How to Add Users to a Document in TDA-GO

Launch TDA-GO and Login

Launch https://tda-go.intelligrants.com. Login with your username and password.

| TEXAS DEPARTMENT OF AGRICULTURE COMMISSIONER SID MILLER | |
|--|--|
| Welcome to the online Grants Management System - TDA Go! Because this is a new online management system, all organizations will need to register with the system. Steps to Get Started: • The initial Registration for your organization, they will receive an email Notification of Access Approval from the orline systems administrator • Once the AO registers the organization, they will receive an email Notification of Access Approval from the online systems administrator • The AC and the designed access to your organizational account for additional staff members as they deem appropriate To visit the official TDA website, click here: | Login Username Username Password Password Your session has expired. Please log back in to access IGX. |
| Announcements This is an announcement from TDA Go staff. | Log In |
| | New User/Organization Registration |

Figure 1. Launch TDA-GO and login

TDA-GO Dashboard

After logging in, your Dashboard will appear. **My Tasks** are documents/applications that are in a status that may require action from users with your role/permissions. **Important:** your **My Tasks** will not always display all documents assigned to you in the system. Once a document is submitted in the system it no longer appears in **My Tasks**, however you still able to access the document.

Figure 2. TDA-GO Dashboard

Navigate to **Searches** in the navigation bar at the top of the screen.

- To find an application or awarded grant agreement, select **Applications/Grants**.
- To find other documents associated with an awarded grant, select the appropriate category listed (Payments, Performance Reports, Materials and Services Reports, Organizational Compliance).

| | C | | DEPARTM MISSIO | | | | | TEXA: | DEPARTMENT OF | A GOI AGRICULTURE GRANTS | | | |
|-------------|--------------------------|----------------------------------|--|--------------------------------------|--|--------------------------------------|-----|--|----------------|---|-------------------------------|----------|---------|
| Home | Searche | 25 × | | | | | | | | 0 🤉 | | 🔴 Mary | / Sue 🝷 |
| as | Application Payments | ns/Grants | _ | | | | | | | | | | |
| Му | Performar | nce Reports | | | Initiate | Related Documer | t i | Initiate New / | Applicatio | n | | | |
| | Materials | and Services Rep | orts | | | | 111 | CDBG - Colonia Fund - Construction - 2022 | TXDOA Provider | 1/12/2022 7:00:00 AM - 5/3/2022 11:59:00 PM | | | 1 II. |
| - | Monitorin; Organizati | g Form ional Compliance | _ | | | | 511 | CDBG - Colonia Fund - Planning - 2021 | TXDOA Provider | 12/1/2020 8:00:00 AM - 12/31/2022 5:00:00 PM | | | h |
| | viy it | | _ | | | 4 | | CDBG - Colonia Fund - Planning - 2022 | TXDOA Provider | 12/1/2021 8:00:00 AM - 12/31/2023 5:00:00 PM | | | |
| Name CDM | e 2021070 | CDBG - Downtown | Organization Delane Testing Organization | Status Application Adjustments | Status Date 9/20/2021 9:19:23 AM | Due Date 5/10/2021 11:59:00 PM | | CDBG - Colonia Self-Help Centers Program - 2022 | TXDOA Provider | 1/12/2022 12:00:00 AM - 12/31/2022 11:59:00 PM | | | |
| | | Revitalization Program - 2021 | Organization | Needed | 9.19.25 AM | 11:59:00 PM | | CDBG - Community Development Fund - | TXDOA Provider | 1/12/2021 12:00:00 AM - 12/31/2022 11:59:00 PM | https://www.texa ture.gov/ | sagricul | |

Figure 2. Under the Searches Menu, select Application/Grants to view documents you're assigned to.

You do not need to enter any data into the search fields to pull up results; simply click **Search** to quickly view all application documents you have access to. However, if you are searching for a specific document, the following filters may be helpful:

Document Name: The application/grant number (i.e. CDV21-####, CDM22-####)

Document Type: The type/fund category of application submitted (i.e. CDBG – Downtown Revitalization, or CDBG – Community Development)

Organization: Name of city or county applicant. Do not include "city of" or "county of" in search field or results may not populate. (i.e. Paducah, Seminole)

| | 0 🗣 🗄 | 🔴 Mary Su |
|--------|----------------|----------------------------------|
| ints | | |
| | | |
| Year | | |
| 2021 | | |
| Status | | |
| ~ | | ~ |
| Person | | |
| | | |
| | Clear | Search |
| | 2021 Status | Vear 2021 Status Person |

2022 TxCDBG – How to Add User to Existing Document in TDA-GO

Once search results have appeared on the screen, you can open the application by clicking on the document name.

| | | | Clea | ar Search |
|------------|--------------|---|--|-----------------------|
| ✓ Docume | ents | | | Number of Results: 26 |
| Name | Organization | Туре | Status | Sub Code |
| CDV21-0002 | Lometa | CDBG - Community Development Fund - 2021 | Grant Agreement in Legal Review | 2021 |
| CDM21-0045 | Palacios | CDBG - Downtown Revitalization Program - 2021 | Grant Agreement Pending TDA Signature | 2021 |
| CDV21-0073 | Carmine | CDBG - Community Development Fund - 2021 | Grant Agreement in Legal Review | 2021 |
| CDV21-0102 | Nolanville | CDBG - Community Development Fund - 2021 | Grant Agreement Pending Grant Recipient Signature | 2021 |
| CDV21-0115 | Timpson | CDBG - Community | Grant Agreement Pending | 2021 |

Figure 4. Example of application/grant search results.

The Document Landing Page appears.

| Home Search | ies 🕶 | | 0 🔩 🗉 | 🛑 Mary Sue 🗸 |
|------------------------------------|---|--|--|--------------|
| CDM22-0010 | Document Lar | ndina Paae | | New Note |
| ✓ Forms | | laing rage | | _ |
| Application | Template Community Development Block Grant 2022 | Instance CDBG - Downtown Revitalization Program - 2022 | Process Application | |
| Applicant Contact Information | Document Name CDM22-0010 | Document Status Application in Process | | |
| General Information | Organization Test Grantee Organization | Your Role Authorized Official | Due Date 5/3/2022 11:59:00 PM | |
| Project Feasibility Information | | | | |
| Community Needs Assessment | | | | |
| Project Details | 1 | | | |

Figure 5. Example of a document landing page

Add User from MY Organization (City/County Staff)

Example:

- The City of Sample, Texas has an application in progress.
- Currently the Mayor (AO) only has access to the document.
- Jane Doe, the City Administrator, a Project Director role (PD) within the organization, needs
 access to the following document (example shown below): CDM2021070
- 1. After the Mayor (AO) has navigated to the document, in the blue navigation menu (under *Tools*) click "Add/Edit People"
- 2. Click "+" to add user, and select "Add User From MY Organization"

| CDM2021070 | Document Add/Edit People | | | | | | |
|---|-------------------------------|------------------------|--------------------------------------|-------------------------|-------------------------|---|--|
| CDM - Downtown Revitalization Program | Add or Edit people assigned t | o the document. | Instance | | Process | | |
| ✓ Status Options | Community Develop | oment Block Grant 2021 | CDBG - Downtown Revita | lization Program - 2021 | Application | | |
| Submit Adjusted Application | CDM2021070 Organization | | Application Adjustments Your Role | Needed | Due Date | | |
| ✓ Tools | Delane Testing Orga | anization | Consultant | | 5/10/2021 11:59:00 PM | | |
| Landing Page | L | | | | | Add | |
| Add/Edit People Assigned to this Document | | | | | | | |
| Status History | Person | Organization | Role | Active Dates | Assigned By | Add User From My Organization Add User From Other Organization | |
| | AO Test, Delane | TXDOA Provider | Authorized Official | 01/01/21 - | Agate TDA Support Staff | | |

3. Search for user(s) by Role or Name and click "Search" to find. Select appropriate Document Role* from drop down menu and click "Save".

| dd Doc | ument User | | Organ | r Search | |
|----------------|--|--|-------------|---------------|---|
| Add D | | OCUMENT Role | Active Date | Inactive Date | |
| Fryer, Addison | Test Grantee Organization (Project Director) | ~ | ä | ä | |
| Mayor, New | Test Grantee Organization (Project Director) | ~ | Ċ. | 6 | |
| PD, Jane | Test Grantee Organization (Project Director) | ~ | Ċi . | Ē | |
| | | Authorized Official Consultant Grant Recipient Viev Payment Processor Project Director | | Save | - |

Note: Document Role selected should mirror the role listed in parenthesis next to Organization

Invite User from OTHER Organization (Consultants, Admins, Grant Writers)

Example:

- The City of Sample, Texas has an application in progress.
- Currently the Mayor (AO) and Jane Doe (PD) have access to the document.
- The City recently selected Awesome Administrators, Inc. to provide administrative services and assist with application preparation.
- Staff from Awesome Administrators, Inc. (Consultant users) need access to the following document (example shown below): *CDM2021070*
- 1. The Mayor (AO) and Jane Doe (PD) should login and navigate to the document. In the blue navigation menu (under *Tools*) select "Add/Edit People".
- 2. Click "+" to add user, and select "Invite User"

| CDM2021070 | Docume | ent Add/E | dit People | | | New N |
|--|-------------------------------|------------------------|-------------------------|--------------------------|-------------------------|---|
| CDM - Downtown Revitalization Program | Add or Edit people assigned t | o the document. | Instance | | Process | |
| | | oment Block Grant 2021 | | alization Program - 2021 | Application | |
| Status Options | Document Name | | Document Status | | | |
| Submit Adjusted Application | CDM2021070 | | Application Adjustments | Needed | | |
| | Organization | | Your Role | | Due Date | |
| ✓ Tools | Delane Testing Orga | inization | Consultant | | 5/10/2021 11:59:00 PM | |
| Landing Page | | | | | | Add |
| Add/Edit People | Y People A | ssigned to this I | Document | | | ¥ Ŧ |
| Status History | Person | Organization | Role | Active Dates | Assigned By | Add User From My Organization Add User From Other Organization |
| | AO Test, Delane | TXDOA Provider | Authorized Official | 01/01/21 - | Agate TDA Support Staff | |

- 3. Enter email address of user to be added*
- 4. Select appropriate Role** from drop down menu and click "Save"

Notes:

- Email address MUST match email associated with consultant user's TDA-GO account or this action will not work.*
- Only Consultant or Grant Recipient Viewer (view only) roles may be selected. Failure to select appropriate role may result in disallowed costs or revocation of Admin Certification.**

| Document Pe | erson | | | × |
|---|---------------|---------------|---|------|
| Email Address | | | |] |
| Julie.doe@awesomeadministra | Active Date | Inactive Date | | |
| Authorized Official | ✓ 🛱 4/01/2022 | Ē | | + |
| Consultant Grant Recipient Viewer Payment Processor Project Director | | | 7 | Save |

5. Consultant user will receive and email with a link to accept the invite to be added to the document.

| You have been invited to work with Delane Testing Organization by Consult | tant Test on their Community D | evelopme | ent Block Gr | ant 2021 d | ocume | ent |
|---|--------------------------------|----------|--------------|-----------------------|------------|-------|
| ○ websites@agatesoftware.com | | ← Reply | ≪ Reply All | \rightarrow Forward | ų, | |
| To O Aubrey-Ann Gilmore Retention Policy Inbox (30 days) (1) This item will expire in 30 days. To keep this item longer apply a different Retention Policy. | Expires 5/1/2022 | | | Fri 4/ | /1/2022 1: | 00 PM |
| You have been invited to work with Delane Testing Organization by Consult Please select this link to accept the invitation. Acceptance Link. This link wil | , | evelopme | nt Block Gra | ant 2021 do | ocume | ent. |

6. Consultant user will click on the link, which will prompt the user to sign into TDA-GO. Once signed in, the system will open the document and display this message:

| Home Ad | dministration | | | |
|------------------------------------|---------------|--|--|------------------------|
| CDM2021070 | | Document Lo | andina Paae | |
| ✓ Forms | | | | |
| Application | | Template Community Development Block Gran | t 2021 CDBG - Downtown Revitalization Program - 2021 | Process Application |
| Applicant Contact Information | ¢ | Document Name CDM2021070 Organization | Document Status Document Invitation Accepted | Due Date |
| General Information | 0 | Delane Testing Organization | You have accepted a document invite. | 5/10/2021 11:59:00 |
| Project Feasibility Information | O | | ок | |
| Community Needs Assessment | 0 | | | |

Adding Additional OUTSIDE Users (For Consultant Roles)

Once a user is assigned to a document, they will have the ability to follow the same steps listed in "Invite User". Consultant users can also invite other TDA-GO users that are not within their own firm/organization.

Example:

Now that a consultant user with Awesome Administrators, Inc. has been added to the document, this
user may now follow the same steps listed above to invite her coworkers and subcontractors to the
document.

| Docur | ment Person | | | × |
|-------------------------------|----------------------------------|-----------------|------|-----------|
| er Email Addres john.mctes | s t@awesomeadministrators.com | | | |
| Assign Rol | es Active [| Date Inactive D | Date | |
| | | 4/01/2022 | + | L |
| , —— Consultan | t | | Save | |
| TX | DOA Provider Proi | ect Director 11 | | nt System |