



## **Program Greensheets User Documentation**

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## 1. Overview

The Greensheets application provides electronic checklists for each grant. The questions on the checklist are customized according to the grant Type and Mechanism.

In order to access this application, it is recommended that the Mozilla web browser be used. Users must also have a valid Novell Network username and password, and be set up with the appropriate roles within the Enterprise database.

## 2. Accessing the Application

Access the Greensheets application through Workbench.

### 2.1. *Launching Workbench*

Workbench requires the Mozilla 1.7.3 version browser to ensure that all of the applications work correctly.

There are three ways to launch Workbench:

1. Click on the NCI Workbench icon
2. From the Start menu on your computer, go to "Core Services Applications/Administrative Applications"
3. Go to the I2E home page at <https://i2e.nci.nih.gov>

#### 1. NCI Workbench Icon

Click on NCI Workbench icon on your desktop.



## 2. From The Start Menu

Select Extramural Workbench from the Core Service/Administration Apps option on the Start Menu.

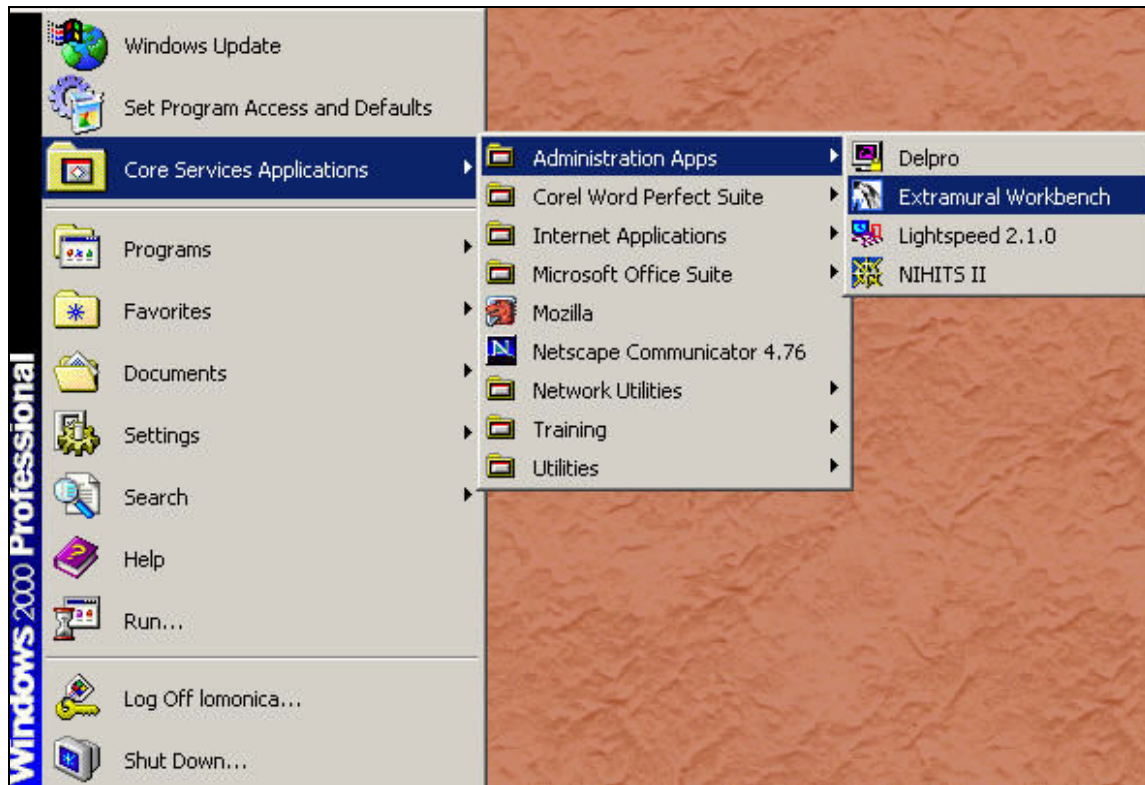


Figure 2-1 Start Menu Options

### 3. Go to I2E home page

Open the Mozilla browser and key in the URL for the I2E home page: <https://i2e.nci.nih.gov>. Follow the link to Workbench.

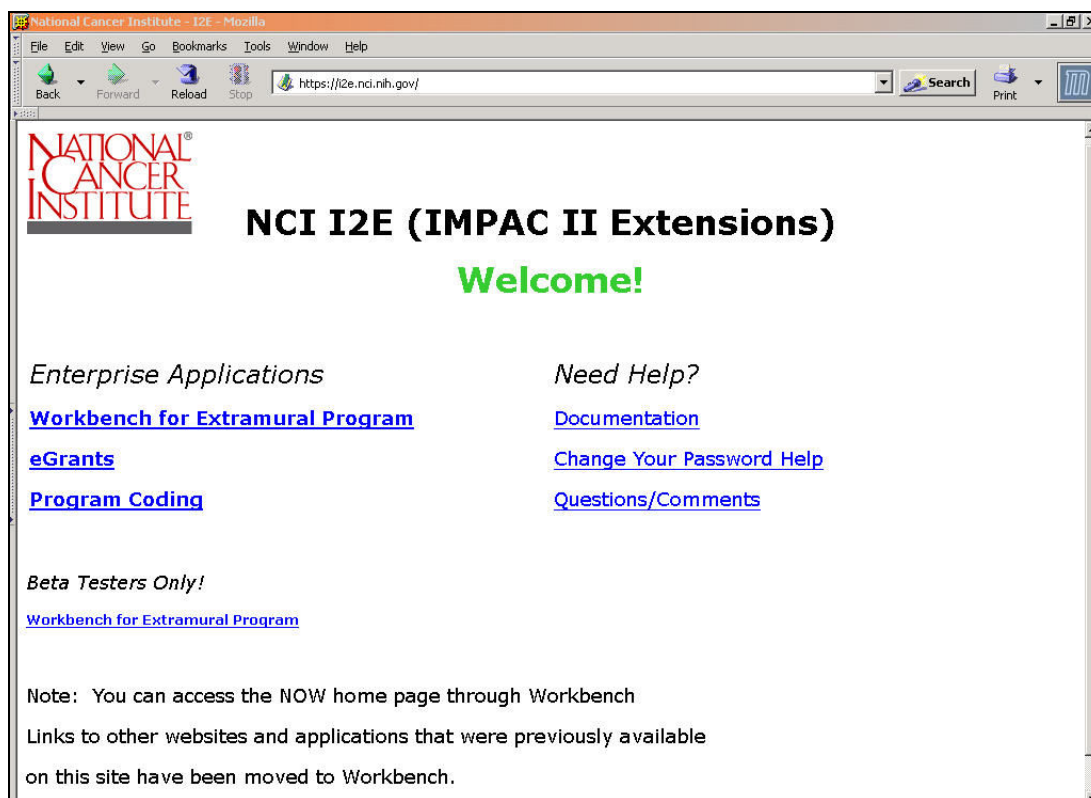


Figure 2-2 The I2E home page screen

## 2.2. Launching Greensheets from Workbench

From the Web Applications section of Workbench, select the “Greensheets” option and click on the “Go” button.

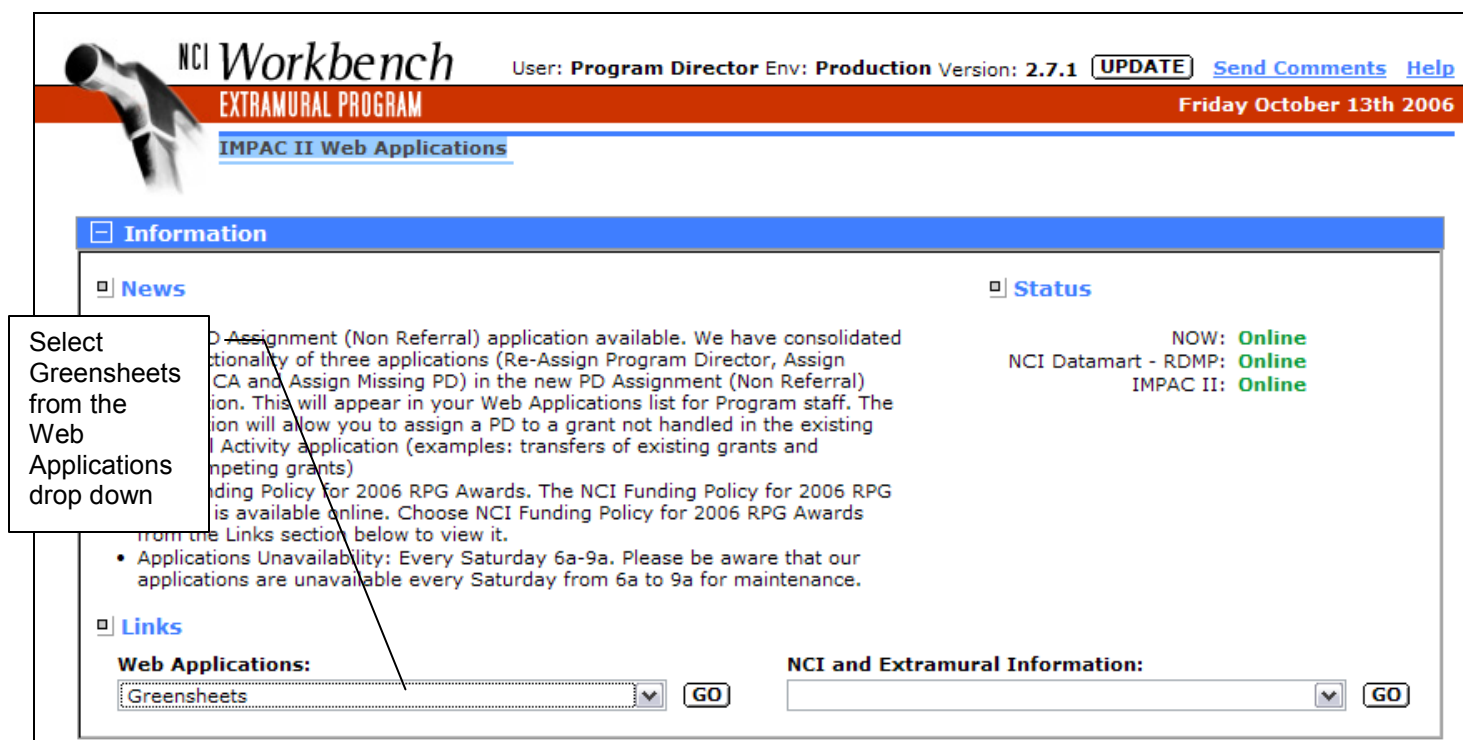


Figure 2-3 Workbench Screen Showing Greensheets Application Selected

A login screen will appear. Key in your NCI network username and password in the appropriate fields.

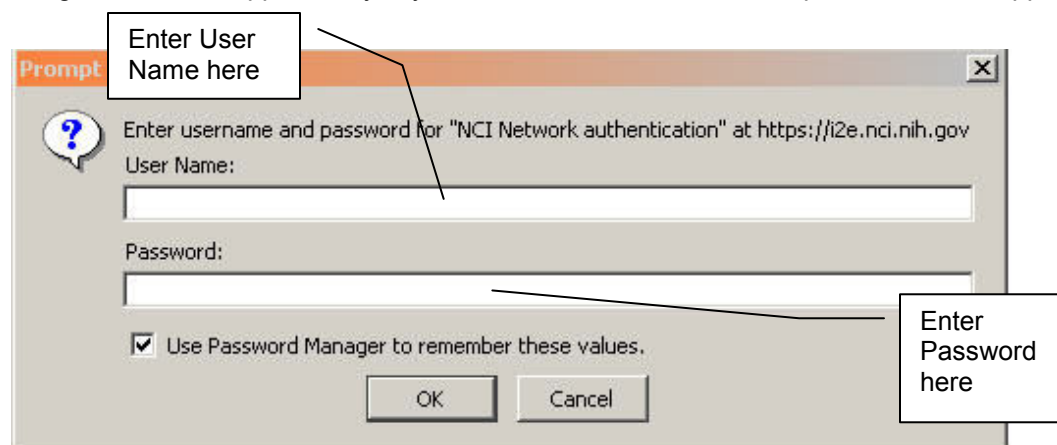


Figure 2-4 Login screen

## 3. Grants List

When you successfully log in to the system, you will see the list of grants, each accompanied with a greensheet icon to access that grant's greensheet. This list of grants will be populated based on your preferences with respect to search criteria. You can, however, change the search criteria to further filter or customize the grants list.

### 3.1. Working with Preferences and Criteria

The Preferences and the Criteria provide you the ability to view only the grants of interest to you. Preferences are a set of query criteria that you can save, and have them applied each time you view the grants list. (There are some additional search criteria elements that you can use in your queries, but you can not save your preferences for them. Those are discussed in the next section.)

The preference and criteria values are shown at the top of the screen above the grants list. If you did not previously save your search criteria preferences, search criteria will be pre-populated for you with default values, which will differ depending on your role. If you are a Program Director, by default your search criteria will look for grants from your portfolio; if you are a Program Analyst, your default search criteria will return grants from your Cancer Activity. You can change your preferences in this respect (it will be described shortly how to do it), and from that point forward, grant lists you will see will reflect your new preference. In addition to My Portfolio / My Cancer Activity preference, the other search criteria you will be able to customize and have your preferences stored for future use, are: Grant Type (default value: Both Competing and Non-Competing Grants); Show only Competing Grants within the Payline (default value: checked); and Mechanism (default is blank).

Criteria

Edit Preferences

Grants From: My Cancer Activity (CI, HP, SC, TC)

Grant Type: Both Competing and Non-Competing Grants

Mechanism: Example: R01  
Leaving Mechanism blank will return all Mechanisms

Show only Competing Grants within the Payline: ☒

Grant Number: -or- PI's Last Name: First Name:

Search Cancel Restore Preferences

NOTE: Selection of ALL NCI Grants, Both Competing and Non-Competing Grants, and leaving the Payline checkbox unchecked will result in all grants being returned within the multi-page list. This will slow system response.

Figure 3-1 Preferences and Criteria

When My Cancer Activity is selected, your particular scientific specialties are shown in parentheses. The example above shows CI, HP, SC, and TC, but in your specific usage it will be the scientific specialties associated with your branch.

#### 3.1.1. Editing Preferences

Click the **Edit Preferences** button to the right of the preferences criteria box to edit the preferences. That will bring up the Edit Preferences page.

Grants From: My Cancer Activity (CI, HP, SC, TC)

Grant Type: Both Competing and Non-Competing Grants

Mechanism: Example: R01  
Leaving Mechanisms blank will return all Mechanisms

Show only Competing Grants within the Payline: ☒

Save Preferences Cancel

NOTE: Selection of ALL NCI Grants, Both Competing and Non-Competing Grants, and leaving the Payline checkbox unchecked will result in all grants being returned within the multi-page list. This will slow system response.

Figure 3-2 Edit Preferences Page

On the Edit Preferences page you can choose to select grants from either “My Portfolio”, “My Cancer Activity”, or “All NCI Grants”. You can filter by any one mechanism or leave the Mechanism box blank to include all Mechanisms in the resulting grants list. You can choose to show Non-Competing Grants, Competing Grants, or both. You can choose to show only non-competing grants within the Payline.

If you choose “Non-Competing Grants” for the Grant Type, the checkbox for “Show only Competing Grants within the Payline” will be available, but irrelevant to the query. If you choose Both Competing and Non-Competing Grants for the Grant Type, the checkbox for “Show only Competing Grants within the Payline” will be applied, but it will not affect that Non-Competing Grants that are returned since the payroll is not relevant to them.

As stated in the note at the bottom of the Edit Preferences Page, you should avoid setting up preferences that return all NCI grants with all the criteria set to include everything because it will return a very large list and slow the system response.

Click Save Preferences to save the preferences. This will bring up a preferences description page.

**Your current preferences are:**

**Grants From:** My Cancer Activity (CI, HP, SC, TC)  
**Grant Type:** Both Competing & Non-Competing Grants  
**Mechanism:**  
**Only Competing Grants within Payline:** Yes

[Greensheets Home](#) [Edit Preferences](#)

**NOTE:** Selection of ALL NCI Grants, Both Competing and Non-Competing Grants, and leaving the Payline checkbox unchecked will result in all grants being returned within the multi-page list. This will slow system response.


[Workbench IMPAC II Applications](#) 

Figure 3-3 Preferences Description Page

The Preferences Description Page shows the preferences you have selected and gives you the option to go back to edit the preferences again, or continue on to the Greensheets Home.

3.1.2. Using Criteria to Search

The criteria applies the preferences and also gives you the ability to filter the list down even more by specifying a particular Grant Number or a PI Name. You can enter in a Grant Number or a part of a Grant Number or a part of the first or last name of the Principal Investigator to filter the list down even more. In these instances, the search will find elements that have the string you entered at the start of the number or name.

Additionally, you can change the other search criteria values at the top of the page to return a list of grants that matches all the modified criteria without changing your preferences that will be used in future sessions.

When you have set the values, you can press the Search button to see the grants list that matches the criteria.

Criteria

Edit Preferences

Grants From: My Cancer Activity (CI, HP, SC, TC)

Grant Type: Both Competing and Non-Competing Grants

Mechanism: Example: R01

Show only Competing Grants within the Payline: ☒

Grant Number: -or- PI's Last Name: First Name:

Search Cancel Restore Preferences

NOTE: Selection of ALL NCI Grants, Both Competing and Non-Competing Grants, and leaving the Payline checkbox unchecked will result in all grants being returned within the multi-page list. This will slow system response.

Figure 3-4 Criteria

Keep in mind that each value you enter on the criteria page restricts the contents of the list more. For example, if you were to have specified Grants From: My Cancer Activity and then entered in a specific Grant Number that you know exists, the grants list could come back empty if that existing grant was not within any of your specific cancer activity scientific specialties.

If you are done working with the list of grants that met your modified search criteria and would like to go back to the list of grants that is based on your usual rules, you can click the [Restore Preferences](#) button.



### 3.2. Sorting the Grant List

To allow a user to quickly locate a grant, all column headers that are underlined are sortable in either descending or ascending order by clicking on the underlined column name. An arrow next to the column header indicates that it is the current sort field; the direction of the arrow indicates the sort order, ascending (↓) or descending (↑). By default, the list is sorted in ascending order by the “Budget Start Date”. The application only supports a single-level sort. To sort the list:

1. Navigate to the column header row of the table.
2. Click on any column header that is underlined to perform a sort. If there is currently an arrow by the column header, the order of the sort will be reversed; if no arrow exists, the Grants will be sorted in ascending order.

The figure below, shows the default sort, which is by Budget Start Date in ascending order.

64 Grants found, displaying Grants 1 to 50.  
[First/Prev] 1, 2 [Next/Last]

Click on any column header to sort data by that field.

	<u>Grant Number</u>	<u>↑ Budget Start Date</u>	<u>PD</u>	<u>PI</u>	<u>CA</u>	<u>Score</u>	<u>%</u>	<u>Board Date</u>	<u>Greensheet Status</u>	<u>GMS GS Status</u>
G *	<a href="#">1R01CA097893-01A2</a>	02/01/2006	Fagan,Pebbles	GRITZ,ELLEN	TC	114	0.5	2005/10	FROZEN	FROZEN
G *	<a href="#">1R01CA113407-01A1</a>	02/01/2006	Parascandola,Mark	MATHIOS,ALAN	TC	150	7.6	2005/10	FROZEN	FROZEN
G *	<a href="#">1R01CA119168-01</a>	03/01/2006	Harris,Linda	TAYLOR,KATHRYN	CI	157	8.5	2005/10	FROZEN	FROZEN
G *	<a href="#">1R01CA114556-01A1</a>	03/08/2006	Parascandola,Mark	PBERT,LORI	TC	152	5.1	2005/10	FROZEN	FROZEN
G *	<a href="#">2R44CA094434-02A2</a>	04/01/2006	Dresser,Connie	COHN,LESLIE	CI	159		2005/10	SAVED	NOT STARTED
G *	<a href="#">2R01CA081595-05A1</a>	04/01/2006	Marcus,Stephen	BECKHAM,JEAN	TC	140	9.1	2006/01	FROZEN	FROZEN
G *	<a href="#">1R21CA109670-01A2</a>	04/07/2006	Yaroch,Amy	PAGOTO,SHERRY	HP	130	0.3	2005/10	FROZEN	FROZEN
G *	<a href="#">1R43CA121796-01</a>	04/20/2006	Dresser,Connie	Tan,William	CI	140		2006/01	FROZEN	FROZEN

Figure 3-5 Budget Start Date in Ascending Order

When a subsequent query is run, the list is returned to the default Budget Start Date sort.

### 3.3. Navigating the Grant List

The Grant List page will inform the user of the number of grants that are available for display. This is shown on the left hand side of the table, just above the columns headers. The application is designed to show 50 grants per page. Should the default view or search result display more than 50 grants, a page navigation bar shall appear just below the grant count, as in the figure below. The number in bold that follows the grant count is the current page that the user is on.

By clicking on First, the user is automatically taken to the first page of the grants list; conversely clicking on Last will take the user to the last page of the grant list. The ‘Prev’ link will take the user to the preceding page, while the ‘Next’ link will take the user to the subsequent page. The application also allows a user to navigate directly to any page by clicking on the page number in the navigation list.

1,743 Grants found, displaying Grants 1 to 50.  
[First/Prev] 1, 2, 3, 4, 5, **6**, 7, 8 [Next/Last]

Click on a number to go to that page; ‘First’ to go the first page; ‘Last’ to go to the last page; ‘Prev’ to go to the prior page; ‘Next’ to go to the next sequential page

	<u>Grant Number</u>	<u>↓ Budget Start Date</u>	<u>PD</u>	<u>PI</u>	<u>CA</u>	<u>Score</u>	<u>%</u>	<u>Board Date</u>	<u>Greensheet Status</u>	<u>GMS GS Status</u>
G	<a href="#">5R21CA099089-02*</a>	06/01/2004	Rasooly,Avraham	FERRARI,MAURO	TD	177			NOT STARTED	NOT STARTED
G	<a href="#">1R01CA098219-01A2</a>	06/01/2004	Spalholz,Barbara	KANTETI,PRASAD	CB	215	38.0	2004/05	NOT STARTED	NOT STARTED
G	<a href="#">5R01CA090644-03*</a>	06/01/2004	Minasian,Lori	HOSKINS,CAROL	CM	175	20.7		NOT STARTED	NOT STARTED
G	<a href="#">5R13CA096469-02*</a>	06/01/2004	Tiwari,Ram	BILLARD,LYNNE	CR	202			NOT STARTED	NOT STARTED

Figure 3-6 Page Navigation

### 3.4. View Grant Details

From the grants list, you can click on the grant number to view the grant details.

Click link to open grant Details

250 Grants found, displaying Grants 1 to 50. [First/Prev] 1, 2, 3, 4, 5 [Next/Last]										
	Grant Number	Budget Start Date	PD	PI	CA	Score	%	Board Date	Greensheet Status	GMS GS Status
	<a href="#">5R33CA099136-02*</a>	06/01/2004	Johnson,George	LAM,KIT	BP	149			NOT STARTED	NOT STARTED
	<a href="#">5R01CA077474-05*</a>	06/01/2004	Hallock,Yali	MIYAMOTO,SHIGEKI	BP	210			NOT STARTED	NOT STARTED
	<a href="#">5U01CA091220-04*</a>	06/01/2004	Arya,Suresh	POLUNOVSKY,VITALY	BP	188			NOT STARTED	NOT STARTED
	<a href="#">5U01CA091290-04*</a>	06/01/2004	Hallock,Yali	ESKO,JEFFREY	BP	147			NOT STARTED	NOT STARTED
	<a href="#">5R01CA090563-04*</a>	06/01/2004	Johnson,George	SIMON,JULIAN	BP	263			NOT STARTED	NOT STARTED
	<a href="#">5R01CA087630-05*</a>	06/01/2004	Hallock,Yali	NEEDHAM,DAVID	BP	157			NOT STARTED	NOT STARTED
	<a href="#">5R01CA101983-02*</a>	06/01/2004	Arya,Suresh	SEDWICK,W	BP	161	17.3		NOT STARTED	NOT STARTED
	<a href="#">5U01CA091178-04*</a>	06/01/2004	Johnson,George	ROSEN,NEAL	BP	165			NOT STARTED	NOT STARTED
	<a href="#">5R01CA052814-15*</a>	06/01/2004	Hallock,Yali	NITISS,JOHN	BP	196			NOT STARTED	NOT STARTED
	<a href="#">5U01CA091295-04*</a>	06/01/2004	Dubois,Ronald	MOREMEN,KELLEY	BP	169			NOT STARTED	NOT STARTED
	<a href="#">5R01CA092366-02*</a>	06/01/2004	Wolpert,Mary	GERWECK,LEO	BP	173	7.3		NOT STARTED	NOT STARTED
	<a href="#">5R01CA096616-02*</a>	06/01/2004	Johnson,George	REBBAA,ABDELHADI	BP	213	13.8		NOT STARTED	NOT STARTED
	<a href="#">5R01CA098605-02*</a>	06/01/2004	Johnson,George	WEINTRAUB,STEVEN	BP	166	9.1		NOT STARTED	NOT STARTED
	<a href="#">5R01CA092090-02*</a>	06/01/2004	Dubois,Ronald	BOTCHKAREV,VLADIMIR	BP	152	6.8		NOT STARTED	NOT STARTED
	<a href="#">1R43CA110815-01</a>	06/01/2004		MANDECKI,WLODEK	BP	160		2004/05	NOT STARTED	NOT STARTED
	<a href="#">5R01CA098194-02*</a>	06/01/2004	Hallock,Yali	FRANZEN,STEFAN	BP	165	12.1		NOT STARTED	NOT STARTED
	<a href="#">5R01CA091901-04*</a>	06/01/2004	Hallock,Yali	ROHR,JURGEN	BP	175			NOT STARTED	NOT STARTED
	<a href="#">5U19CA050771-15*</a>	06/01/2004	Dubois,Ronald	Hecht,Sidney	BP	204			NOT STARTED	NOT STARTED
	<a href="#">5R01CA089636-05*</a>	06/01/2004	Johnson,George	RONINSON,IGOR	BP	173			NOT STARTED	NOT STARTED
	<a href="#">5R01CA078743-08*</a>	06/01/2004	Dubois,Ronald	LIU,Jun	BP	129	0.7		NOT STARTED	NOT STARTED
	<a href="#">5R01CA090744-04*</a>	06/01/2004	Johnson,George	PENNING,TREVOR	BP	171			NOT STARTED	NOT STARTED
	<a href="#">5R01CA064697-07*</a>	06/01/2004	Wolpert,Mary	BROWN,J	BP	216			NOT STARTED	NOT STARTED

Figure 3-7 Program Grant List

### 3.5. Selecting a Greensheet

Any Program Director or Analyst may view all Program Greensheets, but may only edit those that belong to their same Cancer Activity. To select a Program Greensheet:

1. Locate the proper grant (see Locating a Grant) within the Program grant list
2. Click on the greensheet icon () in the first column, to the left of the Grant Number.
3. The appropriate Program Greensheet will open. If the user has edit rights, they will be able to complete the greensheet, otherwise it will display as read-only.

Click icon to open Greensheet

1,743 Grants found, displaying Grants 1 to 50. [First/Prev] 1, 2, 3, 4, 5, 6, 7, 8 [Next/Last]										
	Grant Number	Budget Start Date	PD	PI	CA	Score	%	Board Date	Greensheet Status	GMS GS Status
	<a href="#">5R21CA099089-02*</a>	06/01/2004	Rasooly,Avraham	FERRARI,MAURO	TD	177			NOT STARTED	NOT STARTED
	<a href="#">1R01CA098219-01A2</a>	06/01/2004	Spalholz,Barbara	KANTETI,PRASAD	CB	215	38.0	2004/05	NOT STARTED	NOT STARTED
	<a href="#">5R01CA090644-03*</a>	06/01/2004	Minasian,Lori	HOSKINS,CAROL	CM	175	20.7		NOT STARTED	NOT STARTED
	<a href="#">5R13CA096469-02*</a>	06/01/2004	Tiwari,Ram	BILLARD,LYNNE	CR	202			NOT STARTED	NOT STARTED

Figure 3-8 Opening a Greensheet

# 4. Completing a Greensheet

This application allows users to complete a greensheet, and then either save the greensheet or submit it for review at the next level, as well as print the greensheet. Users can attach files or insert comments for each question on the greensheet. The figure below shows a sample greensheet and the functionality available on each greensheet. The actual questions that are displayed will vary by Type and Budget Mechanism.

The screenshot shows a web-based form titled "PROGRAM Greensheet Type: S & Mech: R13". At the top left, there is a "Print" button and a text box for "POC:". To the right of the POC box, there is a section for "PI: SETO, EDWARD", "Last Changed By: Anya, Suresh", and "Program Director: Anya, Suresh". Below this, there are buttons for "View All Comments", "Clear All Answers", "Save", "Submit", and "Close". The main body of the form contains 13 numbered questions, each with a "Yes", "No", and "Other" radio button. Questions 3, 4, 8, and 9 have dropdown menus for selecting an option. Question 12 has radio buttons for "Committed level" and "Other (must explain)". Question 13 is for "Additional Comments" and includes a note to "Select an icon to enter comments or attach a separate file". At the bottom right, there are buttons for "Clear All Answers", "Save", "Submit", and "Close".

Callouts and their corresponding functions:

- Click to print greensheet (points to the "Print" button)
- Click to view all comments (points to the "View All Comments" button)
- Click to upload a document or file (points to the dropdown menu for question 3)
- Click to enter a comment (points to the dropdown menu for question 8)
- Click to view sub-questions for specific question (points to the question list)
- Click to clear all answers and reset form (points to the "Clear All Answers" button)
- Click to save form with answered questions (points to the "Save" button)
- Click to validate and submit form (points to the "Submit" button)

Figure 4-1 Sample Greensheet Form

## 4.1. Entering Program Contact

Each greensheet can have a program point of contact specified. The Program Director is already specified for the greensheet and the Program staff person that last changed the greensheet form is displayed, but if an additional point of contact is desired for the greensheet it can be entered in a text box on the left side above the questions.

This field is not a required field; a greensheet can be saved and submitted without filling it in. Though there is no enforced format for the value to be filled in, a name in the form "Lastname, Firstname" is most appropriate so that the correct person can be contacted.

The program point of contact is entered into the textbox above the questions as seen in the figure below.

The screenshot shows a web form titled "GREENSHEETS" with a "Print" button. On the left, it displays "Grant Number: 2R01CA100827-04", "Submitter: UNIVERSITY OF TENNESSEE KNOXVILLE", "Primary Specialist: Status: SAVED", and a "POC:" label next to a text input field. A callout box with a pointer to this field contains the text "Enter the name of the Program contact person". On the right, it lists "PI: DEALWIS, CHRIS", "Last Changed By: HEATHA", "Program Director: Knowlton, John", "Backup Specialist:", and "Submitted Date:". At the bottom right are buttons for "View All Comments", "Clear All Answers", "Save", and "Close". The bottom of the form shows "PROGRAM Greensheet Type: 2 & Mech: R01" and a question "1. Funding level. Award at:" followed by a dropdown menu showing "--Select an option--".

**Figure 4-2 Entering Program Point of Contact information**

## 4.2. Answering Questions

Each web-based greensheet form contains a set of base questions that are displayed when the form is first opened. The form is dynamic in that subsequent questions may be displayed based on the answer selected. The forms contain the following answer types:

1. Open a greensheet for Editing (see "Selecting a Greensheet")
2. View the question and select the answer based on the answer type:
  - i. Radio Button – Select one and only one of the provided answers by clicking on the appropriate response

A horizontal row of two radio buttons, the first labeled "Yes" and the second labeled "No".

**Figure 4-3 Example of a Radio Button**

- ii. Drop Down List – Select one and only one of the provided answers by clicking on the drop down and highlighting the appropriate responses by scrolling through the list.

A horizontal dropdown menu with the text "--Select an option--" and a downward-pointing arrow on the right side.

**Figure 4-4 Example of a Drop Down List**

- iii. Text or String Field – Type a response into the textbox.

A large, empty rectangular text input field with a vertical scrollbar on the right side.

**Figure 4-5 Example of a Text Box**

- iv. Check Box – Select one or more of the provided responses by clicking on the box next to the appropriate response(s).

Two checkboxes stacked vertically. The first is labeled "Used as partial payment" and the second is labeled "Used as carry-over". Both checkboxes are currently unchecked.

**Figure 4-6 Example of Check Boxes**

3. If any Sub-questions are displayed, answer the sub-question in the same manner.

## 4.2.1. Viewing sub-questions

The system allows users to view all questions, including sub-questions, on a form. This function is helpful when trying to locate a specific sub-question, especially if the base question to which it belongs is unknown. The system will display all questions on the form, including all sub-questions.

### 4.2.1.1. Viewing Sub-questions for an Individual Question

To view all sub-questions for a specific question on the greensheet:

1. Open a greensheet
2. Click the “click on the green arrow icon (▶) next to the question for which you wish to see sub-questions.

Grant Number: 5R13CA099907-03  
Submitter:  
Institution: H. LEE MOFFITT CANCER CTR & RESEARCH INS  
Primary Specialist: Rogers, Jill  
Status: NOT\_STARTED  
POC:

PI: SETO, EDWARD  
Last Changed By:  
Program Director: Arya, Suresh  
Backup Specialist:

[View All Comments](#) [Clear All Answers](#) [Save](#) [Submit](#) [Close](#)

PROGRAM Greensheet Type: S & Mech: R13

▶ 1. Human Subjects involved?	<input type="checkbox"/> Yes <input type="checkbox"/> No
▶ 2. Live Vertebrate Animals involved?	<input type="checkbox"/> Yes <input type="checkbox"/> No
▶ 3. Research objectives/goals/scope changed significantly and approved since last award? (If change not approved, explanation required.)	--Select an option--
▶ 4. Other support: (If not approved, explanation required.)	--Select an option--
▶ 5. Any scientific overlap? (If Yes, explanation required.)	<input type="checkbox"/> Yes <input type="checkbox"/> No
▶ 6. Does progress report request carryover?	<input type="checkbox"/> Yes <input type="checkbox"/> No
▶ 7. Progress satisfactory for continued funding? (If No, explanation required.)	<input type="checkbox"/> Yes <input type="checkbox"/> No
▶ 8. Any change in key personnel? (All changes that have an impact or are not approved will require an explanation.)	--Select an option--
▶ 9. Are there significant changes in the level of effort of key personnel? (All changes that have an impact or are not approved will require an explanation.)	--Select an option--
▶ 10. Are any inventions mentioned in the text of the progress report that are not noted on the face page of the progress report?	<input type="checkbox"/> Yes <input type="checkbox"/> No
▶ 11. Any program concerns that should be resolved prior to issuing an award? (If Yes, explanation required.)	<input type="checkbox"/> Yes <input type="checkbox"/> No
▶ 12. Funding Recommendation:	<input type="radio"/> Committed level <input type="radio"/> Other (must explain)
▶ 13. Additional Comments: (Select an icon to enter comments or attach a separate file)	

[Clear All Answers](#) [Save](#) [Submit](#) [Close](#)

Figure 4-7 Viewing an Individual Sub-question



- To hide the sub-questions, click on the “sub-questions Hide” (▼) icon.

**Grant Number:** SR13CA099907-03

**Submitter:**

**Institution:** H. LEE MOFFITT CANCER CTR & RESEARCH INS

**Primary Specialist:** Rogers, Jill

**Status:** NOT\_STARTED

**POC:**

**PI:** SETO, EDWARD

**Last Changed By:**

**Program Director:** Arya, Suresh

**Backup Specialist:**

[View All Comments](#) [Clear All Answers](#) [Save](#) [Submit](#) [Close](#)

PROGRAM Greensheet Type: S & Mech: R13

▶ 1. Human Subjects involved?	📎	Yes <input type="radio"/> No <input type="radio"/>
▶ 2. Live Vertebrate Animals involved?	📎	Yes <input type="radio"/> No <input type="radio"/>
▶ 3. Research objectives/goals/scope changed significantly and approved since last award? (If change not approved, explanation required).	📎	--Select an option--
3.1. Explanation Required:	📎	<div style="border: 1px solid #ccc; height: 30px;"></div>
▶ 4. Other support: (If not approved, explanation required.)	📎	--Select an option--
▶ 5. Is there any scientific overlap? (If Yes, explanation required.)	📎	Yes <input type="radio"/> No <input type="radio"/>
▶ 6. Does progress report request carryover?	📎	Yes <input type="radio"/> No <input type="radio"/>
▶ 7. Progress satisfactory for continued funding? (If No, explanation required.)	📎	Yes <input type="radio"/> No <input type="radio"/>
▶ 8. Any change in key personnel? (All changes that have an impact or are not approved will require an explanation.)	📎	--Select an option--
▶ 9. Are there significant changes in the level of effort of key personnel? (All changes that have an impact or are not approved will require an explanation.)	📎	--Select an option--
▶ 10. Are any inventions mentioned in the text of the progress report that are not noted on the face page of the progress report?	📎	Yes <input type="radio"/> No <input type="radio"/>
▶ 11. Any program concerns that should be resolved prior to issuing an award? (If Yes, explanation required.)	📎	Yes <input type="radio"/> No <input type="radio"/>
▶ 12. Funding Recommendation:	📎	Committed level <input type="radio"/> Other (must explain) <input type="radio"/>
▶ 13. Additional Comments: (Select an icon to enter comments or attach a separate file)	📎	


Figure 4-8 Hiding an Individual Sub-question

## 4.2.2. Uploading Documents

The application provides the ability to attach electronic documents to each question of the greensheet. Often a question may request the user to submit a memo or other external document for review. Users may also remove a file once it has been attached.

#### 4.2.2.1. Attaching a file

To attach a file to a greensheet question:













1. Click on the Attach File icon (  ) associated with the question, this will open the File Attachment Window as seen in the figure below.

**Grant Number:**SR13CA099907-03  
**Submitter:**  
**Institution:** H. LEE MOFFITT CANCER CTR & RESEARCH INS  
**Primary Specialist:** Rogers,Jill  
**Status:** NOT\_STARTED  
**POC:**

**PI:** SETO,EDWARD  
**Last Changed By:**  
**Program Director:** Arya,Suresh  
**Backup Specialist:**

[View All Comments](#) [Clear All Answers](#) [Save](#) [Submit](#) [Close](#)

PROGRAM Greensheet Type: 5 & Mech: R13

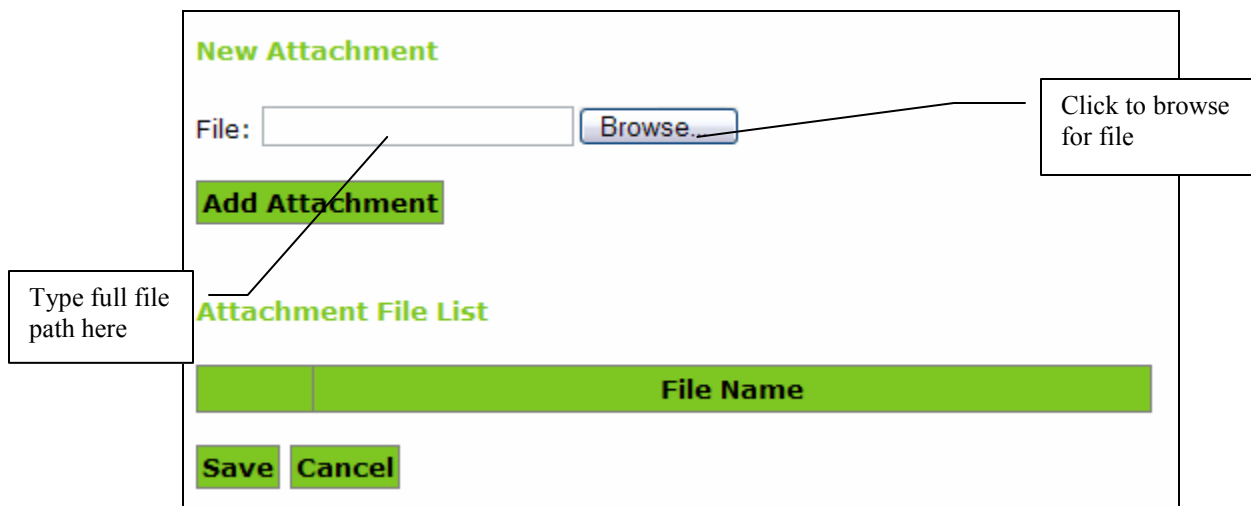
▶ 1. Human Subjects involved?		<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/>
▶ 2. Live Vertebrate Animals involved?		<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/>
▶ 3. Research objectives/goals/scope changed significantly and approved since last award? (If change not approved, explanation required).		--Select an option--
▶ 4. Other support: (If not approved, explanation required.)		--Select an option--
▶ 5. Any scientific overlap? (If Yes, explanation required.)		<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/>
▶ 6. Does progress report request carryover?		<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/>
▶ 7. Progress satisfactory for continued funding? (If No, explanation required.)		<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/>
▶ 8. Any change in key personnel? (All changes that have an impact or are not approved will require an explanation.)		--Select an option--
▶ 9. Are there significant changes in the level of effort of key personnel? (All changes that have an impact or are not approved will require an explanation.)		--Select an option--
▶ 10. Are any inventions mentioned in the text of the progress report that are not noted on the face page of the progress report?		<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/>
▶ 11. Any program concerns that should be resolved prior to issuing an award? (If Yes, explanation required.)		<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/>
▶ 12. Funding Recommendation:		<input type="radio"/> Committed level <input type="radio"/> Other (must explain) <input type="radio"/>
▶ 13. Additional Comments: (Select an icon to enter comments or attach a separate file)		

[Clear All Answers](#) [Save](#) [Submit](#) [Close](#)

Click the icon to upload/delete files associated with a question

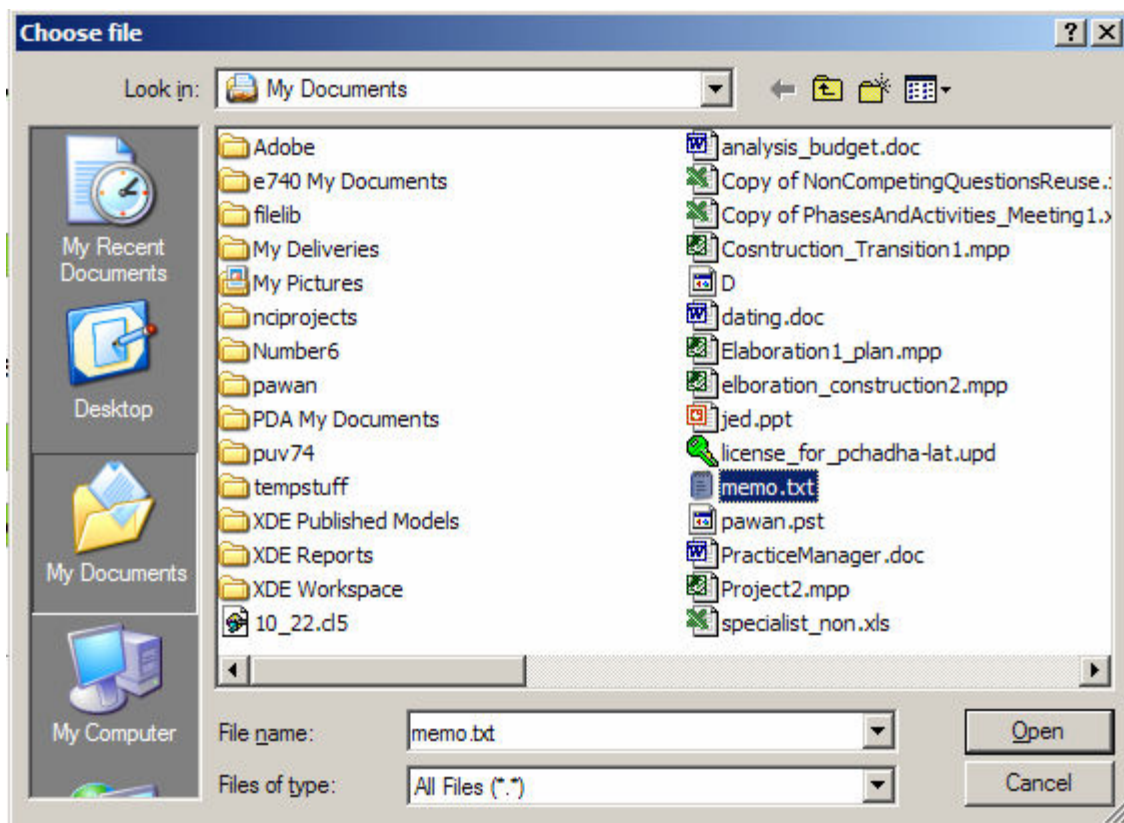
Figure 4-9 File Upload

2. In the Attachment window, either type in the full path of the file or Browse to search for a file
  - a. To browse for a file; click on the “Browse...” button. This will open a standard Windows Choose File window.



**Figure 4-10 File Attachment Window**

- b. User can navigate to the appropriate file, highlight it, and click on Open.



**Figure 4-11 Choose File Window**

- c. This will then close the Choose File window and return to the file attachment window.



- Click on the “Add Attachment” button to add the file; this will then show the file in the Attachment File list.

File:  Browse...

Add Attachment

Attachment File List

File Name	
	memo.txt

Save Cancel

NATIONAL CANCER INSTITUTE

Click to add file

Click to save


**Figure 4-12 File Attachment Window**

- Additional files can be added, repeating steps two and three above.
- Once all files are added, click on the “Save” button.
- To remove all files without saving them, click on the “Cancel Button”

**NOTE:** Files are not actually saved to the database until the greensheet itself is saved. Closing the greensheet without saving it will cause all files to be lost.

#### 4.2.2.2. Removing an Attached File

To remove an attached file:














1. Click on the “File Attached” icon (  ). The File Attachment Window will open, which will list all files attached that are associated with the particular question as seen in the figure below.

**Grant Number:**SR13CA099907-03  
**Submitter:**  
**Institution:** H. LEE MOFFITT CANCER CTR & RESEARCH INS  
**Primary Specialist:** Rogers,Jill  
**Status:** NOT\_STARTED  
**POC:**

**PI:** SETO,EDWARD  
**Last Changed By:**  
**Program Director:** Arya,Suresh  
**Backup Specialist:**

[View All Comments](#) [Clear All Answers](#) [Save](#) [Submit](#) [Close](#)

PROGRAM Greensheet Type: 5 & Mech: R13

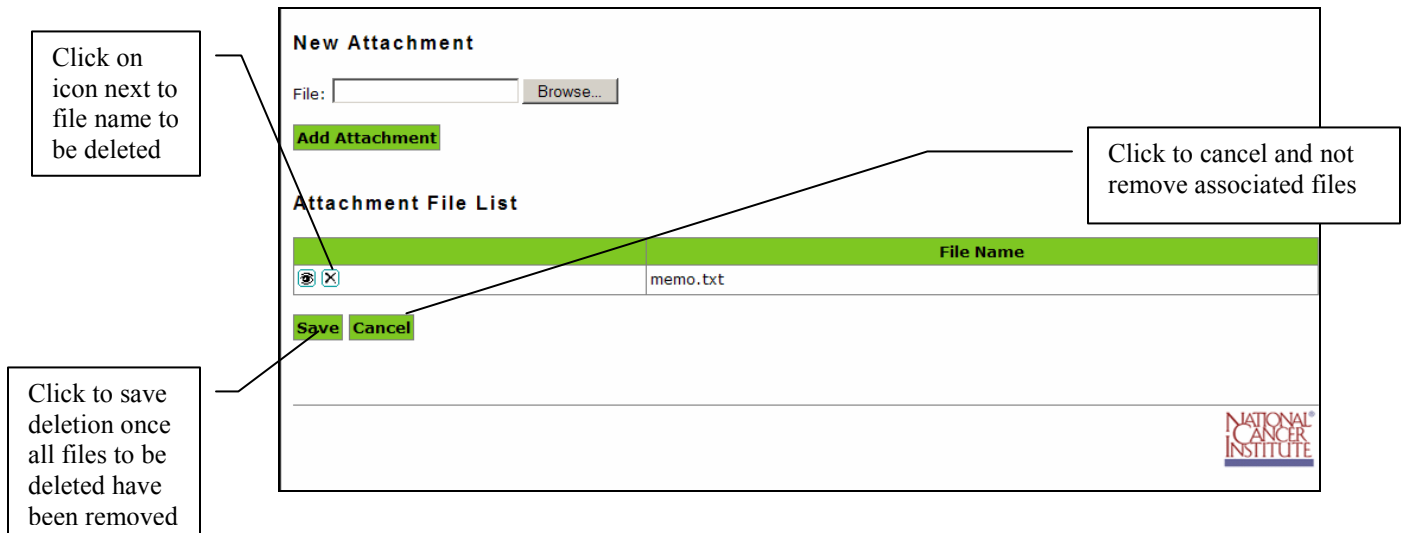
▶ 1. Human Subjects involved?		<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/>
▶ 2. Live Vertebrate Animals involved?		<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/>
▶ 3. Research objectives/goals/scope changed significantly and approved since last award? (If change not approved, explanation required.)		<input type="text" value="Select an option--"/>
▶ 4. Other support: (If not approved, explanation required.)		<input checked="" type="radio"/> --Select an option-- <input type="radio"/>
▶ 5. Any scientific overlap? (If Yes, explanation required.)		<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/>
▶ 6. Does progress report request carryover?		<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/>
▶ 7. Progress satisfactory for continued funding? (If No, explanation required.)		<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/>
▶ 8. Any change in key personnel? (All changes that have an impact or are not approved will require an explanation.)		<input type="text" value="--Select an option--"/>
▶ 9. Are there significant changes in the level of effort of key personnel? (All changes that have an impact or are not approved will require an explanation.)		<input type="text" value="--Select an option--"/>
▶ 10. Are any inventions mentioned in the text of the progress report that are not noted on the face page of the progress report?		<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/>
▶ 11. Any program concerns that should be resolved prior to issuing an award? (If Yes, explanation required.)		<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/>
▶ 12. Funding Recommendation:		<input type="radio"/> Committed level <input type="radio"/> Other (must explain) <input type="radio"/>
▶ 13. Additional Comments: (Select an icon to enter comments or attach a separate file)		

[Clear All Answers](#) [Save](#) [Submit](#) [Close](#)

Click on icon  
of uploaded  
file

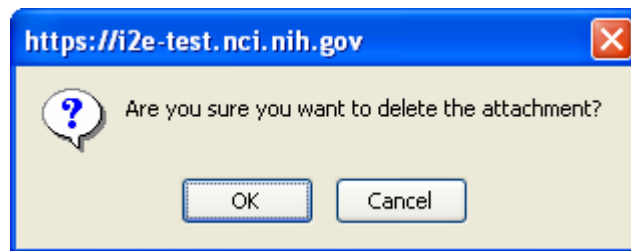
Figure 4-13 Removing an Attached File

2. Click on the Delete File icon (✕) located on the row of the file to be deleted. You can only delete files that you attached. If the file shows up without the Delete File icon, it was attached by someone else and you cannot delete it.



**Figure 4-14 File Attachment Window with Attached File**

3. The system will prompt you to verify that you want to delete the selected file, select OK to delete; selecting the "Cancel" button will return to the File Attachment window.




**Figure 4-15 Delete Confirmation Box**

4. Click "Save" to save the changes; clicking "Cancel" will close the File Attachment window WITHOUT deleting the file.

### 4.2.2.3. Viewing an Attachment

To view an attachment:














1. Click on the File Attached icon (  ) associated with the appropriate question. This will open the File Attachment Window, which will list all files attached that are associated with the particular question as seen in the figure below.

**Grant Number:** SR13CA099907-03  
**Submitter:**  
**Institution:** H. LEE MOFFITT CANCER CTR & RESEARCH INS  
**Primary Specialist:** Rogers, Jill  
**Status:** NOT\_STARTED  
**POC:**

**PI:** SETO, EDWARD  
**Last Changed By:**  
**Program Director:** Arya, Suresh  
**Backup Specialist:**

[View All Comments](#) [Clear All Answers](#) [Save](#) [Submit](#) [Close](#)

PROGRAM Greensheet Type: 5 & Mech: R13

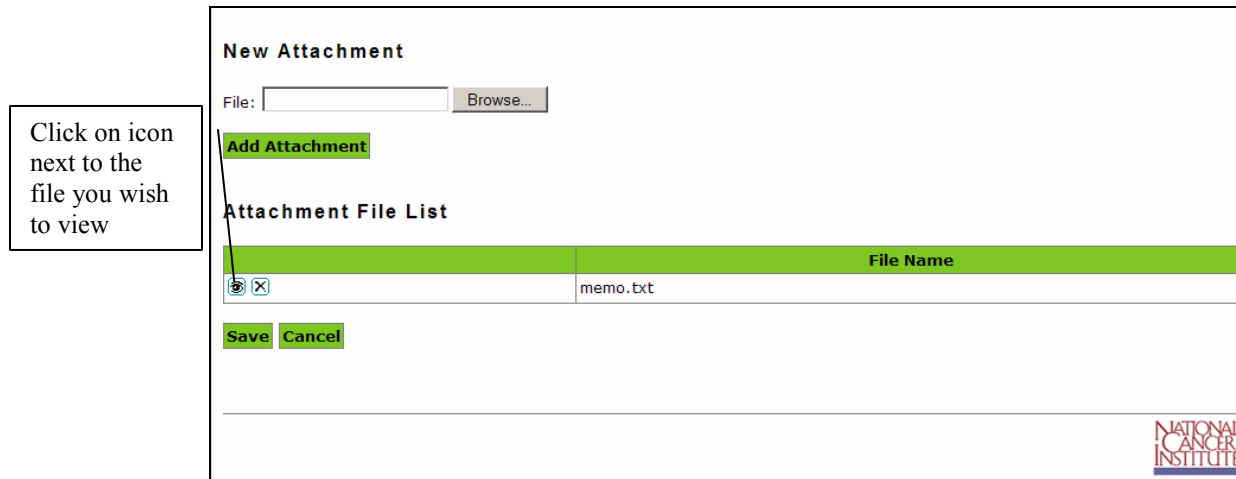
▶ 1. Human Subjects involved?		<input type="radio"/> Yes <input type="radio"/> No
▶ 2. Live Vertebrate Animals involved?		<input type="radio"/> Yes <input type="radio"/> No
▶ 3. Research objectives/goals/scope changed significantly and approved since last award? (If change not approved, explanation required).		--Select an option--
▶ 4. Other support: (If not approved, explanation required.)		--Select an option--
▶ 5. Any scientific overlap? (If Yes, explanation required.)		<input type="radio"/> Yes <input type="radio"/> No
▶ 6. Does progress report request carryover?		<input type="radio"/> Yes <input type="radio"/> No
▶ 7. Progress satisfactory for continued funding? (If No, explanation required.)		<input type="radio"/> Yes <input type="radio"/> No
▶ 8. Any change in key personnel? (All changes that have an impact or are not approved will require an explanation.)		--Select an option--
▶ 9. Are there significant changes in the level of effort of key personnel? (All changes that have an impact or are not approved will require an explanation.)		--Select an option--
▶ 10. Are any inventions mentioned in the text of the progress report that are not noted on the face page of the progress report?		<input type="radio"/> Yes <input type="radio"/> No
▶ 11. Any program concerns that should be resolved prior to issuing an award? (If Yes, explanation required.)		<input type="radio"/> Yes <input type="radio"/> No
▶ 12. Funding Recommendation:		<input type="radio"/> Committed level <input type="radio"/> Other (must explain)
▶ 13. Additional Comments: (Select an icon to enter comments or attach a separate file)		

[Clear All Answers](#) [Save](#) [Submit](#) [Close](#)

Click to view list of files associated with question

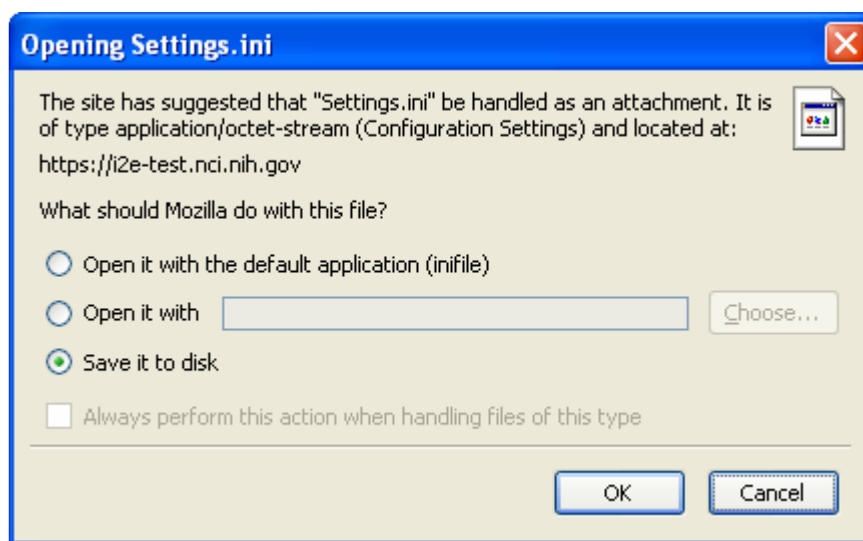
Figure 4-16 Viewing an Attached File

2. Click on the View File icon (📎) located on the row of the file to be viewed.



**Figure 4-17 File Attachment Window**

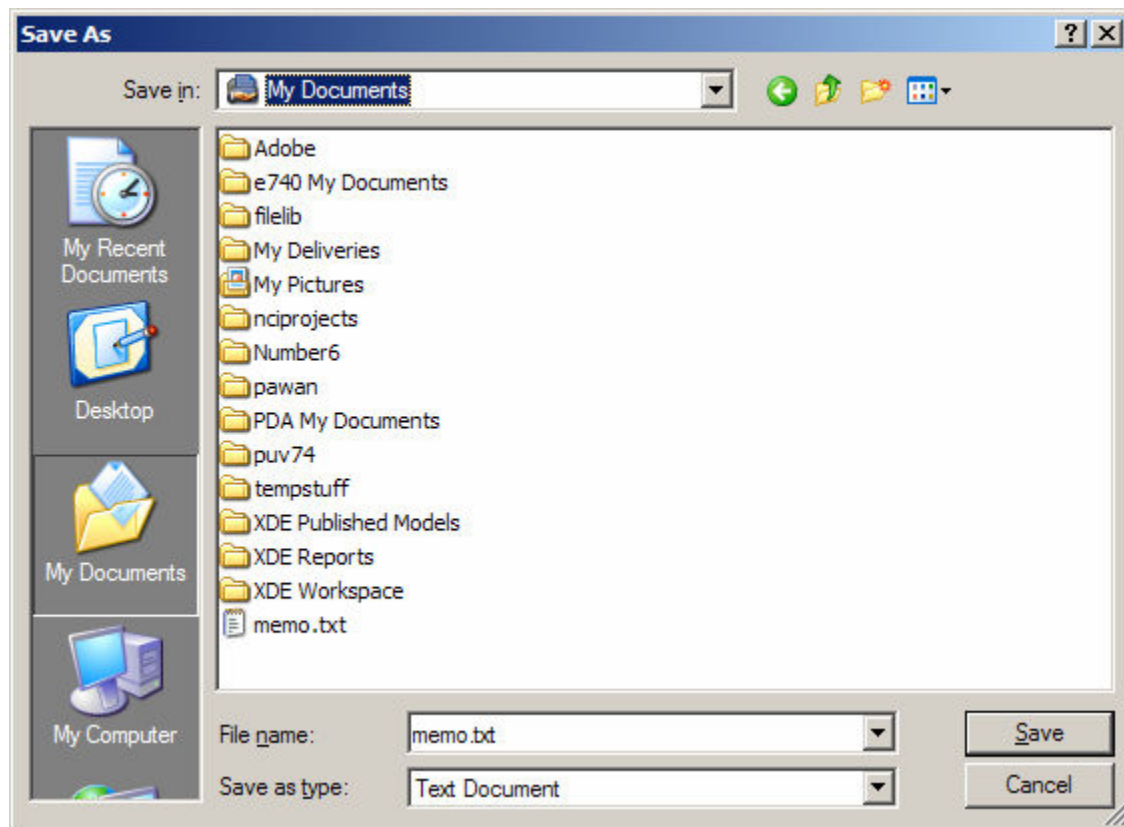
3. The system will present a dialog that will prompt you to either open the file or save it to your local machine.



**Figure 4-18 File Download Box**

- a. Select "Open" to open the file in its native application.
  - i. The file will only open if the appropriate software is available to view the particular file type.

- b. Select “Save” to open a standard Windows “Save As” window that will allow you to choose the directory in which to store the file, as well as rename it if desired. To view the file, you must locate the file outside of the Greensheets application and open it with the appropriate software for the file type.



**Figure 4-19 Save as Dialogue Box**


- c. Select “Cancel” to return to the Attachment File List without viewing the file.

### 4.2.3. Entering and Viewing Comments

For each question, users can provide a comment if they feel additional information is relevant.

#### 4.2.3.1. Entering a Comment

To enter a comment:














1. Select the appropriate question on the greensheet.
2. Click on the “Note” icon () , which will open a text field in which the user may type relevant comments.

Grant Number:SR13CAD99907-03  
Submitter:  
Institution: H. LEE MOFFITT CANCER CTR & RESEARCH INS  
Primary Specialist: Rogers, Jill  
Status: NOT\_STARTED  
POC:

PI: SETO, EDWARD  
Last Changed By:  
Program Director: Arya, Suresh  
Backup Specialist:

View All CommentsClear All AnswersSaveSubmitClose

PROGRAM Greensheet Type: S & Mech: R13


1. Human Subjects involved?		Yes <input type="radio"/> No <input type="radio"/>
2. Live Vertebrate Animals involved?		Yes <input type="radio"/> No <input type="radio"/>
3. Research objectives/goals/scope changed significantly and approved since last award? (If change not approved, explanation required.)		--Select an option--
4. Other support: (If not approved, explanation required.)		--Select an option--
5. Scientific overlap? (If not approved, explanation required.)		Yes <input type="radio"/> No <input type="radio"/>
6. Progress report request carryover?		Yes <input type="radio"/> No <input type="radio"/>
7. Is satisfactory for continued funding? (If not approved, explanation required.)		Yes <input type="radio"/> No <input type="radio"/>
8. Any change in key personnel? (All changes that have an impact or are not approved will require an explanation.)		--Select an option--
9. Are there significant changes in the level of effort of key personnel? (All changes that have an impact or are not approved will require an explanation.)		--Select an option--
10. Are any inventions mentioned in the text of the progress report that are not noted on the face page of the progress report?		Yes <input type="radio"/> No <input type="radio"/>
11. Any program concerns that should be resolved prior to issuing an award? (If Yes, explanation required.)		Yes <input type="radio"/> No <input type="radio"/>
12. Funding Recommendation:		Committed level <input type="radio"/> Other (must explain) <input type="radio"/>
13. Additional Comments: (Select an icon to enter comments or attach a separate file)		

Clear All AnswersSaveSubmitClose

Click icon to open comment text box and to close comment box after entering text

Input Comment text here

Figure 4-20 Entering a Comment


3. When completed, click on the same “Note” icon for the specific question. This will close the comment box and change the icon to show that a comment has been added () .

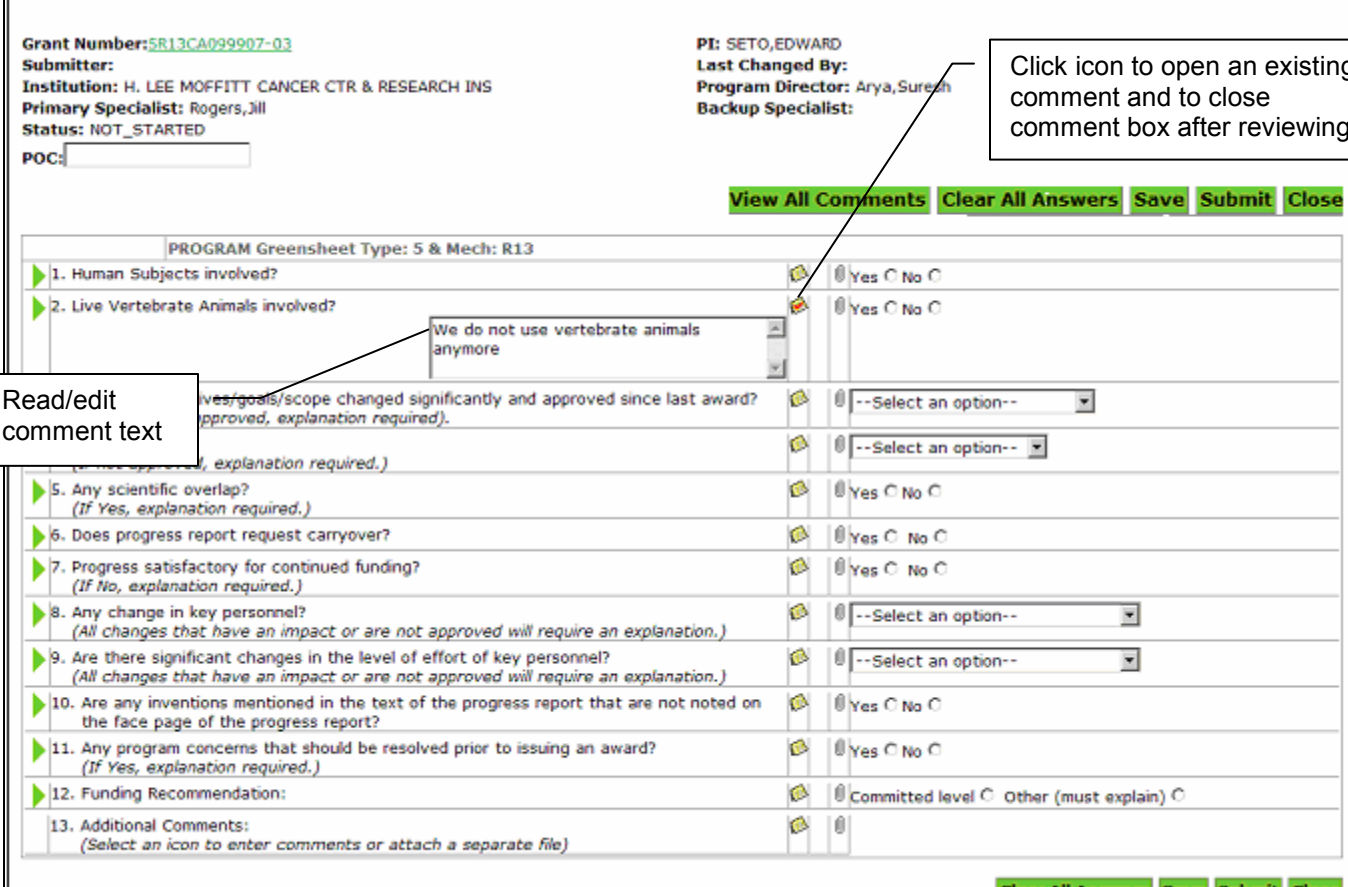
#### 4.2.3.2. Viewing Comments

The application supports viewing an individual comment, and also allows the user to view all comments associated with the greensheet.

## Viewing an Individual Comment

To view and individual comment:

1. Select a specific question that has the “Note included” icon () signifying that a comment is included for the specific question. Click on the icon. A text box with the information appears.
















**Grant Number:** 5R13CA099907-03  
**Submitter:**  
**Institution:** H. LEE MOFFITT CANCER CTR & RESEARCH INS  
**Primary Specialist:** Rogers, Jill  
**Status:** NOT\_STARTED  
**POC:**

**PI:** SETO, EDWARD  
**Last Changed By:**  
**Program Director:** Arya, Suresh  
**Backup Specialist:**

**View All Comments** **Clear All Answers** **Save** **Submit** **Close**

PROGRAM Greensheet Type: 5 & Mech: R13

1. Human Subjects involved?		Yes <input type="radio"/> No <input type="radio"/>
2. Live Vertebrate Animals involved?		Yes <input type="radio"/> No <input type="radio"/>
We do not use vertebrate animals anymore		
3. Has the project goals/scope changed significantly and approved since last award? (If Yes, explanation required.)		--Select an option--
4. (If Yes, explanation required.)		--Select an option--
5. Any scientific overlap? (If Yes, explanation required.)		Yes <input type="radio"/> No <input type="radio"/>
6. Does progress report request carryover?		Yes <input type="radio"/> No <input type="radio"/>
7. Progress satisfactory for continued funding? (If No, explanation required.)		Yes <input type="radio"/> No <input type="radio"/>
8. Any change in key personnel? (All changes that have an impact or are not approved will require an explanation.)		--Select an option--
9. Are there significant changes in the level of effort of key personnel? (All changes that have an impact or are not approved will require an explanation.)		--Select an option--
10. Are any inventions mentioned in the text of the progress report that are not noted on the face page of the progress report?		Yes <input type="radio"/> No <input type="radio"/>
11. Any program concerns that should be resolved prior to issuing an award? (If Yes, explanation required.)		Yes <input type="radio"/> No <input type="radio"/>
12. Funding Recommendation:		Committed level <input type="radio"/> Other (must explain) <input type="radio"/>
13. Additional Comments: (Select an icon to enter comments or attach a separate file)		

**Clear All Answers** **Save** **Submit** **Close**

**Figure 4-21 Viewing an Individual Comment**

2. Depending on access rights, a user may edit the comment by typing in the comment box.
3. When done editing or reading the comment, click on the same icon to close to the comment.



## Viewing All Comments

To view all comments associated with a greensheet:

1. Navigate to the top of the questions and click on the “View all Comments” button (**View All Comments**) located on the right side of the form. This will expand the greensheet and show all comments that are associated with a greensheet. It will also expand those questions that may not contain any comments.

Grant Number: **SR13CA099907-03**  
 Submitter:  
 Institution: H. LEE MOFFITT CANCER CTR & RESEARCH INS  
 Primary Specialist: Rogers, Jill  
 Status: NOT\_STARTED  
 POC:

PI: SETO, EDWARD  
 Last Changed By:  
 Program Director: Arya, Suresh  
 Backup Specialist:

**View All Comments** **Clear All Answers** **Save** **Submit** **Close**

PROGRAM Greensheet Type: S & Mech: R13

1. Human Subjects involved?		Yes <input type="radio"/> No <input type="radio"/>
2. Live Vertebrate Animals involved?		Yes <input type="radio"/> No <input type="radio"/>
3. Research objectives/goals/scope changed significantly and approved since last award? (If change not approved, explanation required.)		--Select an option--
4. Other support: (If not approved, explanation required.)		--Select an option--
5. Any scientific overlap? (If Yes, explanation required.)		Yes <input type="radio"/> No <input type="radio"/>
6. Does progress report request carryover?		Yes <input type="radio"/> No <input type="radio"/>
7. Progress satisfactory for continued funding? (If No, explanation required.)		Yes <input type="radio"/> No <input type="radio"/>
8. Any change in key personnel? (All changes that have an impact or are not approved will require an explanation.)		--Select an option--
9. Are there significant changes in the level of effort of key personnel? (All changes that have an impact or are not approved will require an explanation.)		--Select an option--
10. Are any inventions mentioned in the text of the progress report that are not noted on the face page of the progress report?		Yes <input type="radio"/> No <input type="radio"/>
11. Any program concerns that should be resolved prior to issuing an award? (If Yes, explanation required.)		Yes <input type="radio"/> No <input type="radio"/>
12. Funding Recommendation:		Committed level <input type="radio"/> Other (must explain) <input type="radio"/>
13. Additional Comments: (Select an icon to enter comments or attach a separate file)		

**Clear All Answers** **Save** **Submit** **Close**

**Figure 4-22 Viewing All Comments**

2. Depending on access rights, a user may edit the comments.
3. To close all comments, Navigate to the top of the questions and click on the “Hide all Comments” button (**Hide All Comments**), which replaces the “View All Comments” button. When all comments are hidden, the “View All Comments” button is shown; when the comments are shown, the “Hide All Comments” button is displayed.

### 4.2.4. Clearing a Greensheet

While completing a greensheet, a user can clear all the information entered in an ‘unsaved’ form, including comments and attached files. If the form has been ‘saved’ only information entered since the last saved version will be cleared. Any files that were attached to a previously ‘saved’ form will remain attached. Users must remove those files individually.

To clear the greensheet form:

1. Click on the “Clear All Answers” button ( **Clear All Answers** ) which is found just above the greensheet’s questions and at the bottom right corner of the greensheet. The system will automatically reset the form, but there will not be any verification message.

Grant Number: **SR13CA099907-03**  
Submitter:  
Institution: H. LEE MOFFITT CANCER CTR & RESEARCH INS  
Primary Specialist: Rogers, Jill  
Status: NOT\_STARTED  
POC:

PI: SETO, EDWARD  
Last Changed By:  
Program Director: Arya, Suresh  
Backup Specialist:

View All Comments
Clear All Answers
Save
Submit
Close


PROGRAM Greensheet Type: 5 & Mech: R13

1. Human Subjects involved?	Yes <input type="radio"/> No <input type="radio"/>
2. Live Vertebrate Animals involved?	Yes <input type="radio"/> No <input type="radio"/>
3. Research objectives/goals/scope changed significantly and approved since last award? (If change not approved, explanation required.)	--Select an option--
4. Other support: (If not approved, explanation required.)	--Select an option--
5. Any scientific overlap? (If Yes, explanation required.)	Yes <input type="radio"/> No <input type="radio"/>
6. Does progress report request carryover?	Yes <input type="radio"/> No <input type="radio"/>
7. Progress satisfactory for continued funding? (If No, explanation required.)	Yes <input type="radio"/> No <input type="radio"/>
8. Any change in key personnel? (All changes that have an impact or are not approved will require an explanation.)	--Select an option--
9. Are there significant changes in the level of effort of key personnel? (All changes that have an impact or are not approved will require an explanation.)	--Select an option--
10. Are any inventions mentioned in the text of the progress report that are not noted on the face page of the progress report?	Yes <input type="radio"/> No <input type="radio"/>
11. Any program concerns that should be resolved prior to issuing an award? (If Yes, explanation required.)	Yes <input type="radio"/> No <input type="radio"/>
12. Funding Recommendation:	Committed level <input type="radio"/> Other (must explain) <input type="radio"/>
13. Additional Comments: (Select an icon to enter comments or attach a separate file)	

Clear All Answers
Save
Submit
Close

Click to clear all answers and reset Greensheet

Figure 4-23 Clearing a Greensheet

2. It is also necessary to remove any files associated with questions, which will be denoted with the “File Attached” icon (  ). Click on the icon to show a list of associated files.

Grant Number:SR13CA099907-03

Submitter:

Institution: H. LEE MOFFITT CANCER CTR & RESEARCH INS

Primary Specialist: Rogers,Jill

Status: NOT\_STARTED

POC:

PI: SETO,EDWARD

Last Changed By:

Program Director: Arya,Suresh

Backup Specialist:














View All Comments

Clear All Answers

Save

Click on icon of uploaded file

PROGRAM Greensheet Type: 5 & Mech: R13

1. Human Subjects involved?		Yes <input type="radio"/> No <input type="radio"/>
2. Live Vertebrate Animals involved?		Yes <input type="radio"/> No <input type="radio"/>
3. Research objectives/goals/scope changed significantly and approved since last award? (If change not approved, explanation required).		--Select an option--
4. Other support: (If not approved, explanation required.)		--Select an option--
5. Any scientific overlap? (If Yes, explanation required.)		Yes <input type="radio"/> No <input type="radio"/>
6. Does progress report request carryover?		Yes <input type="radio"/> No <input type="radio"/>
7. Progress satisfactory for continued funding? (If No, explanation required.)		Yes <input type="radio"/> No <input type="radio"/>
8. Any change in key personnel? (All changes that have an impact or are not approved will require an explanation.)		--Select an option--
9. Are there significant changes in the level of effort of key personnel? (All changes that have an impact or are not approved will require an explanation.)		--Select an option--
10. Are any inventions mentioned in the text of the progress report that are not noted on the face page of the progress report?		Yes <input type="radio"/> No <input type="radio"/>
11. Any program concerns that should be resolved prior to issuing an award? (If Yes, explanation required.)		Yes <input type="radio"/> No <input type="radio"/>
12. Funding Recommendation:		Committed level <input type="radio"/> Other (must explain) <input type="radio"/>
13. Additional Comments: (Select an icon to enter comments or attach a separate file)		

Clear All Answers

Save

Submit

Close

Figure 4-24 Removing an Attached File

3. Click on the Delete File icon (  ) located on the row of the file to be deleted.


Click on icon next to file name to be deleted

New Attachment

File:

Add Attachment

Attachment File List

File Name
 memo.txt

Save

Cancel

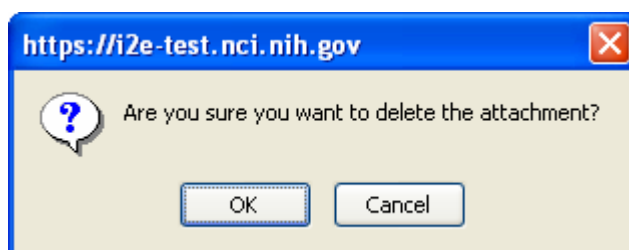
Click to cancel and not remove associated files

Click to save deletion once all files to be deleted have been removed

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Figure 4-25 File Attachment Window with Attached File

- The system will prompt you to verify that you want to delete the selected file, select OK to delete; selecting the “Cancel” button will return to the File Attachment window.



**Figure 4-26 Delete Confirmation Box**

- Click “Save” to save the changes; clicking “Cancel” will close the File Attachment window WITHOUT deleting the file.

### 4.3. Saving a Greensheet

A greensheet can be saved at any point during the editing process. To save a greensheet:

- Click the Save Button (**Save**) on the bottom right of the greensheet. The system will capture all of the information that has been input, including any comments or documents that have been attached.

 The screenshot shows a web form titled "PROGRAM Greensheet Type: 5 & Mech: R13". At the top left, it displays metadata: Grant Number: SR13CA099907-03, Submitter: Institution: H. LEE MOFFITT CANCER CTR & RESEARCH INS, Primary Specialist: Rogers, Jill, Status: NOT\_STARTED, and POC: [text box]. At the top right, it lists: PI: SETO, EDWARD, Last Changed By: Program Director: Arya, Suresh, and Backup Specialist: [text box]. Below this is a row of buttons: "View All Comments", "Clear All Answers", "Save", "Submit", and "Close". The "Save" button is highlighted in green. The main body of the form contains 13 numbered questions with radio button options. A callout box with an arrow points to the "Save" button, containing the text "Click to save the Greensheet". At the bottom right, there is another row of buttons: "Clear All Answers", "Save", "Submit", and "Close", with the "Save" button also highlighted in green.
 

PROGRAM Greensheet Type: 5 & Mech: R13		
1. Human Subjects involved?	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/>
2. Live Vertebrate Animals involved?	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/>
3. Research objectives/goals/scope changed significantly and approved since last award? (If change not approved, explanation required.)	--Select an option--	<input type="radio"/>
4. Other support: (If not approved, explanation required.)	--Select an option--	<input type="radio"/>
5. Any scientific overlap? (If Yes, explanation required.)	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/>
6. Does progress report request carryover?	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/>
7. Progress satisfactory for continued funding? (If No, explanation required.)	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/>
8. Any change in key personnel? (All changes that have an impact or are not approved will require an explanation.)	--Select an option--	<input type="radio"/>
9. Are there significant changes in the level of effort of key personnel? (All changes that have an impact or are not approved will require an explanation.)	--Select an option--	<input type="radio"/>
10. Are any inventions mentioned in the text of the progress report that are not noted on the face page of the progress report?	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/>
11. Any program concerns that should be resolved prior to issuing an award? (If Yes, explanation required.)	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/>
12. Funding Recommendation:	<input type="radio"/> Committed level <input type="radio"/> Other (must explain)	<input type="radio"/>
13. Additional Comments: (Select an icon to enter comments or attach a separate file)	<input type="radio"/>	

**Figure 4-27 Saving a Greensheet**

2. The system will also change the status of the greensheet to “Saved.” The system will not, however, perform any validation of the questions at this point. It will allow a greensheet to be saved with unanswered questions.
3. The application will return the user to the current greensheet form.

#### 4.4. Submitting a Greensheet

Once a greensheet is complete, the user with the appropriate role can submit the greensheet. Not all roles have the ability to submit a greensheet; for them, the Submit button will not be visible. Also, only grants with an asterisk (\*) next to the grant number can be submitted; this represents grants that are in the Control system. To submit a greensheet:

1. Save the greensheet (see “Saving a Greensheet”).
2. Click on the “Submit” (**Submit**) button which is found just above the greensheet’s questions and at the bottom right corner of the greensheet.

**Grant Number:** SR13CA099907-01  
**Submitter:**  
**Institution:** H. LEE MOFFITT CANCER CTR & RESEARCH INS  
**Primary Specialist:** Rogers, Jill  
**Status:** NOT\_STARTED  
**POC:**

**PI:** SETO, EDWARD  
**Last Changed By:**  
**Program Director:** Arya, Suresh  
**Backup Specialist:**

**View All Comments** **Clear All Answers** **Save** **Submit** **Close**

PROGRAM Greensheet Type: S & Mech: R13

1. Human Subjects involved?	<input type="radio"/> Yes <input type="radio"/> No
2. Live Vertebrate Animals involved?	<input type="radio"/> Yes <input type="radio"/> No
3. Research objectives/goals/scope changed significantly and approved since last award? (If change not approved, explanation required.)	--Select an option--
4. Other support: (If not approved, explanation required.)	--Select an option--
5. Any scientific overlap? (If Yes, explanation required.)	<input type="radio"/> Yes <input type="radio"/> No
6. Does progress report request carryover?	<input type="radio"/> Yes <input type="radio"/> No
7. Progress satisfactory for continued funding? (If No, explanation required.)	<input type="radio"/> Yes <input type="radio"/> No
8. Any change in key personnel? (All changes that have an impact or are not approved will require an explanation.)	--Select an option--
9. Are there significant changes in the level of effort of key personnel? (All changes that have an impact or are not approved will require an explanation.)	--Select an option--
10. Are any inventions mentioned in the text of the progress report that are not noted on the face page of the progress report?	<input type="radio"/> Yes <input type="radio"/> No
11. Any program concerns that should be resolved prior to issuing an award? (If Yes, explanation required.)	<input type="radio"/> Yes <input type="radio"/> No
12. Funding Recommendation:	<input type="radio"/> Committed level <input type="radio"/> Other (must explain)
13. Additional Comments: (Select an icon to enter comments or attach a separate file)	

**Clear All Answers** **Save** **Submit** **Close**

Click to submit the Greensheet

Figure 4-28 Submitting a Greensheet

3. The system will perform a validation to ensure that all appropriate questions have been completed; the system does not perform a check for data quality or consistency.

- a. If the form passes validation, the system generates a success message and the status is changed to “Submitted” and the Grant is removed from the Grant list. Should there be a need to reference the grant, it can be located by performing a search (see “Locating a Grant”). The system locks the submitted greensheet, which can only be unlocked by a Specialist (see “Unlocking a Greensheet”).

GREENSHEETS

The Greensheet Form for Grant 1R01CA114001-01A1 has been submitted

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**Figure 4-29 Submission Confirmation Message**



- b. If the form fails validation, the system will alert the user by providing an alert dialogue box and placing an alert icon (⚠) next to the incomplete questions. The user will then need to complete these questions, save the form, and once again submit the form.

Grant Number: **SR13CA022907-03**  
 Submitter:  
 Institution: H. LEE MOFFITT CANCER CTR & RESEARCH INS  
 Primary Specialist: Rogers, Jill  
 Status: NOT\_STARTED  
 POC:

PI: SETO, EDWARD  
 Last Changed By:  
 Program Director: Arya, Suresh  
 Backup Specialist:

**View All Comments** **Clear All Answers** **Save** **Submit** **Close**

PROGRAM Greensheet Type: S & Mech: R13

1. Human Subjects involved?	<input type="checkbox"/> Yes <input checked="" type="radio"/> No
2. Live Vertebrate Animals involved?	<input type="checkbox"/> Yes <input checked="" type="radio"/> No
3. Research objectives/goals/scope changed significantly and approved since last award? (If change not approved, explanation required.)	<input type="checkbox"/> Changed, and approved
4. Other support: (If not approved, explanation required.)	<input type="checkbox"/> Change approved
5. Any scientific overlap? (If Yes, explanation required.)	
6. Does progress report request ca	
7. Progress satisfactory for continu	
8. Any change in key personnel? (All changes that have an impact or are not approved will require an explanation.)	<input type="checkbox"/> Yes, approved but has no impact
9. Are there significant changes in the level of effort of key personnel? (All changes that have an impact or are not approved will require an explanation.)	<input type="checkbox"/> --Select an option--
10. Are any inventions mentioned in the text of the progress report that are not noted on the face page of the progress report?	<input type="checkbox"/> Yes <input checked="" type="radio"/> No
11. Any program concerns that should be resolved prior to issuing an award? (If Yes, explanation required.)	<input type="checkbox"/> Yes <input checked="" type="radio"/> No
12. Funding Recommendation:	<input type="checkbox"/> Committed level <input checked="" type="radio"/> Other (must explain)
13. Additional Comments: (Select an icon to enter comments or attach a separate file)	

**Clear All Answers** **Save** **Submit** **Close**

Microsoft Internet Explorer

⚠ There are still questions that require answers. Look for the exclamation mark that indicates which questions

OK

Answer missing questions and resubmit

Click "Ok" to close dialogue box and answer missing questions

**Figure 4-30 Validating a Greensheet**

## 4.5. Closing a Greensheet

To close a greensheet:

1. Click on the “Close” button ( **Close** ) which is found just above the greensheet’s questions and at the bottom right corner of the greensheet.

The screenshot shows a web form titled 'PROGRAM Greensheet Type: 5 & Mech: R13'. At the top left, it displays 'Grant Number: SR13CA099907-02', 'Submitter: Institution: H. LEE MOFFITT CANCER CTR & RESEARCH INS', 'Primary Specialist: Rogers, Jill', and 'Status: NOT\_STARTED'. At the top right, it shows 'PI: SETO, EDWARD', 'Last Changed By: Program Director: Arya, Suresh', and 'Backup Specialist:'. Below this, there is a row of buttons: 'View All Comments', 'Clear All Answers', 'Save', 'Submit', and 'Close'. The 'Close' button is highlighted with a green box. A callout box with an arrow points to the 'Close' button, containing the text 'Click to close a Greensheet'. The main body of the form contains 13 numbered questions with radio button options for 'Yes' and 'No', and some with dropdown menus for 'Select an option--'. At the bottom right, there is another row of buttons: 'Clear All Answers', 'Save', 'Submit', and 'Close'.

Figure 4-31 Closing a Greensheet

2. A Close Confirmation dialog is displayed.

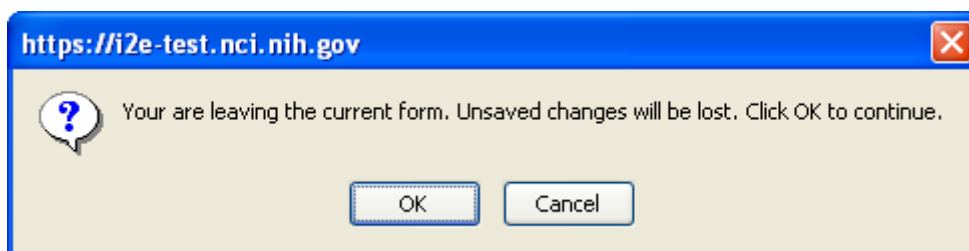


Figure 4-32 Close Confirmation Dialogue Box

- a. To close the form, click on the “OK” button. This will close the form WITHOUT saving any of the questions or any of the documents or files that may have been attached. Closing a form does not alter the status of the form.
- b. To remain on the current form, click on the “Cancel” button.



## 5. Printing a Greensheet

The application allows users to print the active greensheet form and choose from various options to format the printed version of the greensheet form. Those options include printing all questions versus just those that have been answered, and options for printing comments. Printing requires the user to have Adobe Acrobat installed.

To print a greensheet:

1. Select and open a greensheet.
2. Navigate to the top left corner of the form and click on the “Print” button ( **Print** ) located at the top left corner of the form.

**Grant Number:** SR13CA099907-03

**Submitter:**

**Institution:** H. LEE MOFFITT CANCER CTR & RESEARCH INS

**Primary Specialist:** Rogers, Jill

**Status:** NOT\_STARTED

**POC:**

**PI:** SETO, EDWARD

**Last Changed By:**

**Program Director:** Arya, Suresh

**Backup Specialist:**

[View All Comments](#) [Clear All Answers](#) [Save](#) [Submit](#) [Close](#)

PROGRAM Greensheet Type: 5 & Mech: R13		
1. Human Subjects involved?		<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/>
2. Live Vertebrate Animals involved?		<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/>
3. Research objectives/goals/scope changed significantly and approved since last award? (If change not approved, explanation required.)		--Select an option--
4. Other support: (If not approved, explanation required.)		--Select an option--
5. Any scientific overlap? (If Yes, explanation required.)		<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/>
6. Does progress report request carryover?		<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/>
7. Progress satisfactory for continued funding? (If No, explanation required.)		<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/>
8. Any change in key personnel? (All changes that have an impact or are not approved will require an explanation.)		--Select an option--
9. Are there significant changes in the level of effort of key personnel? (All changes that have an impact or are not approved will require an explanation.)		--Select an option--
10. Are any inventions mentioned in the text of the progress report that are not noted on the face page of the progress report?		<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/>
11. Any program concerns that should be resolved prior to issuing an award? (If Yes, explanation required.)		<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/>
12. Funding Recommendation:		<input type="radio"/> Committed level <input type="radio"/> Other (must explain) <input type="radio"/>
13. Additional Comments: (Select an icon to enter comments or attach a separate file)		

[Clear All Answers](#) [Save](#) [Submit](#) [Close](#)

Figure 5-1 Submitting a Greensheet

3. The Print Selection window opens as seen in the figure below.

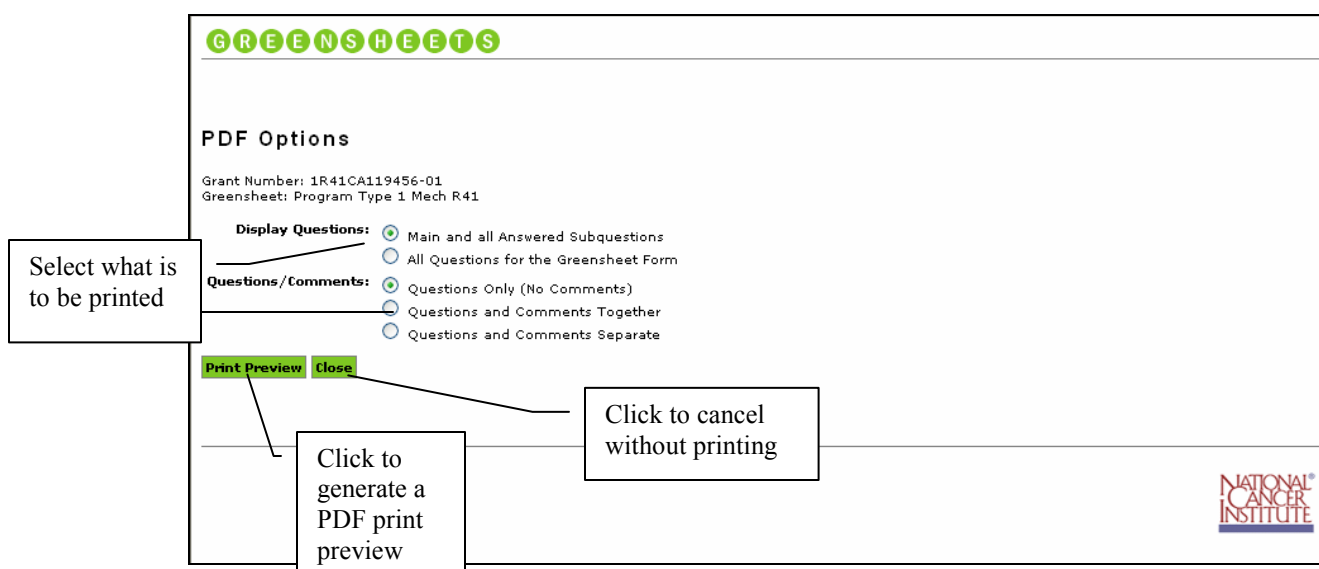


Figure 5-2 Print Selection Window

4. Select the appropriate format and click the “Print Preview” button. This will generate a Portable Document Format (PDF) version of the greensheet.

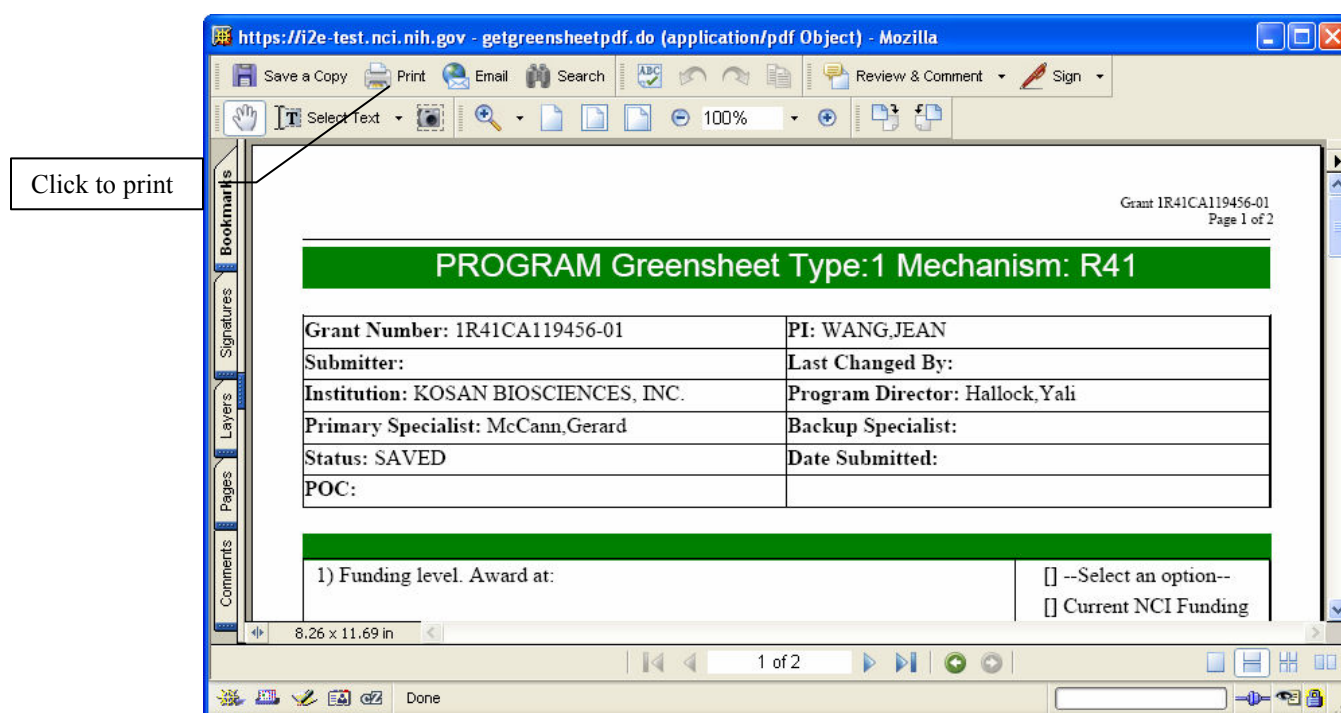



Figure 5-3 PDF Print Preview

- To print the form, click on the print icon (  ) in the toolbar within the new window, which will open a print dialogue box.

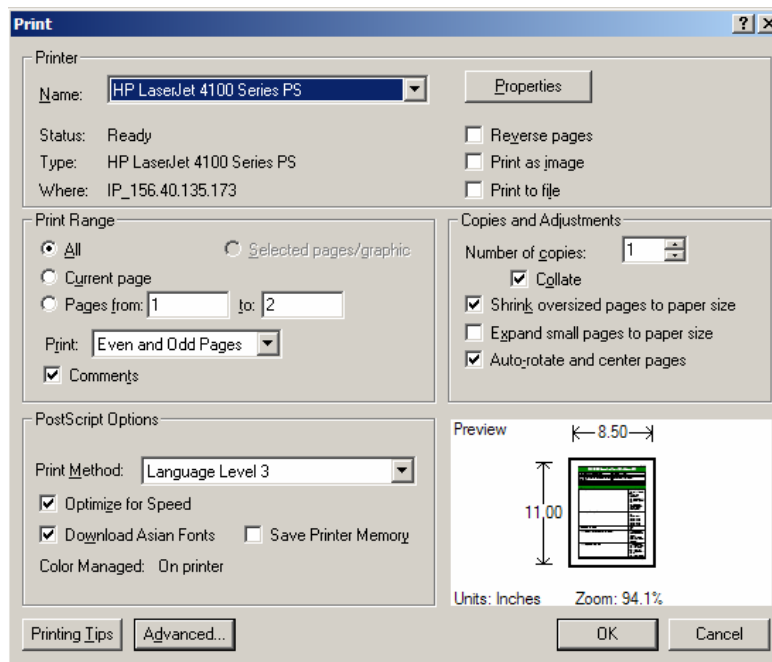


Figure 5-4 Print Dialogue Box

- Select the appropriate printer name and click “OK” to print the form.
- Close the window to return to the greensheet.

## 6. Unlocking a Greensheet






Once a greensheet has been submitted by Program staff, the status changes to “submitted” and the greensheet becomes read-only. Should Program staff member need to edit a greensheet, they must contact the assigned Specialist and ask for the greensheet to be unlocked.







## 7. Icon Glossary

This glossary provides an overview of the icons found within the Greensheets application and a brief description on their use. The icons can be divided into two sections, those that relate to the application and forms, and those that denote the status of a greensheet.











### 7.1. Greensheet Status Icons

As a Program staff member, you will only see the first status icon. The list of all icons used by the application for all users is included here for completeness.

-  **Greensheet Available** – indicates that the greensheet is available to be worked on. Clicking on this icon will open the greensheet.
-  **Greensheet on Control** – indicates that the greensheet is in the Control system and can be submitted. Clicking on the  will open the greensheet.
-  **Greensheet Saved** – indicates that the greensheet has been saved. Clicking on the  will open the greensheet.

4.  **Greensheet Submitted** – indicates that the greensheet has been submitted and cannot be changed thus it is “locked”. Clicking on the  will open the greensheet as read-only.
5.  **Greensheet Un-submitted** – indicates that a previously submitted greensheet has been “unlocked” by the GAB specialist so that it can be changed. Clicking on the  will open the greensheet.
6.  **F Greensheet Frozen** – indicates that the Award has been made and the greensheet can no longer be un-submitted and altered. Clicking on the  will open the greensheet as read-only.

## 7.2. *Greensheet Form Icons*

1.  **Possible Sub-questions** – This icon is located to the left of the question number on the greensheet. It indicates that there are possible sub-questions. Clicking on the icon will display all sub-questions.
2.  **No Additional Sub-questions** – This icon is located to the left of the question number on the greensheet and indicates that there are no additional sub-questions. Clicking on the icon will collapse the displayed sub-questions associated with the question.
3.  **Add Comment** – This icon is located on the greensheet's form; there is a comments icon associated with each question. Clicking on this icon will open a comments box where comments can be entered. Click the icon again to close the comments box.
4.  **Comment Added** – This icon indicates that a comment has been added to the answer for a question. Click on the icon to view the comment.
5.  **Attach File** – This icon allows you to attach a file to an answer; there is an attach file icon associated with each question. Clicking the icon will open a window where you can browse your files and attach the appropriate file to the greensheet.
6.  **File Attached** – This icon indicates that a file has been attached for the associated question. Clicking on this icon will open a page allowing you to manipulate a file that has previously been attached to the question. The file can either be viewed or deleted by clicking on the appropriate icon.
7.  **View File** – This icon is located on the file attachment page. Clicking on this icon will open the file that is currently attached to the specific question. Note: this may require the installation of some external viewer if one is not present on the computer being used.
8.  **Delete File** – This icon appears on the file attachment page. Clicking on this icon will remove the file that is currently attached.
9.  **Alert** – This icon appears on a question number indicating that the question remains unanswered, thus the greensheet cannot be submitted.
10.  **Print** – This icon is located on the Print Preview window. Clicking this icon will display the print options dialog box allowing print options to be selected.