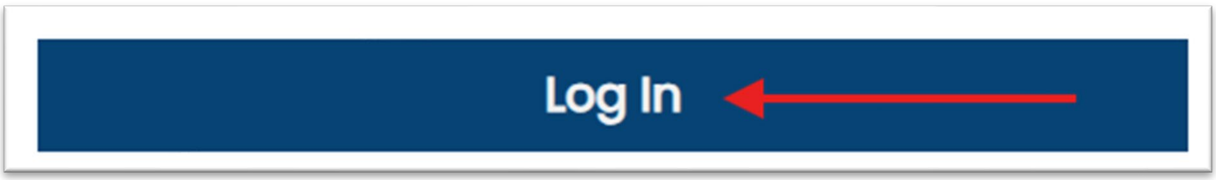
How to Initiate a Training Request

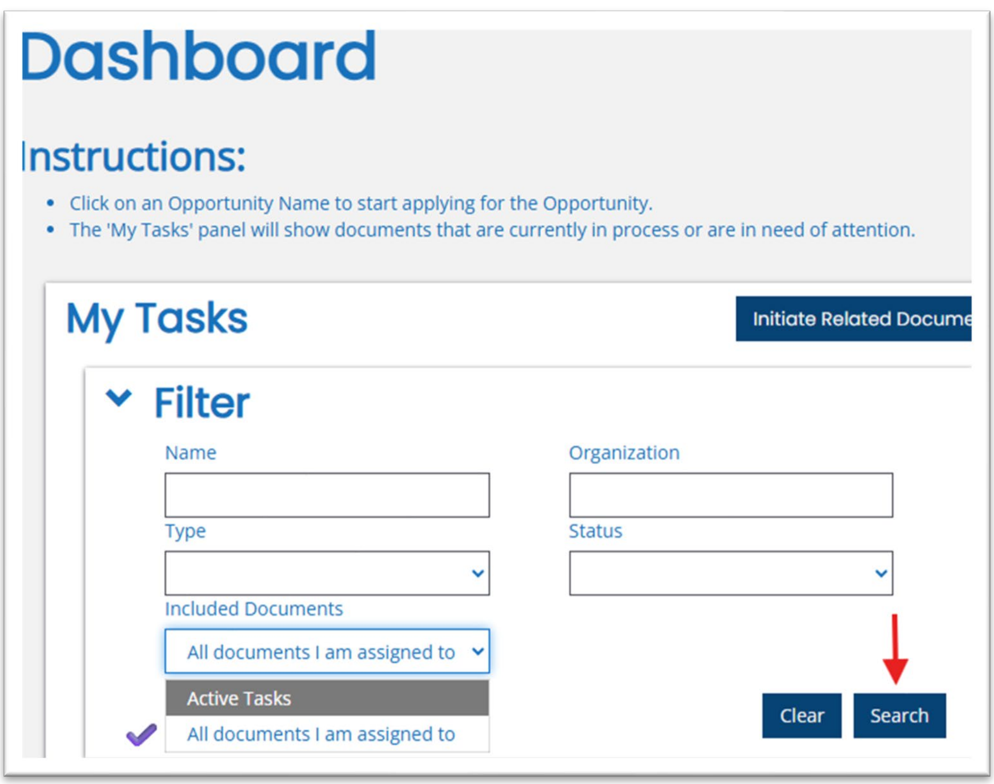
Step 1:

As the **Agency Administrator, Agency Certifying Official,** or **Project Director**, log into IntelliGrants at https://scdps.intelligrants.com/



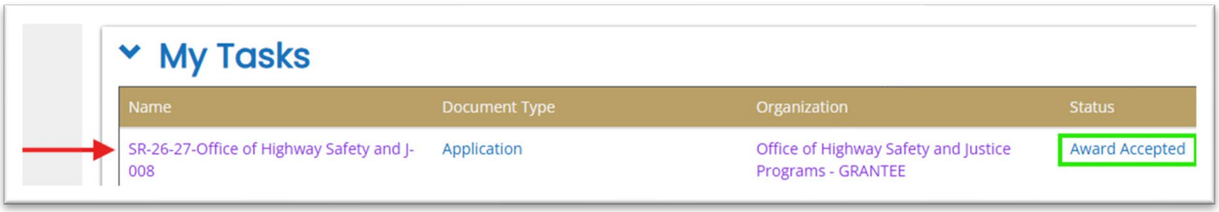
Step 2:

You will arrive at the **Dashboard** page. From the **My Tasks** panel on the **Dashboard** page, select **Filter** and change **Included Documents** from **Active Tasks** to **All Documents I Am Assigned To**. Click **Search**.



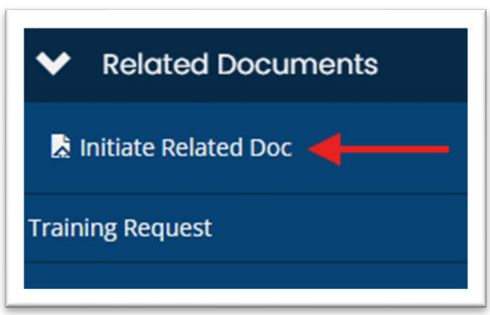
Step 3:

Collapse the **Filter** panel and find your **Award** under **My Tasks** in the **Award Accepted** Status. Click on your **Award** under **Name**.



Step 4:

While still logged in as the **Agency Administrator, Agency Certifying Official,** or **Project Director,** scroll to the very bottom of the **Document Landing Page** on the left-hand panel, expand **Related Documents** and click on **Initiate Related Doc.**



IMPORTANT NOTES

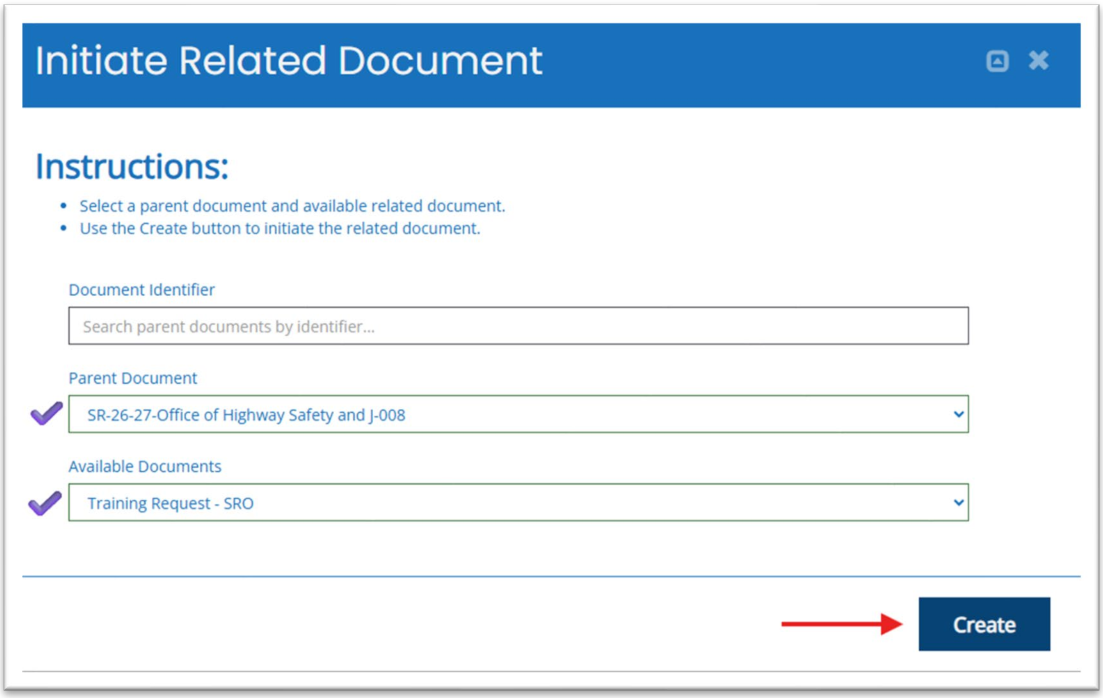
After successfully initiating the training request, you will be directed to the landing page. The **Training Request** is a "sub document" or "child" of the application. So, while it is its own document with its own workflow, it is still tied directly to the application itself.

You may navigate between the documents under the **Related Documents** tab on the left-hand panel. There, you should now see **Application** as an option. Selecting **Application** will trigger a slide out from the menu, revealing the parent application. Selecting the application will redirect you to the landing page of the application.

From the application, you may get back to the sub document in the same way. Under the **Related Documents** tab, you will see a **Training Request** option. Selecting this option will trigger a slide out from the menu, revealing the Training Request sub document(s).

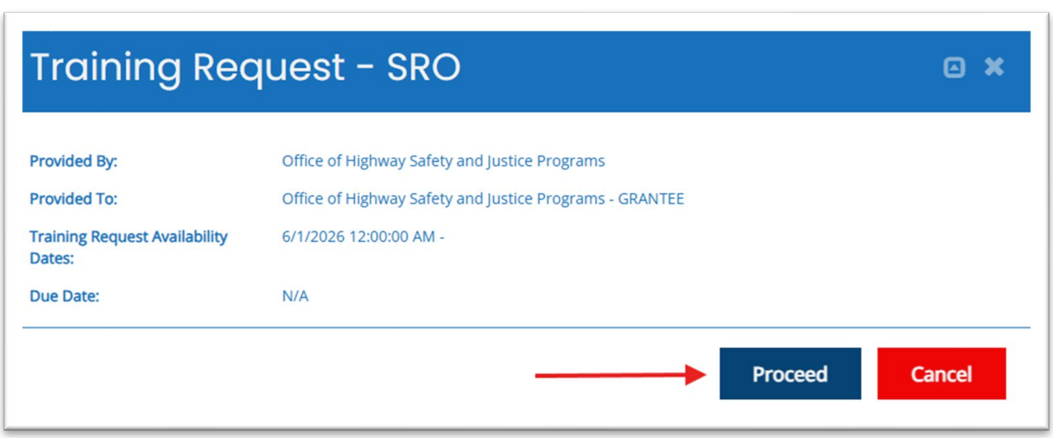
Step 5:

The below modal will appear. For **Document Identifier,** leave this blank. **Parent Document** is your current **Award**. Under **Available Documents**, select **Training Request.** Click **Create.**



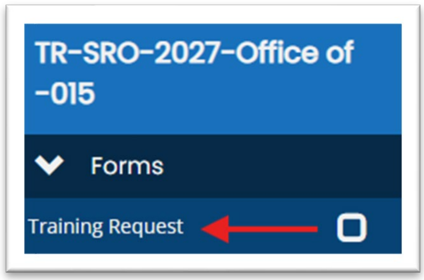
Step 6:

The dialogue box below will appear. Click **Proceed**.



Step 7:

While still logged in as the **Agency Administrator** or the **Project Director**, select the **Training Request** form from the panel on the left-hand side.

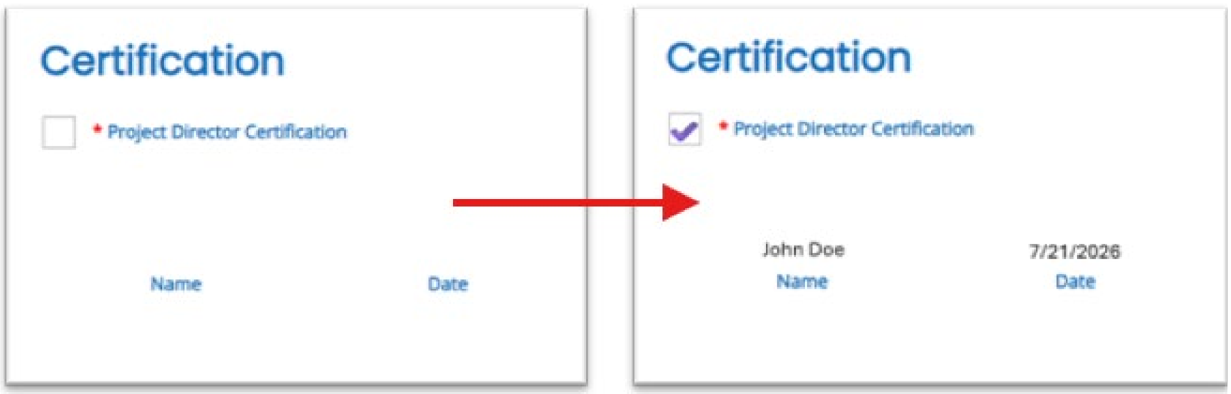


Step 8:

You will arrive at the **Training Request** page. Fill out all relevant information for the training request on this page and upload the required documentation. Once completed, click **Save** at the top right of the webpage.

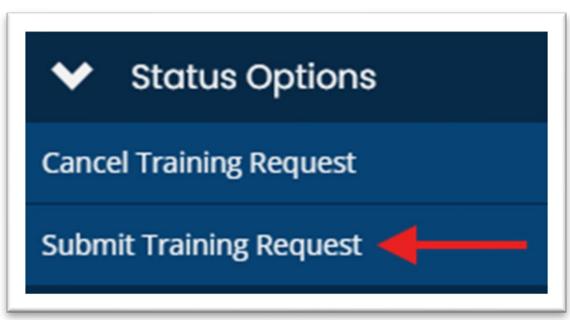
Step 9:

The **Project Director** will now login and navigate back to the **Training Request** page. Click the checkbox next to the **Project Director Certification**. Click **Save**. The **Certification** will now auto populate the **Project Director's** name and current date.



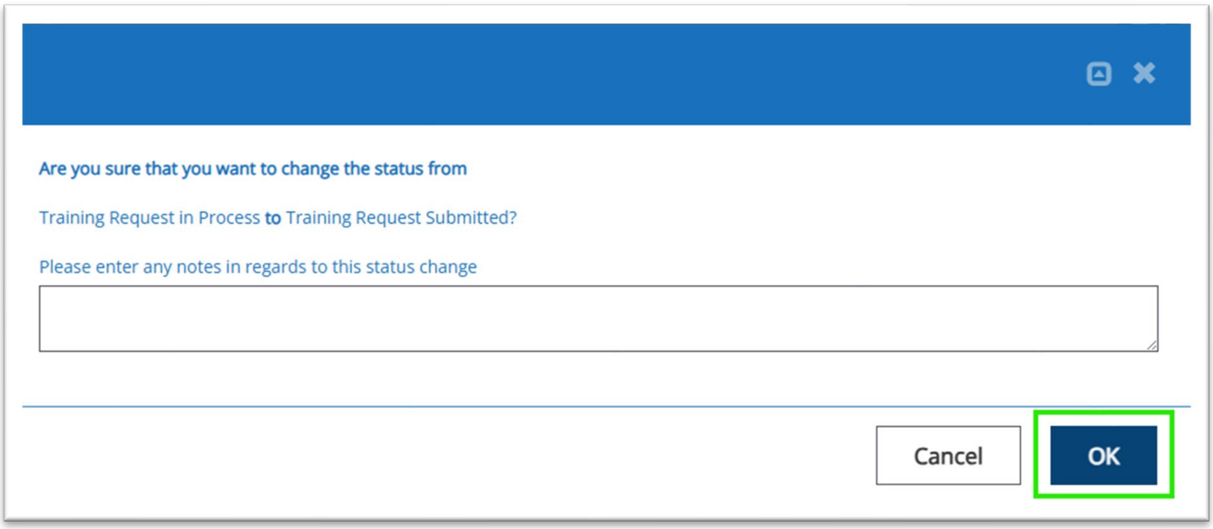
Step 9:

Continuing as the **Project Director** or logging in as the **Agency Administrator or Agency Certifying Official,** navigate back to the **Training Request** Landing Page. Under **Status Options** on the left-hand panel, click **Submit Training Request**.



Step 10:

The dialogue box below will appear. Enter any relevant notes regarding the **Training Request.** Click **OK**.



Step 11:

On the **Document Landing Page**, the **Document Status** should now be **Training Request Submitted**. Your **Training Request** is now under review. Once the **Training Request** has been approved, your document status will change from **Training Request Submitted** to **Training Request Approved**.