

# 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.

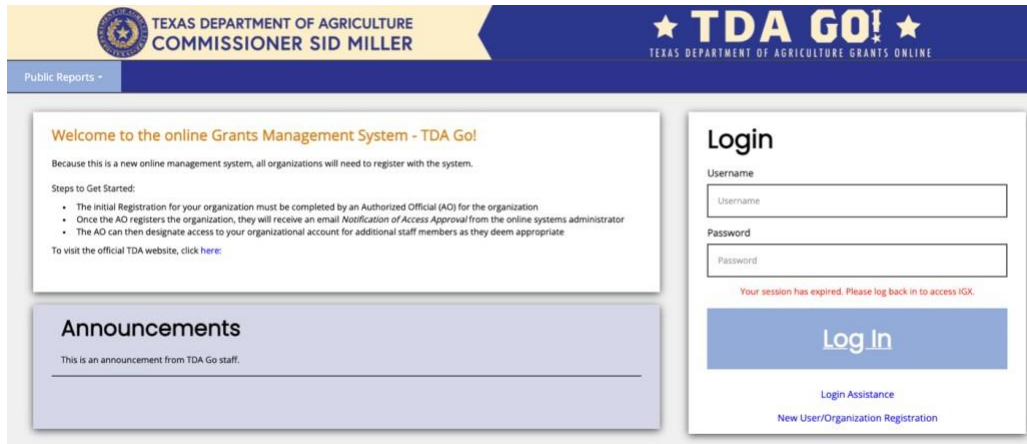


Figure 1. Launch TDA-GO and login

## 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.

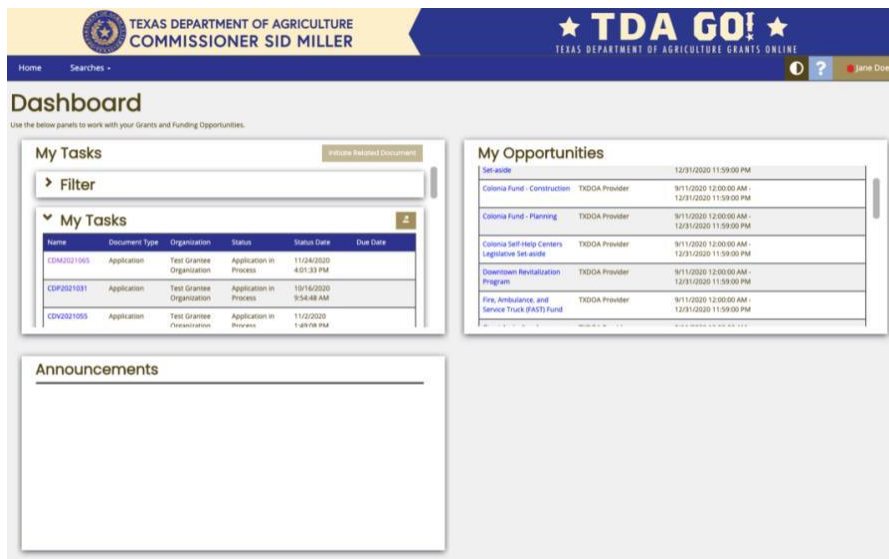


Figure 2. TDA-GO Dashboard

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).

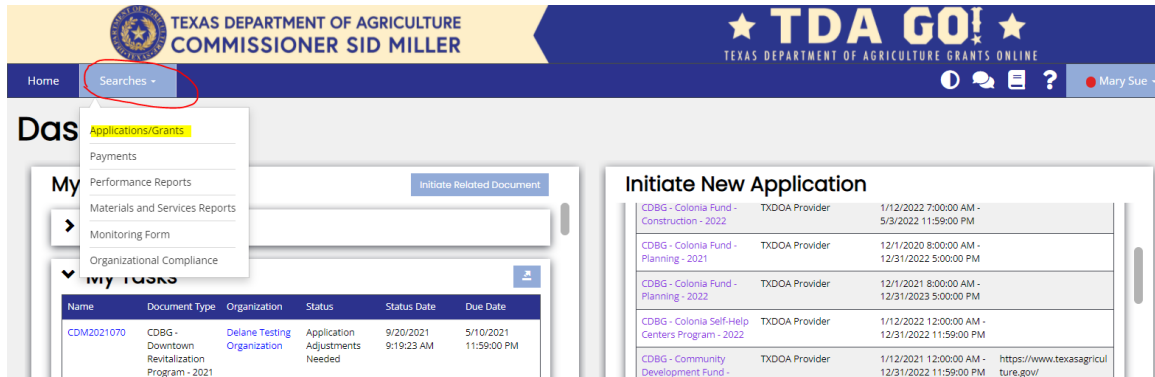


Figure 2. Under the Searches Menu, select Application/Grants to view documents you're assigned to.

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)

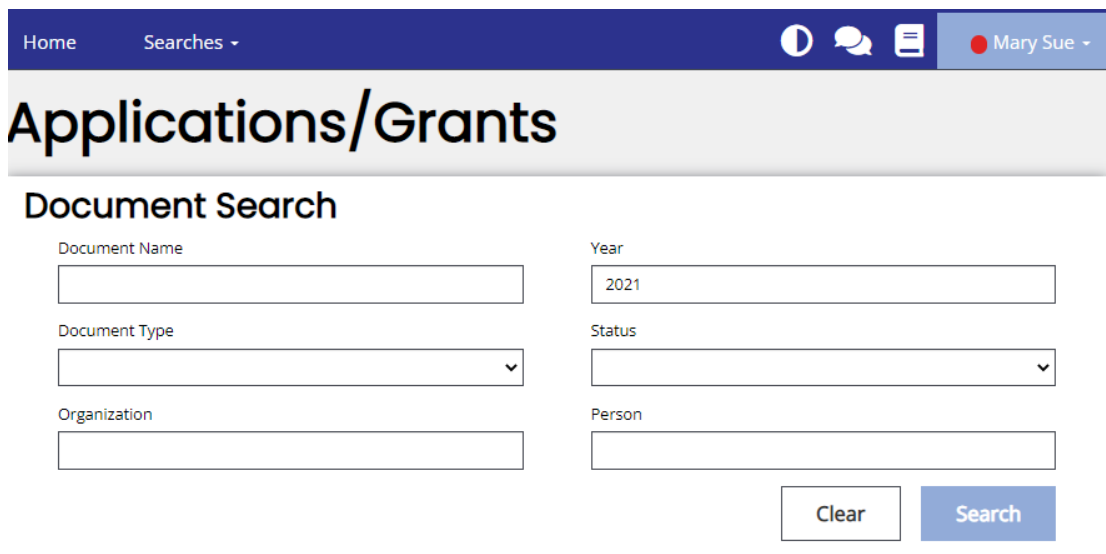


Figure 3. Applicants/Grants search page

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

The screenshot shows a search interface with two input fields: 'Organization' and 'Person'. Below the fields are 'Clear' and 'Search' buttons. A 'Documents' section is expanded, showing a table with 26 results. The first row is circled in red.

Name	Organization	Type	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.

The screenshot shows a document landing page for 'CDM22-0010'. The page title is 'Document Landing Page'. A central card displays the following information:

<b>Template</b> Community Development Block Grant 2022	<b>Instance</b> CDBG - Downtown Revitalization Program - 2022	<b>Process</b> Application
<b>Document Name</b> CDM22-0010	<b>Document Status</b> Application in Process	
<b>Organization</b> Test Grantee Organization	<b>Your Role</b> Authorized Official	<b>Due Date</b> 5/3/2022 11:59:00 PM

On the left side, there is a sidebar with a 'Forms' section containing several items with checkboxes: 'Applicant Contact Information', 'General Information', 'Project Feasibility Information', 'Community Needs Assessment', and 'Project Details'.

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

Add or Edit people assigned to the document.

<b>Template</b> Community Development Block Grant 2021	<b>Instance</b> CDBG - Downtown Revitalization Program - 2021	<b>Process</b> Application
<b>Document Name</b> CDM2021070	<b>Document Status</b> Application Adjustments Needed	
<b>Organization</b> Delane Testing Organization	<b>Your Role</b> Consultant	<b>Due Date</b> 5/10/2021 11:59:00 PM

**People Assigned to this Document**

Person	Organization	Role	Active Dates	Assigned By
AO Test, Delane	TXDOA Provider	Authorized Official	01/01/21 -	Agate TDA Support Staff

Buttons: Add, +, Add User From My Organization, Add User From Other Organization

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”**.

**Document Person**

**Add Document User Search**

Name:  Role:  Organization Name:

Buttons: Clear, Search

**Add Document User**

Person Name	Organization(s)	Document Role	Active Date	Inactive Date
Fryer, Addison	Test Grantee Organization (Project Director)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Mayor, New	Test Grantee Organization (Project Director)	<input type="text"/>	<input type="text"/>	<input type="text"/>
PD, Jane	Test Grantee Organization (Project Director)	<input type="text"/>	<input type="text"/>	<input type="text"/>

Document Role dropdown: Authorized Official, Consultant, Grant Recipient Viewer, Payment Processor, Project Director

Button: 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”

**Document Add/Edit People**

Add or Edit people assigned to the document.

<b>Template</b> Community Development Block Grant 2021	<b>Instance</b> CDBG - Downtown Revitalization Program - 2021	<b>Process</b> Application
<b>Document Name</b> CDM2021070	<b>Document Status</b> Application Adjustments Needed	
<b>Organization</b> Delane Testing Organization	<b>Your Role</b> Consultant	<b>Due Date</b> 5/10/2021 11:59:00 PM

**People Assigned to this Document**

Person	Organization	Role	Active Dates	Assigned By
AO Test, Delane	TXDOA Provider	Authorized Official	01/01/21 -	Agate TDA Support Staff

Buttons: Add User From My Organization, Add User From Other Organization

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 Person**

Email Address: julie.doe@awesomeadministrators.com

**Assign Roles**

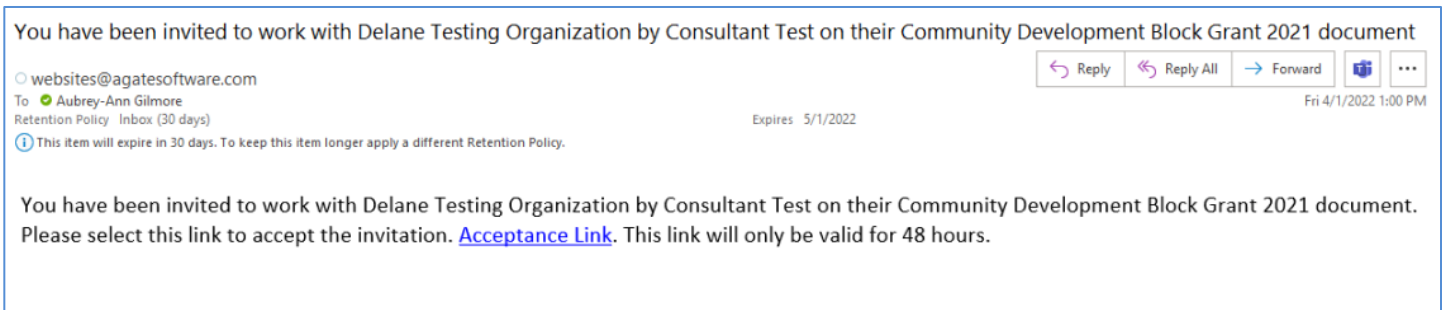
Role: Consultant (selected)

Active Date: 4/01/2022

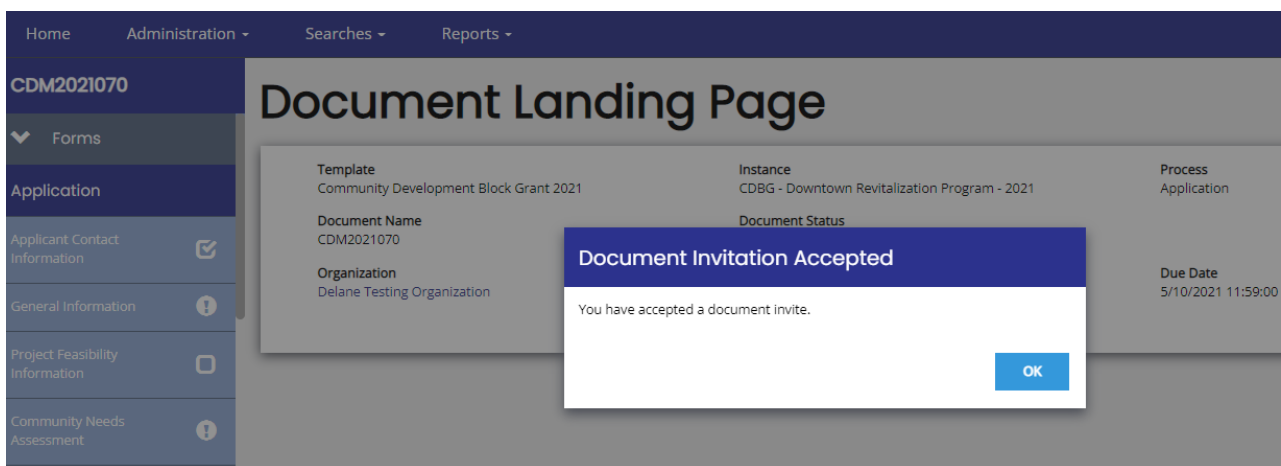
Inactive Date: [ ]

Buttons: Save

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



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:



## 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.

