Greensheets

<u>Specialist Greensheets User Documentation</u>

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1.   Introduction

A Greensheet is a management document used by members of the Program Staff and Grants Administration Branch (GAB) to record the process of evaluating a grant application for scientific merit and to ensure that NIH/NCI funding and policy requirements are met. These requirements vary for each Type and Mechanism; each combination has a different Greensheet to address the specific criteria. Every grant application requires that separate Program, Specialist, and RMC Greensheets be completed for the appropriate Type and Mechanism.

Having a set of standard checklists helps NCI Program and GAB staff in carrying out their inherently governmental stewardship responsibilities, in adherence with existing Federal policies and procedures, and ensures that our grantees are treated consistently and are being held to the standards appropriate for the type of award/funding mechanism being reviewed.

The Electronic Greensheets application will allow Program and GAB to phase out the paper process and replace the printed Program and Specialist Greensheets with an on-line form that is accessible via the Internet. RMC Greensheets are outside the scope of this application and are part of the Control application.

This application provides:

- The ability to extract data from various Greensheet answers.
- The ability to implement Greensheet changes in a timely manner as opposed to circulating new paper versions.
- The ability for staff to start working on the Greensheets earlier than before. Staff does not have to wait to get the paper copy of the Greensheet, they can access electronic Greensheets as early as they want and can submit them once that grant number has been selected for funding and is on the GAB Control system.
- The ability to remove certain questions or the requirement to answer them, at the end of the fiscal year.
- The ability to reduce the incidence of conflicting or incomplete information that can occur with the current paper versions.
- The ability to perform edit checks which serve as a quality control for the completeness of the Greensheet.
- The ability to attach electronic documents and comments to the Greensheet.

In order to access this application, it is recommended that either the Mozilla or Internet Explorer web browsers 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

To access the Greensheets applications:

1. Open a supported web browser and enter the following URL: https://cii-server5.nci.nih.gov:8443/greensheets.
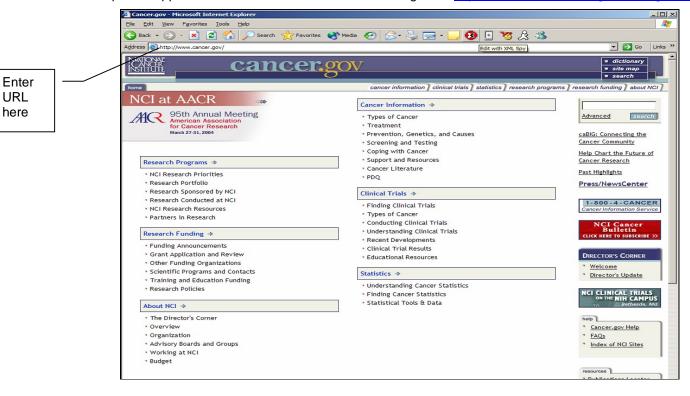

Enter URL here

Figure 2-1 Entering URL

2. Enter Novell Network username and password to log into the Greensheets Application. If you do not have a username and password, please contact the NIH Help Desk to obtain one (helpdesk@nih.gov)

Enter User Name here

Enter password here

Figure 2-2 Entering Network User-id and Password

3. Selecting a Grant

The application provides a default list of grants that are populated based on the user name and permissions from which the user may select one to complete a Greensheet. If the desired grant is not present in this default list, the application also allows a user to search for a Grant by either PI Last Name or Grant Number. Users can also access Your Grants to get further details for a selected Grant. Figure 3-1 shows the Grant List page and all of the actions that a user can perform from within the page.

Click For Help

Click to refresh and update Grant List

Click on any column header to sort data by that field

Use Dropdown to Select PI or Grant Number to search on

Input search string

Use to navigate to different pages of Grant List

Click link to open Grant Details

Click "G" icon to open appropriate Greensheet

Click "lock" icon to un-submit appropriate Greensheet

Greensheets

RCv1.0.0 b03.25.0

Refresh Grants List Help

Search for Grant Number ▼ : _____ Go

Specialist Grants List for Greensheets Specialist

2,526 Grants found, displaying Grants 1 to 50.
[First/Prev] 1, 2, 3, 4, 5, 6, 7, 8 [Next/Last]

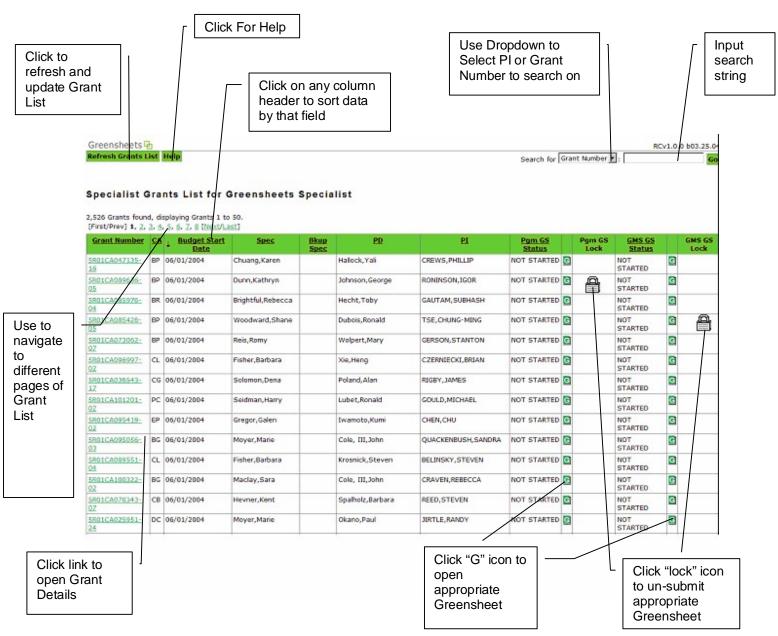| Grant Number	CA	Budget Start Date	Spec	Bkup Spec	PD	PI	Pgm GS Status		Pgm GS Lock	GMS GS Status		GMS GS Lock
5R01CA047135-16	BP	06/01/2004	Chuang,Karen		Hallock,Yali	CREWS,PHILLIP	NOT STARTED	G		NOT STARTED	G	
5R01CA089635-05	BP	06/01/2004	Dunn,Kathryn		Johnson,George	RONINSON,IGOR	NOT STARTED	G	🔒	NOT STARTED	G	
5R01CA095976-04	BR	06/01/2004	Brightful,Rebecca		Hecht,Toby	GAUTAM,SUBHASH	NOT STARTED	G		NOT STARTED	G	
5R01CA085428-05	BP	06/01/2004	Woodward,Shane		Dubois,Ronald	TSE,CHUNG-MING	NOT STARTED	G		NOT STARTED	G	🔒
5R01CA073062-07	BP	06/01/2004	Reis,Romy		Wolpert,Mary	GERSON,STANTON	NOT STARTED	G		NOT STARTED	G	
5R01CA096997-02	CL	06/01/2004	Fisher,Barbara		Xie,Heng	CZERNIECKI,BRIAN	NOT STARTED	G		NOT STARTED	G	
5R01CA036543-17	CG	06/01/2004	Solomon,Dena		Poland,Alan	RIGBY,JAMES	NOT STARTED	G		NOT STARTED	G	
5R01CA101201-02	PC	06/01/2004	Seidman,Harry		Lubet,Ronald	GOULD,MICHAEL	NOT STARTED	G		NOT STARTED	G	
5R01CA095419-02	EP	06/01/2004	Gregor,Galen		Iwamoto,Kumi	CHEN,CHU	NOT STARTED	G		NOT STARTED	G	
5R01CA095056-03	BG	06/01/2004	Moyer,Marie		Cole, III,John	QUACKENBUSH,SANDRA	NOT STARTED	G		NOT STARTED	G	
5R01CA089551-04	CL	06/01/2004	Fisher,Barbara		Krosnick,Steven	BELINSKY,STEVEN	NOT STARTED	G		NOT STARTED	G	
5R01CA100322-02	BG	06/01/2004	Maclay,Sara		Cole, III,John	CRAVEN,REBECCA	NOT STARTED	G		NOT STARTED	G	
5R01CA078343-07	CB	06/01/2004	Hevner,Kent		Spalholz,Barbara	REED,STEVEN	NOT STARTED	G		NOT STARTED	G	
5R01CA025951-24	DC	06/01/2004	Moyer,Marie		Okano,Paul	JIRTLE,RANDY	NOT STARTED	G		NOT STARTED	G	

Figure 3-1 Specialist Grant List

3.1.1. Viewing the Default Grant List

1. Log into the application, as described in the Accessing the Application section
2. The system will return a list of Grants based on the user id and role. This list is comprised of all grants to which the user is assigned as either the Primary or the Backup Specialist.
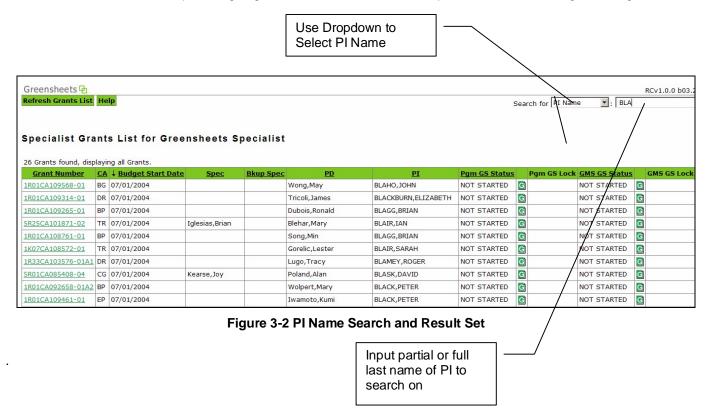
3.1.2. Searching for a Grant

If the user does not see a specific Grant on their Grants list, or wishes to view a previously submitted Grant, he/she can perform a string search on either the last name of the Principal Investigator or the Grant number.

3.1.2.1. Principal Investigator Search

To search for a Grant by the last name of the Principal Investigator:

1. Navigate to the top right of the grant list and select "PI Name" from the drop down.
2. In the text field, type in as much of the last name as is known.
3. The system will match the input string against all last names of PIs and return all Grants that have a PI whose last name starts with the input string. Figure 3-2 below illustrates a sample search on a PI using the string 'Park'.
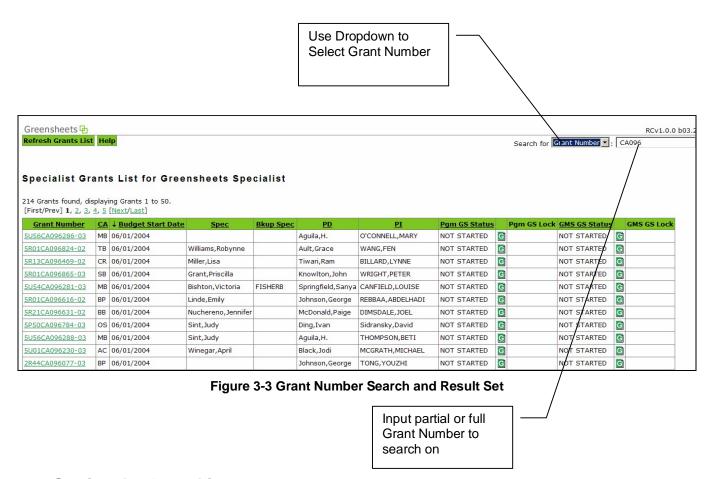
Use Dropdown to Select PI Name

Greensheets   RCv1.0.0 b03.2
Refresh Grants List Help   Search for PI Name ▼ : BLA

Specialist Grants List for Greensheets Specialist

26 Grants found, displaying all Grants.

Grant Number	CA	↓ Budget Start Date	Spec	Bkup Spec	PD	PI	Pgm GS Status	Pgm GS Lock	GMS GS Status	GMS GS Lock
1R01CA109568-01	BG	07/01/2004			Wong,May	BLAHO,JOHN	NOT STARTED	G	NOT STARTED	G
1R01CA109314-01	DR	07/01/2004			Tricoli,James	BLACKBURN,ELIZABETH	NOT STARTED	G	NOT STARTED	G
1R01CA109265-01	BP	07/01/2004			Dubois,Ronald	BLAGG,BRIAN	NOT STARTED	G	NOT STARTED	G
5R25CA101871-02	TR	07/01/2004	Iglesias,Brian		Blehar,Mary	BLAIR,IAN	NOT STARTED	G	NOT STARTED	G
1R01CA108761-01	BP	07/01/2004			Song,Min	BLAGG,BRIAN	NOT STARTED	G	NOT STARTED	G
1K07CA108572-01	TR	07/01/2004			Gorelic,Lester	BLAIR,SARAH	NOT STARTED	G	NOT STARTED	G
1R33CA103576-01A1	DR	07/01/2004			Lugo,Tracy	BLAMEY,ROGER	NOT STARTED	G	NOT STARTED	G
5R01CA085408-04	CG	07/01/2004	Kearse,Joy		Poland,Alan	BLASK,DAVID	NOT STARTED	G	NOT STARTED	G
1R01CA092658-01A2	BP	07/01/2004			Wolpert,Mary	BLACK,PETER	NOT STARTED	G	NOT STARTED	G
1R01CA109461-01	EP	07/01/2004			Iwamoto,Kumi	BLACK,PETER	NOT STARTED	G	NOT STARTED	G

Figure 3-2 PI Name Search and Result Set

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Input partial or full last name of PI to search on

3.1.2.2. Grant Number Search

To search for a Grant by the Grant Number:

1. Navigate to the top right of the grant list and select "Grant Number" from the drop down.
2. In the text field, type in as much of the Grant number as is known.

3. The system will match the input string against all Grant numbers and return all grants that contain the input string. Figure 3-3 below provides an example of a search by Grant number and the result set.

Use Dropdown to
Select Grant Number

Greensheets 🔲   RCv1.0.0 b03.2
Refresh Grants List **Help**   Search for [Grant Number ▾] : [CA096   ]

Specialist Grants List for Greensheets Specialist

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

Grant Number	CA	↓ Budget Start Date	Spec	Bkup Spec	PD	PI	Pgm GS Status	Pgm GS Lock	GMS GS Status	GMS GS Lock
5U56CA096286-03	MB	06/01/2004			Aguila,H.	O'CONNELL,MARY	NOT STARTED	🄶	NOT STARTED	🄶
5R01CA096824-02	TB	06/01/2004	Williams,Robynne		Ault,Grace	WANG,FEN	NOT STARTED	🄶	NOT STARTED	🄶
5R13CA096469-02	CR	06/01/2004	Miller,Lisa		Tiwari,Ram	BILLARD,LYNNE	NOT STARTED	🄶	NOT STARTED	🄶
5R01CA096865-03	SB	06/01/2004	Grant,Priscilla		Knowlton,John	WRIGHT,PETER	NOT STARTED	🄶	NOT STARTED	🄶
5U54CA096281-03	MB	06/01/2004	Bishton,Victoria	FISHERB	Springfield,Sanya	CANFIELD,LOUISE	NOT STARTED	🄶	NOT STARTED	🄶
5R01CA096616-02	BP	06/01/2004	Linde,Emily		Johnson,George	REBBAA,ABDELHADI	NOT STARTED	🄶	NOT STARTED	🄶
5R21CA096631-02	BB	06/01/2004	Nuchereno,Jennifer		McDonald,Paige	DIMSDALE,JOEL	NOT STARTED	🄶	NOT STARTED	🄶
5P50CA096784-03	OS	06/01/2004	Sint,Judy		Ding,Ivan	Sidransky,David	NOT STARTED	🄶	NOT STARTED	🄶
5U56CA096288-03	MB	06/01/2004	Sint,Judy		Aguila,H.	THOMPSON,BETI	NOT STARTED	🄶	NOT STARTED	🄶
5U01CA096230-03	AC	06/01/2004	Winegar,April		Black,Jodi	MCGRATH,MICHAEL	NOT STARTED	🄶	NOT STARTED	🄶
2R44CA096077-03	BP	06/01/2004			Johnson,George	TONG,YOUZHI	NOT STARTED	🄶	NOT STARTED	🄶

Figure 3-3 Grant Number Search and Result Set

Input partial or full
Grant Number to
search on

3.1.3. 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 column header. 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 (Ⴟ). 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 Date in ascending order.

Figure 3-4 Budget Date in Ascending Order

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

3.1.4. 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 Figure 3-5 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.

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 sequential page

Figure 3-5 Page Navigation

3.1.5. Selecting a Greensheet

A Specialist may view all Program and Specialist Greensheets, but may only edit Specialist Greensheets to which they are assigned as either the Primary or the Backup.

3.1.5.1. Selecting a Specialist Greensheet

To select a Specialist Greensheet:

1. Locate the proper grant (see Locating a Grant) within the Specialist grant list
2. Click on the Greensheet icon (🅖) between the "GMS GS Status" and "GMS GS Lock" columns. The appropriate Specialist Greensheet will open. The form will be editable if the user has the correct access rights, otherwise it will be a read-only form. If read-only, a user may scroll through all text fields, and though editable, users will not be able to save edits.
3.

Greensheets 🗗   RCv1.0.0 b03.2
Refresh Grants List **Help**   Search for PI Name ▾ : BLA

Specialist Grants List for Greensheets Specialist

26 Grants found, displaying all Grants.

Grant Number	CA	↓ Budget Start Date	Spec	Bkup Spec	PD	PI	Pgm GS Status	Pgm GS Lock	GMS GS Status	GMS GS Lock
1R01CA109568-01	BG	07/01/2004			Wong,May	BLAHO,JOHN	NOT STARTED 🅖		NOT STARTED 🅖	
1R01CA109314-01	DR	07/01/2004			Tricoli,James	BLACKBURN,ELIZABETH	NOT STARTED 🅖		NOT STARTED 🅖	
1R01CA109265-01	BP	07/01/2004			Dubois,Ronald	BLAGG,BRIAN	NOT STARTED 🅖		NOT STARTED 🅖	
5R25CA101871-02	TR	07/01/2004	Iglesias,Brian		Blehar,Mary	BLAIR,IAN	NOT STARTED 🅖		NOT STARTED 🅖	
1R01CA108761-01	BP	07/01/2004			Song,Min	BLAGG,BRIAN	NOT STARTED 🅖		NOT STARTED 🅖	
1K07CA108572-01	TR	07/01/2004			Gorelic,Lester	BLAIR,SARAH	NOT STARTED 🅖		NOT STARTED 🅖	
1R33CA103576-01A1	DR	07/01/2004			Lugo,Tracy	BLAMEY,ROGER	NOT STARTED 🅖		NOT STARTED 🅖	
5R01CA085408-04	CG	07/01/2004	Kearse,Joy		Poland,Alan	BLASK,DAVID	NOT STARTED 🅖		NOT STARTED 🅖	
1R01CA092658-01A2	BP	07/01/2004			Wolpert,Mary	BLACK,PETER	NOT STARTED 🅖		NOT STARTED 🅖	

Figure 3-6 Selecting a Specialist Greensheet

Click Ǵ icon to open Specialist Greensheet

3.1.5.2. Selecting a Program Greensheet:

To select a Program Greensheet:

1. Locate the proper grant (see Locating a Grant) within the Specialist grant list
2. Click on the Greensheet icon (🅖) between the "PGM GS Status" and "PGM GS Lock" columns. The appropriate Program Greensheet will open as a read-only form. A user may scroll through all text fields, and though editable, users will not be able to save edits.

Figure 3-7 Selecting a Specialist Greensheet

Click G icon to open Program 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. The application also allows users to attach files or insert comments for each question on the Greensheet. Figure 4-1 provides a sample Greensheet and the functionality available on each Greensheet. The actual questions that are displayed will vary by Type and Budget Mechanism combination.
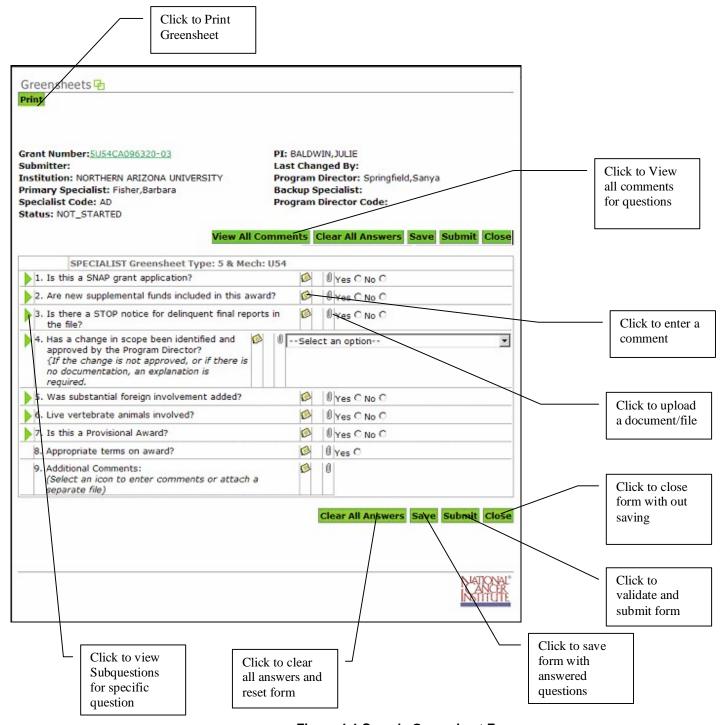
Figure 4-1 Sample Greensheet Form

4.1. *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

Yes ○ No ○

Figure 4-2 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.

--Select an option--

Figure 4-3 Example of a Drop Down List

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

Figure 4-4 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).

☐ Used as partial payment
☐ Used as carry-over
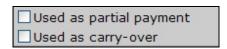
Figure 4-5 Example of Check Boxes

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

4.1.1. 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.

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
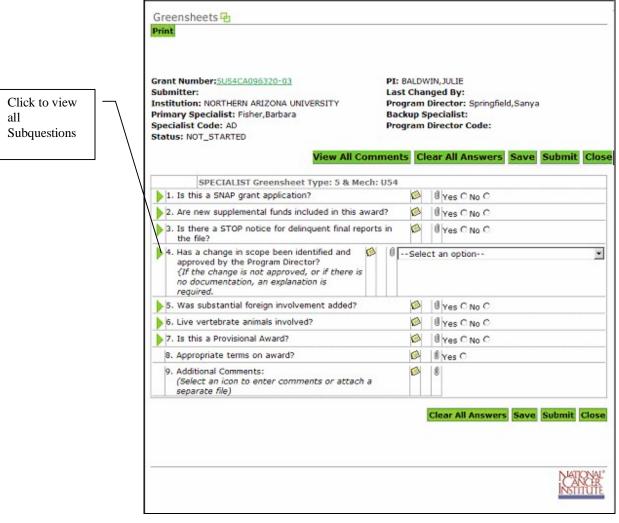
Figure 4-6 Viewing an Individual Sub-question

3. To hide the sub-questions, click on the "Sub-questions Hide " (▼) icon.
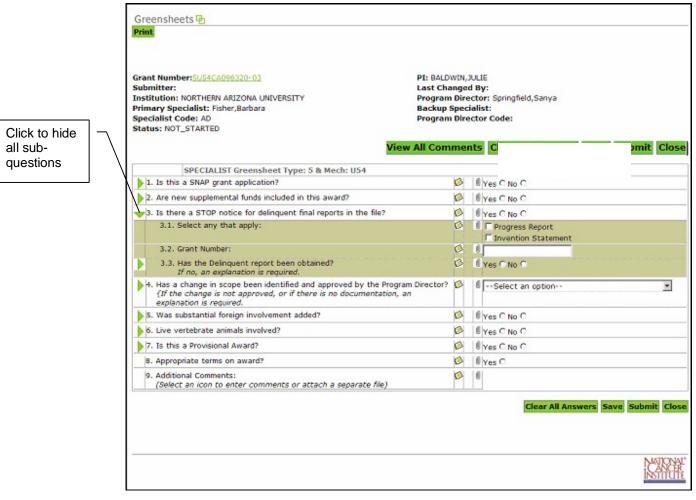
Figure 4-7   Hiding an Individual Sub-question

4.1.2. 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 attached.

4.1.2.1.   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 (Figure 4-9)
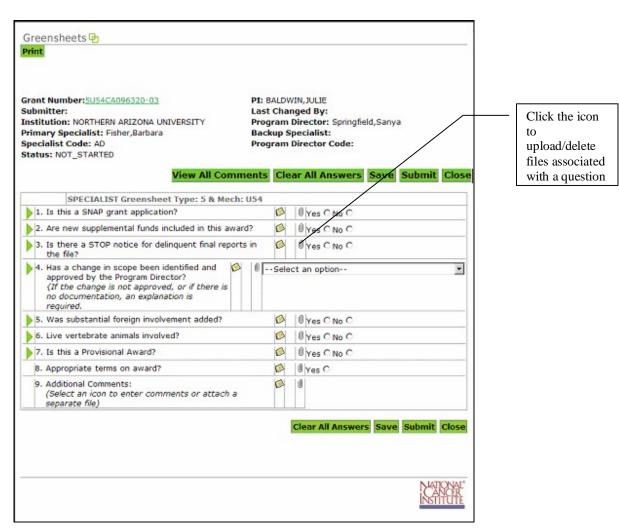
Figure 4-8   File Upload

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.
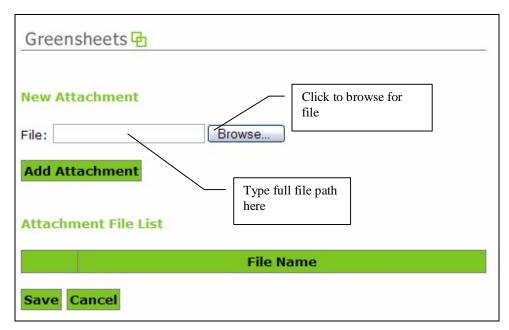
Figure 4-9 File Attachment Window

b. User can navigate to the appropriate file, highlight it, and click on Open.
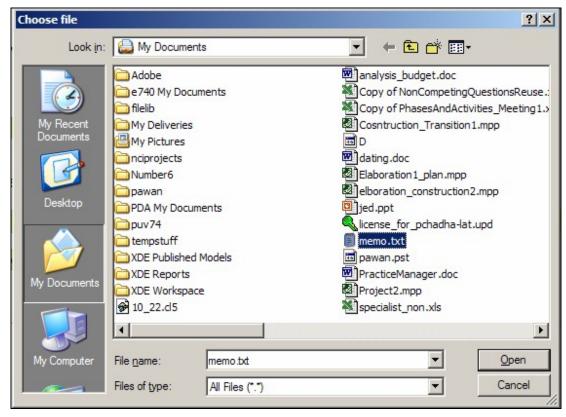
Figure 4-10 Choose File Window

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

3. Click on the "Add Attachment" button to add the file; this will then show the file in the Attachment File list.
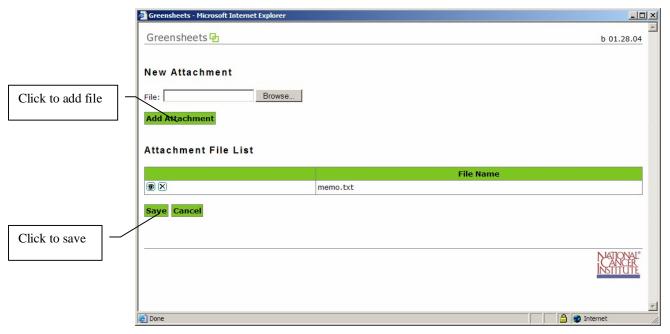
Figure 4-11 File Attachment Window

4. Additional files can be added, repeating steps two and three above.
5. Once all files are added, click on the "Save" button.
6. 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.

4.1.2.2. Removing an Attached File

To remove an attached file:

1. Click on the "File Attached" icon ( ) associated with the question, this will open the File Attachment Window, which will list all files attached that are associated with the particular question (Figure 4-12 below).
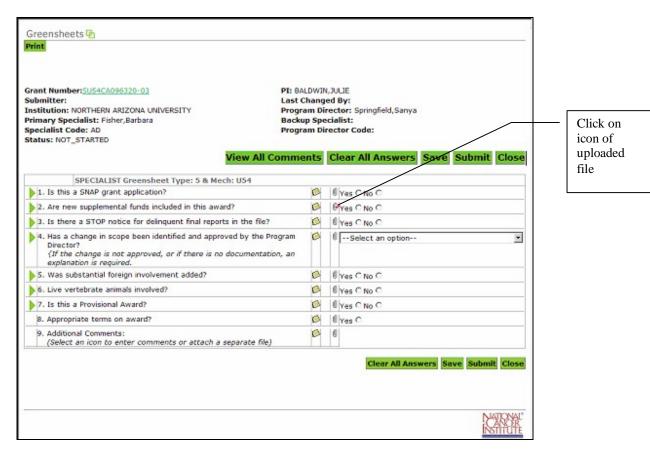
Figure 4-12   Removing an Attached File

2.   Click on the Delete File icon (⊠) located on the row of the file to be deleted.
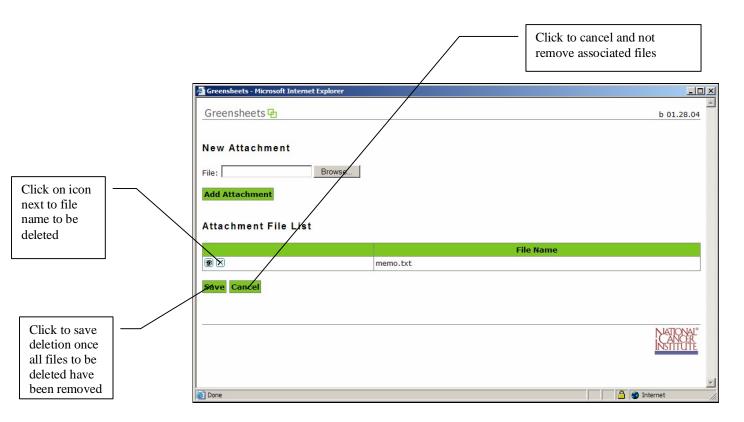
Figure 4-13 File Attachment Window with Attached File

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.
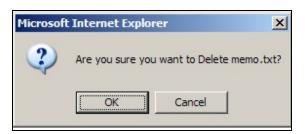
Figure 4-14 Delete Confirmation Box

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

4.1.2.3. 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 (Figure 4-15 below).
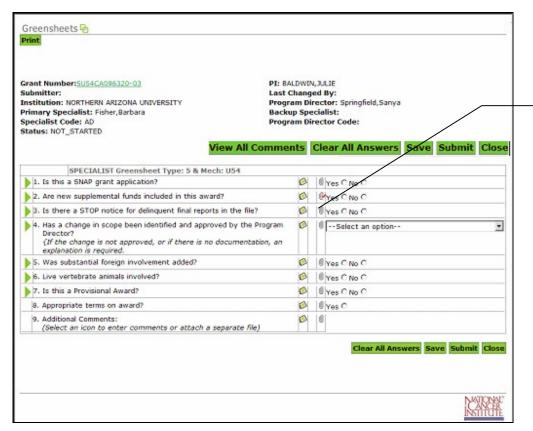
Figure 4-15 Viewing an Attached File

2. Click on the View File icon (👁) located on the row of the file to be viewed.
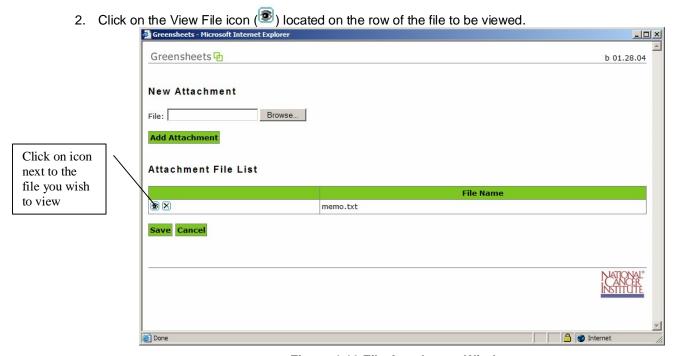
Figure 4-16 File Attachment Window

3. The system will present a File Download Box that will prompt you to either open the file or save it to your local machine.
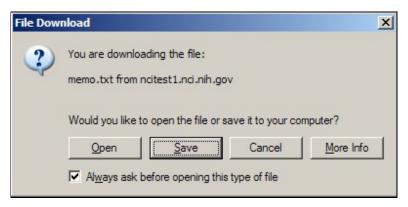
Figure 4-17 File Download Box

    a. Select "Open" to open the 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 application and open it with the appropriate software for the file type.
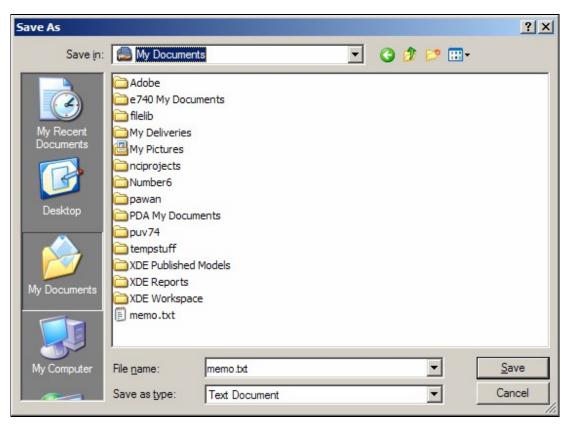
Figure 4-18 Save as Dialogue Box

  c. Select "Cancel" to return to the Attachment File List without viewing the file.

4.1.3. Entering and Viewing Comments

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

4.1.3.1. 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.

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

Input Comment text here

Figure 4-19 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 ().

4.1.3.2. Viewing Comments

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

4.1.3.2.1. 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.

Click icon to open an existing comment and to close comment box after reviewing

Read/edit comment text
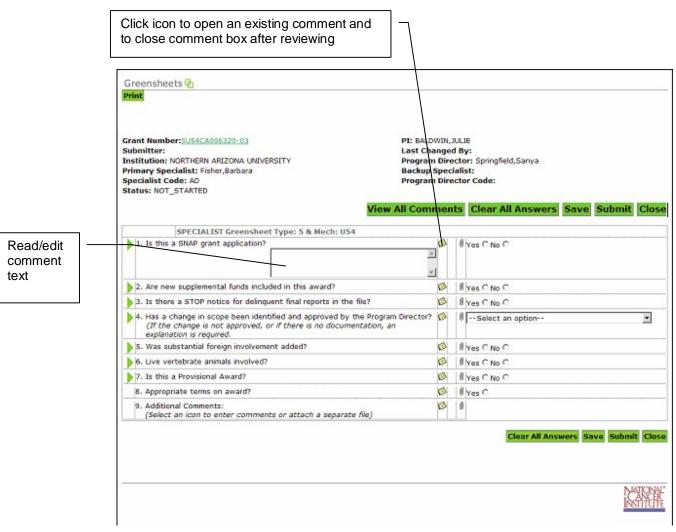
Figure 4-20 Viewing an Individual Comment

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.

4.1.3.2.2. 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.

Click icon to open comments for all questions
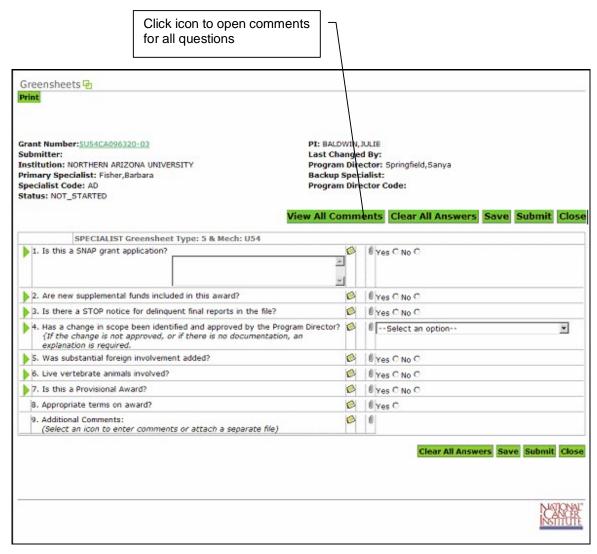
Figure 4-21   Viewing All Comments

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" 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.

4.1.4. 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**). The system will automatically reset the form, but
    there will not be any verification message.
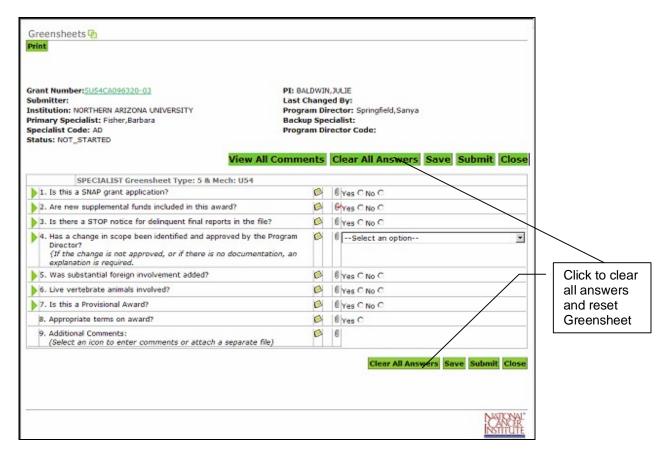
Figure 4-22   Clearing a Greensheet

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.
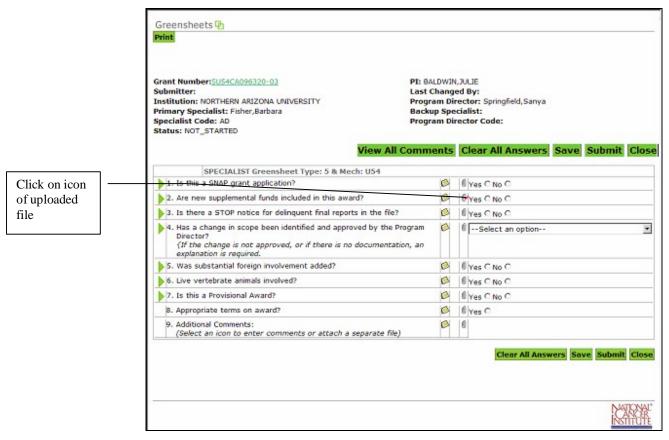
Figure 4-23   Removing an Attached File

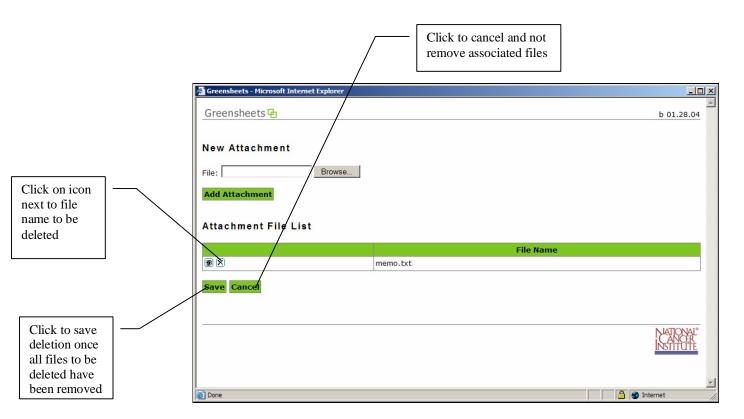3.   Click on the Delete File icon (⊠) located on the row of the file to be deleted.

Click to cancel and not
remove associated files

Click on icon
next to file
name to be
deleted

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

Figure 4-24 File Attachment Window with Attached File

4. 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.
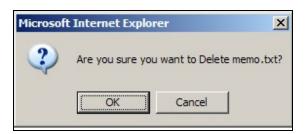
Figure 4-25 Delete Confirmation Box

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

4.2. *Saving a Greensheet*

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

1. 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
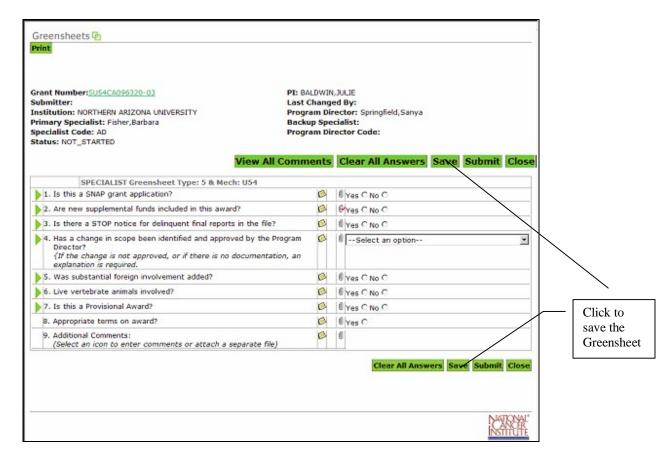
Figure 4-26 Saving a Greensheet

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.

4.3. *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 GAB Control system. To submit a Greensheet:

1. Save the Greensheet (see "Saving a Greensheet").

2. Click on the "Submit" (**Submit**) button which is found at the bottom right hand corner of the Greensheet.
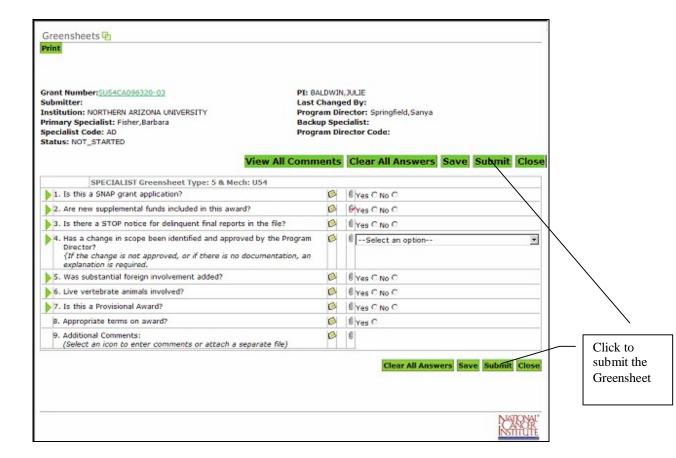
Figure 4-27 Submitting a Greensheet

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").
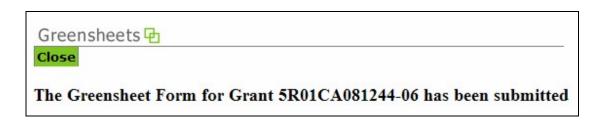
Figure 4-28 Submission Confirmation Message

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
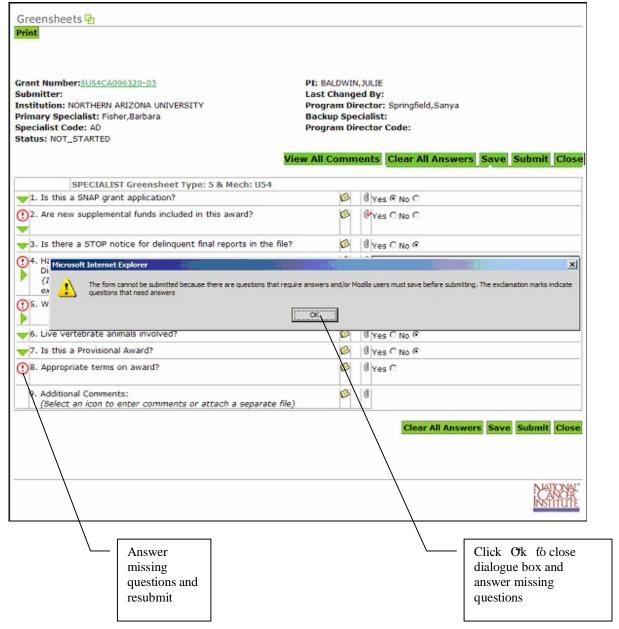

Figure 4-29   Validating a Greensheet

4.4. *Closing a Greensheet*

To close a Greensheet:

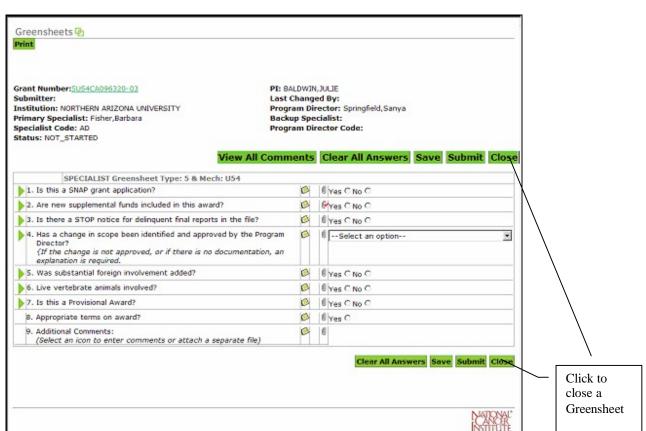1. Navigate to the bottom right-hand corner of the form and click on the "Close" button (**Close**).

Figure 4-30 Closing a Greensheet

2. A Close Confirmation box is displayed.

Figure 4-31 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.
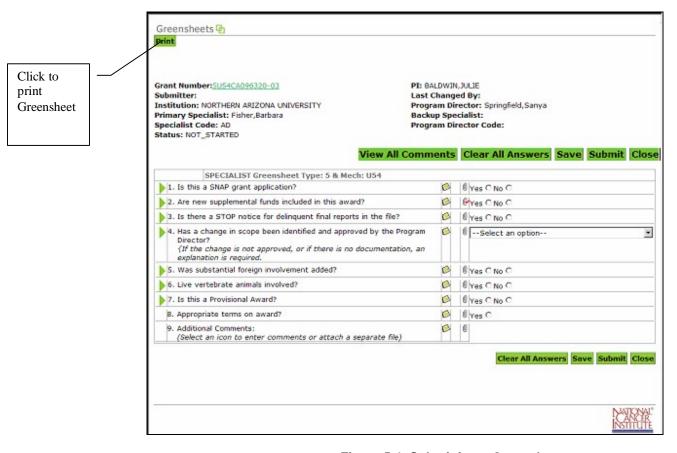

Figure 5-1 Submitting a Greensheet

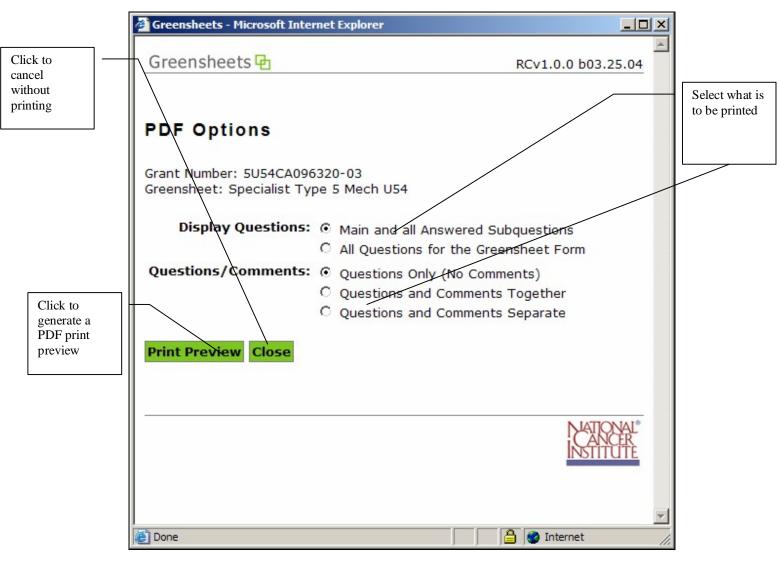3. The Print Selection window (Figure 3-21) opens.

Figure 5-2 Print Selection Window

4. Select the appropriate format and click the "Print Preview" button. This will generate a pdf version of the Greensheet.
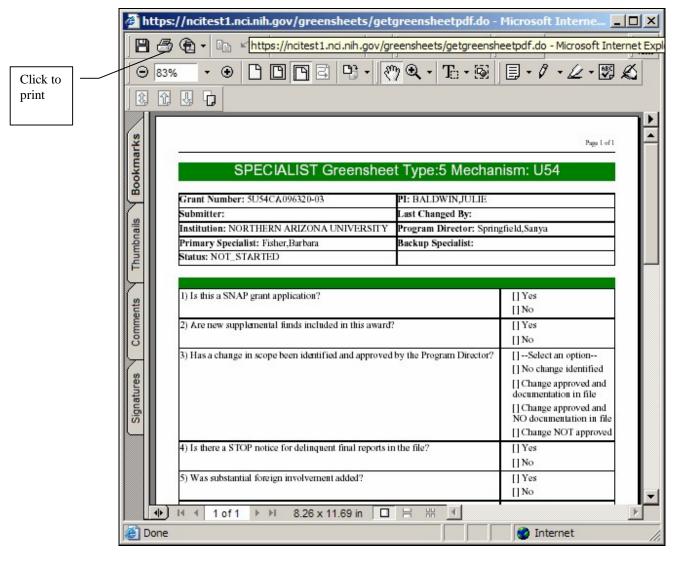
Figure 5-3 PDF Print Preview

5. To print the form, click on the print icon (🖨) in the toolbar within the new window, which will open a print dialogue box.
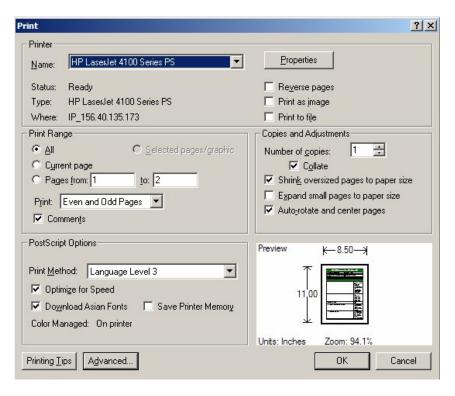
Figure 5-4 Print Dialogue Box

6. Select the appropriate printer name and click "OK" to print the form.
7. 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 need to edit a Greensheet, they must contact the assigned Specialist and ask for the Greensheet to be unlocked.

6.1. *Unlocking a Specialist Greensheet:*

To unlock a Specialist Greensheet:

1. Locate the appropriate Grant and Greensheet in the Specialist Grant List.
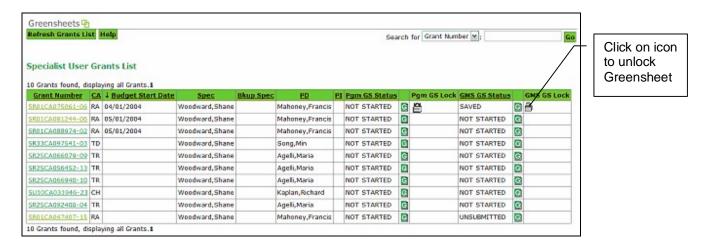2. To unlock a Specialist Greensheet, click on the "Lock" icon (🔒) under the "GMS GS Lock" column.

Figure 6-1 Unlocking a Specialist Greensheet

3. The "Lock icon" will change, and the status of the selected Greensheet will be set to "Unsubmitted".
4. If the request to unlock was made by another Specialist, the user must notify the requestor that the form has been unlocked.

6.2. *Unlocking a Program Greensheet:*

To unlock a Specialist Greensheet:

1. Locate the appropriate Grant and Greensheet in the Specialist Grant List.
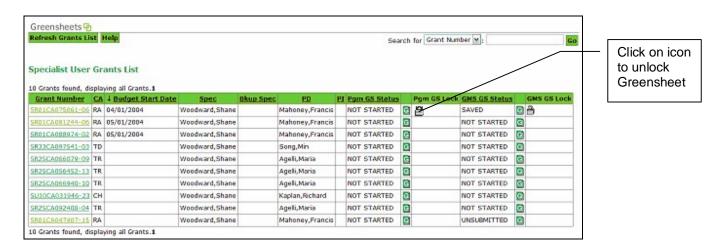2. Click on the "Lock" icon (🔒) under the "PGM GS Lock" column.

Figure 6-2 Unlocking a Program Greensheet

3. The "Lock icon" will change, and the status of the selected Greensheet will be set to "Unsubmitted".
4. The Specialist must notify the Program requestor that the form has been 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.   *Status Icons*

1. **Greensheet Available –** indicates that the Greensheet is available to be worked on. Clicking on this icon will open the Greensheet.

2. **Greensheet Saved –**indicates that the Greensheet has been saved. Clicking on the icon will open the Greensheet**.**

3. **Greensheet Submitted –** indicates that the Greensheet has been submitted and cannot be changed thus it is "locked". Clicking on this icon will open the Greensheet in a read-only state**.**

4. Greensheet Un-submitted – indicates that a previously submitted Greensheet has been "unlocked" by the GAB specialist so that it can be changed. Clicking on this icon will open the Greensheet.

5. **Greensheet Frozen –** indicates that the Award has been made and the Greensheet can no longer be un-submitted and altered. Clicking on this icon will open the Greensheet in a read-only state.

7.2.   *Application Icons*

1. **Add Note Icon**
This Icon is located on the Greensheets form and when clicked will open a comments box next to the specific question. Comments then can be entered into the text box that applies to that specific question. Clicking the icon again will close the comment

2. **Alert Icon**
This icon appears on a Greensheet form to indicate which question or questions in a Greensheet have been left unanswered upon submission. It will appear next to the questions that need to be answered.

3. **Attach File Icon**
This icon appears on a Greensheet form and allows users to attach a file to the Greensheet question associated with the icon.

4. **Delete File Icon**
This icon appears on the file attachment page. Clicking on this Icon will remove the file that is currently attached to the specific question.

5. **File Attached Icon**
This Icon is located next to questions on Greensheet pages that have files associated with them. Clicking on this Icon will open a page allowing one to manipulate a file that has previously been attached to the Greensheet question this icon is found on. It can be either viewed of deleted by clicking on either the View File Icon or the Delete File Icon.

6. **Lock Icon**
This Icon is located on the Grant List page next to Greensheets Forms that have the status of "submitted" and have been locked. Forms can only be unlocked by Specialists. In order for Program staff to unlock Forms they will need to contact the Specialist related to this form.

7. Note Included Icon

This Icon is located next to questions on Greensheet pages which already have comments associated to them. Clicking on this Icon will open a comments box next to the specific question on the Greensheet where this icon was located. The comments that are present can then be viewed and edited.

8. Open Greensheet Icon

This Icon is located on the Grant List page. Clicking this icon will display the Greensheets form associated with that specific grant. In some cases there may be both a Specialist form and Program form associated with Grant.

9. Print Icon

This Icon is located on the Print Preview window. Clicking this icon will display the print options dialog box allowing the desired print options to be selected.

10. Sub-questions Hide Icon – This icon is located to the left of the question number on the Greensheet and indicates that there are no more sub-questions. Clicking on the icon will collapse the displayed sub-questions.

11. Sub-questions Show Icon – This icon is located to the left of the question number on the Greensheet and indicates that there are possible sub-questions. Clicking on the icon will display all sub-questions.

12. View File Icon

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. This may require the installation of some external viewer if one is not present on the computer being used.