



OKLAHOMA GRANT EXCHANGE - OGX



OKLAHOMA
Center for the
Advancement of
Science and Technology

OCAST User Guide - OGX

LAST UPDATED: 2020-10-15



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Introduction

OGX Overview

The OGX Portal specializes in improving functionality and ease of use. These are the areas that the OGX Portal shines in:

- **OGX Dashboard** – The OGX Dashboard allows users to drill down through new reporting panels for funding account information, program budgets, and even view staff performance information.
- **SAM.GOV System Interface** – The new system interface automatically gathers address and contact information during registration and confirms a valid DUNS number. It also allows the system to check for expiration dates and confirm whether an organization can receive federal funding.
- **Easy Configuration of Program Changes** – The OGX portal takes advantage of a new drag-and-drop configuration engine to allow users to make changes to their programs. This includes easily updating forms, process flows, and management reports.
- **Updated Accessibility Features** – OGX was built from the ground up to adhere to ADA and WCAG 2.1 AA standards. The portal will also undergo regular 3rd party web accessibility compliance audits. It includes new options like a high contrast mode and new branding utilities, making it easier to accommodate individuals with disabilities.

Current OGX Contact Information

OGX and OCAST has supplied the following contact information for users needing assistance:

Agency/Individual Name	Phone Number	Email Address	Website URL
Agate Software Helpdesk	1 (866) 4490-1425	azhelpdesk@agatesoftware.com	
OCAST, Connor Cox	1 (405) 319-8428	Connor.Cox@ocast.ok.gov	www.ocast.ok.gov



System Requirements

The system was designed so that computer users can use it with little or no changes to their computer environment. The requirements that are mentioned below are common computer elements that should be already present.

Internet Connection

The 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 Microsoft Edge, Chrome, Firefox, or Safari. If the web browser is not update, the following message will display:



Enabling Cookies

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

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

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

Adobe Acrobat DC

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

System Login Page

URL

To access the OGX portal, type the following into the address bar of the web browser and press **Enter**.
<https://www.ogx.ok.gov>

NOTE: If you have an existing user account in OKGrants, then you may login to OGX using your OKGrants User Name and Password. Upon login you may be asked to change your password; you may use the same password without issue. Be aware that the OGX portal does not save your User Name and Password. However, this option may be available for some browsers.

OGX Portal Home Login Page Sections

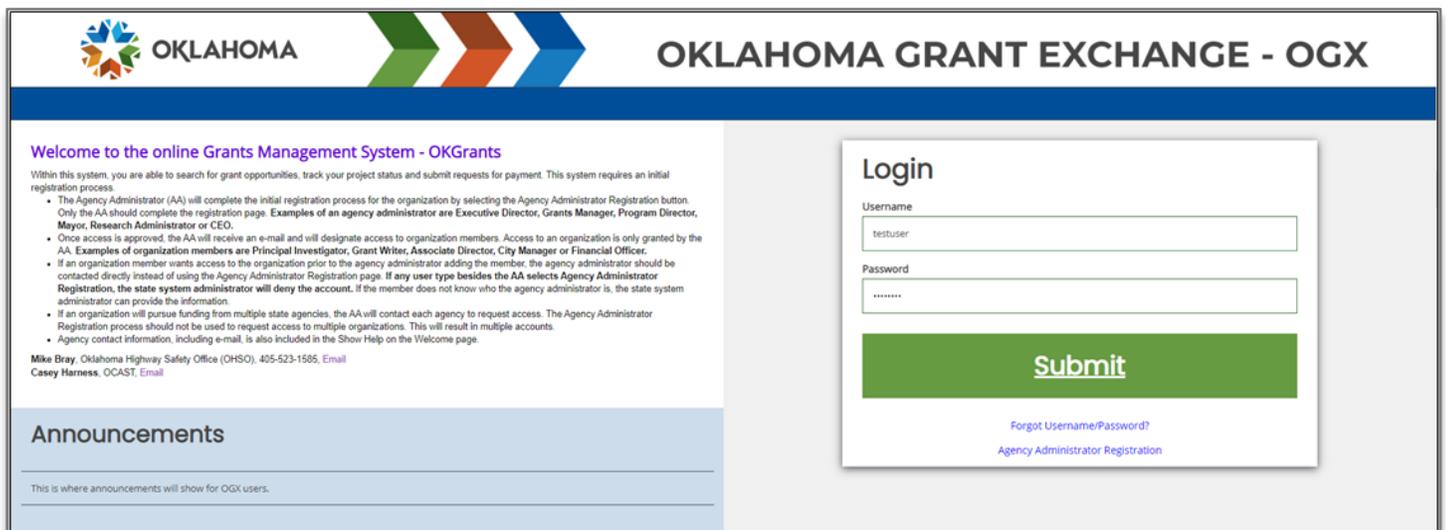


Figure 1 The Login Page

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

Welcome/Announcements

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

OGX Portal Login Section

The OGX portal login process requires a user to enter in a **User Name** and **Password** to login.

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

Logging in to the OGX Portal

User Name

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

Password

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

Submit Button

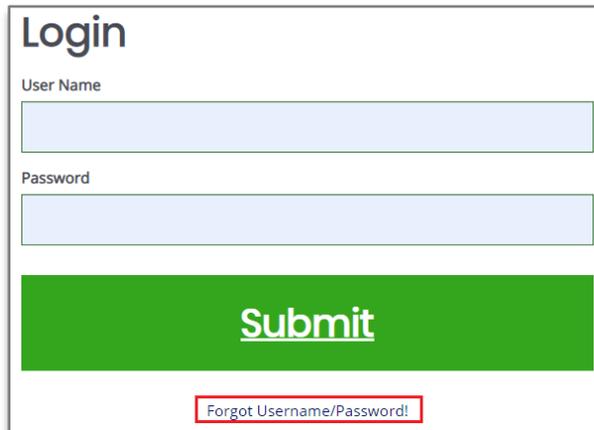
Push the **Submit Button** to login onto the OGX Portal.

Trouble Shooting Issues Logging in to the OGX Portal

Forgot Username

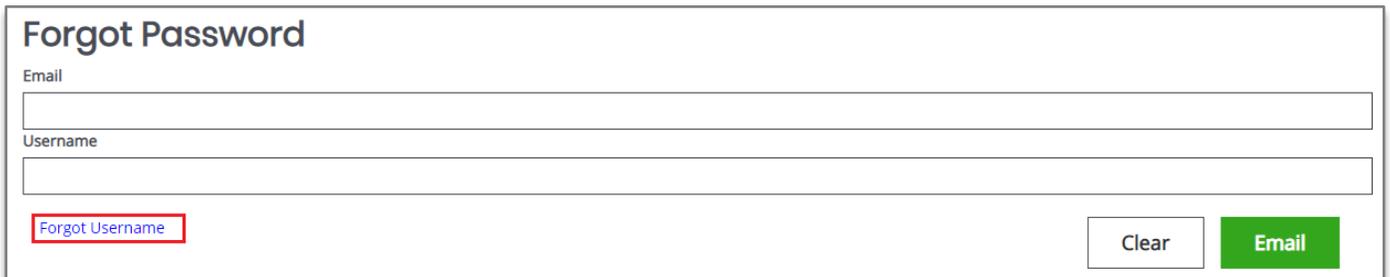
The OGX portal allows the user to request the retrieval of their username. To do so, complete the following steps:

- 1) Click on the **Forgot Username/Password!** link.



The screenshot shows a login form titled "Login". It contains two input fields: "User Name" and "Password". Below these fields is a large green "Submit" button. At the bottom of the form, there is a link labeled "Forgot Username/Password!" which is highlighted with a red rectangular box.

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



The screenshot shows a form titled "Forgot Password". It contains two input fields: "Email" and "Username". Below the "Username" field is a link labeled "Forgot Username" which is highlighted with a red rectangular box. To the right of the form are two buttons: "Clear" and "Email".

- 1) Enter the email address and click on the **Email** button. An email will be sent to that email address with the user's username.
- 2) The user can follow the instructions in the **"Forgot Password"** section to allow them to log into the system.

"Locked Out"

Once a user has exceeded 3 login attempts for the portal, they are "locked out". The user may use the **Forgot Password** link to request a temporary password at any point. Instructions for using the "Forgot Password" link are provided below.

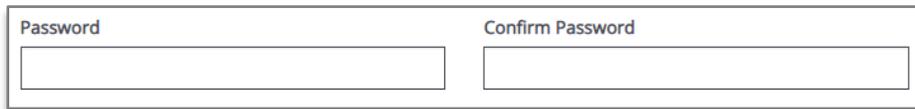
Forgot Password

The OGX portal allows the user to request a temporary password be generated and sent to their email address. To do so, complete the following steps:

- 1) Click on the **Forgot Username/Password!** link.
- 2) Enter the username and the email address. Click on the **Email** button. A temporary password will be sent to the email address supplied.



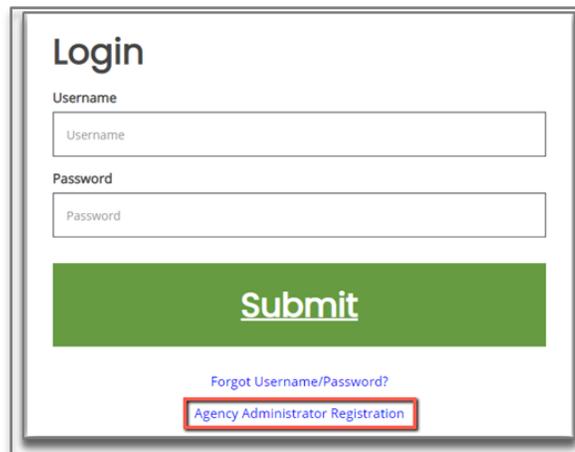
- 3) Once the user has received a temporary password, they will need to login.
NOTE: The password field is case sensitive and will not recognize characters of the wrong case. Precision when entering the username into the username field will decrease the risk of error messages being generated by the system.
- 4) At that point, the user will be brought directly to the **Profile** page and requested to create a new password. The user can use the Edit Password button at the bottom of the page to update the password. When the user clicks on the **Edit Password** button, the **Password** and **Confirm Password** fields are available.



New User

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

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



- 2) Fill in the required fields (*) and any optional fields desired and click on the **Save** button.

NOTE: Users registering by the New User link will need to be approved by pre-existing OGX portal users.

NOTE: If a user attempts to access the system before they have been approved, the system will show their password as invalid.

Legend

- First Name (Required)** – the first name of the registering user.
- Middle Name** – the middle name of the registering user.
- Last Name (Required)** – the last name of the registering user.
- Organization (Required)** – the name of the organization the registering user wants to register under.
- Title** – the position title of the registering user.
- Street Address (Required)** – the street address of the organization the user is registering for.
- State (Required)** – the state drop-down selection for the state of the registering user’s organization.
- County (Required)** – the county drop-down selection for the county of the registering user’s organization.
- City (Required)** – the name of the city of the registering user’s organization.
- Zip Code (Required)** – the zip of the registering user’s organization.
- Email (Required)** – the email address of the registering user.
- Phone (Required)** – the phone number of the registering user.
- Username (Required)** – the username the registering user wishes to register for.
- Password/Verify Password (Required)** – the password the registering user wishes to register for.

User Information

Once a person logs into the system, their **Profile** page and a list of organizations the individual belongs to is visible.

Profile

Profile

Basic Information

First Name	Middle Name	
<input type="text" value="Subgrantee Recipient"/>	<input type="text"/>	
Last Name	Prefix	Suffix
<input type="text" value="Testing"/>	<input type="text" value=""/>	<input type="text" value=""/>
Title		
<input type="text" value="Testing"/>		
Primary Phone	Secondary Phone	
<input type="text" value="5555555555"/>	<input type="text"/>	
Email		
<input type="text" value="ajurgensen@agatesoftware.com"/>		

Address Information

Street Address		
<input type="text" value="2014 University"/>		
City	State	
<input type="text" value="Okemos"/>	<input type="text" value="Kentucky"/>	
ZIP	County	
<input type="text" value="48866"/>	<input type="text" value="Adair County"/>	

Additional Information

Job Certification	
<input type="button" value="Select"/>	
Security Image	
<input type="text" value="No Image Selected"/>	<input type="button" value="Update Security Image"/>
Username	
TestingRecipientAdmin	<input type="button" value="Edit Username"/>
Password	
*****	<input type="button" value="Edit Password"/>

Basic Information Legend

First Name – the first name of the individual.

Middle Name – the middle name of the individual.

Last Name – the last name of the individual.

Prefix – an optional prefix for the individual.

Suffix – an optional suffix for the individual.

Title – the position title for the individual.

Primary Phone – the primary phone number for the individual.

Secondary Phone – the optional secondary phone number for the individual.

Email – the email address of the individual.

Address Information Legend

Street Address – the street address for the individual.

City – the city the individual's street address is in.

State – the dropdown menu of the state the individual's street address is in.

Zip – the zip code the individual's street address is in.

County – the dropdown menu of the county the individual's street address is in.

Additional Information Legend

Job Certification – a repository for uploading personal certification forms.

Security Image – an optional security image to implement as an additional security measure.

Username – a label containing the username of the individual and a button that allows the individual to update the username.

Password – a label containing the current password of the individual and a button that allows the individual to update the password.

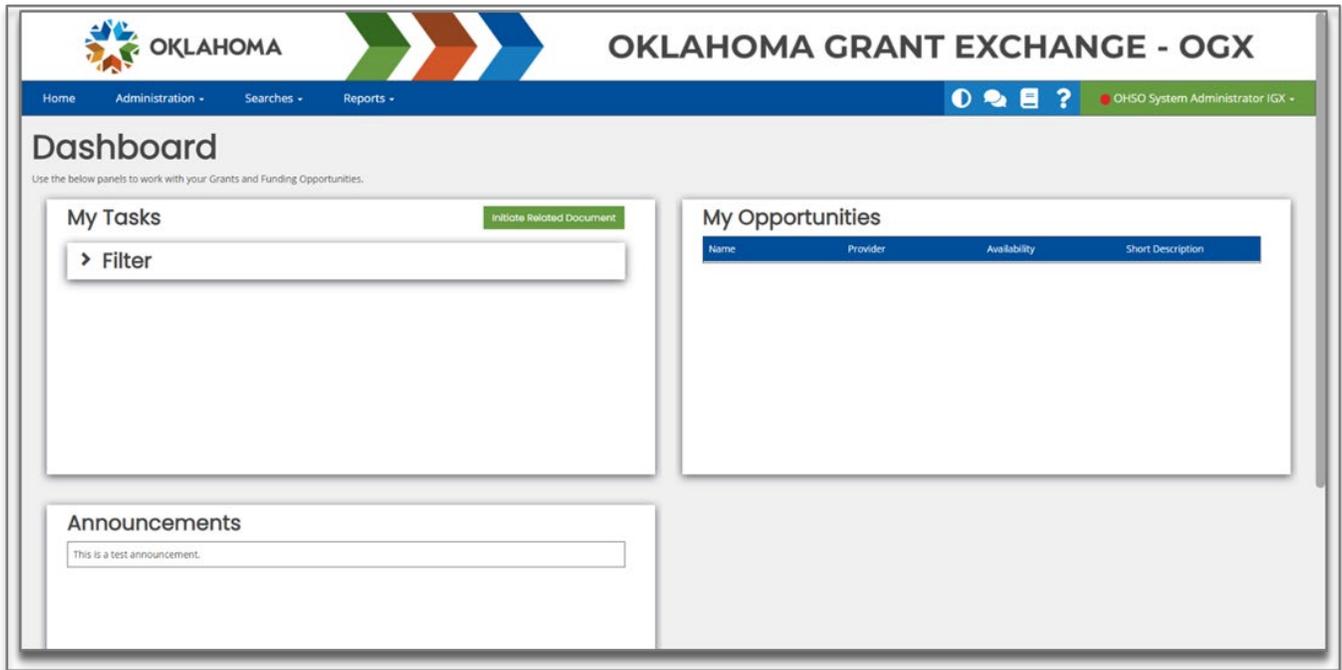
Organizations

This section contains a table with the label for the role the individual has in that organization, the active date field, the inactive date field, and the name of the person who assigned that individual to the organization.

NOTE: A person can have multiple organizations listed.

Home

The **Home** page is the home page for OGX 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.

Searches

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

Menu Options

- Applications
- Financials
- Programmatic Reports

Icons

	Theme Setting	This button switches the theme visible from black and white to color and vice versa.
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 <p>Training Materials</p>	<p>Clicking this button allows the user to view available training materials</p>
 <p>Help</p>	<p>Clicking this button allows general help tips to display about the current item selected.</p>
<p>Name</p>	<p>Clicking on the user’s name allows the user to access the Profile, Messages, Edit Dashboard, and Logout links.</p>

Dashboard

My Tasks

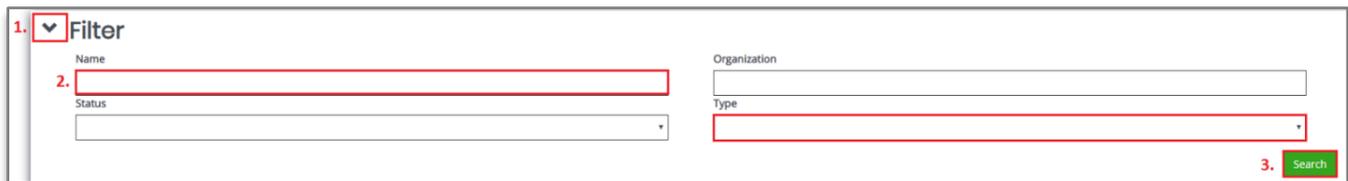
The **My Tasks** area is an area that defines the tasks assigned to the user. It also gives the user a way to initiate a related document (like a report or requisition). This area can be filtered using the **Filter** function.



Using the My Tasks Filter

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

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



Announcements

The **Announcements** area is an area that allows the user access to announcements from the portal designers. These announcements can include (but are not limited to) training dates, news updates, or web site links.

Announcements

Grant System Training is coming soon. [Select this link to sign up!](#)

State Agency receives Federal Award

Visit our website by using this link: <https://intelligrants.com>

Test Announcement

My Opportunities

The **My Opportunities** area allows the user to start grant opportunity documents (usually applications).

My Opportunities

Name	Provider	Availability	Short Description
Sample Program Application	Base Provider Organization	5/4/2019 10:00:00 AM - 5/25/2022 9:30:00 AM	Sample Funding Program for the IGX System
Sample Program Applicationnnnn	Base Provider Organization	5/4/2019 10:00:00 AM - 5/25/2023 9:30:00 AM	Sample Funding Program for the IGX System
State as Grantee Application	Base Provider Organization	1/30/2019 12:00:00 AM -	Application to apply for Federal/Other funding

Grant Opportunities

Starting a Grant Opportunity

To start a grant opportunity, please follow these instructions:

- 1) Click on the grant opportunity name in the **Name** column. This brings up a menu with more information and the **Agree** or **Decline** buttons.

Sample Program Application

Provided By: Base Provider Organization

Provided To: Agate Software

Application Availability Dates: 5/4/2019 10:00:00 AM - 5/25/2022 9:30:00 AM

Description:
Sample Funding Program for the IGX System

Agreement Language:
By selecting the **Agree** button below, I attest that I am a duly authorized representative of the Applicant, and have been authorized by Applicant to make all representations, attestations and certifications contained in this RFP and all Addenda, if any issued, and to execute this Application document on behalf of Applicant. I also attest that the Applicant is eligible to apply for this RFP.

Agree **Decline**

- 2) Click on the **Agree** button.

Working on a Grant Opportunity

Start the grant opportunity using the instructions in the previous section.

NOTE: The default page for the application is the Document Landing Page.

The Document Landing Page

The Document Landing Page contains several sections and the **New Note** button.

OKLAHOMA GRANT EXCHANGE - OGX

Home Administration Searches Reports

HR20-013

Forms

Application

Principal Investigator Information

Project Information

Document Landing Page

View document details.

FY20 Health Research Program	FY20 Health Research Program	OCAST Application
HR20-013	Your Role	Period Date
Organization Delane Testing Organization	IntelliGrants Administrator	1/1/2020 12:00:00 AM 6/30/2020 11:59:00 PM

New Note

Application Link

The number listed above the **Forms** header is the application number. It also functions as a link to bring the user back to the **Document Landing Page**.

Forms Menu

The **Forms Menu** is divided into sections containing individual forms for the user(s) to fill in. There are drop-down arrows next to the Forms header that allow the forms to be hidden and other sections uncovered.



Legend

Forms – the list of forms. Usually forms without sections are listed first, then the form list is broken in to sections.

Tools – a list of tools available to the user.

Status Options – a list of possible status options to apply to the application. This list will vary from user to user, depending on which role the user is logged in as and current status of the application.

Related Documents – a list of related documents (primarily reports) associated with the application.

Document Details

The Document Details section provides visual data including the grant opportunity status, future statuses, the name of the organization, the role of the user currently logged in, and both the **Period Date** and **Due Date**.

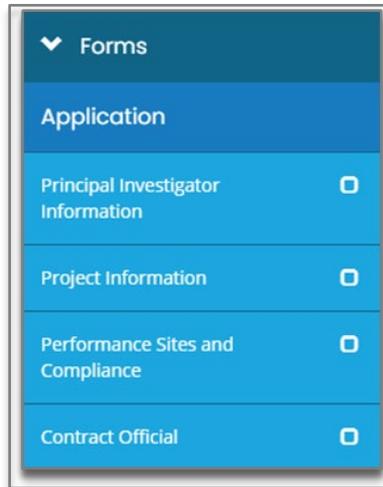
New Note Button

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

Grant Opportunity Forms

Forms

The list of forms is usually divided into sections, with the first section visible being the default form location.

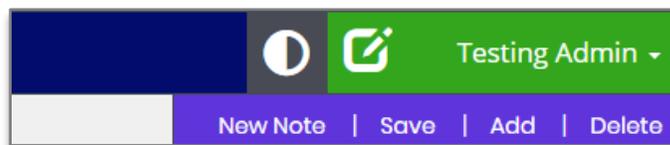


Clicking on a form link in any section will bring up that form for the user to fill in.



Form Options

There are additional tools in the purple banner on the right side of the screen.



Legend

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

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

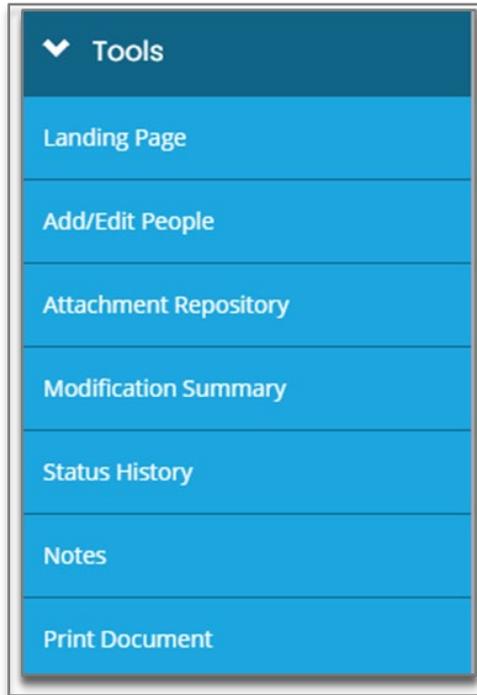
Save – allows the user to save the form.

Add – allows the user to create an additional instance of the form. It is the digital equivalent to being handed an extra piece of paper of a specific form to staple to an existing packet of forms.

Delete – allows the user to delete the instance of the form that is visible to the user. Clicking on the **Delete** button will clear out the fields on the form (including any uploaded attachments).

Tools

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



Legend Summary

Landing Page – the default application page.

Add/Edit People – allows the user to add/edit people associated with a specific document.

Attachment Repository – allows the user to access a list of stored attachments.

Modification Summary – allows the user to access a summary of modifications for a specific document.

Status History – allows the user to access a history of the status(s) of a specific document.

Notes – allows the user to create/view/edit notes for a specific document.

Print Document – allows the user to create a PDF of the document.

Landing Page

Clicking on this link returns the user to the **Document Landing Page**.

Document Add/Edit People

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

A screenshot of a table titled 'People Assigned to this Document'. The table has a dark blue header and a light blue body. The header row contains the following columns: 'Person', 'Organization', 'Role', 'Active Dates', and 'Assigned By'. There is a green plus sign button in the top right corner of the table header. The table contains one data row with the following values: 'a, a' under 'Person', 'Agate Software' under 'Organization', 'Authorized Official' under 'Role', '10/18/19 -' under 'Active Dates', and 'Grant System' under 'Assigned By'. There is a small edit icon in the bottom right corner of the table.

Person	Organization	Role	Active Dates	Assigned By
a, a	Agate Software	Authorized Official	10/18/19 -	Grant System

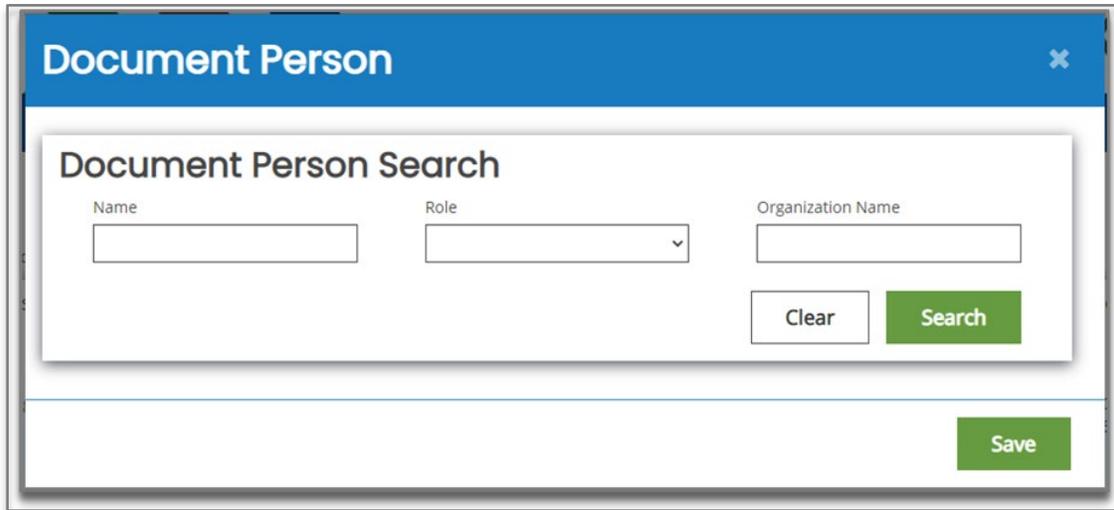
Adding/Assigning People to the Document

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

- 1) Click on the **Plus Sign** button on the **People Assigned to this Document** row.

- 2) Select the **Person** and **Role** options from the drop-down menus.
- 3) Click the **Save** button.

NOTE: This will automatically assign today's date. If a past active date is required, please use the menu in the Active Date field to select the date.

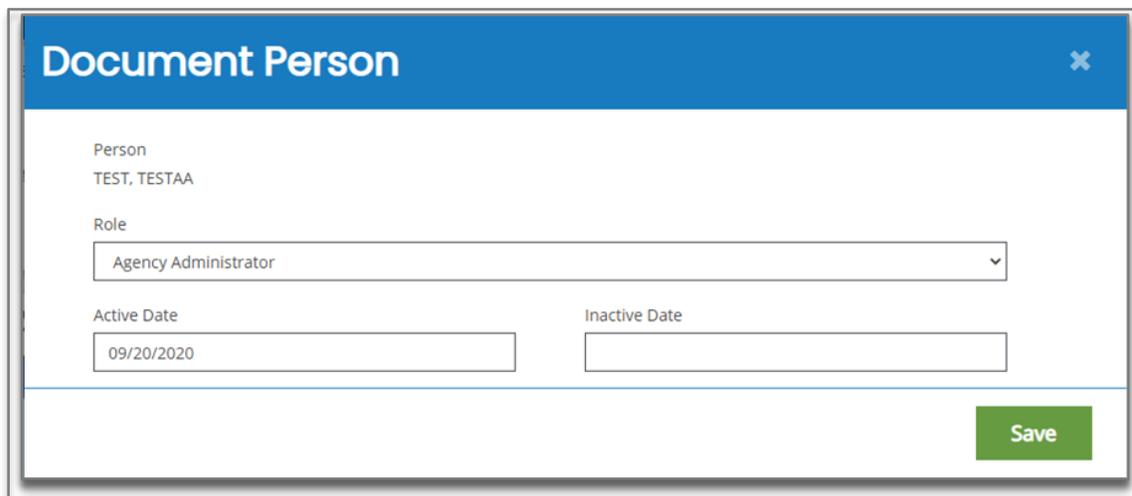


The screenshot shows a window titled "Document Person" with a close button (X) in the top right corner. Below the title bar is a "Document Person Search" section. This section contains three input fields: "Name" (a text box), "Role" (a dropdown menu), and "Organization Name" (a text box). Below these fields are two buttons: "Clear" and "Search". At the bottom right of the window is a "Save" button.

Editing People Assigned to the Document

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

- 1) Click on the **Pen** button on the right side.
- 2) Select a role from the **Role** drop-down list.
Optional: Update the Active Date field.
- 3) Click the **Save** button.



The screenshot shows a window titled "Document Person" with a close button (X) in the top right corner. The form displays the following information and fields: "Person" (TEST, TESTAA), "Role" (Agency Administrator), "Active Date" (09/20/2020), and "Inactive Date" (empty). A "Save" button is located at the bottom right of the window.

Attachment Repository

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

Document Modification Summary

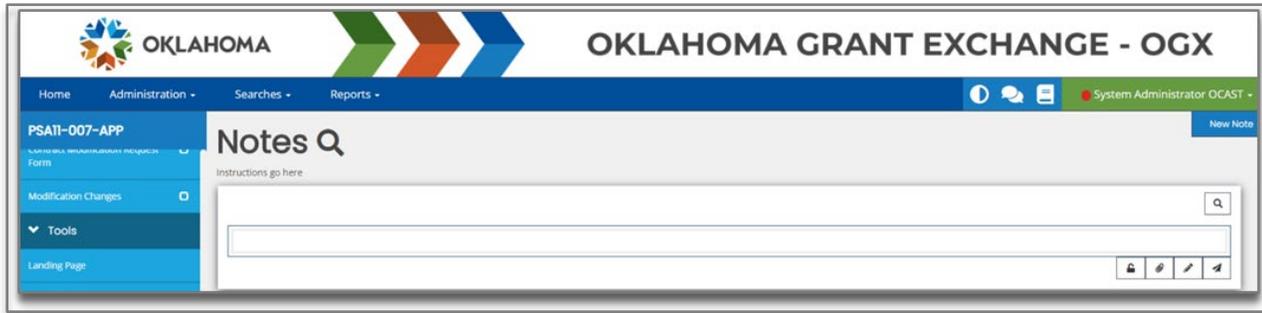
This tool allows the user to view and/or download the modification summary.

Status History

This tool allows the user to view the status of the document – including the **Status** name, **Date/Time** the document had that status, and the name of the **Person** who changed the status of that document. There is also a field for status notes.

Notes

This tool allows the user to add/edit notes.



Adding a New Note

Please use these instructions to create a note.

- 1) Click on the **New Note** button.
- 2) Fill in the field.
- 3) Click on the **Paperclip** icon to add a note (optional).
- 4) Click on the **Paper Airplane** icon to SAVE the note.

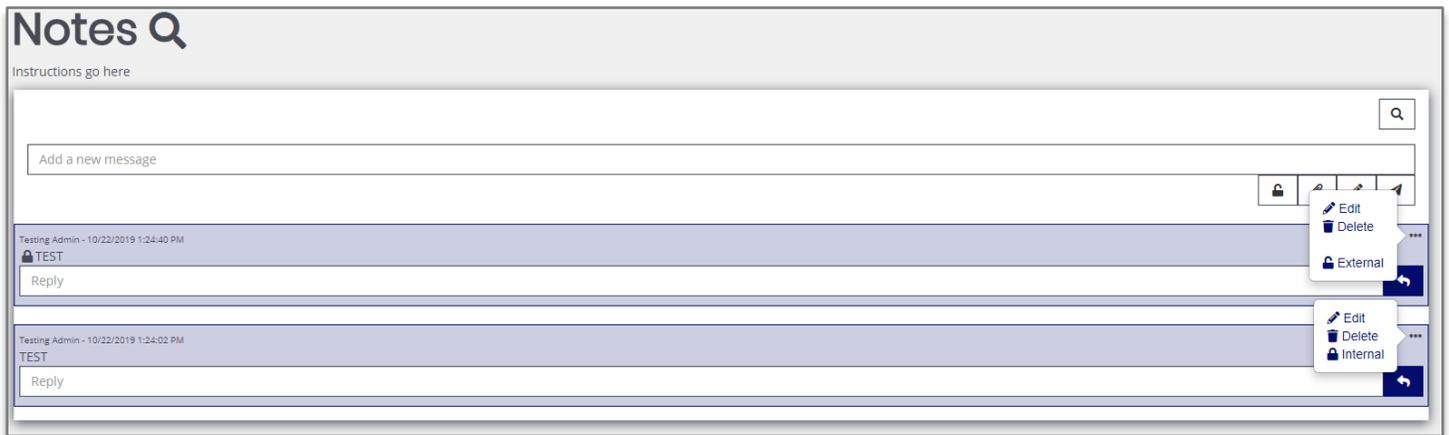
Additional Fields

Icon	Name	Description
	Internal Note	This tool locks this note into the form as an internal note. The internal notes are only visible to members within the same organization.
	Attachment(s)	This tool allows the user to add attachments to the note.
	Editor	This tool allows the user to edit a note.
	Save Note	This tool allows the user to save the note.

Locating a Note

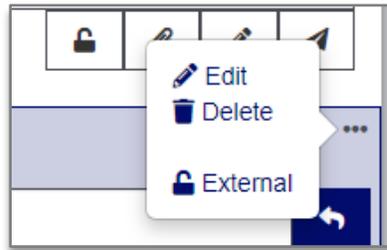
Once a note is created, it ends up in the **Notes** area of the **Tools** menu. To access the note, please follow these instructions:

- 1) Click in the **Forms** section to minimize that section.
- 2) Click on the **Notes** link in the **Tools** section.

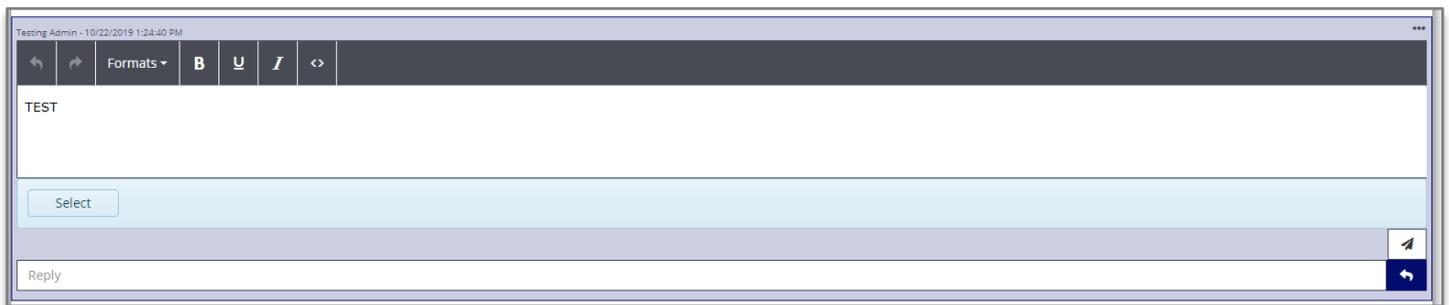


Updating a Note

- 1) Click in the **Forms** section to minimize that section.
- 2) Click on the **Notes** link in the **Tools** section.
- 3) Click on the ... icon. This brings up the **Edit**, **Delete** and **External/Internal** tool buttons.



- 4) Click on the **Edit** tool to edit the text field.

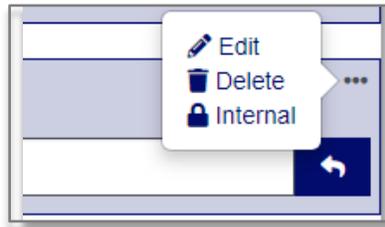


- 5) Click in the text field to adjust the formatting and/or the contents of the note.
- 6) Click the paper airplane icon to save the updates to the note.

Deleting a Note

- 1) Click in the **Forms** section to minimize that section.
- 2) Click on the **Notes** link in the **Tools** section.

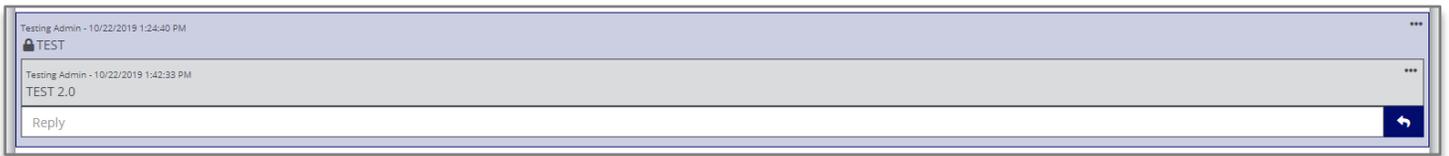
- 3) Click on the ... icon. This brings up the **Edit**, **Delete** and **External/Internal** tool buttons.



- 4) Click on the **Delete** button to delete the note.

Replying to a Note

- 1) Click in the **Forms** section to minimize that section.
- 2) Click on the **Notes** link in the **Tools** section.
- 3) Add a response to the **Reply** section and click on the airplane icon.



Print Document

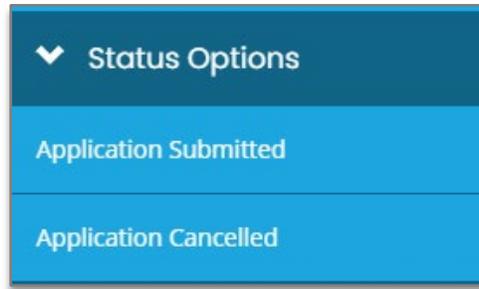
This tool allows the user to create a PDF version of the document to save onto the user's computer and/or print out. Each form has the option of being included in the printout (with both questions and answers), excluded in the printout, or including a blank version of that form.

	Include	Exclude	Include Blank Copy
ALL	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
JST TEST 9/26	OR <input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Form 1	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Form 2	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Testing Hidden Variables	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Testing Print Versions Stackable Form	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

Print

Status Options

The **Status Change** area allows the user to change the status of a document. This is normally useful for submitting applications, signing contracts, or requesting grant modifications.



Related Documents

The **Related Documents** section is where the user can access documents (such as reports) that are related to the application/contract.

Accessing a related Document

To access a report, please follow these instructions:

- 1) Navigate to the grant.
- 2) Close the **Forms**, **Tools**, and **Status Options** sections.
- 3) Click on the report link in the **Related Documents** section.
- 4) Click on the report link in the 2nd column. This will bring up the **Document Landing Page** for the report.



Starting a Related Doc

Click on the **Initiate Related Doc** button (either in the **Related Documents** section or in the **My Tasks** area of the **Dashboard**).

Searches

The **Searches** tab is used to quickly locate specific documents. Different types of searches have their own search sections set up. The sections below explain how to use these search sections.

Applications

To use this search tab, please follow these instructions:

- 1) Go to **Searches** → **Application/Grant**.
- 2) OPTIONAL: Enter in search parameters. Click the **Clear** button to clear out search parameters.
- 3) Click the **Search** button.
- 4) Click on the name of a specific document in the **Name** column.

The screenshot shows a 'Document Search' form with the following fields: Name (text input), Organization (text input), Type (dropdown menu), Status (dropdown menu), and Sub Code (text input). There are 'Clear' and 'Search' buttons at the bottom right. Below the form is a table with the following data:

Name	Organization	Type	Status	Sub Code
Application-Agate Software-1	Agate	Sample Program Application	Application in Phase 1 Review	2018

Legend

Name – A text field for the name of the document.

Organization – A text field for the name of the organization that created the document.

Type – A drop-down list to select the type of document from.

Status – A drop-down list to select a specific document status from.

Sub Code – A text field to enter the sub code of the document in.

Financials

To use this search tab, please follow these instructions:

- 1) Go to **Searches** → **Financials**.
- 2) OPTIONAL: Enter in search parameters. Click the **Clear** button to clear out search parameters.
- 3) Click the **Search** button.
- 4) Click on the name of a specific document in the **Name** column.

Document Search

Name

Organization

Type

Status

Sub Code

▼ Documents +

Name	Organization	Type	Status	Sub Code
PR-Demo-2018-0073	Base Applicant Organization	Progress Report	Progress Report in Process	2018

Programmatic Reports

To use this search tab, please follow these instructions:

- 1) Go to **Searches** → **Programmatic Reports**.
- 2) OPTIONAL: Enter in search parameters. Click the **Clear** button to clear out search parameters.
- 3) Click the **Search** button.
- 4) Click on the name of a specific document in the **Name** column.

Document Search

Name

Organization

Type

Status

Sub Code

▼ Documents +

Name	Organization	Type	Status	Sub Code
PR-Demo-2018-0073	Base Applicant Organization	Progress Report	Progress Report in Process	2018