New Jersey Department of Transportation

Applicant User Guide
Version 2.0
NJDOT SAGE System

Table of Contents

1. System Requirements

NJDOT SAGE was designed so that the vast majority of computers users will be able to use the system with little or no changes to their computer environment. The four requirements that are mentioned below are common computer elements that should be already present on most machines.

NJDOT SAGE system requirements listed below can also be viewed on the system itself by clicking the “review the system requirements” link from the system homepage.

1.a. Operating System

NJDOT SAGE was designed for both of the two most common computer operating systems - Windows and Macintosh. It has not been tested and is not supported on other operating systems such as Linux and Unix. Users accessing the system from a Macintosh environment are required to have MacOS 7.5 or higher running on a PowerPC processor. Windows users are required to have an operating system that is Windows 95 or higher.

1.b. World Wide Web Connection

NJDOT SAGE is an Internet application. It is accessed via the Internet and was specifically designed for Internet usage. The Internet is the more general term that is typically used to refer to the World Wide Web. The World Wide Web consists of a vast array of content that is accessible via a web browser. For the purpose of accessing NJDOT SAGE, the standard Internet connection is via a modem connection. A modem is a piece of hardware that connects to the computer to send data through a phone line to and from the computer. Internet connections that are "faster" than a modem connection, such as cable and DSL, will improve the speed at which the system operates, but are not necessary in order to use the system. If you are in an office environment, you may already have an Internet connection, but if you are unsure, please contact your organization's network administrator.

For those using a dial-up connection over a modem, it is highly recommended that you have a modem connection speed of at least 33.6 kbps (kilobits per second).

1.c. Web Browser

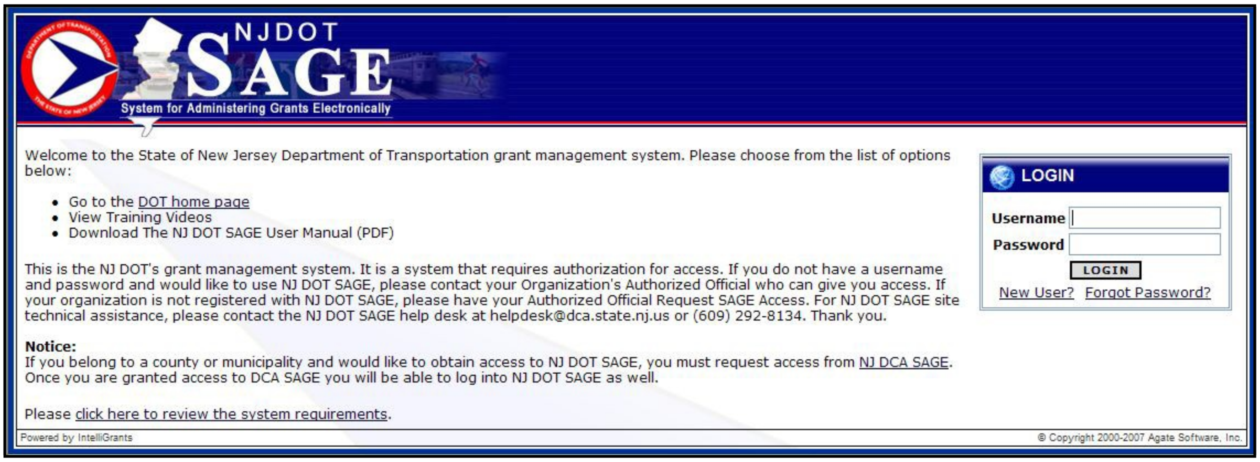
This system was designed to be compatible with common up-to-date web browsers including Internet Explorer, Firefox, Safari, and Opera.

1.d. Adobe Acrobat Reader

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 Reader you may choose to view, print, or save these documents. If you do not have one you can go to www.Adobe.com and download one for free.

2. NJDOT SAGE System Homepage

To access NJDOT SAGE, type https://njsage.intelligrants.com/ into the address bar of your web browser and hit
“Enter”.
The page you see should look like the image shown below.



2.a. Browser Configuration

In order to avoid various browser-related restrictions unnecessarily placed on NJDOT SAGE, please make the following configuration changes for the web-browser that you are using.

2.a.1 Internet Explorer

If you are using Internet Explorer, it is recommended that you add the NJDOT SAGE homepage to your list of trusted sites. To do this, please complete the following steps:

1) Click "Tools"
2) Click "Internet Options"
3) Click the "Security" tab
4) Click "Trusted Sites"
5) Click the "Sites" button
6) In the "Add this Web site to the zone:" textbox type “https://njsage.intelligrants.com/” and then click the "Add" button
7) Click the "OK" button, and then click the "OK" button again

3. Applicant user types

There are three security roles defined for NJDOT SAGE users: Authorized Officials, Agency Administrator, and Agency Staff. These roles have different security access to work on the applications. 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 NJDOT SAGE. The organization's staff entered by the Authorized Officials will be assigned to either the Agency Administrator or Agency Staff security level role. Each security role is summarized below:

Authorized Officials and Agency Administrators will be able to:

- Edit and delete user account information for Agency Staff
- Initiate available grants and apply for grant applications
- Enter, update and delete information on applications
- Download and attach files to the applications
- Cancel an entire application before submission
- Submit applications, for the various applications available to NJDOT SAGE, with printable access to agreement to terms and conditions
- Modify applications with status of Modifications Required
- Check on the status of each application

Agency Staff will be able to:

- Edit their own user account information
- Enter, update and delete information on applications where permission is granted
- Download and attach files to the applications
- Modify applications with status of Modifications Required where permission is granted
- Check on the status of applications where permission is granted

Security Roles	Control Access to Organization	Control Access to Application	Read	Write	Submit Application	Delete Application
Authorized Officials	x	x	x	x	x	x
Agency Administrators	x	x	x	x	x	x
Agency Staff			x	x		

4. Gaining access to NJDOT SAGE

In order to use the system you must first be granted access to it. If you are a member of a Non Profit Organization you must do the following to gain access to NJDOT SAGE:

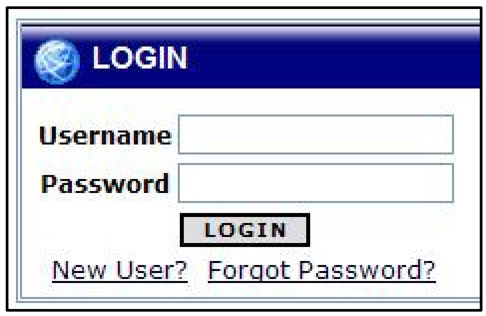
- Request access to the system and get approved by a NJDOT SAGE system administrator.

This process is described below.

****Members of Counties or Municipalities please skip ahead to section 4.c.****

4.a. Gaining access through a system administrator (Non Profits & Consultant)

The first time that a user comes to NJDOT SAGE, they must create a new user account. To create a new user account:



1) From the NJDOT SAGE homepage click the "New User?" link located in the "Login" section.
2) Complete the user form in its entirety.
   a) Fill in all information as required. All items marked with an '*' are required to create your account.
   b) The 'Username' field must consist of all letters and numbers.
   c) The 'Password' field must consist of all letters and numbers and must be at least 7 characters long.
   d) The fields 'Password' and 'Confirm Password' must be the same.
   e) The Person who is to be the Authorized Official for the Organization completes the page, including Organization and title. **If Organization and Title is not included it will delay the process.**
3) Click "Save" to save the data.

Having saved your contact information, your account must then be approved by an administrator before you can access the system. If you attempt to access the system prior to getting approved/validated by a system administrator you will receive the following message:

Your account has not been validated yet.

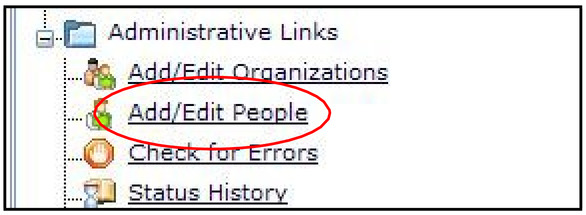
When access has been granted to you by a system administrator you will receive an email message confirming that your account has been validated.

4.b. Assigning Consultants

1) If a person is an employee of a consulting firm and that firm has not enrolled in the DOT SAGE system, the firm must become enrolled using the Login Page New User selection within DOT SAGE. The person enrolling the firm and obtaining the initial

Login Identification for the firm must be senior/executive management with authority to represent the firm, and manage staff. That person will be assigned as the Authorized Official.

2) The consultant's ID must then be verified by an administrator in NJ DOT SAGE as described in section 4.a.
3) After the Consulting Firm staff has been added and verified (as described in section 1.a.), the Consulting firm needs to notify the prime Municipality that the staff person is available for project activity.
4) An Application must be initiated prior to assigning a consultant to assist the applicant agency. This can be accomplished by clicking "create new" under the specific program. The applicant Agency Administrator or Authorized Official can then attach the consultant to the application by clicking the "Add/Edit People" link under the Management Activities section of the application.



Search for the name of the consultant and add them as an Agency Staff member. Make sure you place a check in the box next to their name, give them the Agency Staff role, and an Access Date.

If you want the consultant to submit the application on your behalf, you can give them to role of Agency Administrator.

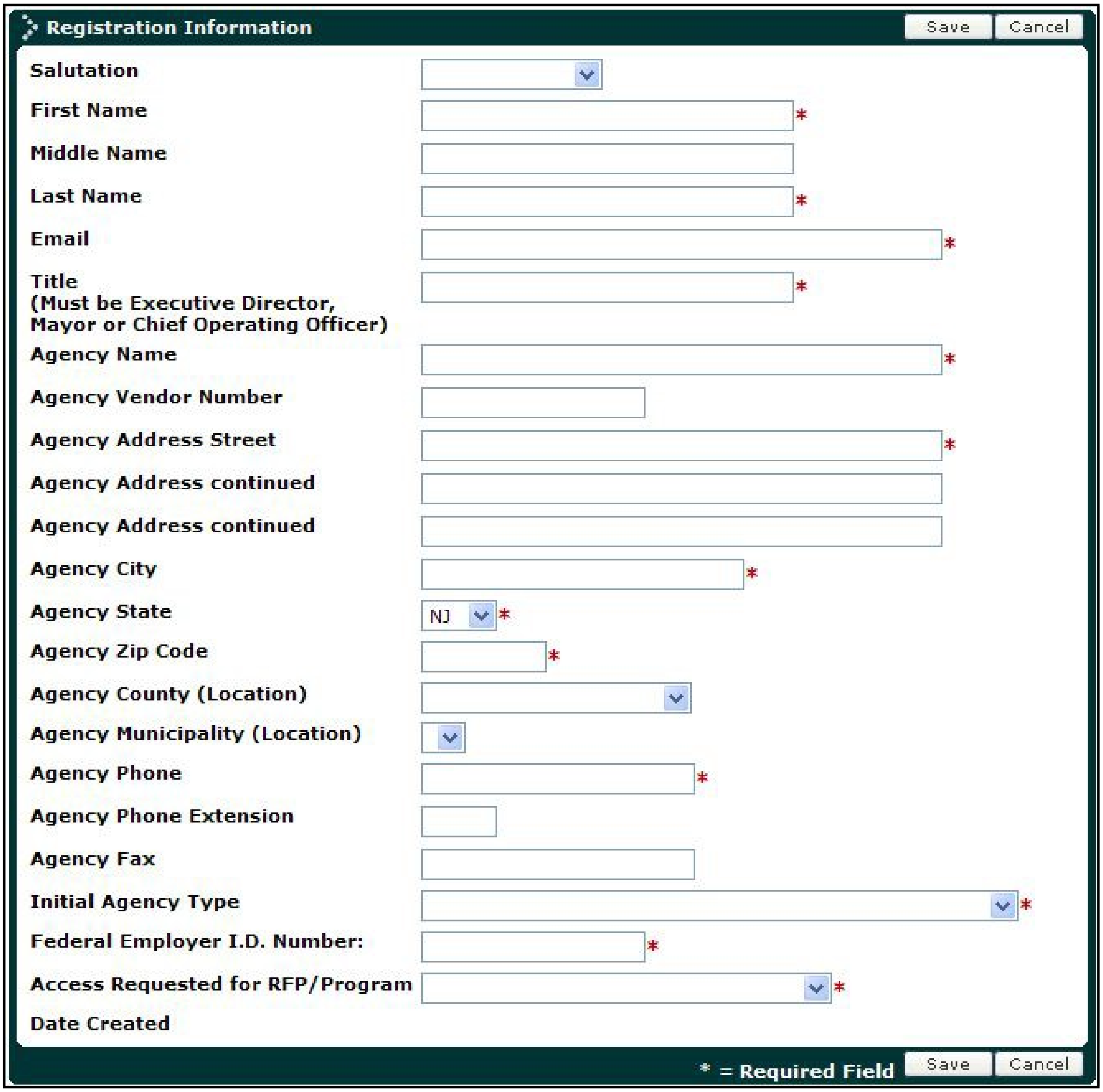
4.c. Gaining access through a System Administrator (Counties & Municipalities)

If you are a member of a County or Municipality you must request access to NJDOT SAGE differently than members of nonprofit organizations do. Rather than submitting your request for access to NJDOT SAGE you are going to need to submit your request to the NJDCA SAGE. The URL for NJDCA SAGE is https://njdcasage.state.nj.us/portal.asp.

The first step in adding a new user through NJDCA SAGE is navigating to the DCA SAGE homepage. Once again, the URL for DCA SAGE is located at this address, https://njdcasage.state.nj.us/portal.asp. After typing this URL into your address bar and clicking go, you should see the page shown below.

1) Once you have made your way to this page, the next step is to click on the "Request SAGE Access" link.

You should then be taken to the page shown below.



2) You should begin filling out all the information. All items marked with an '*' are required to create your account.

Having saved your contact information, your account must then be approved by an administrator before you can access the system.

When access has been granted to you by a system administrator you will receive an email message confirming that your account has been validated. You now have access to NJDOT SAGE and NJDCA SAGE.

4.d. Gaining access through another in your applicant organization (Counties & Municipalities)

The second way in which you can get access to the NJDOT SAGE is by having an Authorized Official from your organization add you to the system. The Agency Administrator will not be allowed to perform this task.

1) Your organization's Authorized Official will need to log into NJDCA SAGE and click on the Agency Information link at the top of the page.

2) The Authorized Official will then need to scroll down the page until they see the Agency Contacts section of the Agency Information Page.

3) The Authorized Official should see a list of people under the Agency Information section that are currently added to NJDCA SAGE for this Organization.

5. Keeping contact information current

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. This is done very quickly and easily in NJDOT SAGE. By keeping your user record and organization record current with all of the latest changes, NJDOT staff will be able to contact you appropriately when the need arises. The following instructions are for users that are part of a Non Profit organization. The procedure for updating contact information is different for users who are members of Counties or Municipalities.

5.a. Updating your user information (Non Profits & Consultants)

You may update your user record at any time by following these steps:

1) Click the "View/Edit My Information" link from the "My Information" section on the Main Menu.
2) Update the form accordingly and click the "Save" button.

NOTE: There may be links within the contact information section which may request for some additional information. If these links exist, please click the links and fill out the required information. An example of a link might be the "Mailing Address".

5.b. Updating another user's contact information (Non Profits & Consultants)

If you are the Authorized Official/Agency Administrator for your organization you may edit the contact information from others in your organization by following these steps:

1) Click the name of the organization of the person or people you would like to edit from the "My Organizations" section on the Main Menu.
2) At the bottom of the screen in the "Organization Members" section click the name of the person whose contact information you want to change.
3) Update the form accordingly and click the "Save" button.

5.c. Updating the information for your organization (Non Profits & Consultants)

Although it doesn't occur often, when your organization's contact information changes it is important to update that information in the system by following these steps:

1) Click the name of the organization you would like to edit from the “My Organizations” section on the Main Menu.
2) Update the form accordingly and click the “Save” button.

NOTE: There may be links within the organization information section which may request for some additional information. If these links exist, please click the links and fill out the required information. An example of a link might be the “Vendor Number”.

5.c.1 Deactivating a user in the system

Only an Authorized Official from an organization may choose to deactivate a member of the organization. A deactivated user will not be able to edit application related information for your organization. You may deactivate a member of your organization by following these steps:

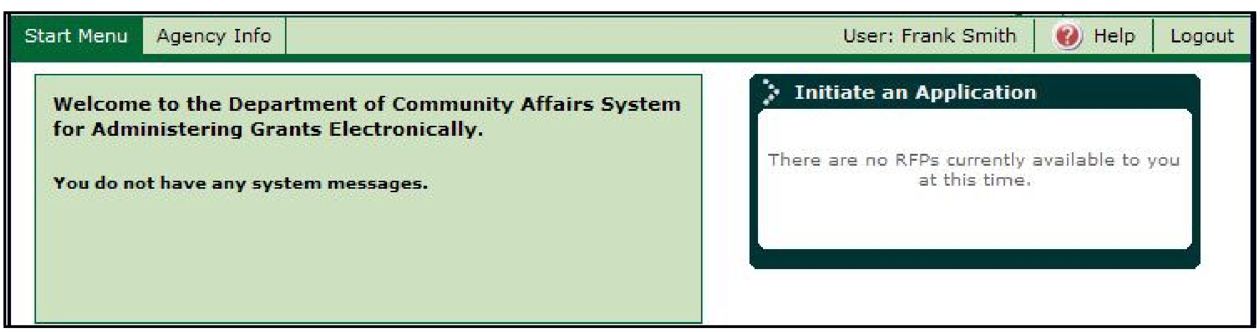
1) Click the name of the organization of the member you would like to deactivate from the “My Organizations” section on the Main Menu.
2) Change the second active date in the system to some day in the past for that user that you want to deactivate and then click the “Save” button.

NOTE: This is an important responsibility to track which users may or may not have access to the system. Please keep updated appropriately.

5.d. Updating your user record (Counties & Municipalities)

If you are a member of a county or municipality then you must update your contact information from the NJDCA SAGE system. Just like the previous section when we added news users, once you click the “Save” button the updated information will be synced with the NJDOT system.

1) Click on your name in the navigation menu across the top of the page.



2) You will then be brought to the Edit Your Contact Information page. To change your personal information, click “Edit.”
3) Update the form accordingly and click the “Save” button.

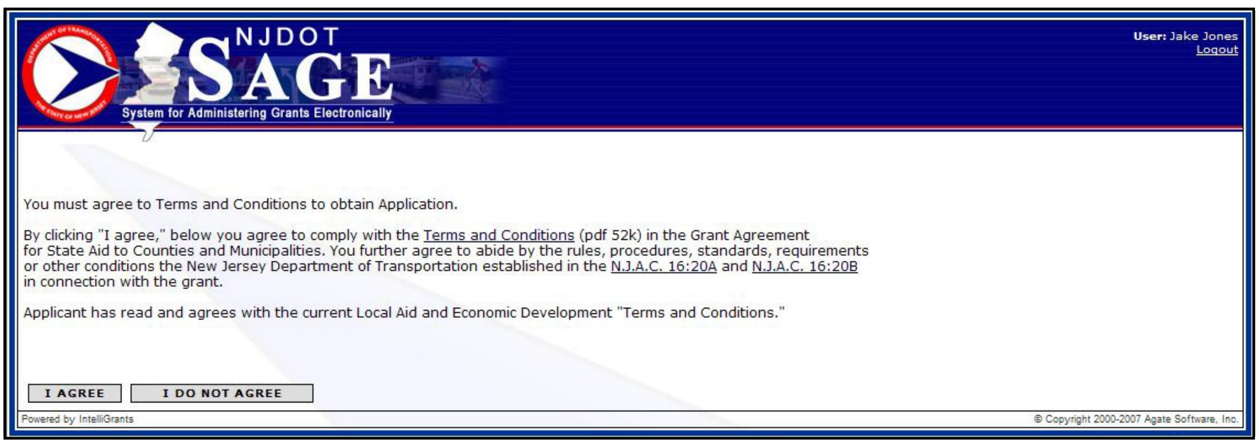
6. Initiate an Application

The Authorized Official and Agency Administrator are the two applicant security roles that may initiate applications. In order to create an application, please follow these steps:

1) From the Main Menu, look at the 'My documents' section. This section will show you all of the applications where you have existing applications in the system, or where you may apply for a new grant application.

For those applications where you can apply for a new application you will see a 'Create New' link. Click the 'Create New' link.

2) A confirmation page will appear asking for confirmation. You must read the Terms and Conditions and by clicking the 'I Agree' button you accept those conditions. An application will be created and you will be taken to the 'Application Menu' to initiate the application.



Following the creation of an application, a new link (application in process) for that program will be on the Main Menu along with all of the applications created within the organization. The link to the application will appear in the 'My Documents' section under the name of the grant application. When logging back into NJDOT SAGE, click this link to return to the application.


MY DOCUMENTS
Show
My Active Documents
GO
County Aid
CA-2008-North Trenton Housing-00051 [Application In Process]
Safe Routes to School
Create New Safe Routes to School

7. The Application menu

The Application Menu is organized into various sections that help to organize the application tasks and information. These sections are described below.

7.a. Information Section

The information in this section contains important information about the application such as the organization that initiated the application, the application identifier, and the status. This section also includes the 'Show Notes' button allowing for application notes to be added to the application.

7.b. Status Management Section

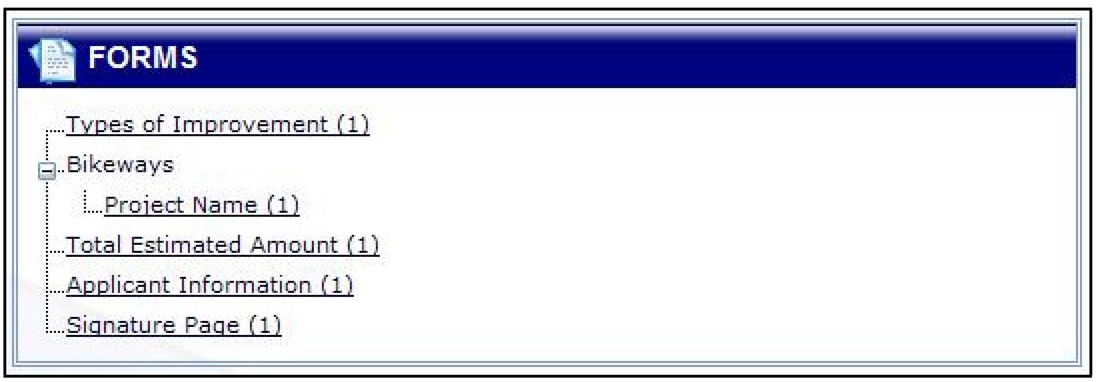
The Status Management section allows an Authorized Official/Agency Administrator the ability to push the application to the next status level.

7.c. Management Activities Section

The Management Activities section allows an Authorized Official/Agency Administrator certain administrative responsibilities such as the ability to add/edit organization and people from the application and view the status history of the application.

7.d. Forms Section

The Forms section is where the vast majority of the work in an application is completed. This section contains all of the forms that are necessary to complete prior to the application being submitted. To edit application forms simply click the name of the form.



8. Assigning users to an Application

The Authorized Official has administrative rights to add Agency Administrator or Agency Staff to application. The Agency Administrator can also add Agency Staff. Users with the Agency Staff security role can assist the Authorized Official/Agency Administrator with completing the forms in the application. Users may be added to the application through out the application completion process.

8.a. Assign User Access to Application

1) To add Agency Staff to an application, the Authorized Official/Agency Administrator clicks on the application of choice in the 'My Documents' Section on the Main Menu.
2) Under 'Management Activities' choose the Add/Edit People link.
3) Type in the name of the individual in the search criteria box and click the 'Search' button.
4) From the search results, select the person, give him/her a security role (Agency Staff) and fill in the access date you would like this individual to access the application.

8.b. Remove User Access to Application

There are two ways to remove a user's access to an application. To remove a user's access to an application, on the application menu choose the 'Add/Edit People' link on the Application under Management Activities and:

1) Edit the access start and/or end date for the user.

Or

2) For the desired user, in the 'Selected' column, disable (uncheck) and save the page. The user will be removed from the page.

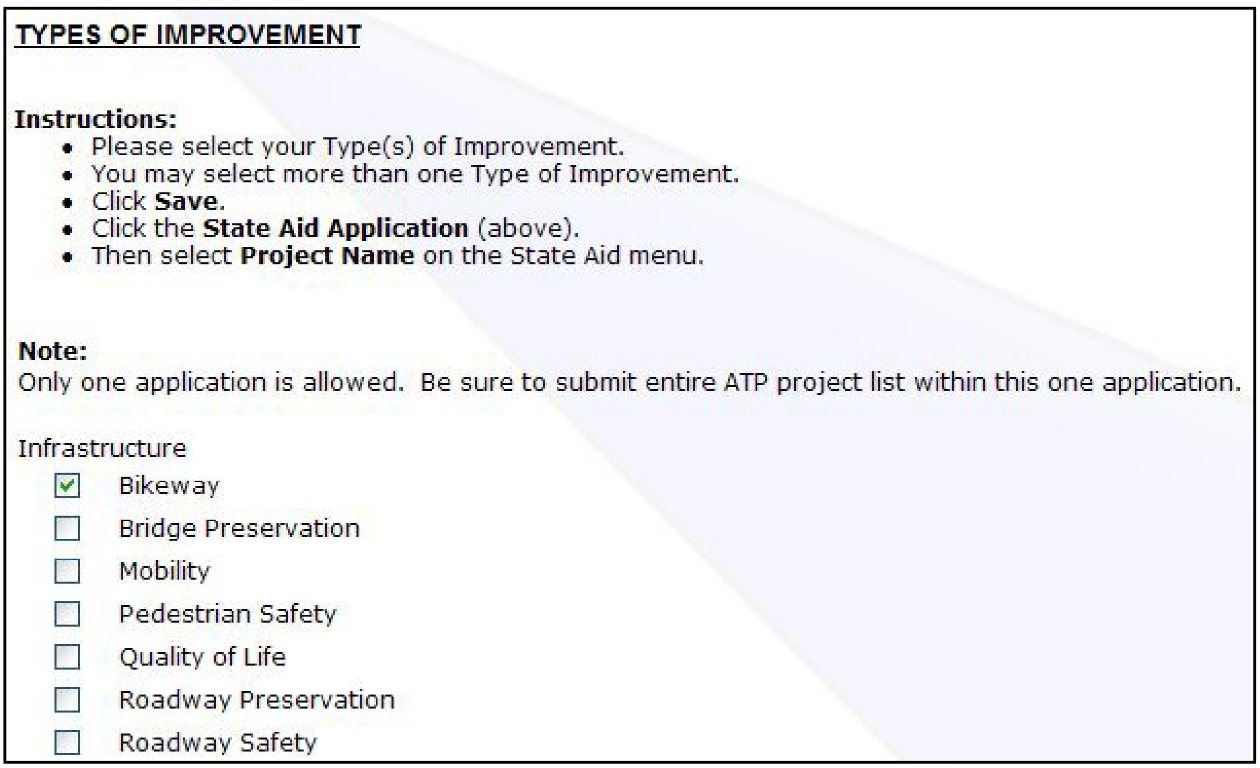

ORGANIZATION MEMBERS
1: Current Members
2: Add Members
Person
Role
Active Dates
Assigned By
Jones, Jake
Authorized Official
9/1/2007
Smith, Tom
Kent, Mike
Authorized Official
9/1/2007
Smith, Tom
Smith, Tom
Authorized Official
9/1/2007
Kent, Mike

9. Application form completion

The various pages in the forms section of your application must be completed before it can be submitted. The following sections will lead you through the steps necessary for accomplishing that goal.

9.a. Types of Improvement

Applications require an initial selection of a Type of Improvement. In the 'Forms' section, use the Type of Improvement link to select the Type(s) of Improvement that apply for this application. The selection made will be used to determine which additional forms are necessary to complete your application. In order to see the forms for that particular Type of Improvement, you must check the desired checkbox and then click the "Save" button. The forms for that Type of Improvement will then appear on your treeview.


TYPES OF IMPROVEMENT

Instructions:
- Please select your Type(s) of Improvement.
- You may select more than one Type of Improvement.
- Click **Save.**
- Click the **State Aid Application** (above).
- Then select **Project Name** on the State Aid menu.

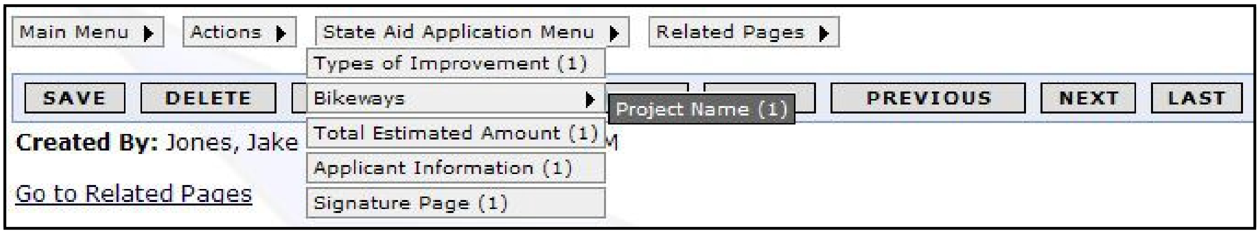
Note:
Only one application is allowed. Be sure to submit entire ATP project list within this one application.

Infrastructure
- [x] Bikeway
- [ ] Bridge Preservation
- [ ] Mobility
- [ ] Pedestrian Safety
- [ ] Quality of Life
- [ ] Roadway Preservation
- [ ] Roadway Safety

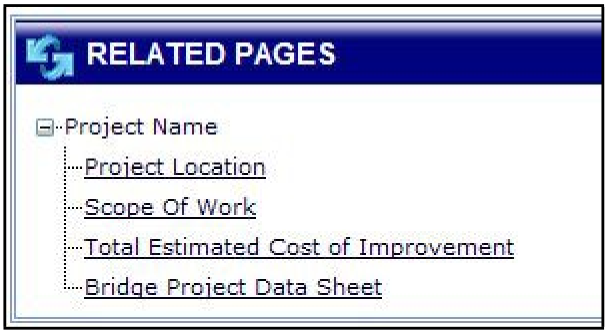
9.b. Forms Navigation

There are three basic methods for navigating through the forms of your application. You may either use the Menu at the top of any page within the application, the treeview on the Application Menu, or you may use the links listed in the Related Pages section.

The image shown below is the Menu bar from within an application page with the "Project Name" link highlighted by the cursor. To return to the Main Menu from this menu simply click the "Main Menu" link to the far left. To select a particular form in the application, hover over the "Application Menu," then the section of the link you want to access, and then click the link.

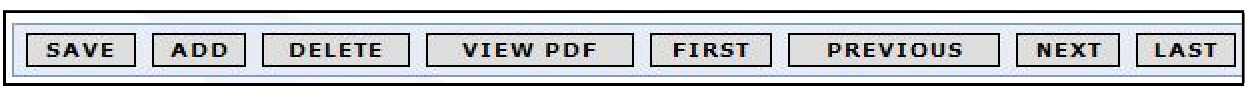


Some pages like the "Project Name" page will have related information. Once you save information from a link located in the 'Forms' section, you will receive a treeview of the related pages near the bottom of the page. To access one of these pages, simply click the available link.

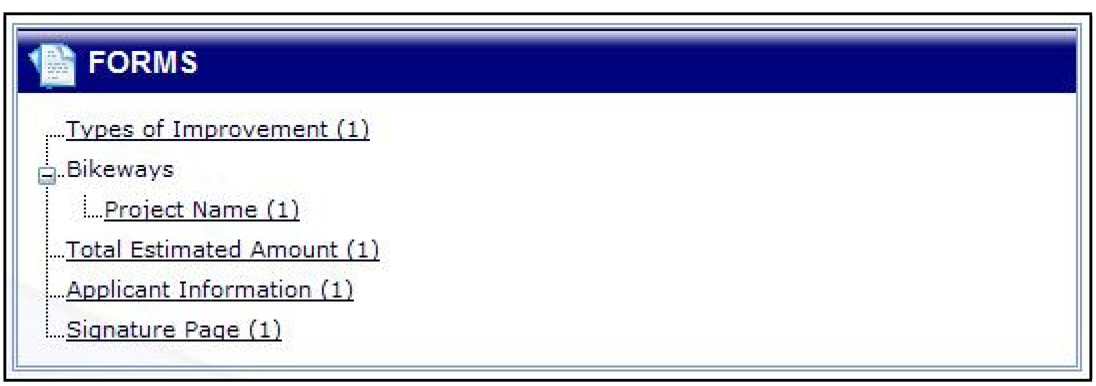


You can also access these pages using the Related Pages menu located at the top of the page.

There are also "Next" and "Previous" buttons available on the navigation menu. You may choose to use these buttons to proceed to the next page or retreat to the previous page throughout the application's pages. There are also "First" and "Last" buttons that will take you to the first and last pages on the application menu.

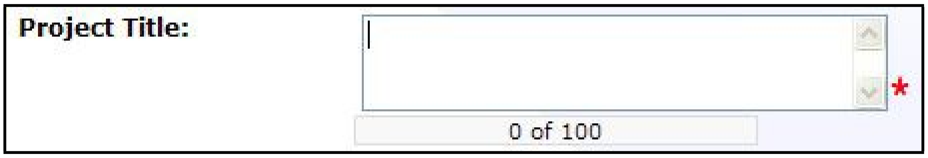


The treeview on the Application menu is another way to navigate to each of the forms in the application. You may return to the application menu after completing each page and then click on the next page.



9.c. Form Completion

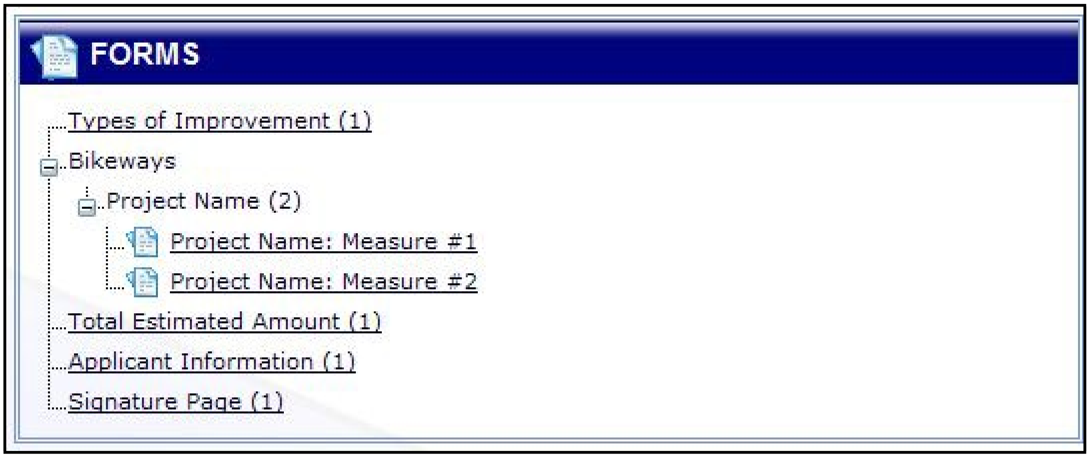
When filling out an application form it is suggested that you first complete all of those fields for which you have information. Not everyone in each organization will have all of the information necessary to complete each form. Complete as much of it as you can and then click the “Save” button. Fields followed by red asterisks are required fields.



In the creation of some forms the “Add” button was used to create additional forms. Any form that has an “Add” button allows you to have multiple instances of that form. The following picture shows the available “Add” button on a page that multiple pages can be created.

When multiple pages have been created for this particular form, you can choose between them. A dropdown will appear on the far right of the button toolbar.

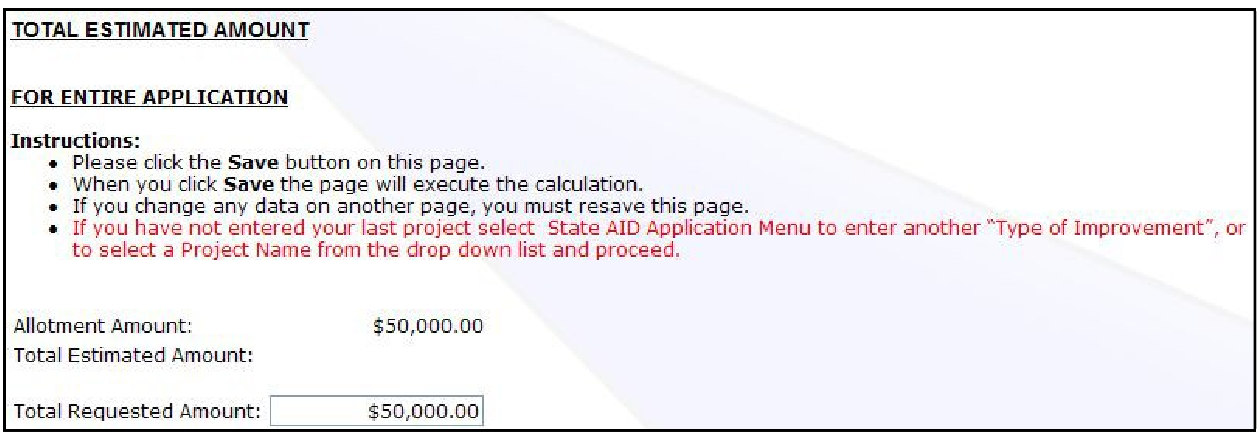
When additional pages have been created, a number in parentheses will appear after the link to indicate the number of pages connected with the particular link.



9.d. Requested Funds

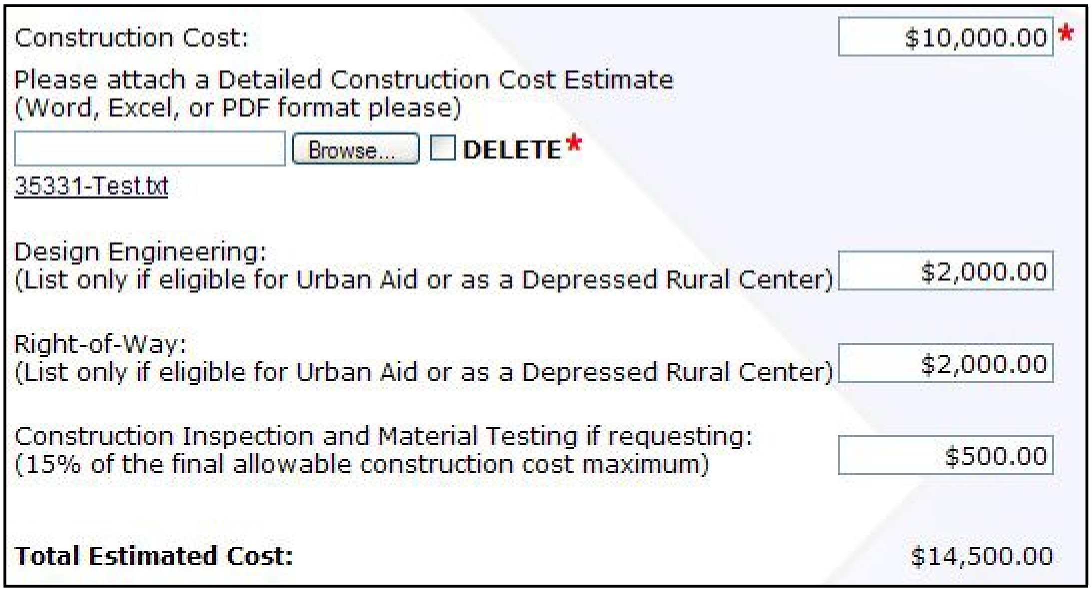
This section of the application forms is where the requested funds are collected. Authorized Official, Agency Administrator, and Agency Staff security roles enter information into the various links in the requested funds portion of the application. The Total Estimated Cost of Improvement page contains individual fields for capturing information like construction, design, and engineering costs associated with a particular project. The information that is entered on this page will then be added to the Total Estimated Amount page alone with all other project cost that has been entered.

The Total Estimated Amount page may be used to view the Total Estimated amount for the entire application. It is important to save the Total Estimated Amount page after all Total Estimated Cost of Improvement pages are completed and the Total Requested Amount is entered. This will insure that all summary information is calculated correctly from the individual Total Estimated Cost of Improvement pages.



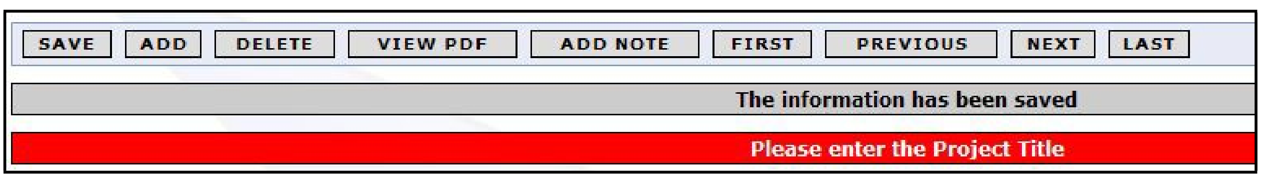
9.e. Automatic Calculations

When possible, NJDOT SAGE will automatically calculate totals for you. The 'Total Estimated Cost of Improvement' page is a good example of this. When the page is saved the system will use the values that you have entered in the previous boxes to calculate a 'Total Estimated Cost.' (Please see "Total Estimated Cost" box below). The system will show you these values and will use them to automatically generate other totals as well. Remember to click the forms 'Save' button in order to calculate the form calculations.



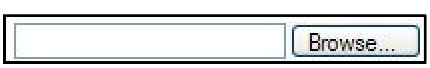
9.f. Error Messages

If any information is not completed within an application form in its entirety or there are mistakes, an error message will be displayed in red across the top of the page. During form completion it is not necessary to correct form errors right away. You may return to the form and fix errors at any time and if for some reason any errors remain when the application is submitted, NJDOT SAGE will require the errors to be fixed before the application submission is completed. See the example below.

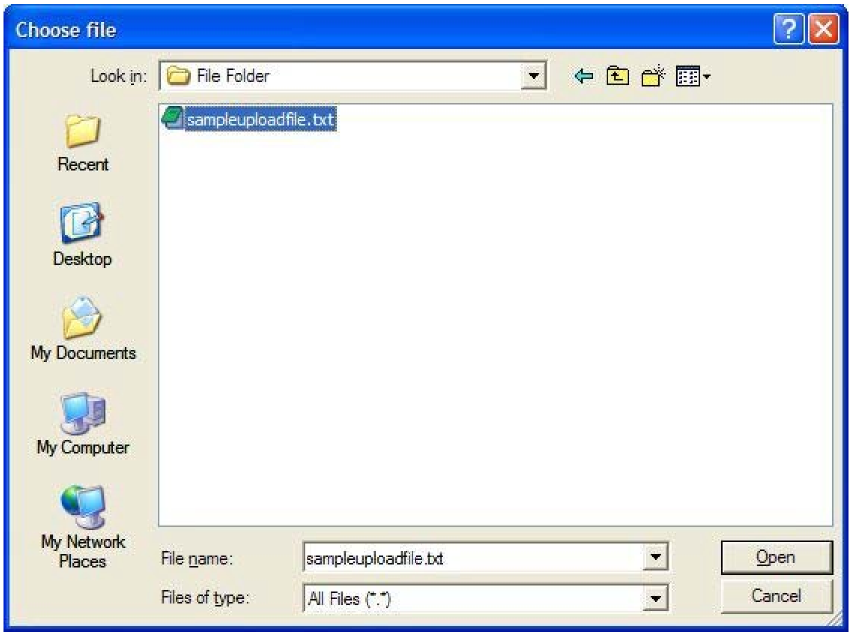


9.g. Uploads & Attachments

For some pages, form fields are not enough to capture the type of information that may be required. In those situations, a file upload field may be provided to allow you to upload a file instead. Files of the following types are allowed as uploads, bmp, doc, gif, jpg, pdf, png, ppt, tif, txt, wpd, and xls. To upload a file, click the “Browse” button.

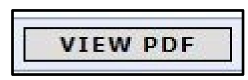


Browse to the folder that contains the file you would like to upload and either double-click the file or click the file and then click the “Open” button.



After the page reloads, you must then click the page “Save” button to save the uploaded file.

9.h. View PDF



In many pages a “View PDF” button will be available that will automatically create a PDF for you with the data that you provided for each form. These dynamic PDF’s can be printed, or saved to your computer for reference. It is a good practice to review the PDF files for accuracy prior to submitting the application electronically.

10. Submitting your Application

The Authorized Official and Agency Administrator security roles are the only roles authorized to submit your Application. When the application is believed to be complete and no more changes are required, the Authorized Official or Agency Administrator can choose to submit.

It is important to note that once an application is submitted it will enter into a read-only status and cannot be changed!

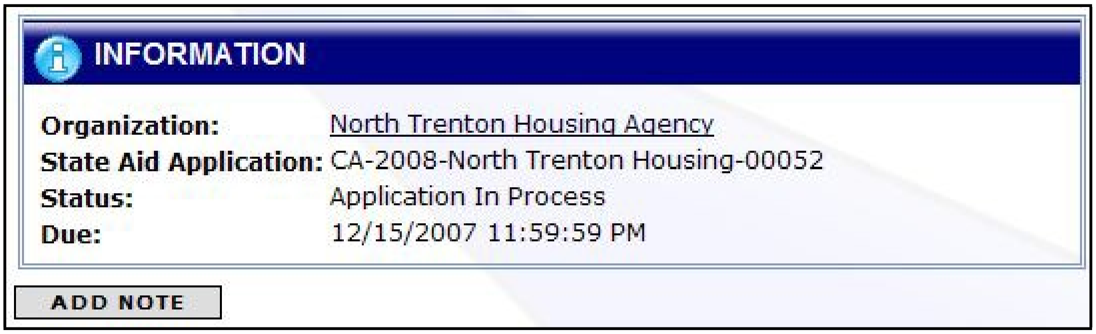
To submit, the Authorized Official/Agency Administrator must choose the 'Application Submitted' status in the Status Management section on the application menu and then click the "Change Status" button. If any errors exist in the application they will appear at that time and must be fixed before it can be submitted. If no errors exist, the Authorized Official/Agency Administrator will be prompted to confirm his or her decision.

11. Notes

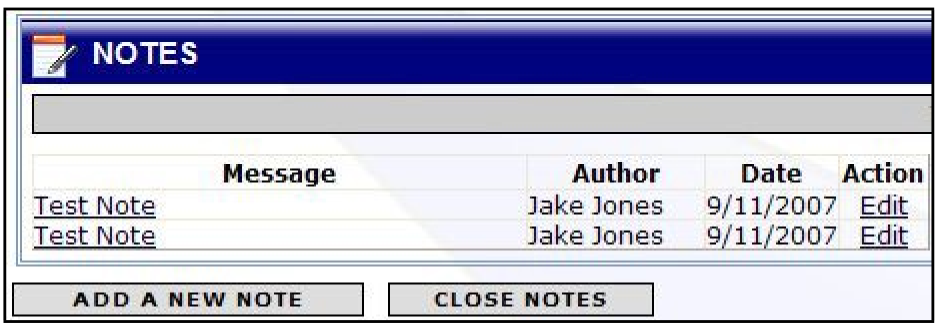
NJDOT SAGE allows for applications to have notes attached to them. These notes may be used to communicate to other organization staff members or to NJDOT staff who are assigned to the application. Notes may be added on the main menu or on specific forms.

11.a. Adding and Editing Notes

1) Click on the ‘Show Notes’ button.



2) Any existing notes will be shown at the top of the new window.



   a) Each note has the following information: message name, author, date, and action.
   b) By clicking on the message name, the note will expand showing the entire note’s message.
   c) By clicking on either edit or reply under the action column, a note may either be edited (by the user who created the note) or replied (by another user).
3) To add a new note:
   a) Click Add a New Note, type in the subject, message, and check the user(s) the note is meant for and click save.
4) Click the ‘Close Notes’ button to close the notes Window.

12. Automatic e-mail notifications

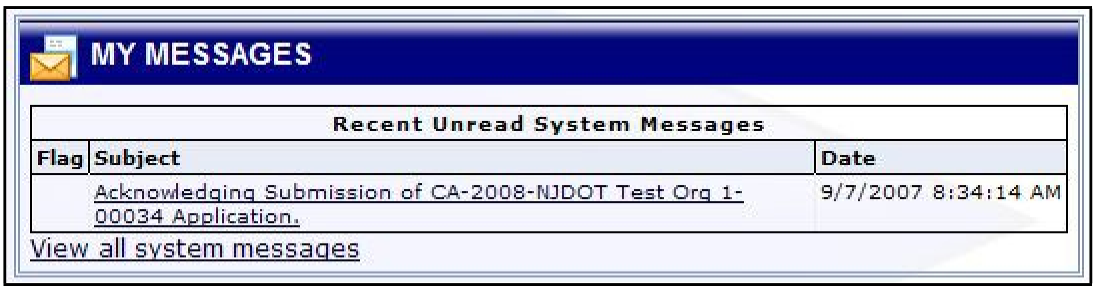
12.a. Automatic E-mail Notifications

Automatic email notifications may be sent to you periodically throughout the grant year. These messages will be sent via the system according to an automatic process or as the result of a user triggered event. These messages might accompany the creation of an application, the submission of an application, or a pending due-date that is approaching. These messages are intended to help you know what is occurring in the system that pertains to you or your Organization. These messages may also be sent by NJDOT personnel.

In order to receive these messages it is important that you include an active, frequently used email address when creating your contact record in the system. If you provide an incorrect email address or an address to an account that is either inactive or full, you will not be able to receive these important messages.

12.b. System Messages

In addition to the automatic email notifications, there is an area referred to as the System Messages that manages messages sent to you either from the system itself or from NJDOT personnel. You can view or edit your System Messages by following these steps:



1) Click the Subject of a message or click the "View all system messages" link from the My Messages section on the Main Menu.

a) Clicking the Subject of a message will take you to the message itself. You can read the message from that screen and then may perform any of the following actions:
   (1) Click the "List" button to view a full list of your messages in your My Messages folder.
   (2) Click the "Delete" button to delete the message.
   (3) Choose a folder from the dropdown list and click the 'Go' button

b) Clicking the "See All" link will bring you to the 'My Messages folder' where you may perform any of the following actions:

   (1) Click the Subject of a message to read a message in the folder.
   (2) Click the "Folder Administration" button to create a new folder in which to store system messages.

(3) Click a folder name to see all of the messages in that folder.

Automatic email notifications and system messages will help you to know the events that are occurring in NJDOT SAGE and will keep you up-to-date on the progress of your application related items.