

Introduction to Using SAGE NJ's System for Administering Grants Electronically

To access Council grant opportunities, an organization must be registered in the State of New Jersey's grant management system called SAGE: The System for Administering Grants Electronically. This system requires authorization for access.



Accessing Arts Council Grants in SAGE

Section 1: Accessing SAGE

Section 2: Logging In – The Basics

Section 3: Creating and Submitting Your Application

Section 4: Tips, Tricks and Things to Remember

PLEASE NOTE: If you have any questions about creating a SAGE account or technical questions about an existing SAGE account, please contact Robert Worshinski at <u>robert.worshinski@sos.nj.gov</u> or by phone at 609-633-1049.



SECTION 1 Accessing SAGE

www.sage.nj.gov



There are multiple versions of SAGE. The Arts Council uses "Blue SAGE." Be sure the login page looks like this to ensure you are in Blue SAGE.

Welcome to the State of New Jersey System for Administering Grants Electronically (SAGE)

This is the State of New Jersey's grant management system. This system requires authorization for access. If you do not have a username and password please click the **New User** link to request access to the site.

NOTE: Counties and municipalities are already established SAGE user agencies.New user access is established by your agency's officials in <u>DCA SAGE</u>.

Helpful Links

NEW JERSEY

or Administering Grants Electronically

Portal Home

System Login

- Reset Your Password
- SAGE Help Desk and Support Services
- Search programs available through SAGE
- Request Access to SAGE
- Dept of State Applicant User Guide

Powered by IntelliGrants™

Copyright 2000-2017 Agate Software, Inc.

Login Username

New User

10.01

Forgot Username/Password?



SAGE System Requirements

Operating System

> NJ Department of State (DOS) SAGE was designed to work with both of the two most common computer operating systems - Windows and Macintosh.

World Wide Web Connection

> NJDOS SAGE is an Internet application. It is accessed via the Internet and was specifically designed for Internet usage.

Web Browser

This system was designed to be compatible with common up-to-date web browsers. Google Chrome is the recommended browser when using SAGE.

Adobe Acrobat Reader

> Adobe Acrobat Reader is used to view PDF documents. The system will generate grant documents in PDF format using information that has been saved into the various narrative and budget pages.

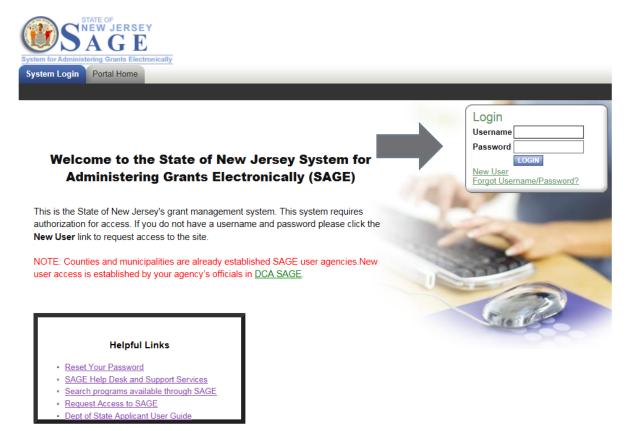


SECTION 2 Logging In – The Basics



NJDOS SAGE System Home Page

If you are a new user - click on *New User*. If you have forgotten your username or password – click on *Forgot Username/Password*.



Powered by IntelliGrants™

© Copyright 2000-2017 Agate Software, Inc.



New User



| O <u>Back</u> | |
|---------------|--|
|---------------|--|

Registration

NOTE: Municipality and County Authorized Official and staff must not make changes here. You should make any necessary changes in NJDCA SAGE.

If you are a municipality or county staff please <u>Click Here.</u> You must first access the DCA SAGE system to gain access to Statewide SAGE

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 | ✓ ★ Zipcod | e 📉 \star |
| County | | ~* | | | |
| Phone #1 | | * Phone #2 | | | |
| Fax | | Cell Phone | | | |
| Email | | | * | | |
| Website | | | | | |
| Username | | * | | | |
| Password | | * Confirm Pa | ssword | * | |

Select: Department of State –

Council on the Arts





Forgot Username/Password





Forgot Your Password?

Please enter the following information to reset your password.

| You will be e-mailed a new password if a matching e-mail address is found. | | | | | | | | | |
|--|------------------|-----------------------------|--|--|--|--|--|--|--|
| Please enter your username | Forgot Username? | | | | | | | | |
| Please enter your e-mail address | * | | | | | | | | |
| RESET MY PASSWORD AND E-MAIL ME THE NEW ONE | | | | | | | | | |
| O Top of the Page | | | | | | | | | |
| Powered by IntelliGrants™ | | © Copyright 2000-2017 Agate | | | | | | | |
| | | | | | | | | | |



Registration

- > Enter your organization's (F)ederal (E)mployer (I)dentification (N)umber
- > Select the **Department of State Council on the Arts** as the Granting Department
- > Complete the user form in its **<u>entirety</u>**.
- > The 'Username' field must consist of all letters and numbers.
- The 'Password' field must consist of all letters and numbers and must be at least 7 characters long.
- > The fields 'Password' and 'Confirm Password' must be the same.
- Please keep record of your username and password.
- The Person who is to be the Authorized Official for the Organization completes the page, including Organization and title.

Please create an account for each person in your organization who will need to access documents in SAGE.

- > If Organization and Title are not included your validation will be delayed.
- > Click "Save" to save the data.



Registration (continued)

NOTE: Once you create a user account and gain access to the system, you will never have to request access again. Once you have saved your contact information, your account must then be approved by a Department of State administrator before you can access the system.

> Note: Access and approval of registration is <u>NOT</u> automatic.

- If you attempt to log in to 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 you will receive an email message confirming that your account has been validated.



Main Menu - HOME



- 1 Documents Tab
- 2 Training Materials
- 3 Organization(s)
- 6 View Available Opportunities



Items to Edit - Profile

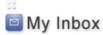


Hello DOS, please choose an option below.



You have 21 opportunities available. Select the View Opportunities button below to see what is available to your organization.

VIEW OPPORTUNITIES



You have 8 new messages. Select the Open Inbox button below to open your system message inbox.

OPEN INBOX



| Export Results to Screen V Sort by: Select V GO | | | | | | | | |
|---|--------------------------|--------------------------|---------------|------------------------|---------------|----------|--|--|
| Info | Document Type | Organization | Name | Current Status | Date Received | Date Due | | |
| | OFBI Direct Service 2015 | DOS Quality Control Inc. | OFBI15DSP-089 | Application in Process | 3/9/2015 | | | |



Verify Profile Information

| System for Administerin Home Calendar | G Grants Electronically | penditure Reports | Report | s <u>Training Materials</u> | Organization(s) Profile:DOSQC Logout | |
|--|-------------------------|----------------------------|-------------------|-------------------------------|--|--------------------------|
| Back | | | | | | |
| Profile Please complete all th | e required fields bel | low. Required fields are r | narked with an *. | | | |
| Contact Information | 1 | | | | | _ |
| | Prefix | First | Middle | Last | Suffix | |
| Name | The Honorable 🗸 | DOS | | Quality Control | * ~ | |
| Organization | DOS Quality Contro | ol Inc. | * | | | |
| Title | Quality Control Office | cial | | | Make sure a | all information i |
| Address | 225 West State Stre | eet | * | | | |
| City Trento | n i | * State New Jersey | ✓ ★ Zipcode | 08625 | correct and | current. The er |
| County Merce | er County 🗸 🗡 | r | | | addross list | ed here should |
| Phone #1 | (609) 555-5555 | * | Phone #2 | | | eu nere shoulu |
| Fax | | | Cell Phone | | $^{-}$ the main co | ntact for |
| Email | donotrespond@aga | atesoftware.com | * | | the main co | |
| Website | | | | | | |
| Username | DOSQC | * | | | communica | ting with the A |
| Password | | * | Confirm Password | | * | |
| District Assignment Region Assignment | | | | | Council. | |

Organization Information

| Organization | Role | Active Dates | Assigned By |
|--------------------------|---------------------|-------------------------|---------------------|
| DOS Quality Control Inc. | Authorized Official | 10/03/2013 - open ended | Schaum, Mr. William |
| NJSAGE_DOS | TRAV Reviewer | 05/26/2015 - open ended | Karr, Colleen |

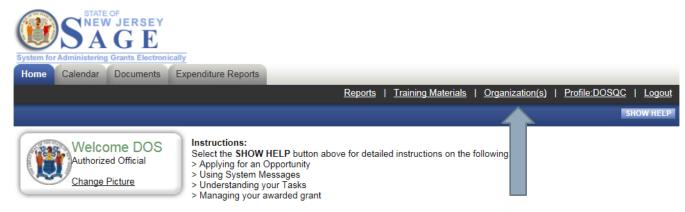


ai

e

S

Items to Edit - Organization



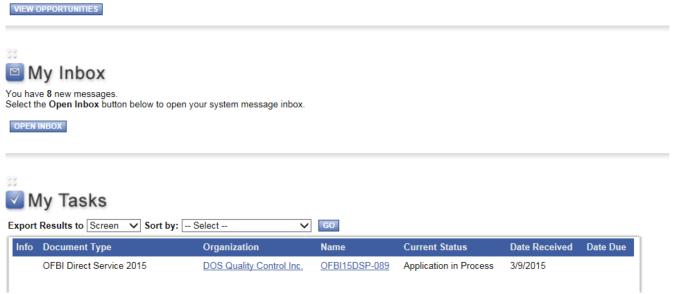
Hello DOS, please choose an option below.

Click on the Organization(s) link.

View Available Opportunities

You have 21 opportunities available.

Select the View Opportunities button below to see what is available to your organization.





Verify Organization Information and Additional Profile Information

| | w Jersey | | |
|----------------------------|---|--|--|
| System for Administerin | g Grants Electronically | | |
| Home Calendar | Documents Expenditure Reports | | |
| | | <u>Reports</u> <u>Training Materia</u> | als Organization(s) Profile:DOSQC Logout |
| | | | SAVE SHOW HELP |
| O Back | | | |
| Organizati | on - 📓 DOS Quality (| Control Inc. | |
| Please complete all t | he required fields below. Required fields | are marked with an *. | |
| Organization Inform | ation Organization Members Org | anization Documents Organization Details | |
| Organization Infor | nation | | |
| Name | DOS Quality Control Inc. | * | Make sure all information |
| Federal Tax I.D. Number | 100009999 * | | is correct for your |
| DUNS Number | | | • |
| SAM CAGE Code | | | organization. |
| Address | 225 West State Street | ~ | |
| | | × * | Then aligh an Overshipstic |
| City | Trenton * State New | w Jersey V * Zipcode 08625 | Then click on Organization |
| County | Mercer County 🗸 🖈 | | Details for the Additional |
| Phone | (609) 555-5555 * Fax | | Drofile Information page |
| Email | | | Profile Information page. |
| Website | | | |



Additional Profile Information

| Home C | STATE OF SAGE Imministering Grants Electronically Calendar Documents Expenditure Reports Reports Forms Menu Status Changes Management Tools Related Doc | | Organization(s) Profile:DOSQC Logout ADD NOTE SHOW HELP |
|------------|--|-----------------|---|
| Please com | ganization Information plete all required forms below. Information Organization Members Organization Documents Organ on Details | ization Details | Click on the DOS link for the Additional Profile Information page. |
| Status | Page Name | Note Created By | Last Modified By |
| | NJ State Council on the Arts Board Chart | | NOTE: NJ Council on the Arts |
| | Additional Profile Information – Required for applicants to the NJ Department of State | | grantees have two separate |
| | Additional Profile Information – Required for applicants to the NJ Department of Education | | links of information to input. |
| | Additional Profile Information – Required for applicants to the NJ Department of Human Services | | |
| | Additional Profile Information – Required for applicants to the NJ Department of Heath | | |
| | Additional Profile Information – Required for applicants to the NJ Department of Law and Public Safety | | |
| | Organization Vendor Numbers - Payee Name and Address | | |

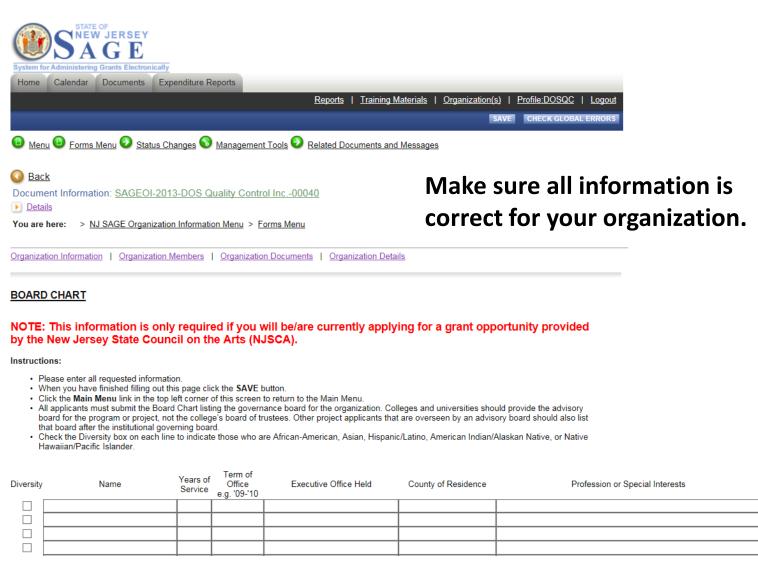


Additional Profile Information

| System for Administening Grant: Electronically Home Calendar Documents Expenditure Reports | |
|--|--------------------------------------|
| Reports Training Materials Organization(s) Profile (SQC Logout | |
| Menu Forms Menu Status Changes Management Tools Related Documents and Messages | Make sure to click the |
| Many Forms Meny V Status Changes V Management Tools V Related Documents and Messages | · · · · - • |
| Back Document Information: SAGEOI-2013-DOS Quality Control Inc00040 | <u>SAVE</u> button. |
| Octails You are here: > NJ SAGE Organization Information Menu > Forms Menu | |
| | |
| Crganization Information Organization Members Organization Documents Organization Details | |
| ADDITIONAL NJDOS ORGANIZATIONAL PROFILE INFORMATION | |
| NOTE: This information is only required if you will be/are currently applying for a grant opportunity provided by the NJ Department of State (Council on the Arts, Historical Commission, Office of Faith-Based Initiatives, Travel and Tourism, and Center for Hispanic Policy Research and Development). | |
| Instructions: | |
| Please enter all requested information. When you have finished filling out this page click the SAVE button. Click the Main Menu link in the top left corner of this soreen to return to the Main Menu. | |
| Charities Registration # (Click HERE for more information) CH Example: CH 1234567* | |
| Please upload proof of your Charities Registration number in the box provided. Browse | DO NOT PUT A ZERO |
| Organization Exempt EX or EXE | |
| Division of Revenue registration number (Click <u>HERE</u> for more Information) (enter 0 Ir other Governmental Agency (County, Municipality or School Board)) Certificate Number Example: Certificate Number 1234567 * | (Unless you are exempt) |
| Please upload proof of your Division of Revenue Registration number in the box provided. Browse | |
| Congressional District of Applicant | |
| (if your organization exists outside of New Jersey check this box and leave the above box blank) | |
| State Legislative District of Applicant (If your organization exists outside of New Jersey check this box and leave the above box blank) | |
| Date of Incorporation (MM/DD/YYYY) | |
| Fiscal Year Ends (MINDD)* | |
| Executive Director of Organization | Complete All information |
| Prefix First Name Last Name Suffix Title | Complete ALL information |
| | in almalia a information in blue bou |
| Project Director | including information in blue box. |
| Prefix First Name Title | |
| V | |
| Board President or Chairman | |
| Prefix First Name Last Name | |
| | |
| Address | |
| Address 2 City | |
| State | |
| Zipoode | artscouncil ni gov 609-292-6130 |

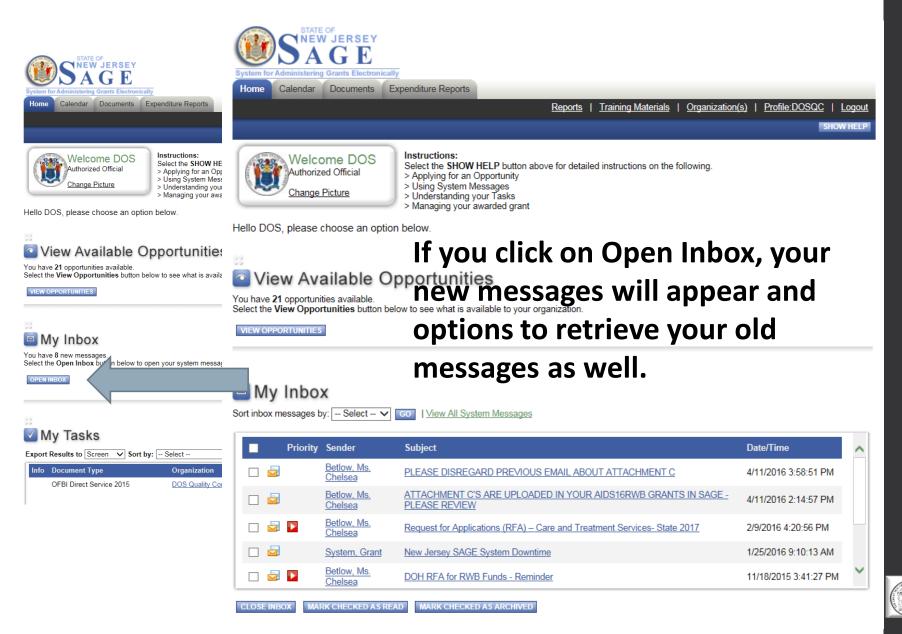


Items to Edit – Board Chart





Your SAGE Inbox



Your SAGE Tasks





Instructions:

Select the SHOW HELP button above for detailed instructions on the following.

- > Applying for an Opportunity
- > Using System Messages
- > Understanding your Tasks
- > Managing your awarded grant

Hello DOS, please choose an option below



You have 21 opportunities available. Select the View Opportunities button below to see what is available to your organization.

VIEW OPPORTUNITIES



You have 8 new messages. Select the Open Inbox button below to open your system message inbox.

OPEN INBOX

My Tasks are items that need your attention. There may be an application/report in process or even a payment voucher requiring a signature.

This is a list of your TO DOs!



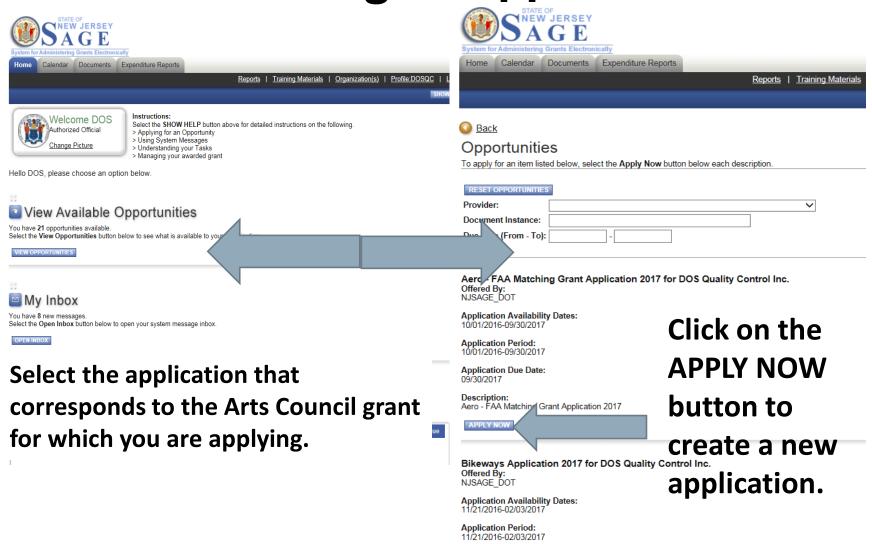


SECTION 3

Creating and Submitting Your Application



Creating an Application



Application Due Date:



Finding Your Application

Once you create an application, there are two ways to access it for completion.



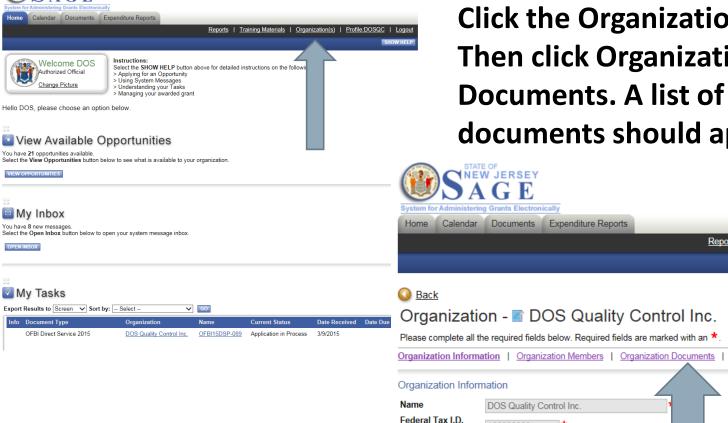


Finding Your Application – Method 1

| <complex-block> Visit of the end of the</complex-block> | Search Documents Document Type Document Type Document Name Status Organization Year SEARCH CLEAR | arch find a specific Docume A list of Should your a | he dropdov then click s of your docu appear, in pplication. | earch. uments | |
|--|--|---|---|----------------------------------|----|
| OPEN INBOX | Document Type | Organization | Name | Current Status | Ye |
| | Destination Marketing Organizat | ion 2016 | | | |
| Wy Tasks | Destination Marketing Organization 2016 | Central New Jersey Convention & Visitors Bureau | TRAV-DMO-2016-00015 | Executed | 20 |
| Export Results to Screen V Sort by: Select V GO | Destination Marketing Organizat | <u>ion 2017</u> | | | |
| Info Document Type Organization Name OFBI Direct Service 2015 DOS Quality Control Inc. OFBI15DSP-089 | Destination Marketing Organization 2017 | Central New Jersey Convention & Visitors Bureau | TRAV-2017-DMO-00005 | Executed | 20 |
| | NJ SAGE Organization Informati | on | | | |
| | NJ SAGE Organization Information | DOS Quality Control Inc. | SAGEOI-2013-DOS Quality Control Inc00040 | Initiate Organization Details | 20 |
| | OFBI Direct Service 2015 | | | | |
| | OFBI Direct Service 2015 | DOS Quality Control Inc. | OFBI15DSP-089 | Application in Process | 20 |



Finding Your Application – Method 2 SAGE



Click the Organization(s) link. **Then click Organization Documents. A list of your** documents should appear.

 \wedge

* State New Jersey

Reports | Training Materials |

Organization Details

Zipcode 08625

artscouncil.nj.gov | 609-292-6130

Expenditure Reports

Documents

DOS Quality Control Inc

225 West State Street

100009999

Trenton

Number DUNS Number SAM CAGE Code Address

City

SAGE Application Format

Please make sure to complete all forms in their entirety!

If you see this



You have errors in that certain section.

All applications <u>MUST</u> consist of and include <u>ALL</u> of the items requested in order to be considered complete.



Navigating Forms in SAGE

| System for Home | S [™] | ATE OF EW JERSEY A G C Ar Documents Electronically ar Documents Expenditure Reports | R | <u>Reports</u> <u>Tra</u> | ining Materials Org | anization(s) Profile:DOSQC Logout ADD NOTE |
|----------------------|----------------------------|---|------|-----------------------------|------------------------|---|
| 6 | <u>i () For</u> Forms M | ms Menu | | Hove | r over "F | orms Menu" to |
| O Ba | Status | | Note | easily | <mark>move b</mark> | etween the various |
| Docur <u>De</u> t | | Profile Information | 1 | forms | within | a SAGE document. |
| Info | | ation Forms Selection of Grant Category | | | Current Status | Period Date / Date Due |
| | | Organization Contact Information | | Official | Application in Proces | 07/01/2014 - 06/30/2015 |
| | | Executive Summary | | | , application in recoo | s N/A |
| | | Organizational Capacity | | | | |
| DOCU | | Statement of Need | | | | |
| This for the stat | | Statement of Collaboration | ~ | | Please use the navig | ation above to view forms, change |



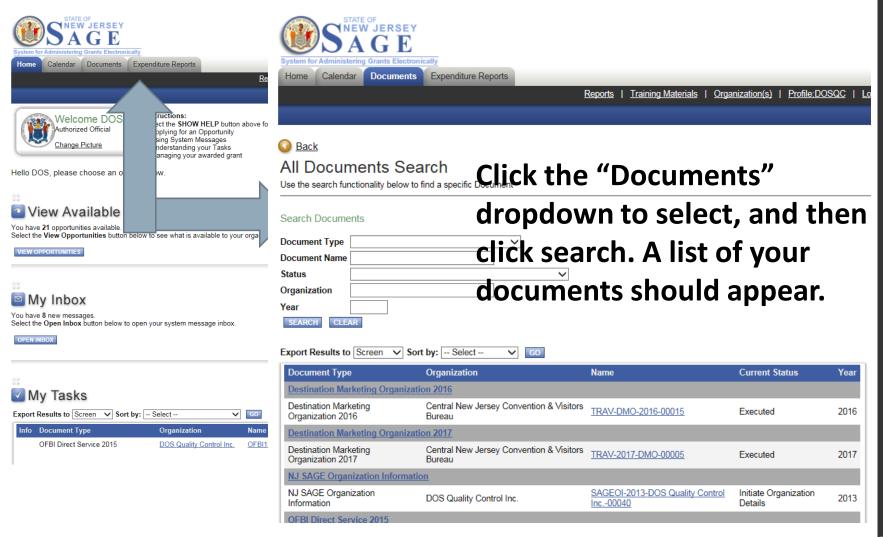
Application Status Changes

| System for Administering | G E | ically | | | | | | | | |
|--------------------------|-----------|---------------------|--------------------------|-----|----------------------|-----------------|---------------------|------------------|----|--------|
| Home Calendar | Documents | Expenditure Reports | | | | | | | | |
| | | | Reports | I | Training Materials | <u>Organiza</u> | tion(s) | Profile:DOSQ | 21 | Logout |
| | | | | | | | | | A | D NOTE |
| | Status C | | jement Tools 📀 Related D | ocu | ments and Messages | | | | | |
| O Back | Possibl | e Statuses | | | | | | | | |
| Document Informat | | CATION SUBMITTED | | | | | | | | |
| Info Document T | | | | | Current Status | | Period I Date Du | | | |
| OFBI Direct \$ | | STATUS | | ia | I Application in Pro | ocess | 07/01/20 N/A | 014 - 06/30/2015 | | |

Once you have completed your application, hover over "Status Changes." To submit your application, click "Apply Status" under "Application Submitted." Clicking on "Application Cancelled" will cancel and delete your application.



Finding Your Executed Application





SECTION 4

Tips, Tricks, and Things to Remember



Important Tips for Using SAGE

- >We recommend you prepare your application responses in Word or Notepad first, then copy and paste into SAGE.
- Do not use <u>any</u> type of formatting tabs, bold, italics, bullet points, etc. These will not translate in SAGE and will mess up the overall format of your application.
- Max. upload size is 13 MB. Try not to use the "x" (docx, xlsx, etc.).
- Adding people: When someone leaves your organization, you need to register a new person - you cannot assume the SAGE identity of the person that left. It ruins the integrity of the previous application documents.



Important Tips for Using SAGE (2)

- If you see a red * that means the field is required. Fill it out!
- If you lock yourself out, there is no administrator wait
 15 minutes to attempt to log in again.
- There is not a 24 hour help desk... so when working late at night, we cannot help you.
- DO NOT WAIT until last minute to register, or to start your application process. We are not here 24 hours, and it is not an automated registration process.



Important Tips for Using SAGE (3)

- View all documents you CAN view full PDF or page PDF depending on the application. However, we do not recommend using the PDF to do a final proofread.
- >Add/edit people If a person cannot see a document, they may have been added to your organization after the document was created – you need to ADD/EDIT people to the individual document for them to view and access it.
- People within SAGE that have the most "power" to SAVE, EDIT, CREATE, AND DELETE are: the Authorized Official and the Agency Administrator. The Agency Staff (your organization's staff) primarily have the authority to view and edit but not create or submit.
- A person can be attached to multiple organizations with the same username and password.



Important Tips for Using SAGE (4)

- ➢Whether or not you can see an application depends on the department and how they release it − if it's open to all applicants, you will be able to see and create an application, if it is specific to a type of applicant, you may not be able to see or have access to the application.
- If you can't see a previous document, click on the DOCUMENTS tab to initiate a search.
- > Due dates will appear in the DETAILS section of the application, report, etc.
- If you do not have full permissions for a page and you are checking for errors, they may not pop up because you do not have permission to edit or save the page that has an error on it.



Important Tips for Using SAGE (5)

- SAGE's time clock may be different than yours. Please do not wait until the last minute to submit, or you can run the risk of submitting after SAGE's time clock has closed the submission process.
- Fridays are behind-the-scenes technical update days for SAGE. You can work in SAGE on Fridays, but we recommend saving your work often.

> ALWAYS CLICK ON THE <u>SAVE</u> BUTTON

- >AGAIN DO NOT WAIT until the last minute to register, or to start the application process.
- >We are not here 24 hours, and SAGE is not an automated registration process.





We're Here to Help!

If you have questions about any Council programs, services, or grant applications, a complete staff list can be found at <u>https://www.nj.gov/state/njsca/dos_njsca_about.html</u>.

If you have any questions about creating a SAGE account or technical questions about an existing SAGE account, please contact Robert Worshinski:

robert.worshinski@sos.nj.gov or 609-633-1049.