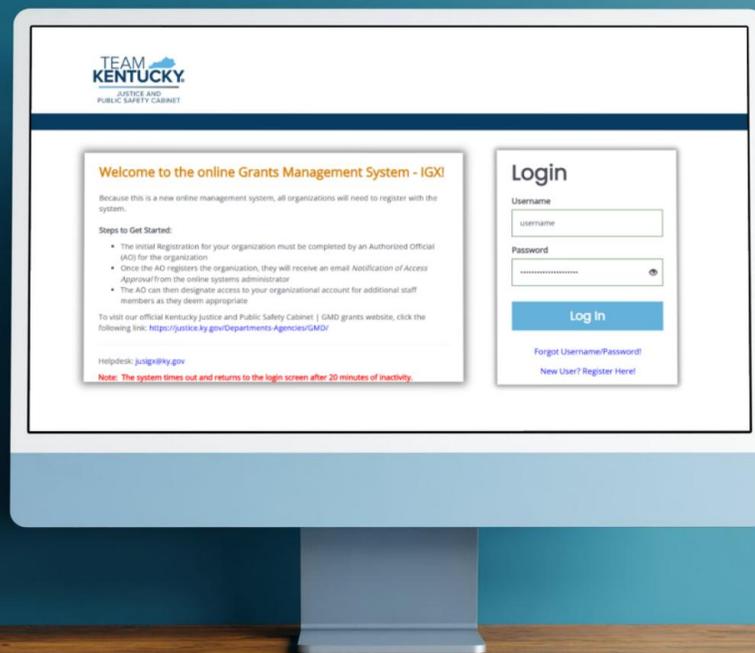


Intelligrants 10.0

IGX

Managing User Accounts and Document Access User Guide



Technical assistance resource for subrecipients of U.S. Department of Justice grants administered by the Kentucky Justice and Public Safety Cabinet, Grants Management Division.

MANAGING USER ACCOUNTS AND DOCUMENT ACCESS IN IGX

This reference guide is designed to assist individuals assigned to the **Authorized Official** user role in [Intelligrants 10.0 \(IGX\)](#) with creating new user accounts, assigning user roles, and granting access to an organization's documents. This guide is intended for use by users of existing organizations in IGX and does not cover how to complete the initial setup of an organization in the system. Please refer to the instructions posted on the IGX homepage or contact JUSIGX@ky.gov for assistance setting up a new organization in IGX.

This reference guide explains how to:

- Create IGX accounts and assign user roles for new agency staff (p. 3);
- Deactivate user access when appropriate (p. 5);
- Authorize user access to existing grants (p. 6); and
- Add users to Financial or Progress Reports (p. 8).

INTELLIGRANTS 10.0 (IGX)

All grants administered by the Kentucky Justice and Public Safety Cabinet Grants Management Division (GMD) are managed within JPSC's electronic grants management system, Intelligrants 10.0 (IGX). IGX can be accessed at: <http://kyjusticeigx.intelligrants.com/>.

IGX USER ROLES

Each user account will be registered as either an **Authorized Official** or **Grant Administrator**. It is important to understand which user role should be assigned to members within your organization depending on the permissions, or functions, available to each user role. More than one individual in an organization may be assigned to the **Authorized Official** role, but applicants are encouraged not to assign all individuals as **Authorized Officials**. Applicants should follow the principle of least privilege when assigning user roles to maintain separation of duties to the greatest extent possible.

Allowable Actions	Authorized Official	Grant Administrator
Initiate and populate grant application	✓	✓
Submit grant application	✓	✗
Add or remove users from agency account	✓	✗
Create and submit Grant Award Modification (GAM) request	✓	✓
Create and submit progress reports	✓	✓
Create and submit financial reports	✓	✓

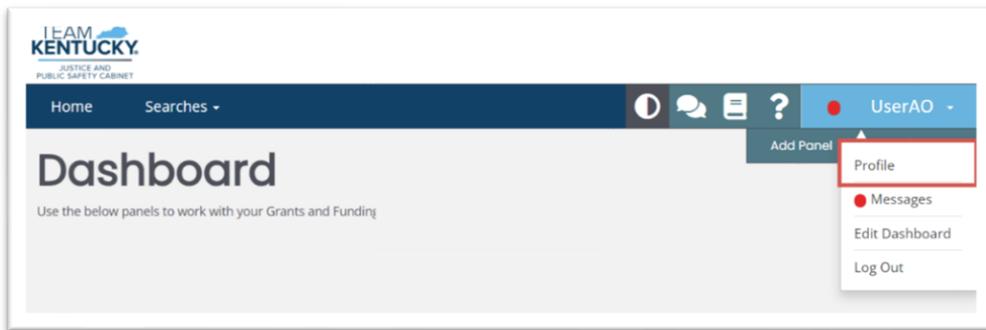
ACCESS TO GRANTS AND RELATED DOCUMENTS

The addition of a new user to an organization provides access to all future applications initiated by the organization in IGX but does not retroactively assign access to existing grants and related documents. The **Authorized Official** is the only user that can assign organization member access to previously initiated grants, including grant applications in process, at the time the user is added. Likewise, the **Authorized Official** must assign user access to Progress Reports and Financial Reports that were previously initiated for the new user to view them.

ADDING A NEW USER TO YOUR ORGANIZATION

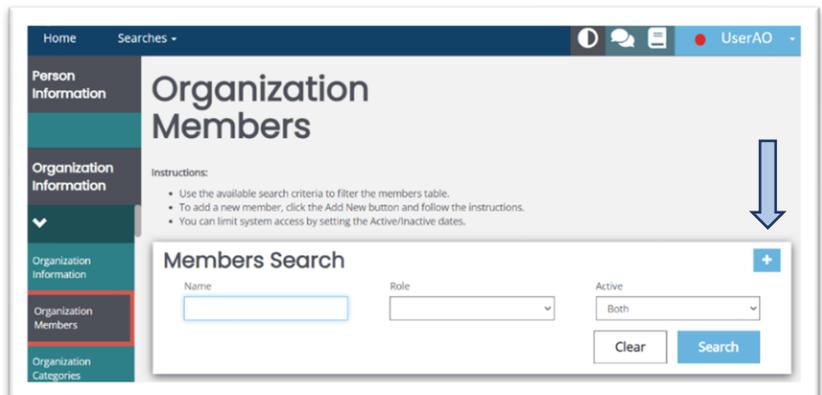
The **Authorized Official** is the only user that can add or remove users from an organization's account. Complete the following steps to add a new user to an organization.

1. Log in to IGX using Authorized Official (AO) account credentials.
2. Click on username in the top right corner of the page.
3. Select **Profile** from the dropdown menu.

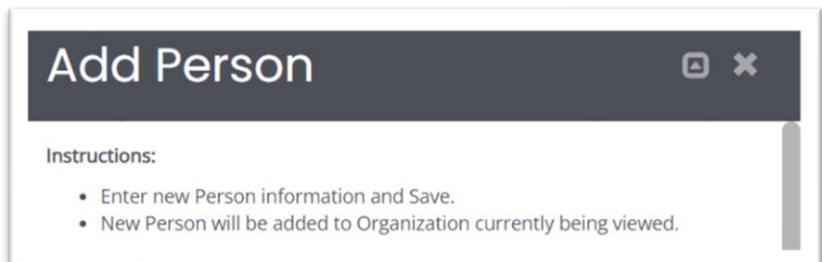


4. Under the **Organization Information** header from the menu on the left side of the page, select **Organization Members**.

- a. Search to ensure the user is not already registered as an organization member.
- b. If the user is not in the system, select the plus sign (+) to add the new user.



5. An **Add Person** window will appear. Complete the **General Information** and **Contact Information** fields.



6. Use the **Assign Role** dropdown menu to select a user role.

7. Set an **Active Date** for user access and, if applicable, an inactive date.

Assign Roles

Role <input style="width: 90%; height: 25px;" type="text" value=""/>	Active Date <input style="width: 90%; height: 25px;" type="text" value="07/11/2024"/>	Inactive Date <input style="width: 90%; height: 25px;" type="text" value="MM/DD/YYYY"/>	<input style="width: 30px; height: 30px; background-color: #0070c0; color: white; border: none;" type="button" value="+"/>
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8. To automatically enable access to all prior and active grants and documents (including reports) associated with the organization, select “Yes” from the **Assign to Existing Documents** dropdown menu. *Refer to the instructions on pages 6-8 of this guide to manually assign user access to individual grants and documents.*

Assign to Existing Documents? ?

No

Yes

9. Create a username and password for the new user. Click **Save** to create the new user account.

Security Information

Username

Password

Confirm Password

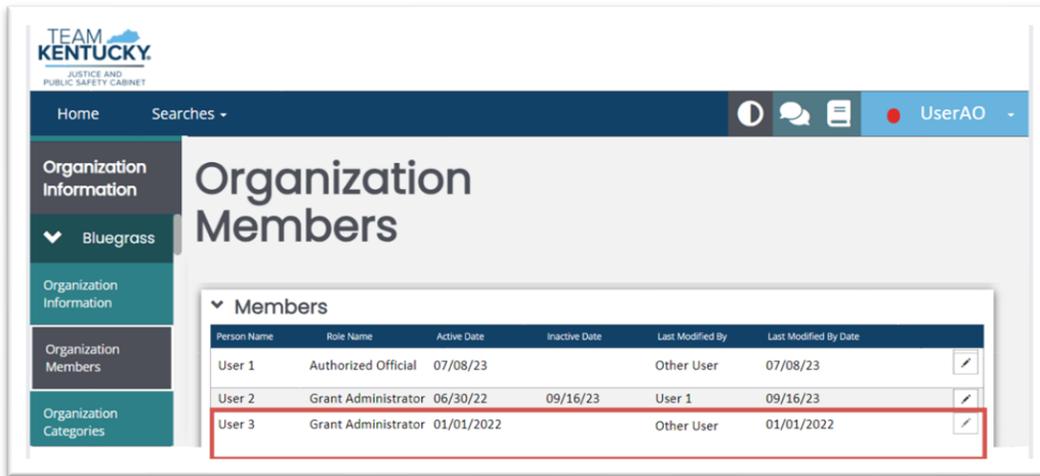
The new user will receive an email notification that a new account has been created for them in IGX. The new user may access the system using the temporary login credentials provided by the **Authorized Official** and reset their password upon login:

IGX Home → Click Username (Top Right) → Profile → Login Information → Edit Password → Save

DEACTIVATING A USER ACCOUNT

One of the primary duties of an **Authorized Official** in IGX is to continually manage organizational user accounts. This includes deactivating user accounts when appropriate.

1. Log in to IGX using Authorized Official (AO) account credentials.
2. Click on username in the top right corner of the page.
3. Select **Profile** from the dropdown menu.
4. Under the **Organization Information** header from the menu on the left side of the page, select **Organization Members**.
5. Click the **Edit Icon** on the right side of the organization member table to edit a user's access.



6. Enter an **Inactive Date** for user to deactivate access on the specified date. Click **Save** to make the change effective.

Edit Person

Name
User 3

Role
Grant Administrator

Active Date
 01/01/2022

Inactive Date

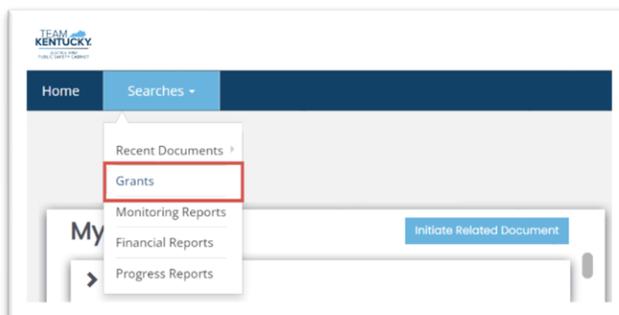
Save

ASSIGNING ACCESS TO EXISTING GRANTS

An **Authorized Official** may complete the following steps to authorize a new user to access an organization’s existing applications and grants.

NOTE: The instructions within this section refer to the manual assignment of users to individual grants. If an Authorized User selected “Yes” to Assign to Existing Documents when establishing the new user account, the user was automatically assigned access and the following steps do not need to be completed.

1. Log in to IGX using Authorized Official (AO) account credentials.
2. To access a grant award, click **Searches**.
3. Select **Grants** from the dropdown menu.



4. Under **Type**, select application type (ex. Victims of Crime Act 2024) and click **Search**.

The screenshot shows the 'Document Search' form. The 'Type' dropdown menu is open, and 'Victims of Crime Act (VOCA) 2022' is selected and highlighted with a red box. Other fields include 'Application Number/Grant Number', 'Sub Code', 'Status', and 'Person'. 'Clear' and 'Search' buttons are at the bottom right.

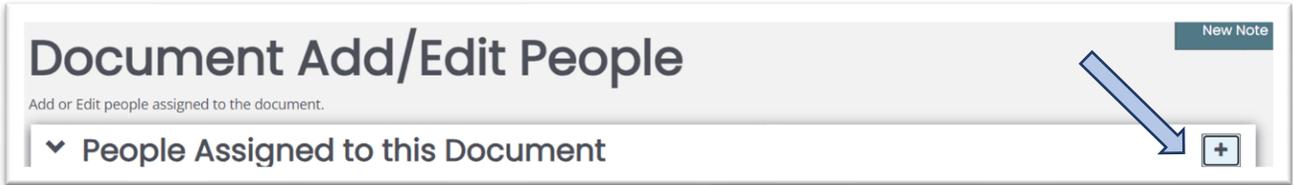
5. Click on the **Application/Grant Number** in the Name column of the search results.

The screenshot shows a table of search results under the 'Documents' header. The first row is highlighted with a red box. The table has columns for Name, Organization, Type, and Status.

Name	Organization	Type	Status
VOCA-2022-Bluegras-00028	Bluegrass	Victims of Crime Act (VOCA) 2022	Award Approved

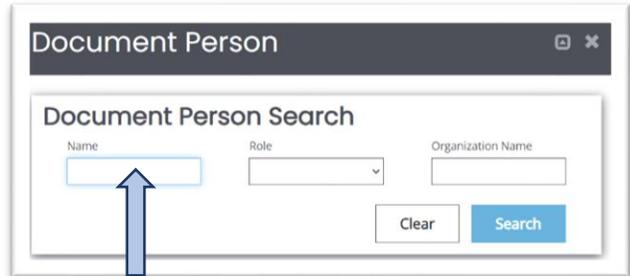
6. Under the **Tools** header from the menu on the left side of the page, select **Add/Edit People**.

7. Click the plus sign (+) to **Add User from Organization**.

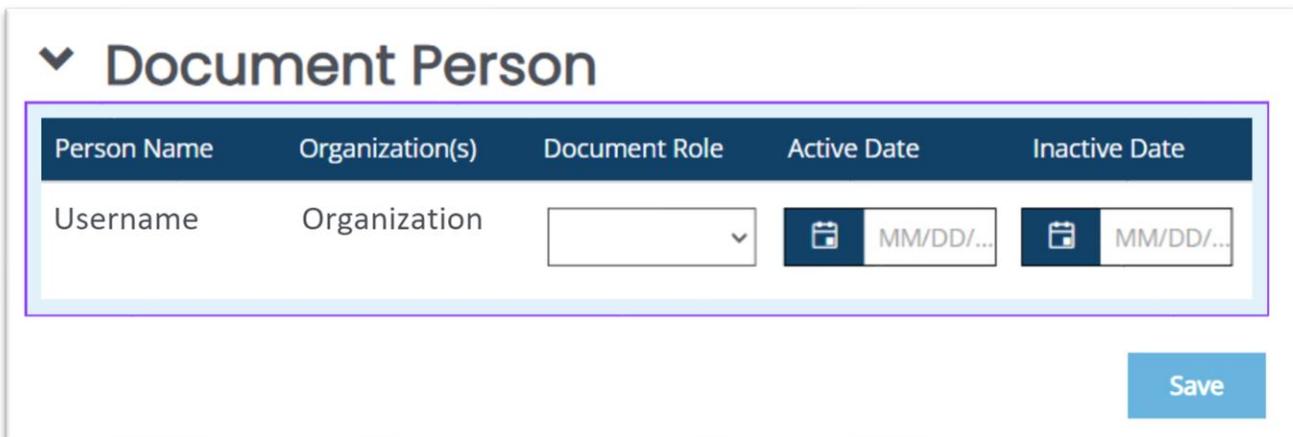


8. Locate user through a name search in the **Document Person Search** window. Click **Search**.

The user must already have a registered account connected to your organization to use this function.



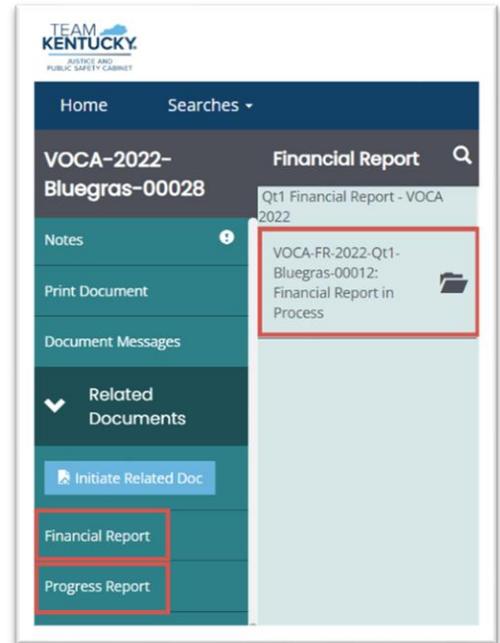
9. Assign a **Document Role** (Authorized Official or Grant Administrator) and active date. Inactive date is not required. Click **Save** to complete the addition of the user to the grant.



AUTHORIZING ACCESS TO PROGRESS AND FINANCIAL REPORTS

If a grant is in *Award Approved* status, the **Authorized Official** may complete the following steps to add users to Progress and Financial Reports. The steps to add a user to a Progress or Financial Report are similar to the steps to add a user to a grant award detailed in the previous section, however, the action to **Add/Edit People** must be initiated within the individual report(s).

NOTE: The instructions within this section refer to the manual assignment of users to documents. If an Authorized User selected “Yes” to Assign to Existing Documents when establishing the new user account, the user was automatically assigned access and the following steps do not need to be completed.



1. Open the grant and navigate to the **Related Documents** section of the menu on the left side of the page.
2. Select the report for which user access will be authorized. *If there is more than one report listed, the user will need to be added to each report individually.*
3. Under the **Tools** header from the menu on the left side of the page, select **Add/Edit People**.
4. Click the plus sign (+) to **Add User from Organization**



5. Locate the user through a name search in the **Document Person Search** window. Click **Search**.
6. Assign a **Document Role** (Authorized Official or Grants Administrator) and **Active Date**. Inactive date is not required. Click **Save** to complete the additional of the user to the document.

