Description Application Support Materials *

File name Choose File No file chosen

File name Choose File No file chosen ☐ DELETE

File name 4146_2-BrandingSamples.docx

+ File name Choose File No file chosen

Situational Business Rules

In some locations, a field may or may not be required based on other information typed into the document. For example, there may be a “Yes/No” question, and if “Yes” is answered, the form may require that the user provide information explaining the answer. Be sure to follow the instruction provided both in the instructions on the form and in the “Page Error” messages associated with that question.

Uploads & Attachments

Upload fields can be utilized to upload / attach files to forms, where available. To utilize this field, click the **Browse...** button, and select the desired file that the user wishes to upload, and then click **Open**. This will bring the file name into the field.



- Only files of the following types are allowed: doc, eps, pdf, jpg, gif, bmp, txt, avi, wmv, ppt, xlsx, mov, dpi, png, and mp3.
NOTE: Some uploads have maximum file sizes. If the user receives an unusual error message, the user can re-save the file in a smaller size and re-upload the file.
- When combined with *Repeatable Rows*, the user may have the ability to upload additional attachments. They can do this by selecting files for each available upload field, and then clicking the **Save** button. After saving the page, additional upload fields will become available.

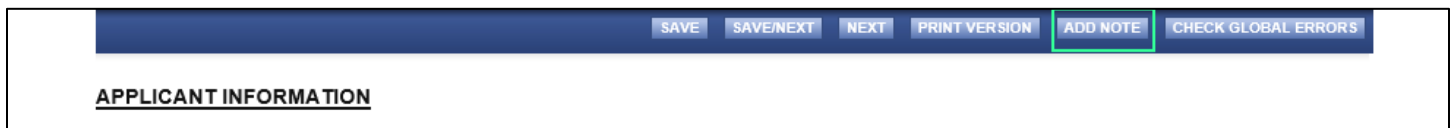
Copy & Paste Disclosure

- Users should be cautious while utilizing the copy and paste function of most word processing programs to transfer text into narrative boxes within, as it will not recognize certain formatting, including tables, graphs, photographs, bullets, and certain tabs.
- Users must also be aware of the character limits of each text box, as attempting to copy and paste text that is larger than the allotted amount of space will yield an error. The character limit may be found at the bottom left of each text box.
- Users may want to first copy and paste text into any standard “notepad” (or equivalent) program.

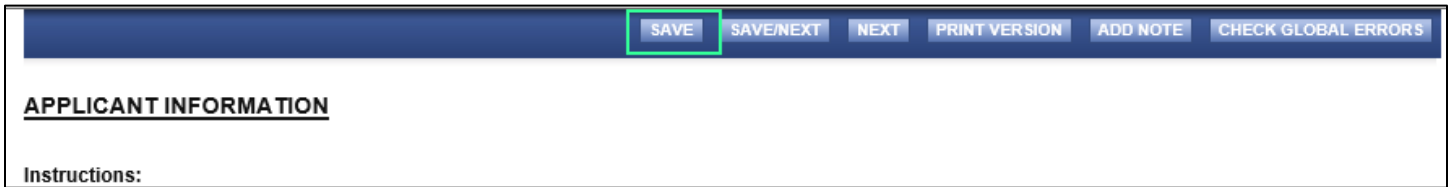
Adding and Editing Notes

To encourage communication within the system, users will have the ability to add notes to a form. Follow these steps:

- Click the **Add Note** button that is located at the top right corner of the page. This will open the **Notes** panel. This panel can be moved to any location on the screen.
- To add a new note, click on the **Add a New Note** button. This will open the **Add New Note** panel.



- Enter a “Subject” and a “Message”, and then check the box next to the name of the users who can view this note. The user may also check the All / None checkbox to either check everyone, or no one.
 - View** notes by clicking on the link provided in the **Messages** column.
 - Edit** notes by clicking on the link provided in the **Action** column.
- Click on the **Save** button.



The screenshot shows the top navigation bar of the SAGE Portal with buttons: SAVE, SAVE/NEXT, NEXT, PRINT VERSION, ADD NOTE, and CHECK GLOBAL ERRORS. The 'SAVE' button is highlighted with a green box. Below the navigation bar is a section titled 'APPLICANT INFORMATION' with a sub-section 'Instructions:'.

Printing the Form

Some data collection forms may offer a PDF version of the data typed into the form. The user can utilize these PDF versions to print the form, or to save for future reference. To download a PDF version of the form, click the **Print Version** button that is located at the top right corner of the page.



Save and Submit [Some Sites have this set up]

SAGE Portal allows the user to submit the document at the same time a form is being saved. To complete both actions at the same time, click on the **Save & Submit** button on a specific form.



Save/Next [Some Sites have this set up]

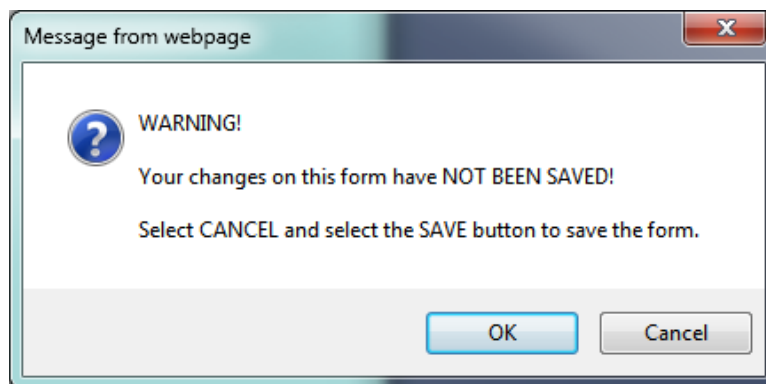
SAGE Portal allows the user to save the form and move to the next form at the same time. To do so, click on the **Save/Next** button. NOTE: The **Next** button is also available for users to move on to the next form without saving their current form.



Page Save Warning

If any of the field(s) in a form are changed, a pop-up box will appear if the user attempts to leave the page without saving the form first.

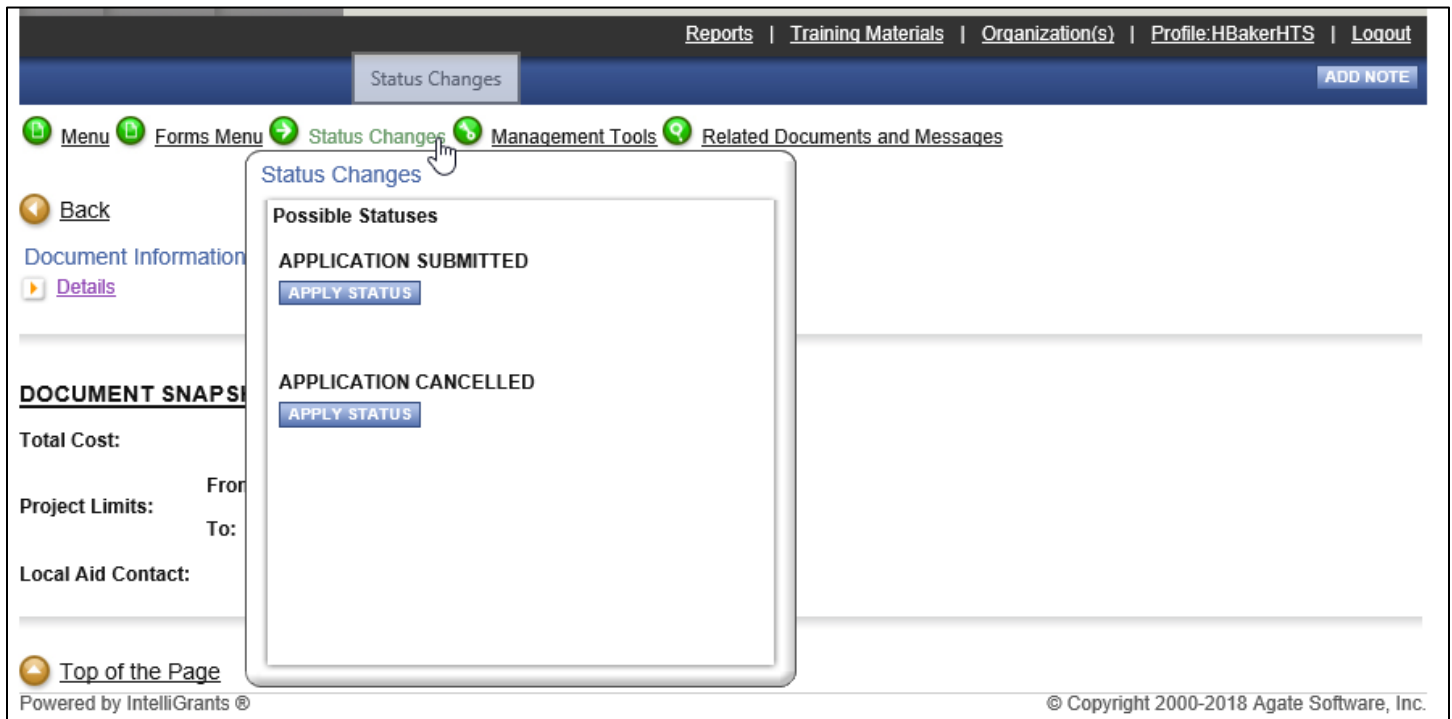
- Click "Ok" to leave the page without saving.
- Click "Cancel" to return to the form and save changes.



Status Changes

The **Status Changes** menu is used to push the document through the process steps in the process flow. For example, this is how a document can be submitted for review, or returned for revisions/updates or signatures. This menu may have just one (1) option, multiple options, or no options listed.

NOTE: If no options are listed, the user does not have the permissions necessary to move the document out of its status.



- 1) From the **Document Menu** page, hover over or click on the **Status Change** link and then click on the desired status of the document.
- 2) To change the status of the document, click the **Apply Status** button located underneath the status the user wishes to apply to this document.

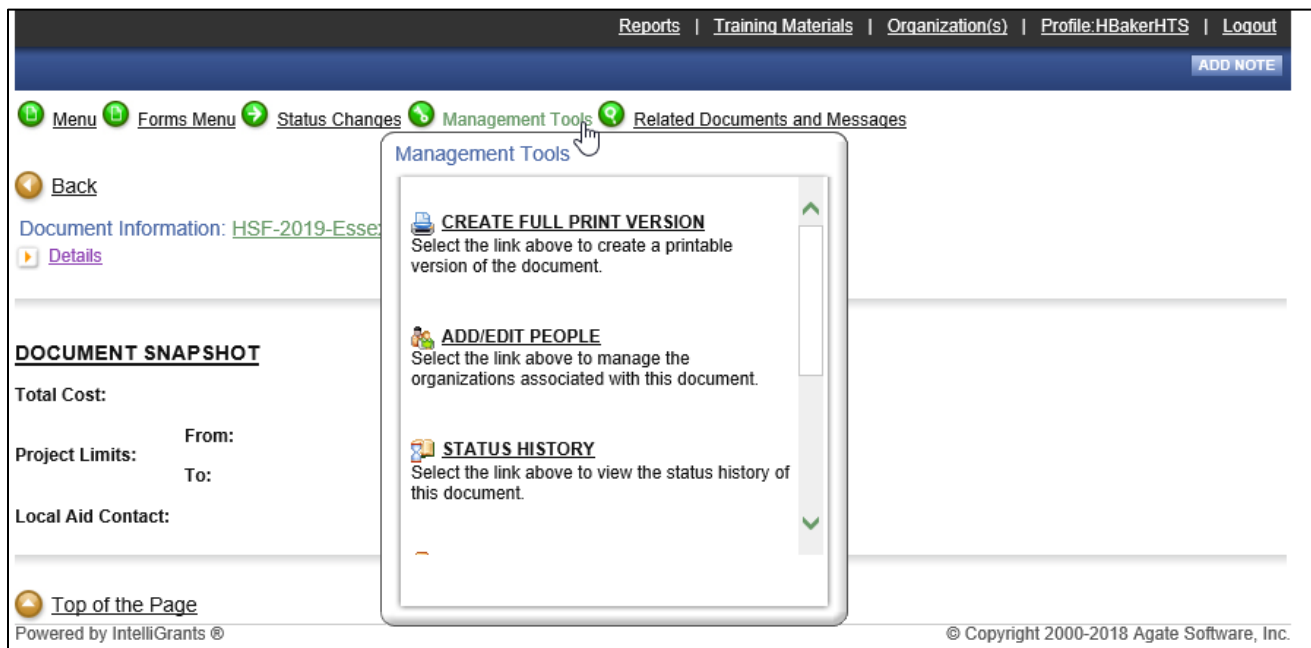
Access Management Tools

From the **Document Menu** page, hover over or click on the **Management Tools** link and then click on the desired tool. Below a **Management Tools Summary** has been created, along with sections on various tools.

Management Tools Summary

Below is a screenshot showing some of the common tools available for updating documents within the system.

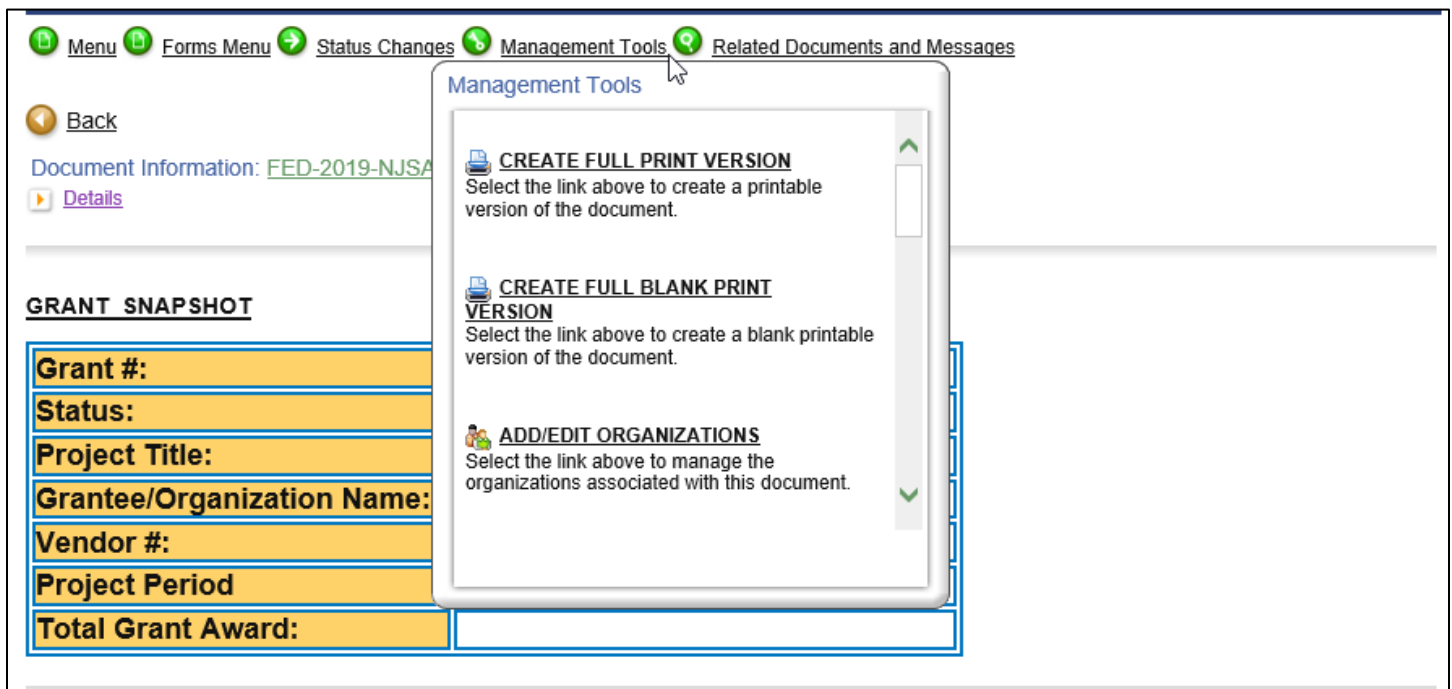
NOTE: Access to these tools is dependent on the user role.



Add/Edit Organizations

Adding Organization(s)

- 1) From the **Management Tools** page, click on the **Add/Edit Organizations** link. The default page that appears will list the organizations already assigned to this document.
- 2) In the **Organization Search** field, enter part of an organization name and click on the **Search** button. This will bring up the **Organization(s) Found** section.



- 3) To add an organization, click on the check box next to the organization name and click on the **Save** button.

Removing Organization(s)

- 1) To remove an organization, use the **Organization Search** tool to locate the organization, click the checkbox next to the organization name to deselect that organization.
- 2) Click on the **Save** button.

Add/Edit People

Adding User(s)

This tool will allow the user to add new users and existing users to this document.

- 1) From the **Management Tools** page, click on the **Add/Edit People** management link.
- 2) In the Person Search section, enter the user's name, and then click the **Search** button. This will bring up the **People Found** section.

The screenshot shows a web application interface. At the top, there's a navigation bar with links: Menu, Forms Menu, Status Changes, Management Tools (highlighted), and Related Documents and Messages. Below this, a 'Management Tools' modal window is open. It contains three sections: 'ADD/EDIT PEOPLE' (with a description: 'Select the link above to perform actions such as adding people, changing a security role, or altering people's active dates on this document.'), 'MY ACTIVITIES SEARCH/REPORT' (with a description: 'Select the link above to perform a search and output the results from the My Activities.'), and 'STATUS HISTORY' (with a description: 'Select the link above to view the status history of this document.'). To the left of the modal, there's a 'GRANT SNAPSHOT' section with fields: Grant #, Status, Project Title, Grantee/Organization Name, Vendor #, Project Period, and Total Grant Award.

- 3) To add a person, click on the check box next to their name, select their role, and click the **Save** button. This will grant that user access to the document.

Current People Assigned				
<input type="checkbox"/>	Person	Organization(s)	Role	Active Dates
<input checked="" type="checkbox"/>	Bob Gaydosh	NJSAGE HTS (HTS Regional Supervisor)	HTS Regional Supervisor	6/28/2018
<input checked="" type="checkbox"/>	Brad Admin	NJSAGE Test Org 1 (Agency Administrator)	Agency Administrator	6/28/2018

Removing User(s)

To revoke user access, within the **Current People Assigned** section enter an end date in the **Active Dates** column for that user, and then click the **Save** button.

Create Full Print Version

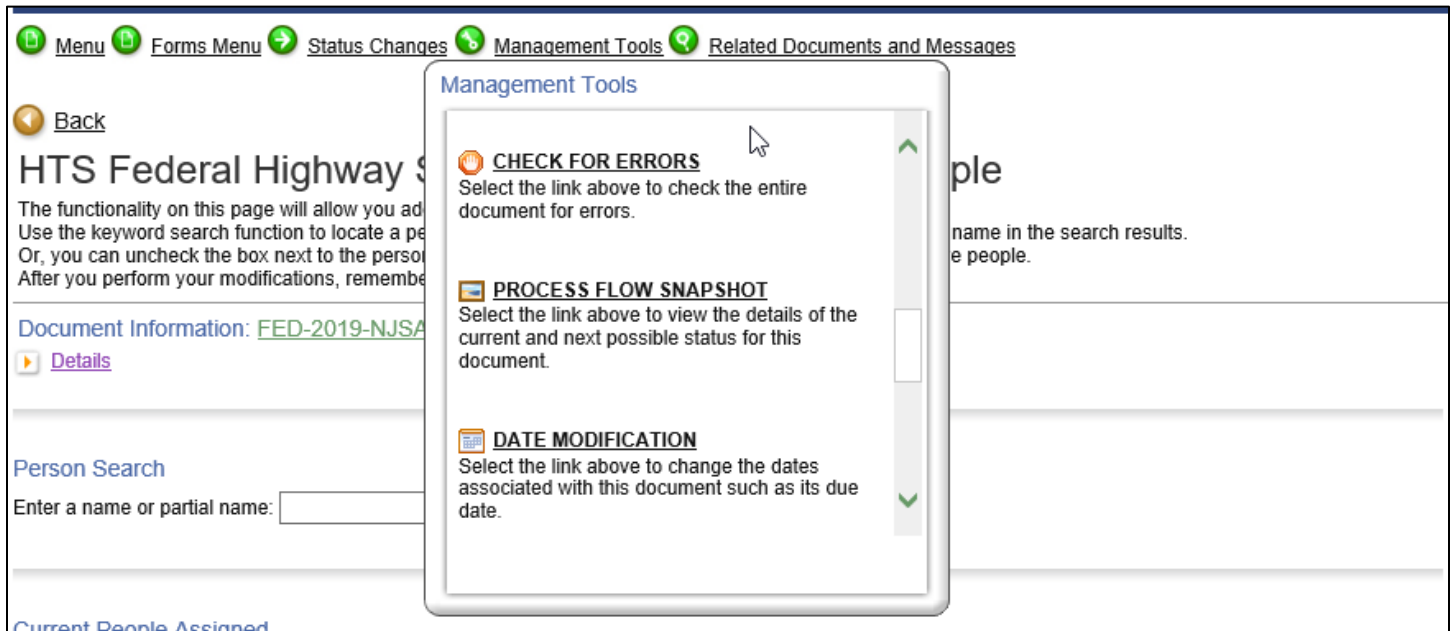
This tool creates a printable version of the document for reading and/or saving.

Create Full Blank Print Version

This tool creates a form/template version of the blank document.

Check for Global Errors

This tool is used to check for Global errors within the document prior to submitting it to the next status.

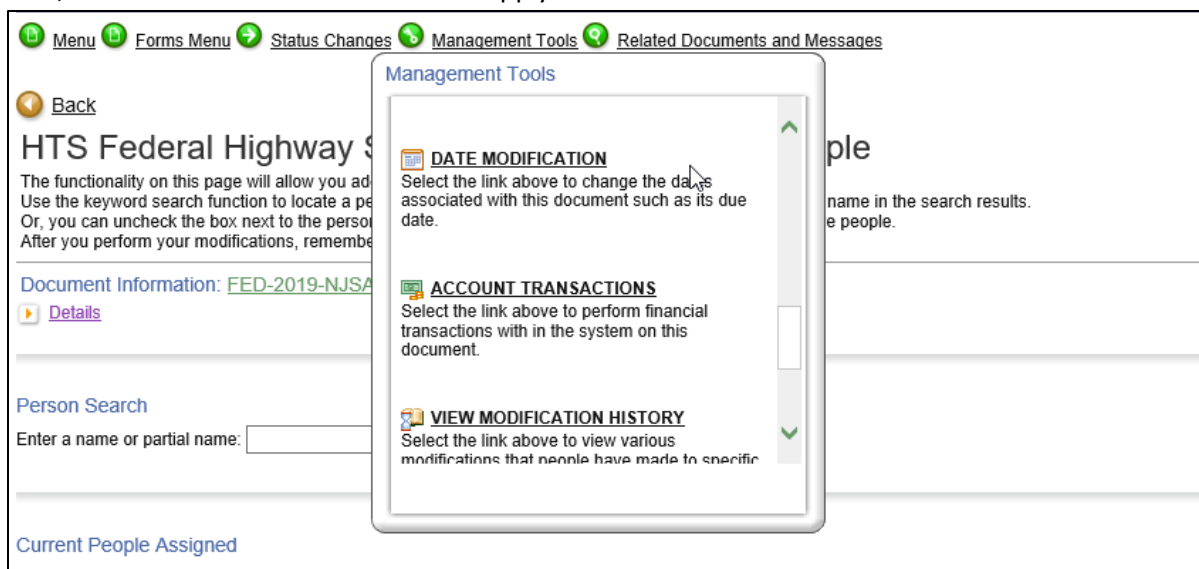


View Modification History

This tool is used to view various modifications that people have made to specific pages in the document.

Date Modification

This tool will allow the user to modify the dates associated with this document, such as the period dates and the due date. To do so, enter the dates the user wishes to apply to this document and click the **Save** button.



Progress Reports and Related Documents

From the **Document Menu** page, hover over the **Related Documents and Messages** link. This will show the **Related Items** page.

Related Documents

In the **Related Documents** section, the user can initiate/view subdocuments, progress reports, reimbursement requests or invoices (if available).

Initiating a Report

To initiate a report, please complete the following steps:

- 1) Click on the "Initiate a/an" link of a specific report.
- 2) Click on the **I Agree** button for the certification form (if available).
- 3) This will bring up the **Document Menu** for the report that follows the same One-click navigation pattern as described in the **Document Menu** section. The user will be required to complete forms and submit the report.

Updating a Report

To update a report, please complete these steps:

- 1) Click on the document link in the **Name** column for a specific report.
- 2) This will bring up the **Document Menu** for the report that follows the same One-click navigation pattern as described in the **Document Menu** section. The user will be required to complete forms and submit the report.

Additional Filters

- Reports can be sorted by those options listed in the drop-down menu. To use those options, click on one of them and click on the **Go** button (not shown in screenshot).
- Alternatively, text can be typed into the **Filter by Document Type** text box and the **Go** button clicked.

Additional Filters

- Messages can be sorted by those options listed in the drop-down menu. To use those options, click on one of them and click on the **Go** button.
- The “Show All Messages” checkbox can be clicked as well to display all messages available.

My Reports

These reports are used to generate reports designed for exports from the system.

NOTE: Access to these reports is dependent on the user role.

- 1) Clicking on a specific report link opens that report on screen.
- 2) Enter any search results parameters in the top section of the report.

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Reports

Select a report below to execute it.

Formatted Reports

- [Skills 4 Jersey Batch Report](#)
- [HTS Grants Tracking - General Report](#)
- [HTS Grants Tracking - Summary Report](#)
- [HTS Grants Tracking - Summary Report Advisor](#)
- [HTS Grants Tracking - Summary Report Auditor](#)
- [HTS Grants Tracking - Summary Report Program Staff](#)

Queries

- [Active Document Query](#)
- [CFS Vendor Information](#)
- [File Attachment Query](#)
- [NJ SAGE Notes Summary](#)
- [Organization Person Role](#)
- [Program Eligibility Query](#)
- [Status History Query](#)
- [Documents by Status](#)
- [HTS Grant Number Report](#)
- [HTS Grants Tracking - General Query](#)
- [HTS Statewide, Countywide, Municipality Report](#)
- [Proposed Budget](#)

- 3) Click on drop-down menu options to specify how the user wants to view the report.

Export Results to: **Screen** | Results Per Page: **20** | Sort By: **-- SELECT --** | **ASCENDING**

Screen
Excel
Text File
CSV
XML

10
20
30
40
50
100
500

-- SELECT --
Organization
Document Name
Current Status
Average Reviewer Score
Final Score
Approved?

ASCENDING
DESCENDING

[Top of the Page](#)

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- 4) Click on the **Execute** button to run the report. Click the **Clear** button to clear out the search results parameters entered in Step 2.

The screenshot shows the web interface for the New Jersey Division of Highway Traffic Safety. At the top left is the state seal and the text "NEW JERSEY DIVISION OF HIGHWAY TRAFFIC SAFETY". Below this is a navigation bar with links: Home, Calendar, Documents, Applications/Grants, Reports, Administration, Training Materials, Dashboard, Organization(s), Profile:HBakerHTS, and Logout. On the right side of the navigation bar are two buttons: "EXECUTE" (highlighted with a red box) and "CLEAR". Below the navigation bar is a "Back" button with a left arrow icon. The main heading is "HTS Grants Tracking" with the subtitle "HTS Grants Tracking - General Report". A message states: "For more detailed instructions, select the Show Help button." Below this is a section for report settings: "Export Results to" (Screen), "Results Per Page" (20), "Sort By" (-- SELECT --), and "ASCENDING". At the bottom left is a "Top of the Page" button with an up arrow icon. The footer contains "Powered by IntelliGrants ©" on the left and "© Copyright 2000-2018 Agate Software, Inc." on the right.

- 5) This will generate the report in the format that the user set up in Step #3.

My Training Materials

To access the training materials available to the user, please follow these steps:

- 1) Click on the **Training Materials**. This will bring up a list of manuals and other items.

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Welcome Heather
IntelliGrants Administrator (MAIN)
[Change Picture](#)

Hello Heather, please choose an option below.

My Inbox
You have 0 new messages.
Select the **Open Inbox** button below to open your system messages.

My Training Materials
Click on the link(s) to open, view or print the training materials

Documentation	Videos
NJ DHTS User Manual	NJ DOS IG16 Admin Webinar
	NJ DOS IG16 Grantee Webinar
	NJ DHTS Application Submission

[Top of the Page](#)
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[CLOSE](#)

- 2) Click on the link of the manual or other item.


Organization(s)

Overview

The organization(s) link will direct the user to a menu where organization updates can be recorded. These organization updates are divided among, but not limited to different sections.

- **Organization Information**
- **Organization Members**
- **Organization Documents**

Organization Information

 [Back](#)

Organization - NJSAGE HTS

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

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

Organization Information

Name	<input type="text" value="NJSAGE HTS"/>			*				
Identifier	<input type="text" value="NJSAGE HTS"/>			*				
Federal Tax I.D. Number	<input type="text" value="787878788"/>			*				
DUNS Number	<input type="text" value="80-665-6781"/>							
DOE District Code	<input type="text"/>							
DOE County Code	<input type="text"/>							
SAM CAGE Code	<input type="text"/>							
Address	<input type="text" value="NJSAGE HTS"/>			*				
City	<input type="text" value="Trenton"/>	*	State	<input type="text" value="New Jersey"/>	*	Zip code	<input type="text" value="08625"/>	*
County	<input type="text" value="Mercer County"/>							
Phone	<input type="text" value="609-633-8726"/>	*	Fax	<input type="text"/>				
Email	<input type="text"/>							
Website	<input type="text"/>							

Organization Members

This section allows the user to manage access by other members.

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Organization - NJSAGE HTS

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

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

Organization Members

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

- To add a member to your organization, select the **Add Members** link below.
- If a member has already added his/her information in the system, you can search for the member.
- 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"/>	O'Malley, Mrs. Heather	External Reviewer	4/30/2013		Gaydosh, Bob 5/1/2013	Gaydosh, Bob 5/1/2013

The page includes a list of current (active) members. The function for deactivating/removing organization members is also available on this page.

Deactivating/Removing Organization Members

To deactivate the user from the organization, please follow these instructions:

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Organization - NJSAGE HTS

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

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

Organization Members

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

- To add a member to your organization, select the **Add Members** link below.
- If a member has already added his/her information in the system, you can search for the member.
- 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"/>	O'Malley, Mrs. Heather	External Reviewer	4/30/2013		Gaydosh, Bob 5/1/2013	Gaydosh, Bob 5/1/2013
<input checked="" type="checkbox"/>	Desai, Mr. Mumukshu	HTS Audit Staff			Walker, David 1/5/2011	
<input checked="" type="checkbox"/>	Groffie, Paul	HTS Audit Staff			Walker, David 1/5/2011	
<input checked="" type="checkbox"/>	Marty, Carol-Ann	HTS Audit Staff			Walker, David 1/5/2011	
<input checked="" type="checkbox"/>	Ottobre, Kelly	HTS Audit Staff			Tkaczyk, Mr. Joshua	

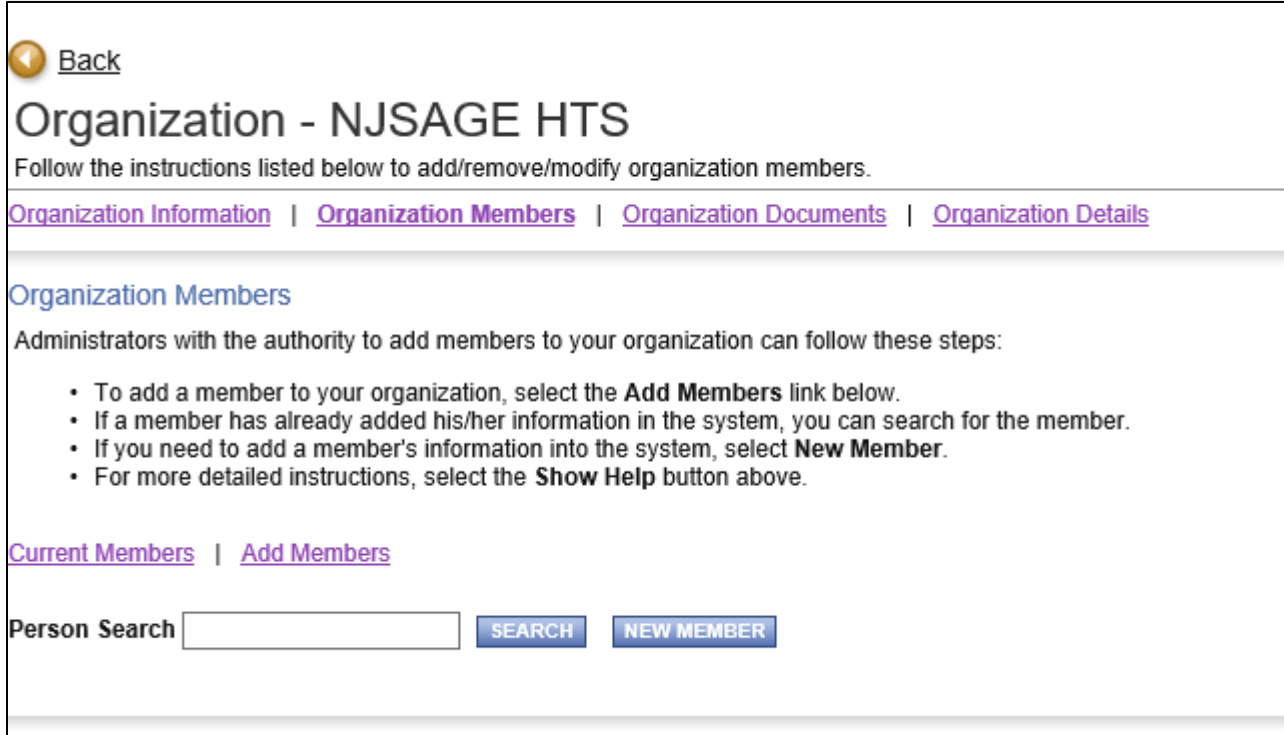
Today: June 26, 2018

- 1) Click on the **Organization(s)** link.
- 2) Locate the specific user that is being removed.
- 3) Click in the 2nd date field in the **Inactive Dates** column. This will bring up an auto prompt to select a date for the user to be deactivated.
- 4) Click on the **Save** button at the top of the page.

Adding Pre-Existing Members to an Organization


To add users to an organization by a pre-existing member of the organization, please follow these instructions:

- 1) Click on the **Organization(s)** link.
- 2) Click on the **Add Members** link.



The screenshot shows a web interface for 'Organization - NJSAGE HTS'. At the top left is a 'Back' button with a left arrow icon. Below the title is a subtitle: 'Follow the instructions listed below to add/remove/modify organization members.' A horizontal navigation bar contains four links: 'Organization Information', 'Organization Members', 'Organization Documents', and 'Organization Details'. Below this is a section titled 'Organization Members'. It contains a paragraph: 'Administrators with the authority to add members to your organization can follow these steps:' followed by a bulleted list: '• To add a member to your organization, select the **Add Members** link below.', '• If a member has already added his/her information in the system, you can search for the member.', '• If you need to add a member's information into the system, select **New Member**.', and '• For more detailed instructions, select the **Show Help** button above.' Below the list are two links: 'Current Members' and 'Add Members'. At the bottom is a 'Person Search' section with a text input field, a 'SEARCH' button, and a 'NEW MEMBER' button.

- 3) Click on the **Add Members** link. This will bring up a **Person Search** field.



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

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

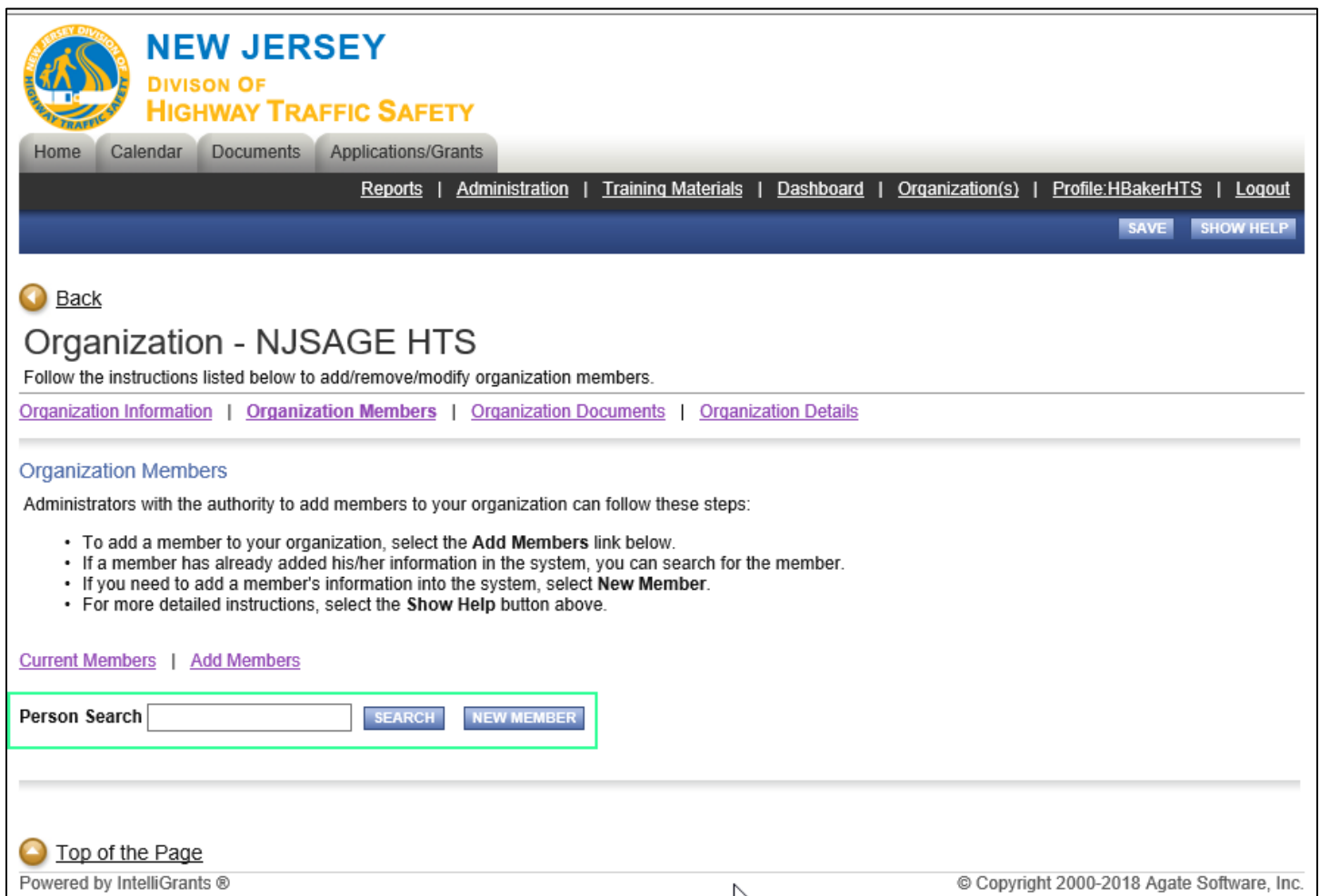
Organization Members

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

- To add a member to your organization, select the **Add Members** link below.
- If a member has already added his/her information in the system, you can search for the member.
- 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](#)

- 4) Populate information in the **Person Search** field and click on the **Search** button.
- 5) Click the checkbox next to that person, select a role from the drop-down menu, and click on the **Save** button.



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Organization - NJSAGE HTS

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

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

Organization Members

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

- To add a member to your organization, select the **Add Members** link below.
- If a member has already added his/her information in the system, you can search for the member.
- 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](#)

Person Search [SEARCH](#) [NEW MEMBER](#)

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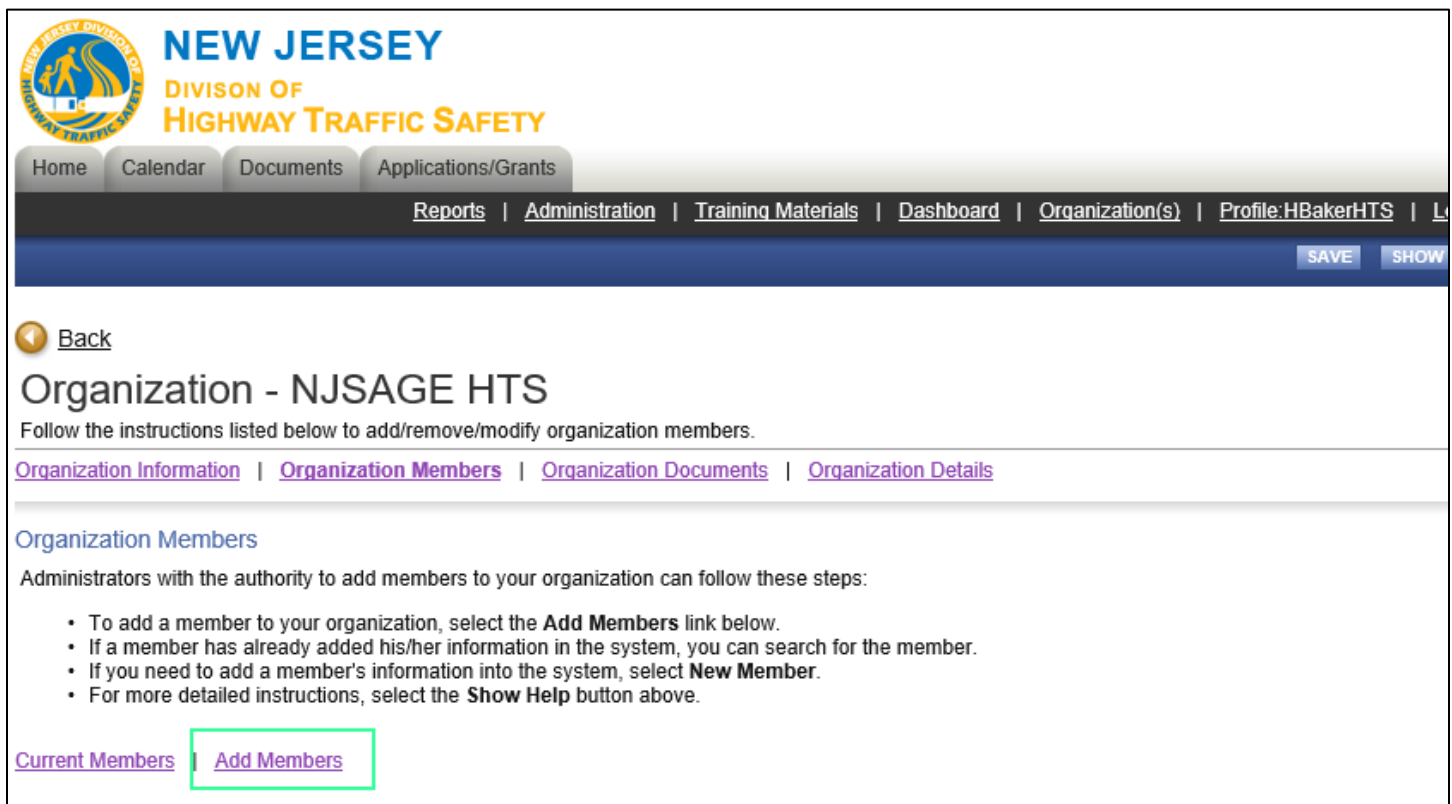
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Adding New Members to an Organization

To add users to an organization by a pre-existing member of the organization, please follow these instructions:

NOTE: This is an additional way of registering users. Individuals can register themselves by following the instructions in the *New User* section on the System Login Page.

- 1) Click on the **Organization(s)** link.
- 2) Click on the **Add Members** link.



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Organization - NJSAGE HTS

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

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Organization Members

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

- To add a member to your organization, select the **Add Members** link below.
- If a member has already added his/her information in the system, you can search for the member.
- 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](#)

- 3) Click on the **New Member** button. This will bring up a form requesting basic contact information for that user. Complete the form by filling in the required fields (*) and click on the **Save & Add to Organization** button.
- For some organizations, the new user receives a username and temporary password by email.
 - For other organizations, the user adding the new member(s) will need to contact those new members directly to let them know the usernames and passwords assigned to them. The new members can then login and reset their passwords.




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[Reports](#) | [Administration](#) | [Training Materials](#) | [Dashboard](#) | [Organization\(s\)](#) | [Profile:HBakerHTS](#) | [Logout](#)

[SAVE & ADD TO ORGANIZATION](#) | [SHOW HELP](#)

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Organization - NJSAGE HTS

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

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

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 *.

	Prefix	First	Middle	Last	Suffix
Name	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Title	<input type="text"/>				
Email	<input type="text"/>				
Username	<input type="text"/>				
Password	<input type="text"/>			Confirm Password	<input type="text"/>
Date Active	<input type="text"/>			Date Inactive	<input type="text"/>
Role	<input type="text"/>				

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 Profile page.

Address	<input type="text"/>				
City	<input type="text"/>	State	<input type="text"/>	Zip code	<input type="text"/>
County	<input type="text"/>				
Phone #1	<input type="text"/>	Phone #2	<input type="text"/>		
Fax	<input type="text"/>	Cell Phone	<input type="text"/>		
Website	<input type="text"/>				

My Profile

On the profile page, a user can update their contact information and password information.

Contact Information

- 1) Navigate to the **Profile** page.
- 2) Update any fields that are not greyed out (Optional – no updates may need to be completed).
- 3) When updating the password, create a new password and enter it into both the **Password** and **Confirm Password** fields towards the bottom of the page.

NOTE: A password requires both uppercase and lowercase letters and numbers.

- 4) Click on the **Save** button.

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Profile

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

Contact Information

Name	Prefix	First	Middle	Last	Suffix
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Display Name

Organization

Title

Address

City State Zip code

County

Phone #1 Phone #2

Fax Cell Phone

Email

Website

Username

Password Confirm Password

Organization Information

- Clicking on the **Organization** link will return the user to the **Organization Information** section.
- The **Role** assigned to the user is listed.

Change my Home Page Picture

- Allows the user to upload an image to use on their home page.