GREENSHEETS

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.

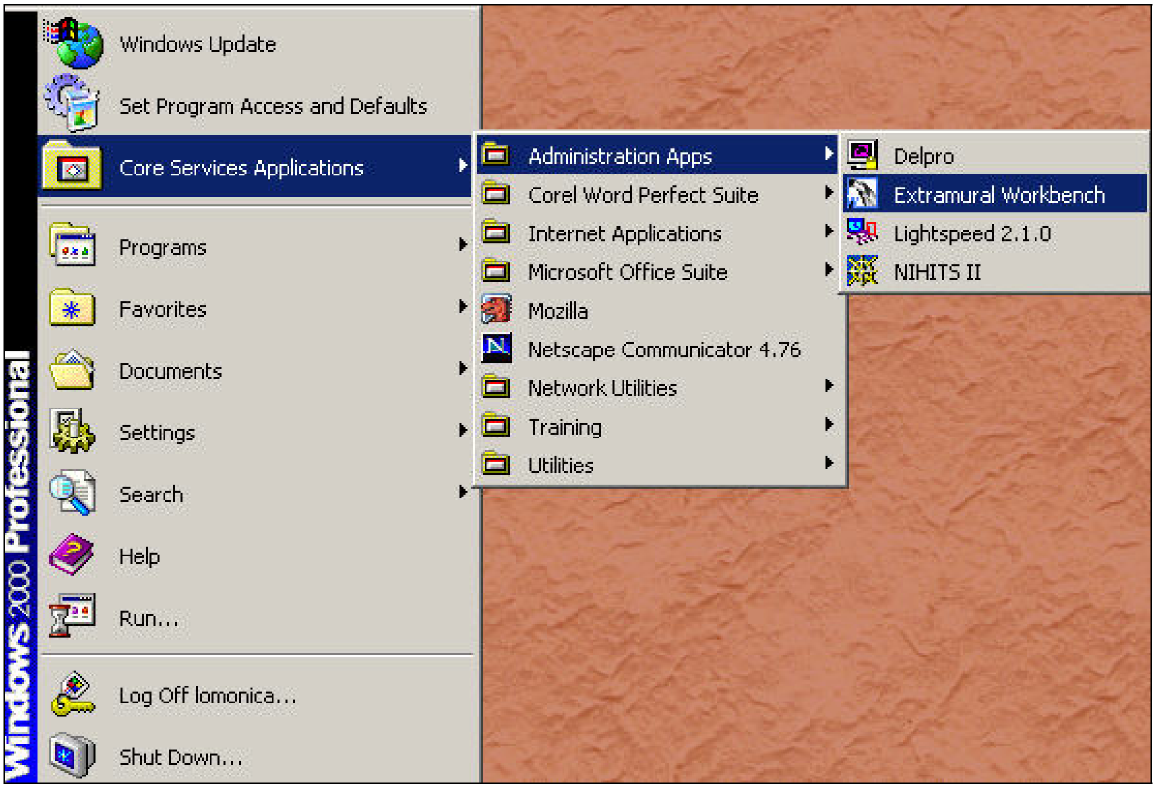


Figure 2-1 Start Menu Options

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.

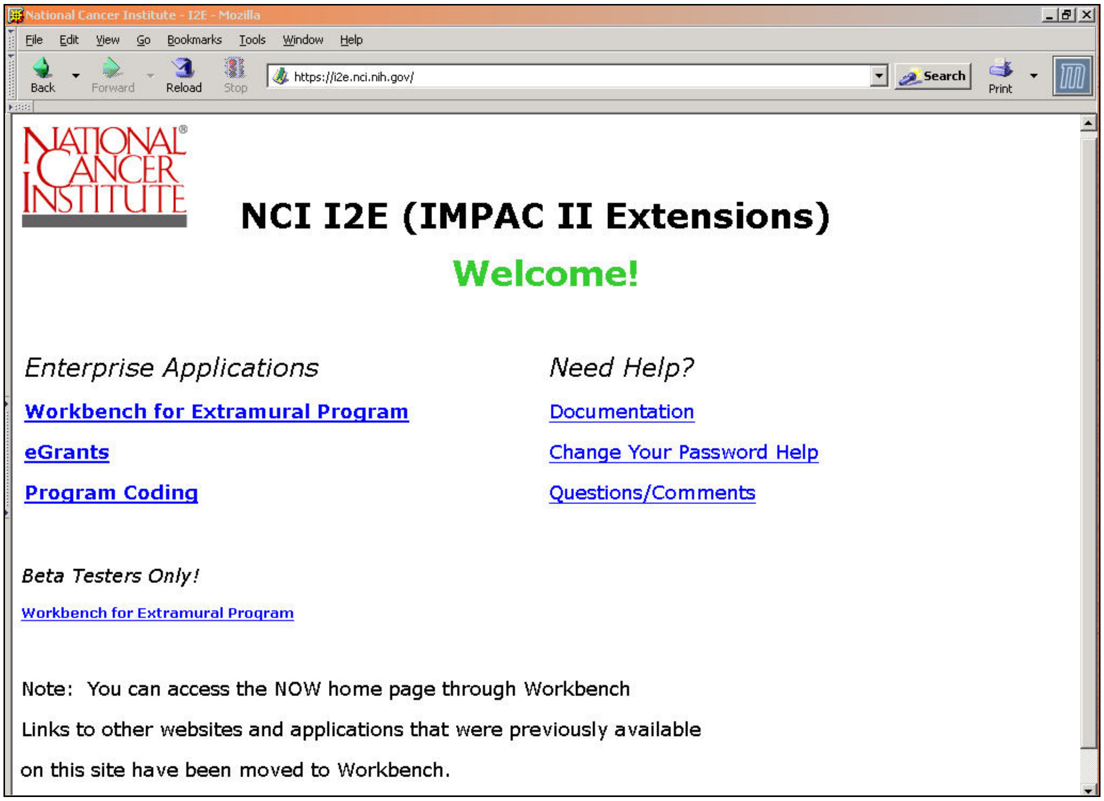


Figure 2-2 The I2E home page screen

2.2. *Launching Greensheets from Workbench*

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

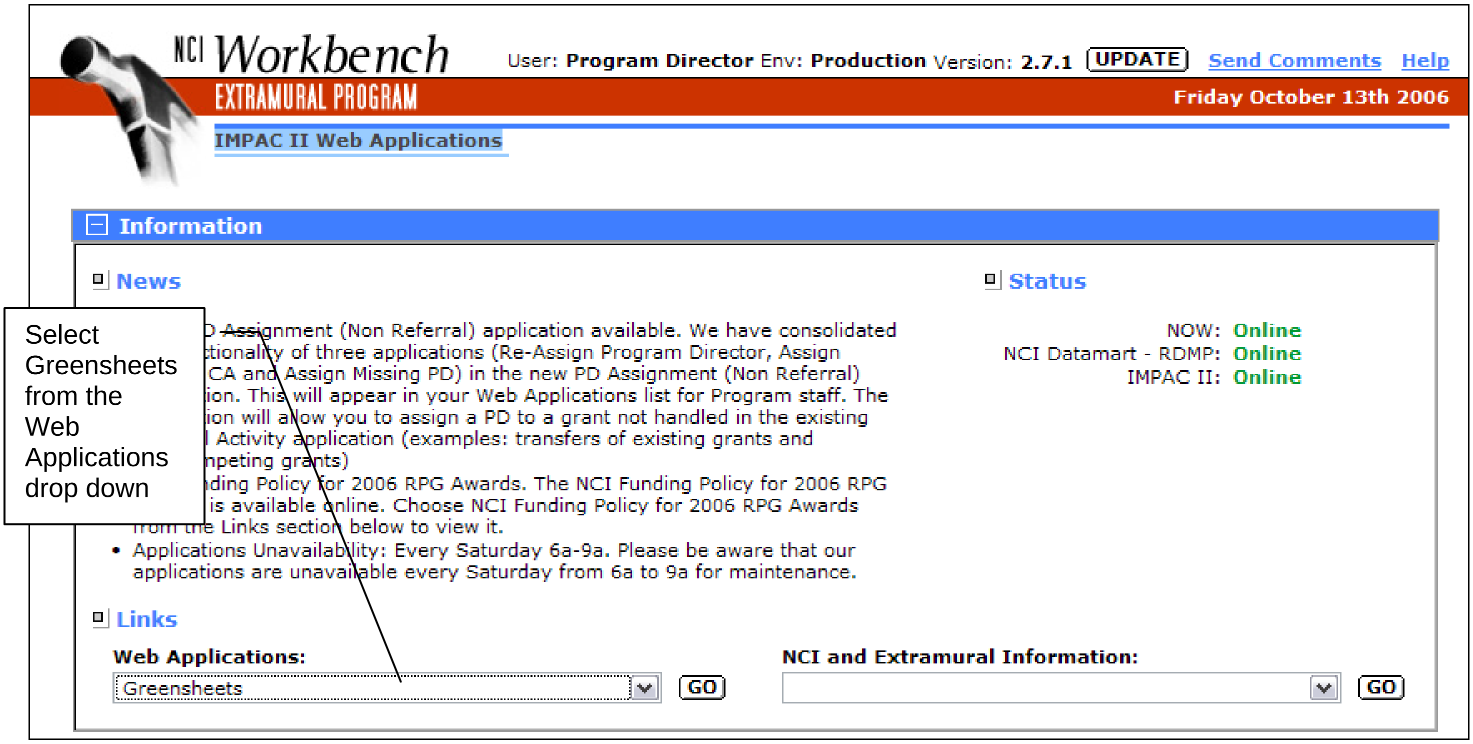


Figure 2-3 Workbench Screen Showing Greensheets Application Selected

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

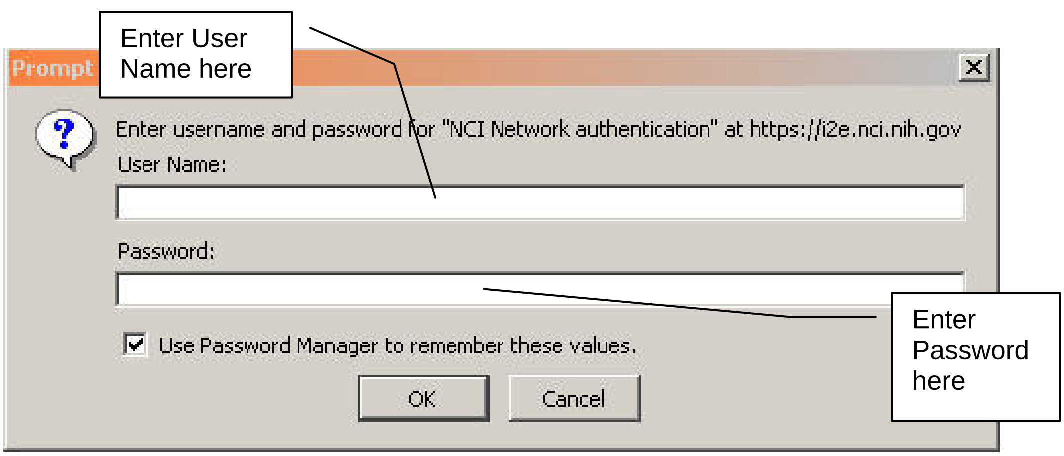


Figure 2-4 Login screen

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 Search Criteria and Preferences*

The Search Criteria provide you the ability to view only the grants of interest to you, as well as to find grants that may not be on your immediate "to do" list if you need.

Preferences are a subset of search criteria that you can save so you won't have to enter them each time you log in to Greensheets. Of course, any time you do a search, you can "override" your saved preferences and specify some additional criteria in order to customize and fine-tune your search results.

The grant list criteria 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).

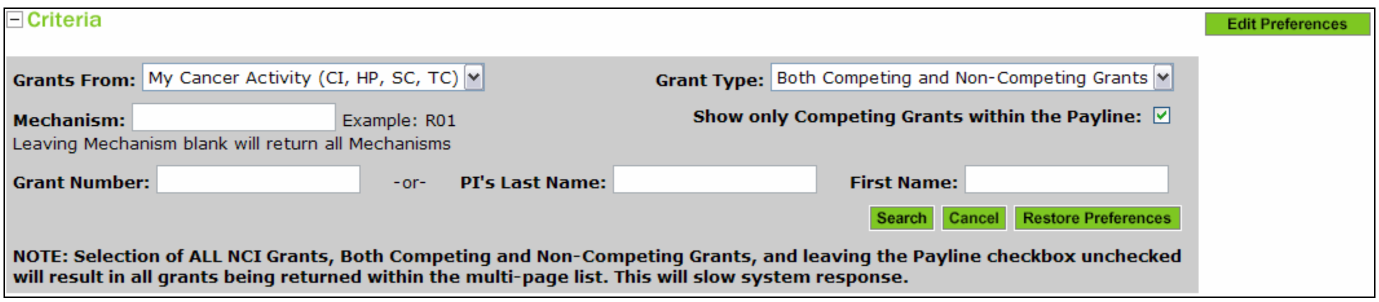


Figure 3-1 Preferences and Criteria

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.

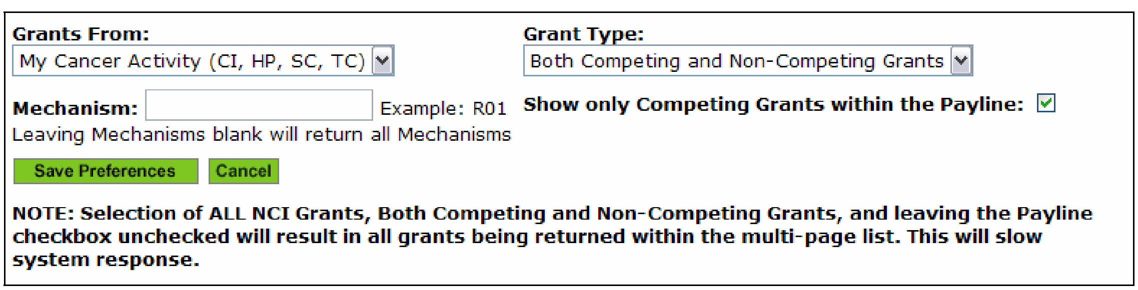


Figure 3-2 Edit Preferences Page

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 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 payline 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.

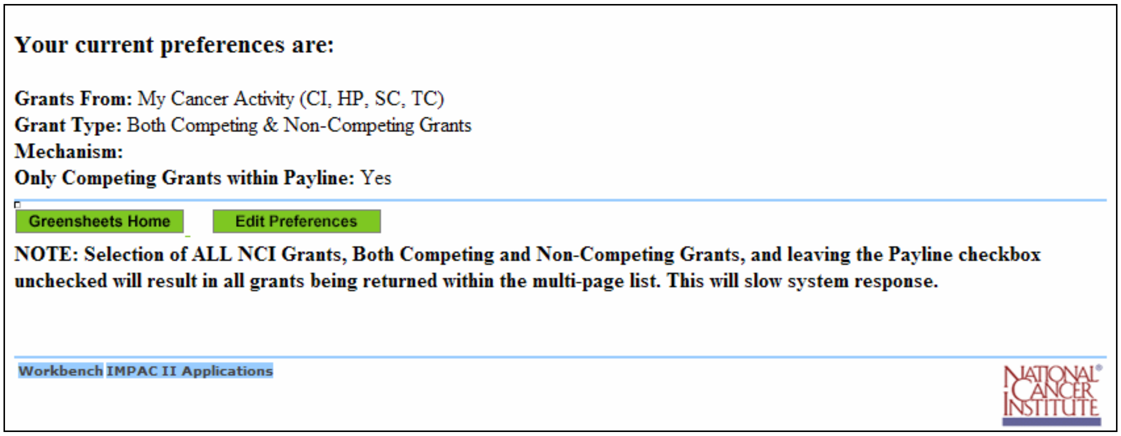


Figure 3-3 Preferences Description Page

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 Search Criteria panel allows you to control what grants you will see in grants list. You can use it to customize your typical grants list slightly, or to search for any grant by its grant number or PI's name.

Figure 3-4 shows the typical Search Criteria panel.

Upon logging in to Greensheets, values for "Grants From", "Grant Type", Mechanism, and "Show only Competing Grants within the Payline" search criteria will be set according to your saved preferences, or – if you did not save them – according to default values typical for your role (described in the beginning of this section). You can always change these values to run a customized search. Results of a search based on these criteria will be automatically restricted to grants with not-yet-submitted greensheets from the current fiscal year.

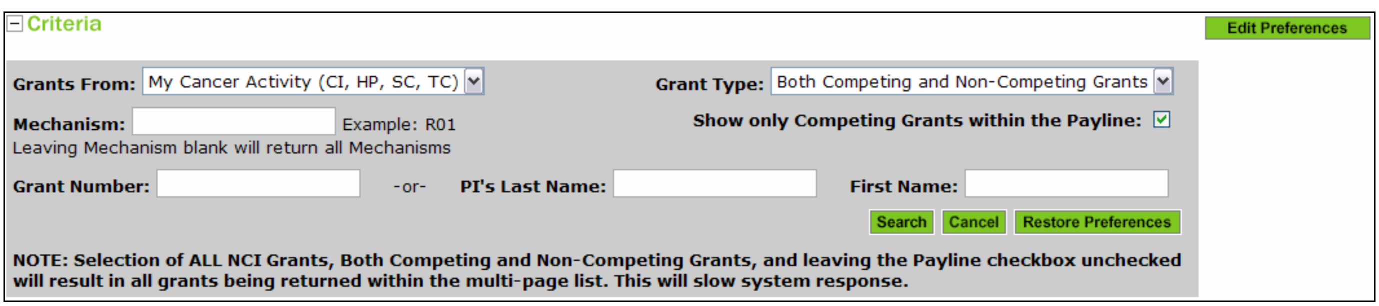


Figure 3-4 Criteria

Additionally, you can search for a specific grant by grant number and/or Principal Investigator's name. This type of search will find grants/greensheets where the "search criteria" you entered matches the beginning of the PI's last name or first name, or any fragment of the grant number, and will return grants even with frozen and submitted greensheets, as well as grants from prior fiscal years. Note, though, that other search criteria will also be applied, so if you are looking (by grant number or PI's name) for a grant that is or was outside of your portfolio and Cancer Activity, be sure that search criteria

"Grants From", "Grant Type", "Mechanism", and "Show only Competing Grants within the Payline" are not set to values that are too restrictive.

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

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*

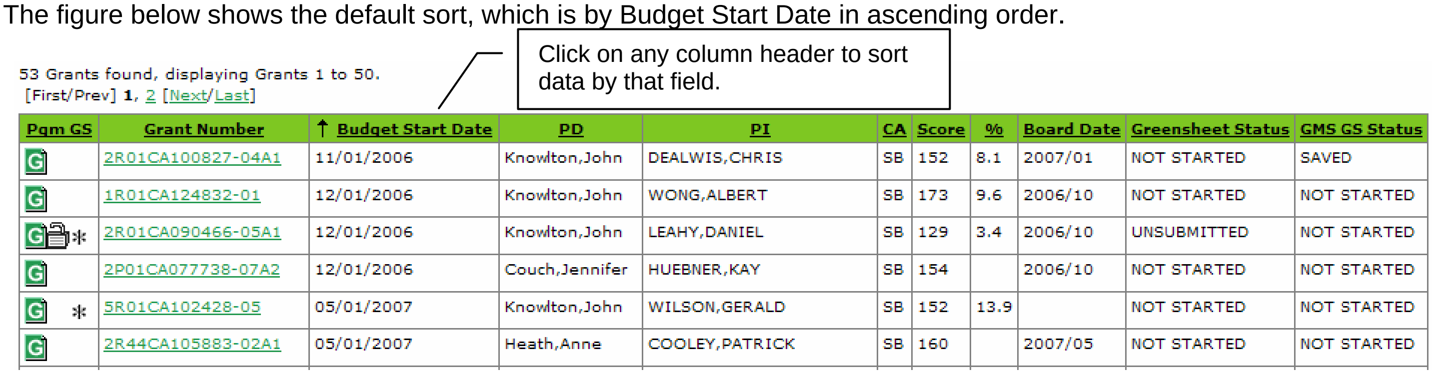
To allow a user to quickly locate a grant, all columns are sortable in either descending or ascending order by clicking on the underlined column name. An arrow next to the column header indicates that it is the current sort field; the direction of the arrow indicates the sort order, ascending (↓) or 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.

Sort order of most columns is alphabetical or numerical, but if you choose to sort the list according to "greensheet status icons" (the first column, "Pgm GS" – see section 7 "Icon Glossary"), the system will display the grants in the following order:

1. Not started, "on control"
2. Saved, "on control"
3. Unsubmitted
4. Saved, not "on control"
5. Not started, not "on control"
6. Submitted
7. Frozen.

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



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

Pgm GS	Grant Number	↑ Budget Start Date	PD	PI	CA	Score	%	Board Date	Greensheet Status	GMS GS Status
	2R01CA100827-04A1	11/01/2006	Knowlton,John	DEALWIS,CHRIS	SB	152	8.1	2007/01	NOT STARTED	SAVED
	1R01CA124832-01	12/01/2006	Knowlton,John	WONG,ALBERT	SB	173	9.6	2006/10	NOT STARTED	NOT STARTED
	2R01CA090466-05A1	12/01/2006	Knowlton,John	LEAHY,DANIEL	SB	129	3.4	2006/10	UNSUBMITTED	NOT STARTED
	2P01CA077738-07A2	12/01/2006	Couch,Jennifer	HUEBNER,KAY	SB	154		2006/10	NOT STARTED	NOT STARTED
	5R01CA102428-05	05/01/2007	Knowlton,John	WILSON,GERALD	SB	152	13.9		NOT STARTED	NOT STARTED
	2R44CA105883-02A1	05/01/2007	Heath,Anne	COOLEY,PATRICK	SB	160		2007/05	NOT STARTED	NOT STARTED

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.

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

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
G	5R21CA099089-02*	06/01/2004	Rasooly,Avraham	FERRARI,MAURO	TD	177			NOT STARTED	NOT STARTED
G	1R01CA098219-01A2	06/01/2004	Spalholz,Barbara	KANTETI,PRASAD	CB	215	38.0	2004/05	NOT STARTED	NOT STARTED
G	5R01CA090644-03*	06/01/2004	Minasian,Lori	HOSKINS,CAROL	CM	175	20.7		NOT STARTED	NOT STARTED
G	5R13CA096469-02*	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
G	5R33CA099136-02*	06/01/2004	Johnson,George	LAM,KIT	BP	149			NOT STARTED	NOT STARTED
G	5R01CA077474-05*	06/01/2004	Hallock,Yali	MIYAMOTO,SHIGEKI	BP	210			NOT STARTED	NOT STARTED
G	5U01CA091220-04*	06/01/2004	Arya,Suresh	POLUNOVSKY,VITALY	BP	188			NOT STARTED	NOT STARTED
G	5U01CA091290-04*	06/01/2004	Hallock,Yali	ESKO,JEFFREY	BP	147			NOT STARTED	NOT STARTED
G	5R01CA090563-04*	06/01/2004	Johnson,George	SIMON,JULIAN	BP	263			NOT STARTED	NOT STARTED
G	5R01CA087630-05*	06/01/2004	Hallock,Yali	NEEDHAM,DAVID	BP	157			NOT STARTED	NOT STARTED
G	5R01CA101983-02*	06/01/2004	Arya,Suresh	SEDWICK,W	BP	161	17.3		NOT STARTED	NOT STARTED
G	5U01CA091178-04*	06/01/2004	Johnson,George	ROSEN,NEAL	BP	165			NOT STARTED	NOT STARTED
G	5R01CA052814-15*	06/01/2004	Hallock,Yali	NITISS,JOHN	BP	196			NOT STARTED	NOT STARTED
G	5U01CA091295-04*	06/01/2004	Dubois,Ronald	MOREMEN,KELLEY	BP	169			NOT STARTED	NOT STARTED
G	5R01CA092366-02*	06/01/2004	Wolpert,Mary	GERWECK,LEO	BP	173	7.3		NOT STARTED	NOT STARTED
G	5R01CA096616-02*	06/01/2004	Johnson,George	REBBAA,ABDELHADI	BP	213	13.8		NOT STARTED	NOT STARTED
G	5R01CA098605-02*	06/01/2004	Johnson,George	WEINTRAUB,STEVEN	BP	166	9.1		NOT STARTED	NOT STARTED
G	5R01CA092090-02*	06/01/2004	Dubois,Ronald	BOTCHKAREV,VLADIMIR	BP	152	6.8		NOT STARTED	NOT STARTED
G	1R43CA110815-01	06/01/2004		MANDECKI,WLODEK	BP	160		2004/05	NOT STARTED	NOT STARTED
G	5R01CA098194-02*	06/01/2004	Hallock,Yali	FRANZEN,STEFAN	BP	165	12.1		NOT STARTED	NOT STARTED
G	5R01CA091901-04*	06/01/2004	Hallock,Yali	ROHR,JURGEN	BP	175			NOT STARTED	NOT STARTED
G	5U19CA050771-15*	06/01/2004	Dubois,Ronald	Hecht,Sidney	BP	204			NOT STARTED	NOT STARTED
G	5R01CA089636-05*	06/01/2004	Johnson,George	RONINSON,IGOR	BP	173			NOT STARTED	NOT STARTED
G	5R01CA078743-08*	06/01/2004	Dubois,Ronald	LIU,Jun	BP	129	0.7		NOT STARTED	NOT STARTED
G	5R01CA090744-04*	06/01/2004	Johnson,George	PENNING,TREVOR	BP	171			NOT STARTED	NOT STARTED
G	5R01CA064697-07*	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
G	5R21CA099089-02*	06/01/2004	Rasooly,Avraham	FERRARI,MAURO	TD	177			NOT STARTED	NOT STARTED
G	1R01CA098219-01A2	06/01/2004	Spalholz,Barbara	KANTETI,PRASAD	CB	215	38.0	2004/05	NOT STARTED	NOT STARTED
G	5R01CA090644-03*	06/01/2004	Minasian,Lori	HOSKINS,CAROL	CM	175	20.7		NOT STARTED	NOT STARTED
G	5R13CA096469-02*	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.

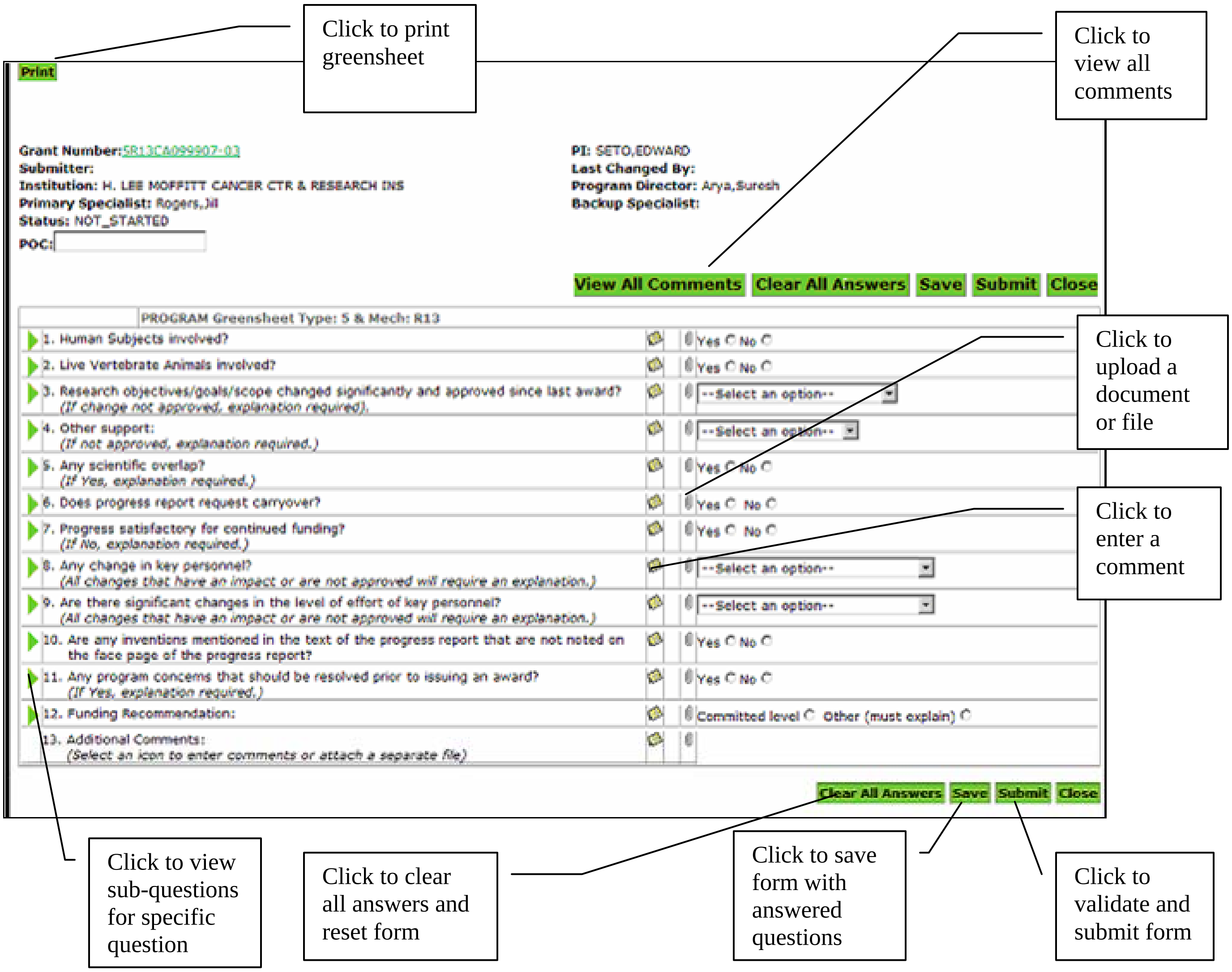


Figure 4-1 Sample Greensheet Form

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.

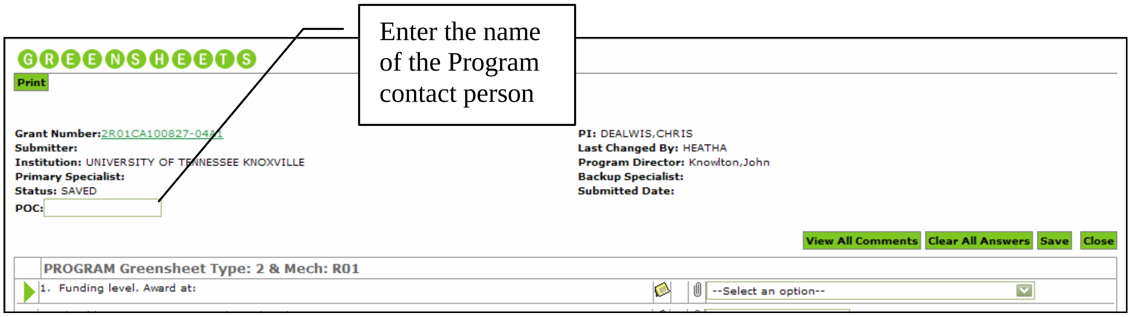


Figure 4-2 Entering Program Point of Contact information

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

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.

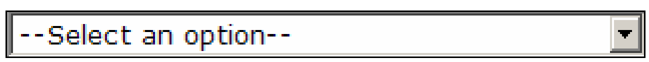


Figure 4-4 Example of a Drop Down List

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

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).

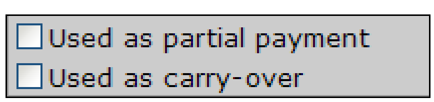


Figure 4-6 Example of Check Boxes

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.

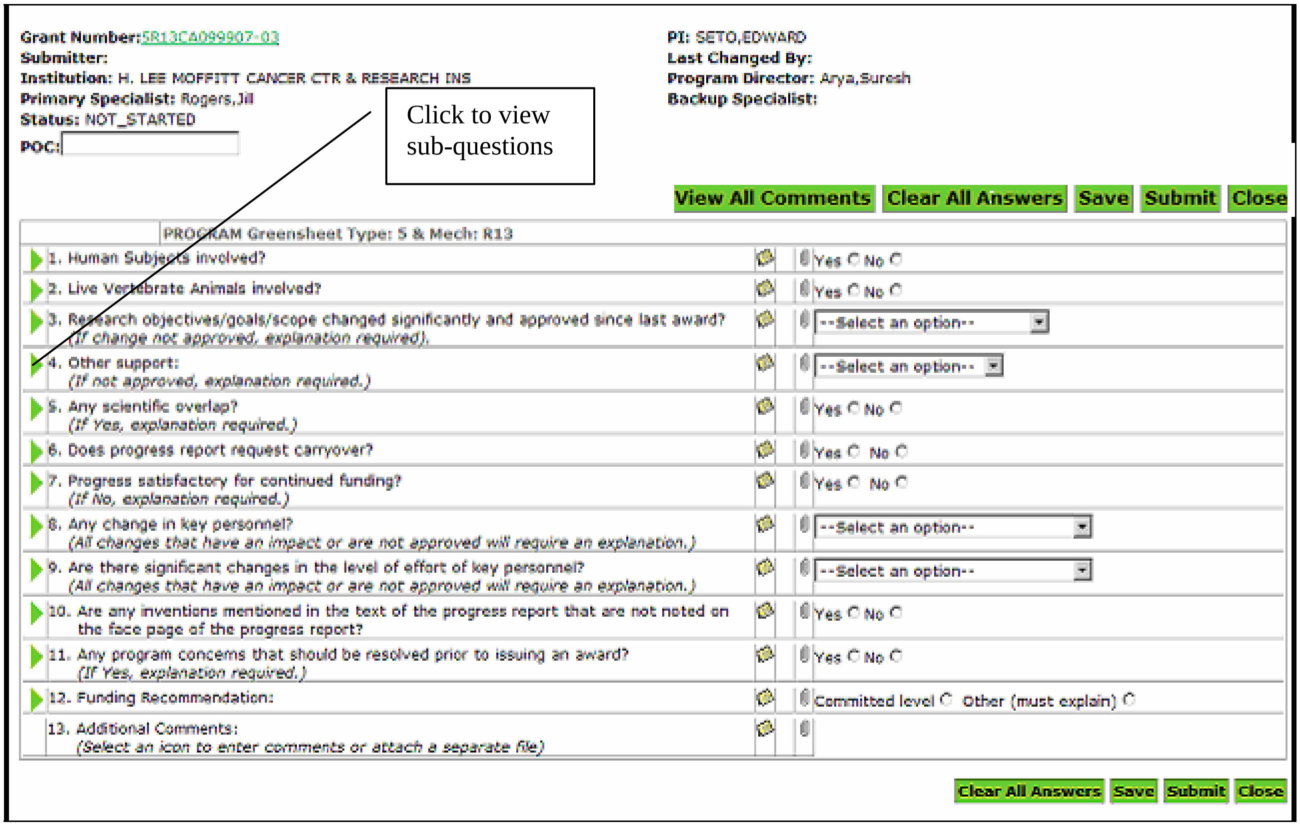


Figure 4-7 Viewing an Individual Sub-question

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

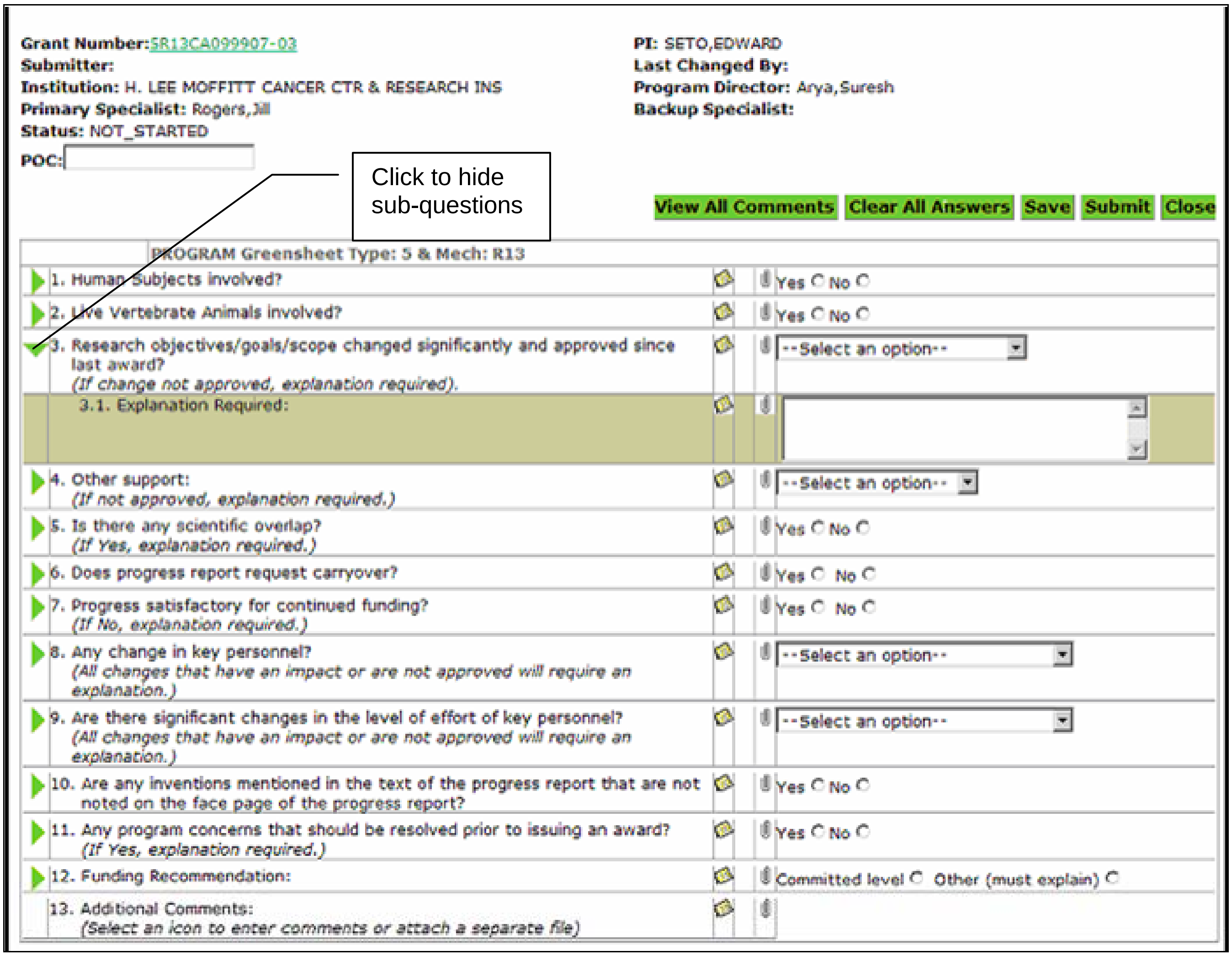


Figure 4-8 Hiding an Individual Sub-question

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.

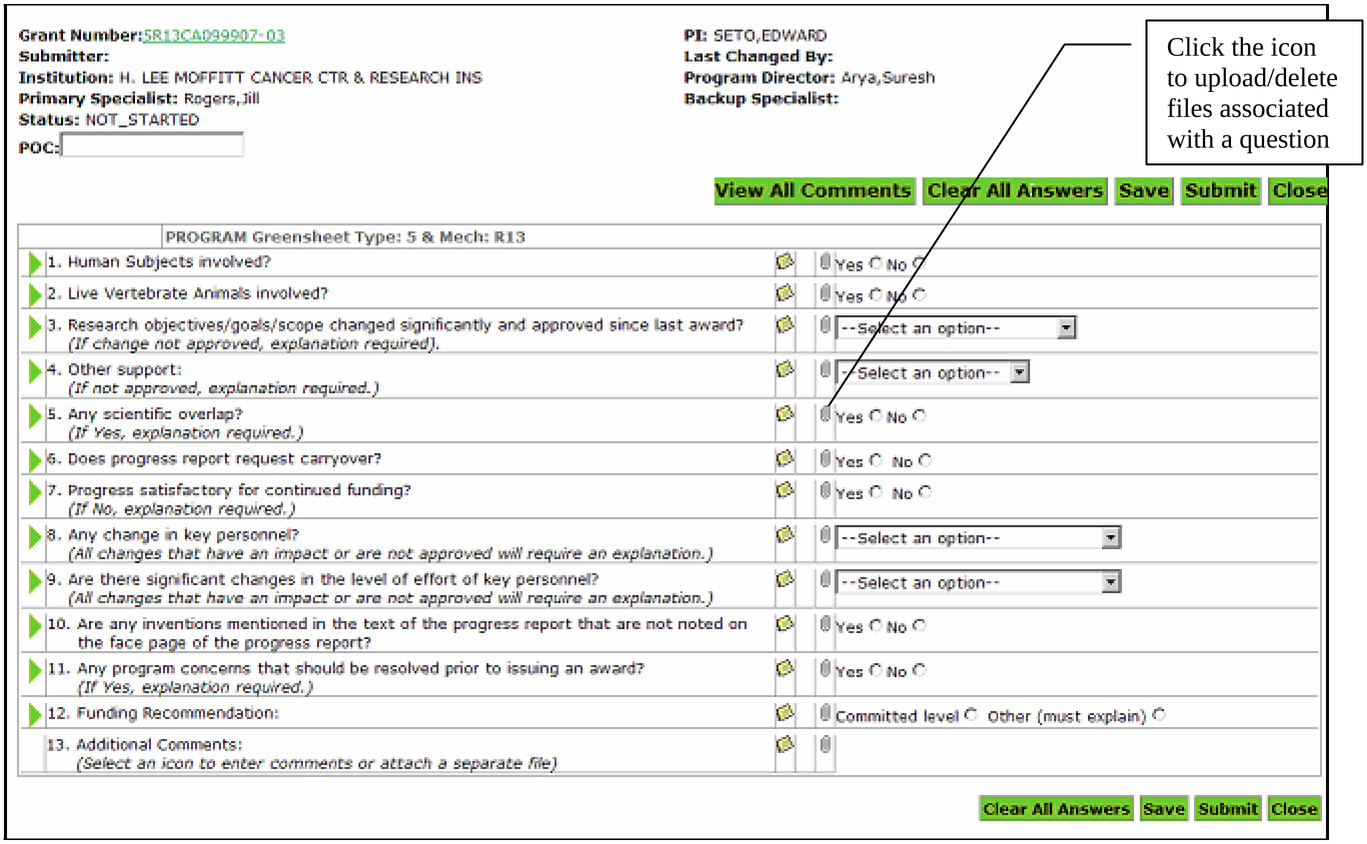


Figure 4-9 File Upload

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.

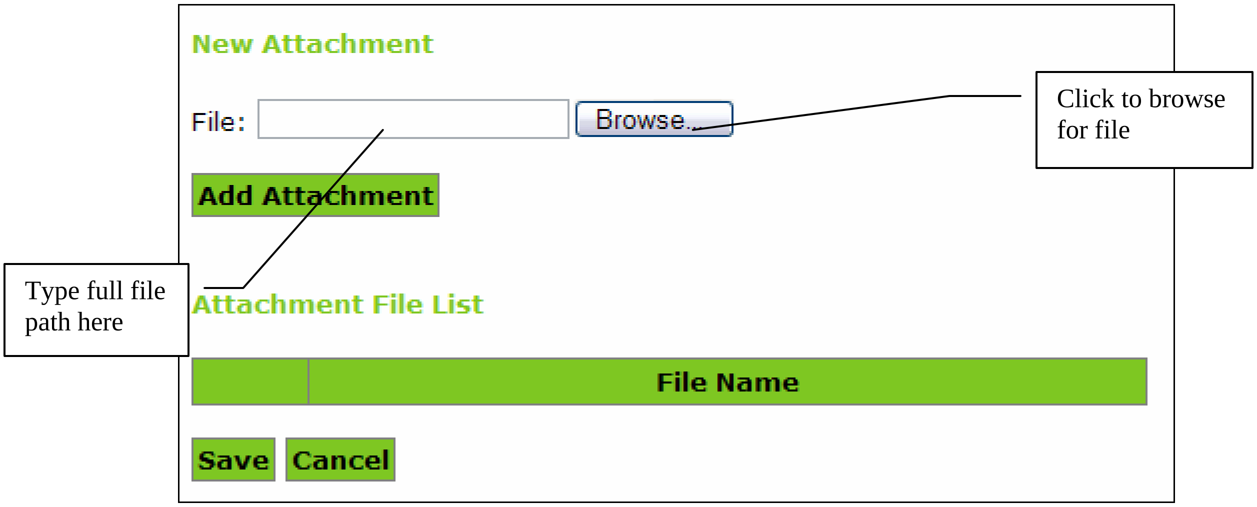


Figure 4-10 File Attachment Window

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

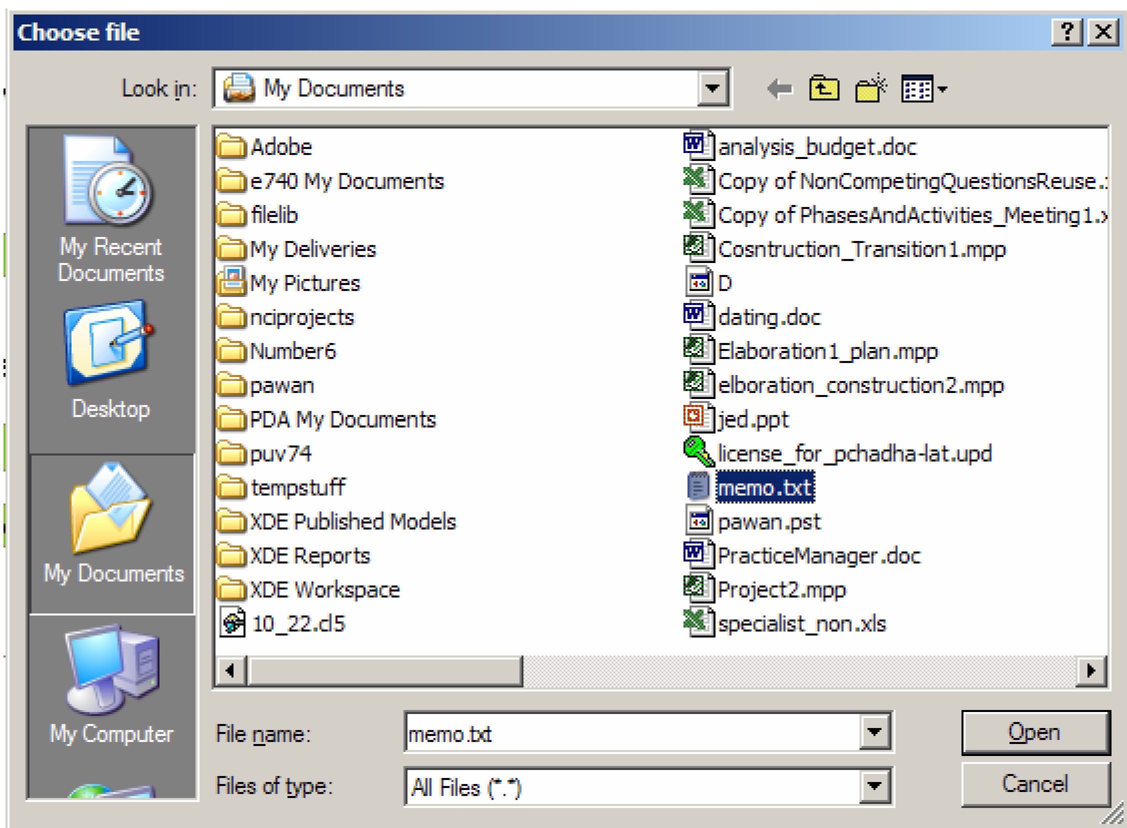


Figure 4-11 Choose File Window

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

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

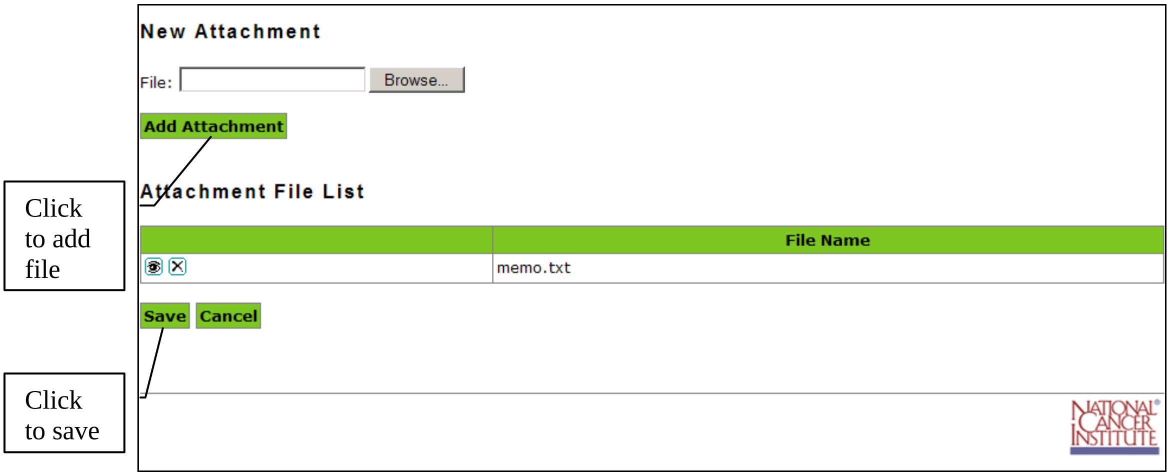


Figure 4-12 File Attachment Window

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.

4.2.2.2. 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.

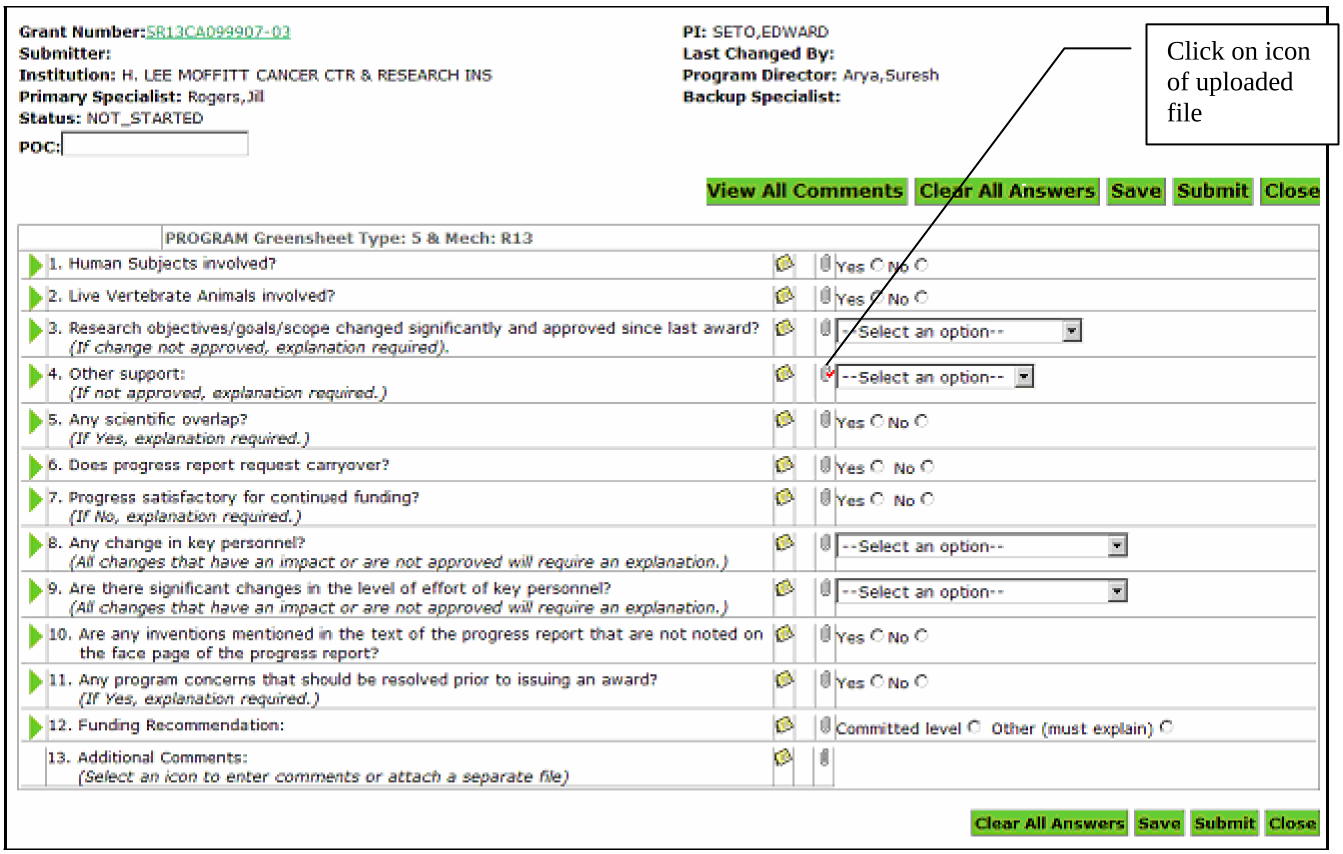


Figure 4-13 Removing an Attached File

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.

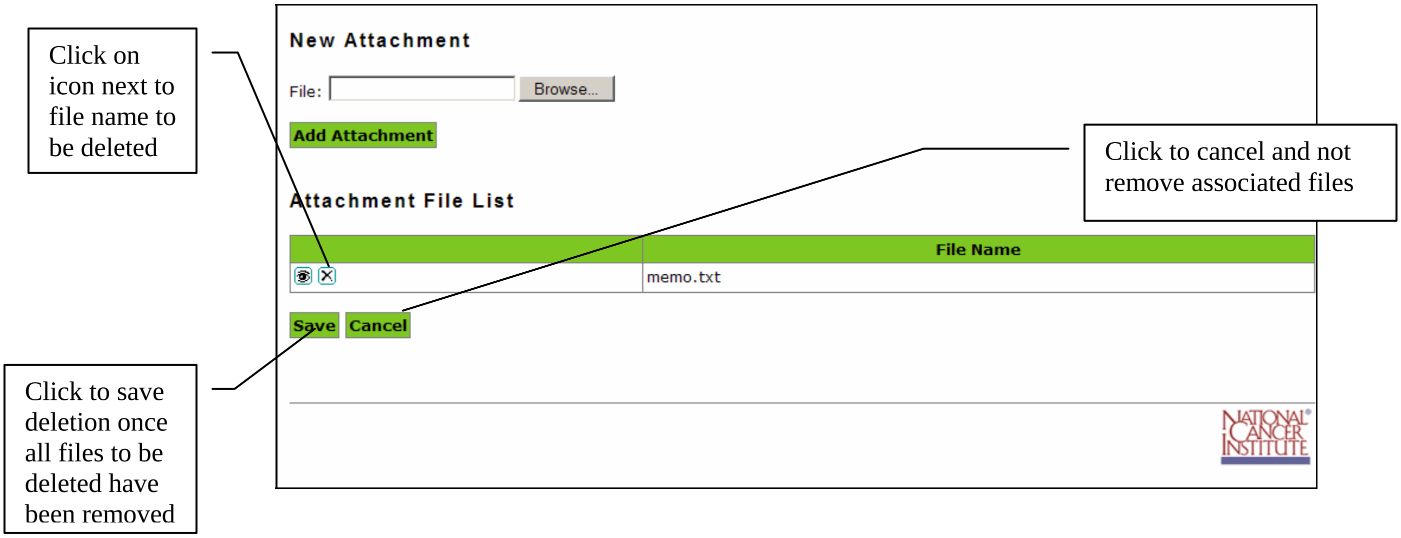


Figure 4-14 File Attachment Window with Attached File

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.

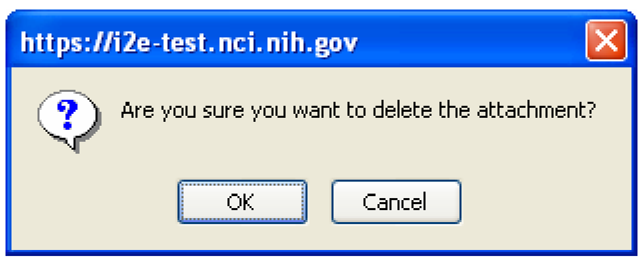


Figure 4-15 Delete Confirmation Box

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.

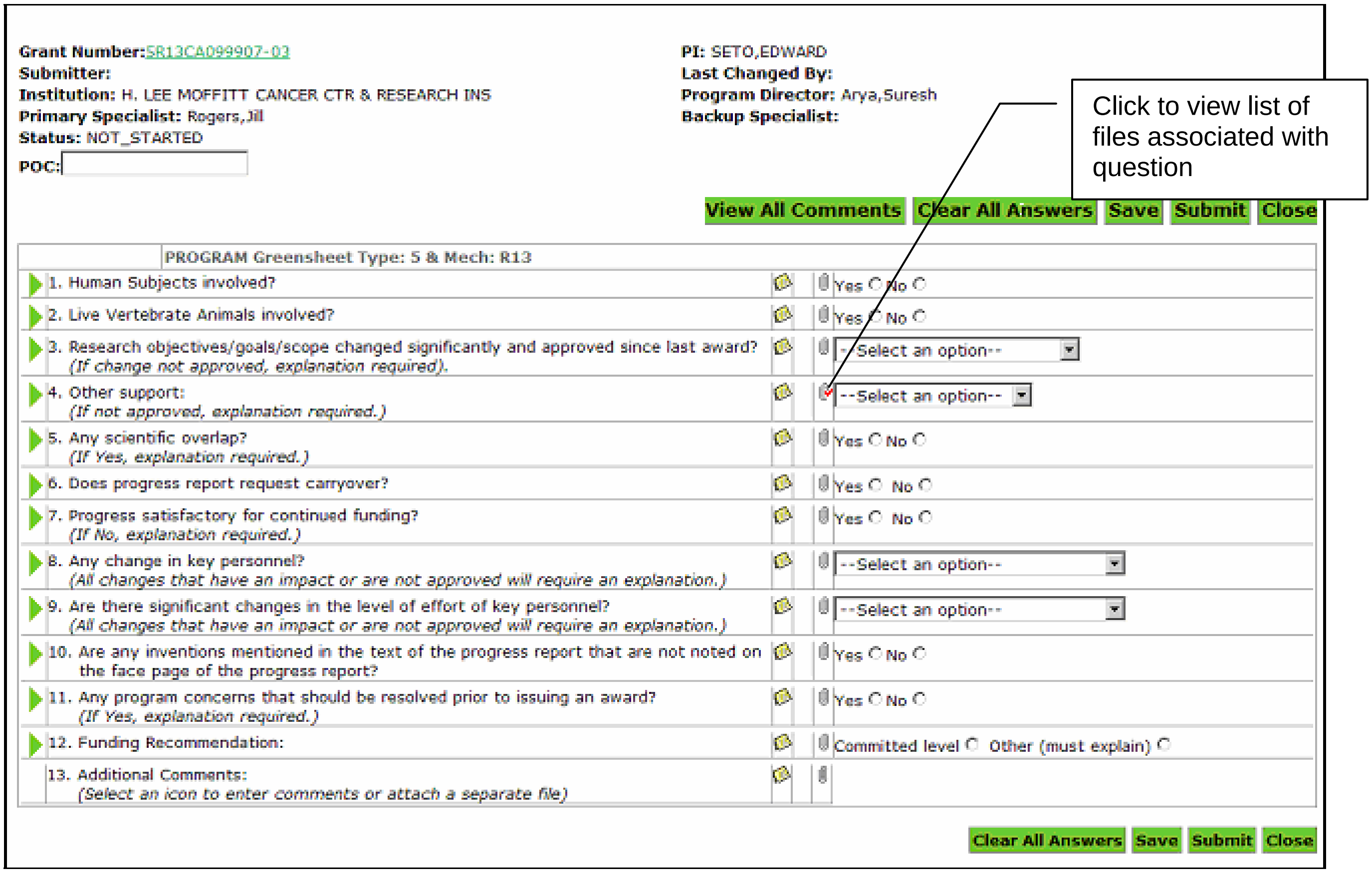


Figure 4-16 Viewing an Attached File

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

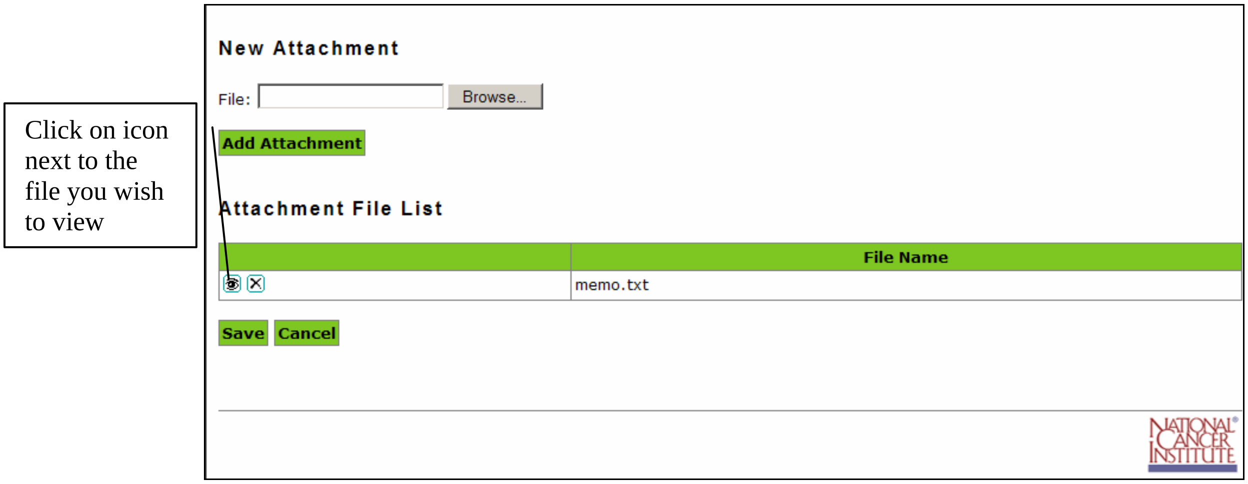


Figure 4-17 File Attachment Window

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

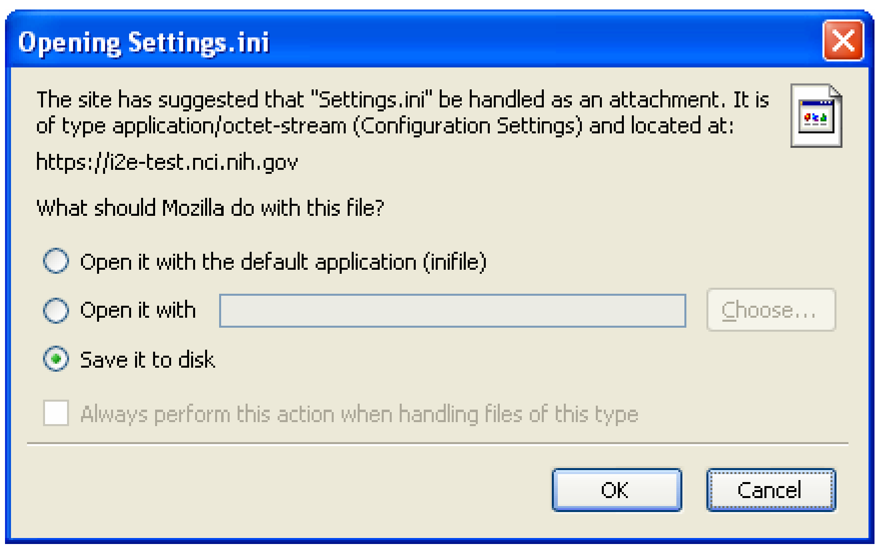


Figure 4-18 File Download Box

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.

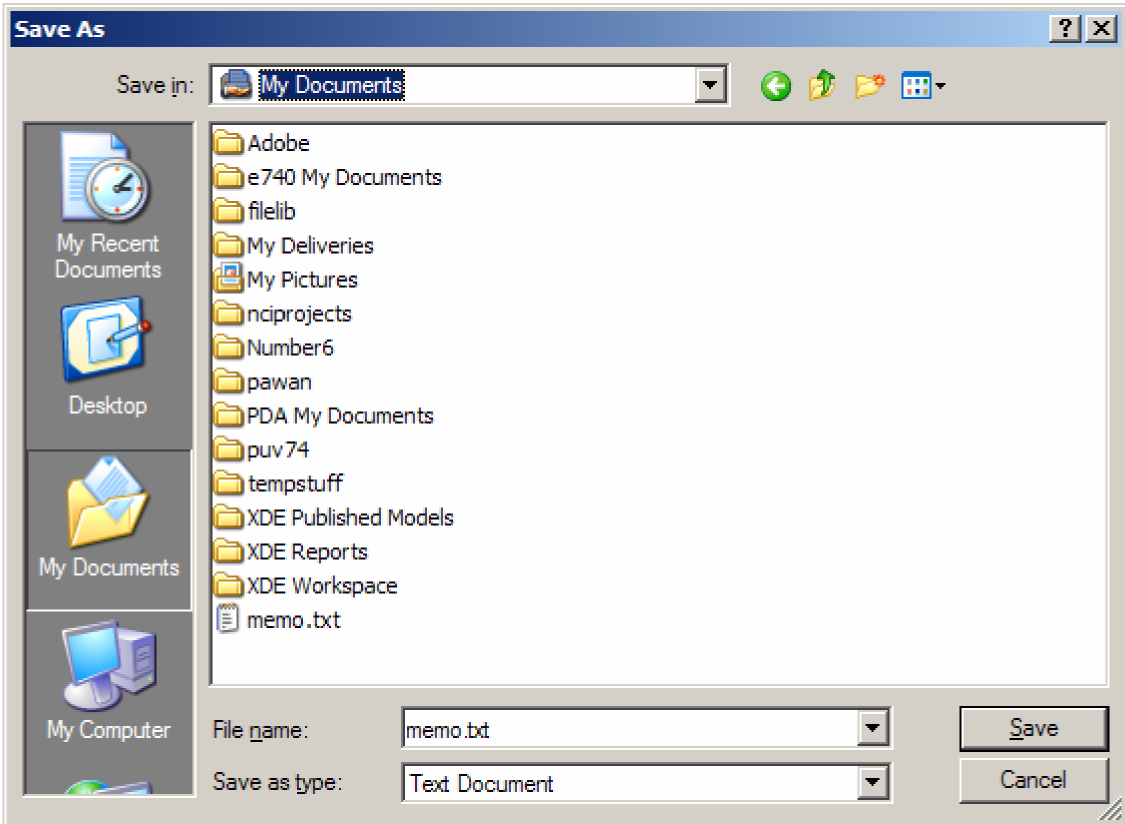


Figure 4-19 Save as Dialogue Box

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.

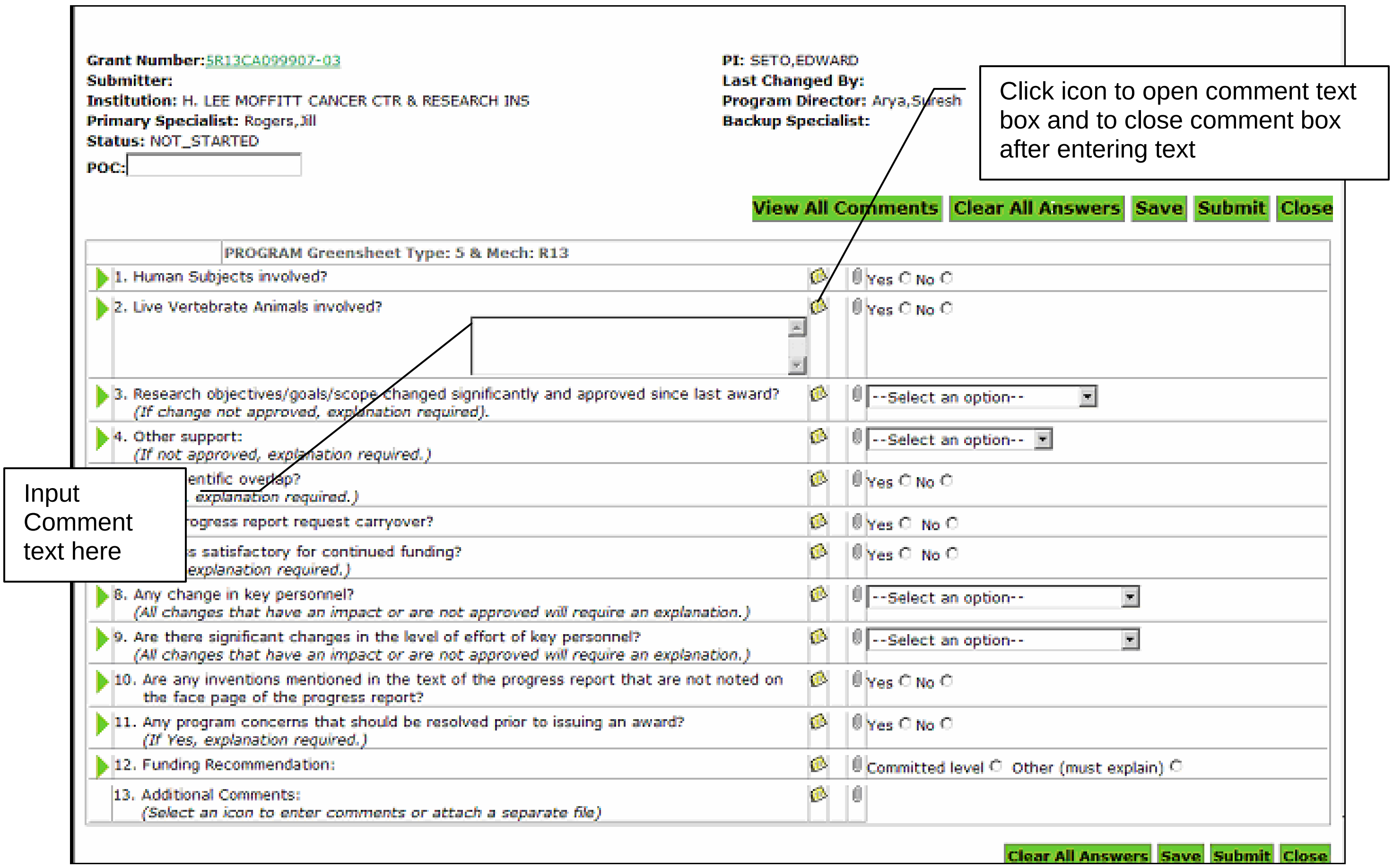


Figure 4-20 Entering a Comment

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.

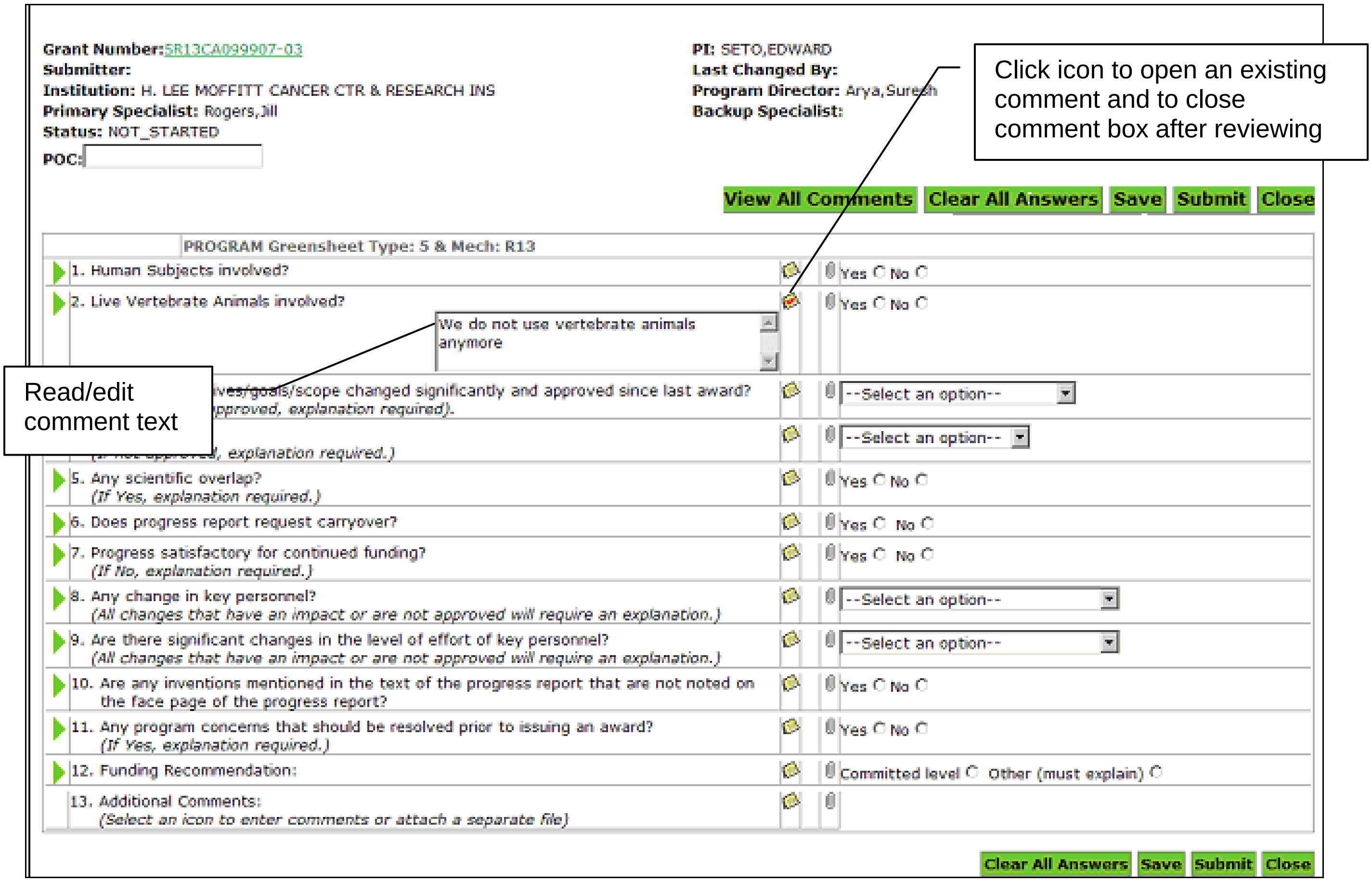


Figure 4-21 Viewing an Individual Comment

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.

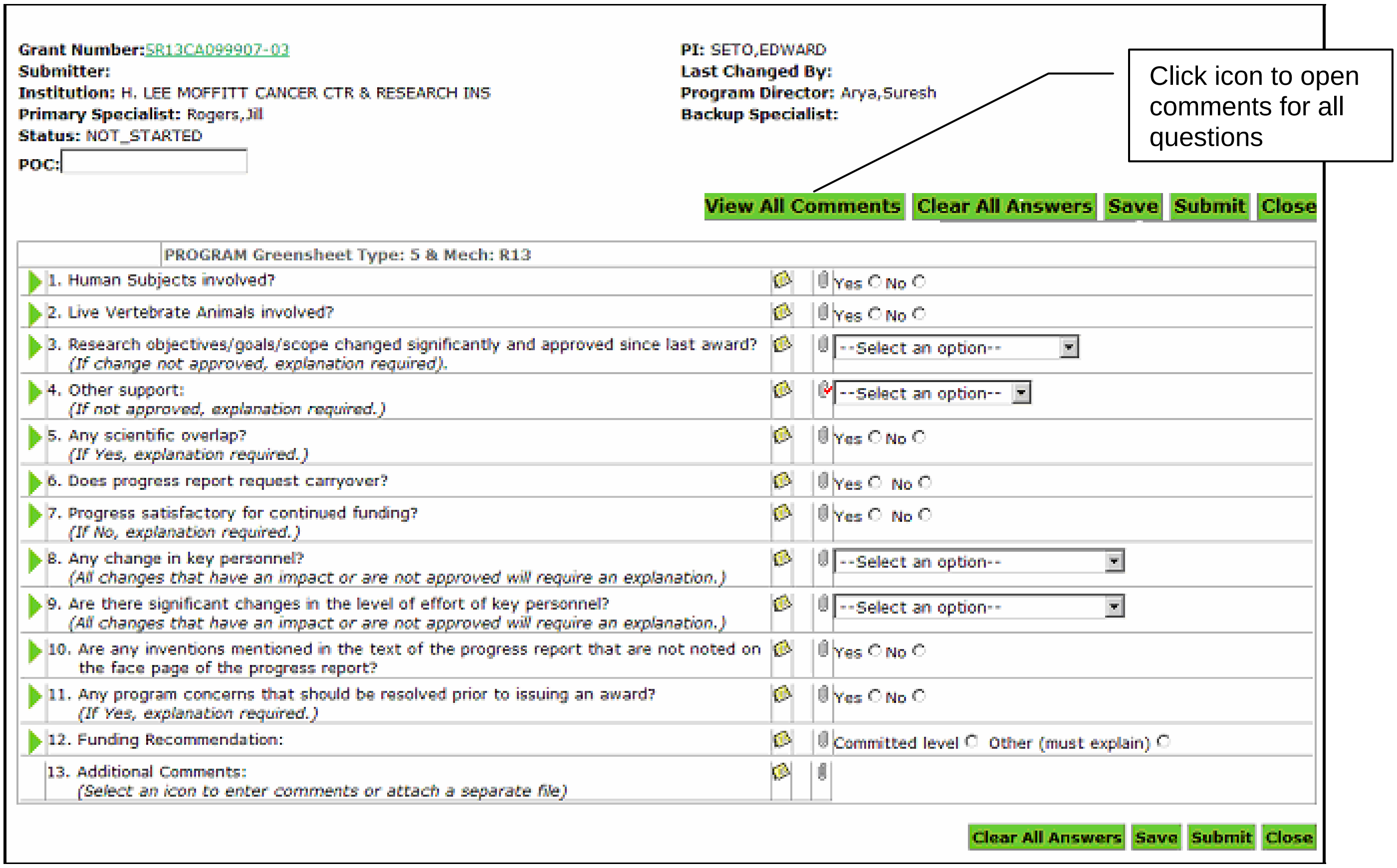


Figure 4-22 Viewing All Comments

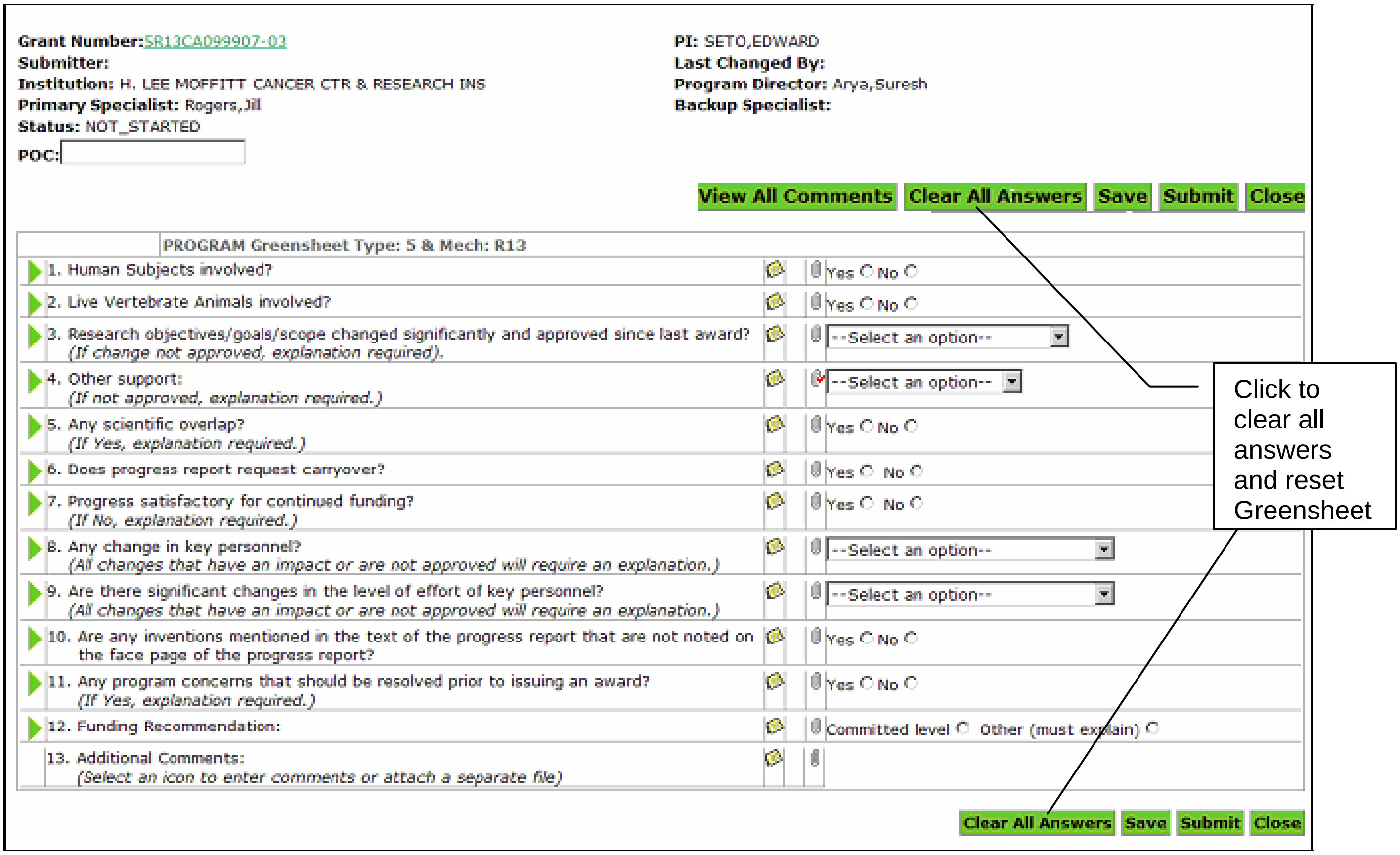
2. Depending on access rights, a user may edit the comments.
3. To close all comments, Navigate to the top of the questions and click on the “Hide all Comments” button (Hide All Comments), which replaces the “View All Comments” button. When all comments are hidden, the “View All Comments” button is shown; 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: 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 ○ No ○
2. Live Vertebrate Animals involved?	Yes ○ 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.)*	Yes ○ No ○
6. Does progress report request carryover?	Yes ○ No ○
7. Progress satisfactory for continued funding? *(If No, explanation required.)*	Yes ○ 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?	Yes ○ No ○
11. Any program concerns that should be resolved prior to issuing an award? *(If Yes, explanation required.)*	Yes ○ No ○
12. Funding Recommendation:	Committed level ○ Other (must explain) ○
13. Additional Comments: *(Select an icon to enter comments or attach a separate file)*	

Clear All Answers | Save | Submit | Close

Figure 4-23 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.

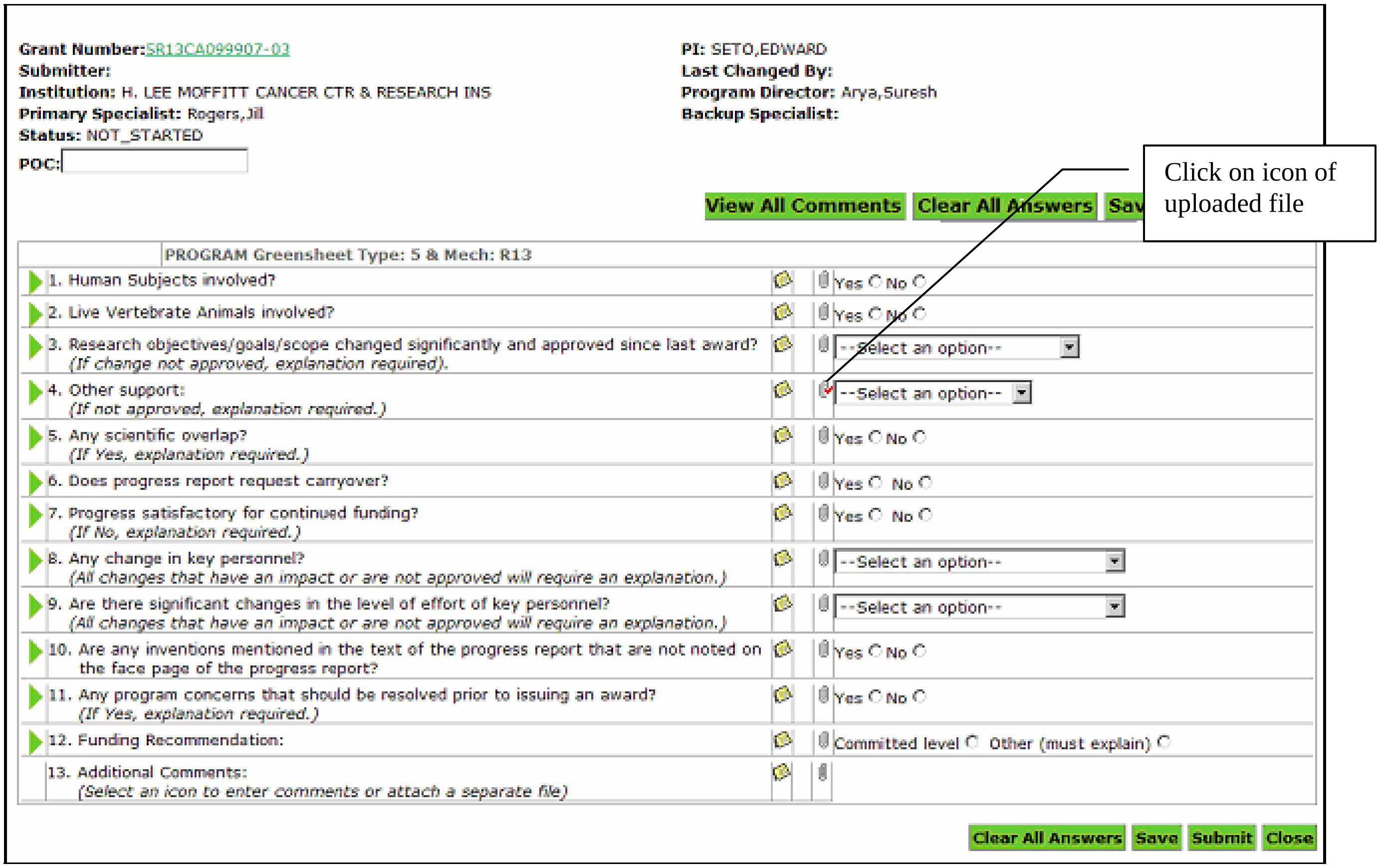


Figure 4-24 Removing an Attached File

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

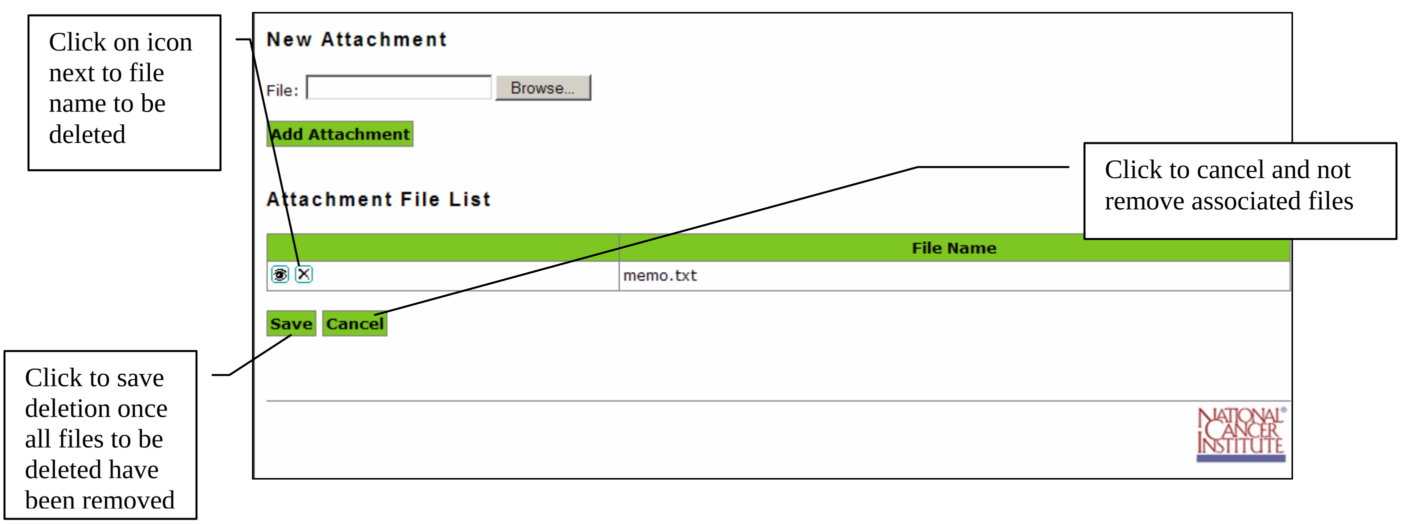


Figure 4-25 File Attachment Window with Attached File

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.

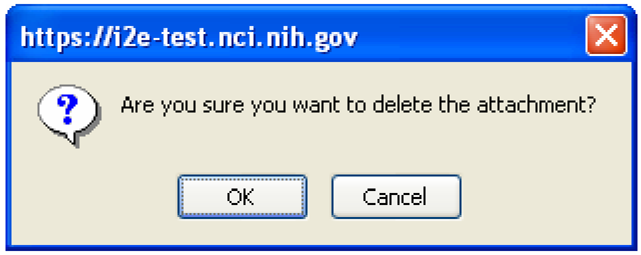


Figure 4-26 Delete Confirmation Box

5. 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:

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.

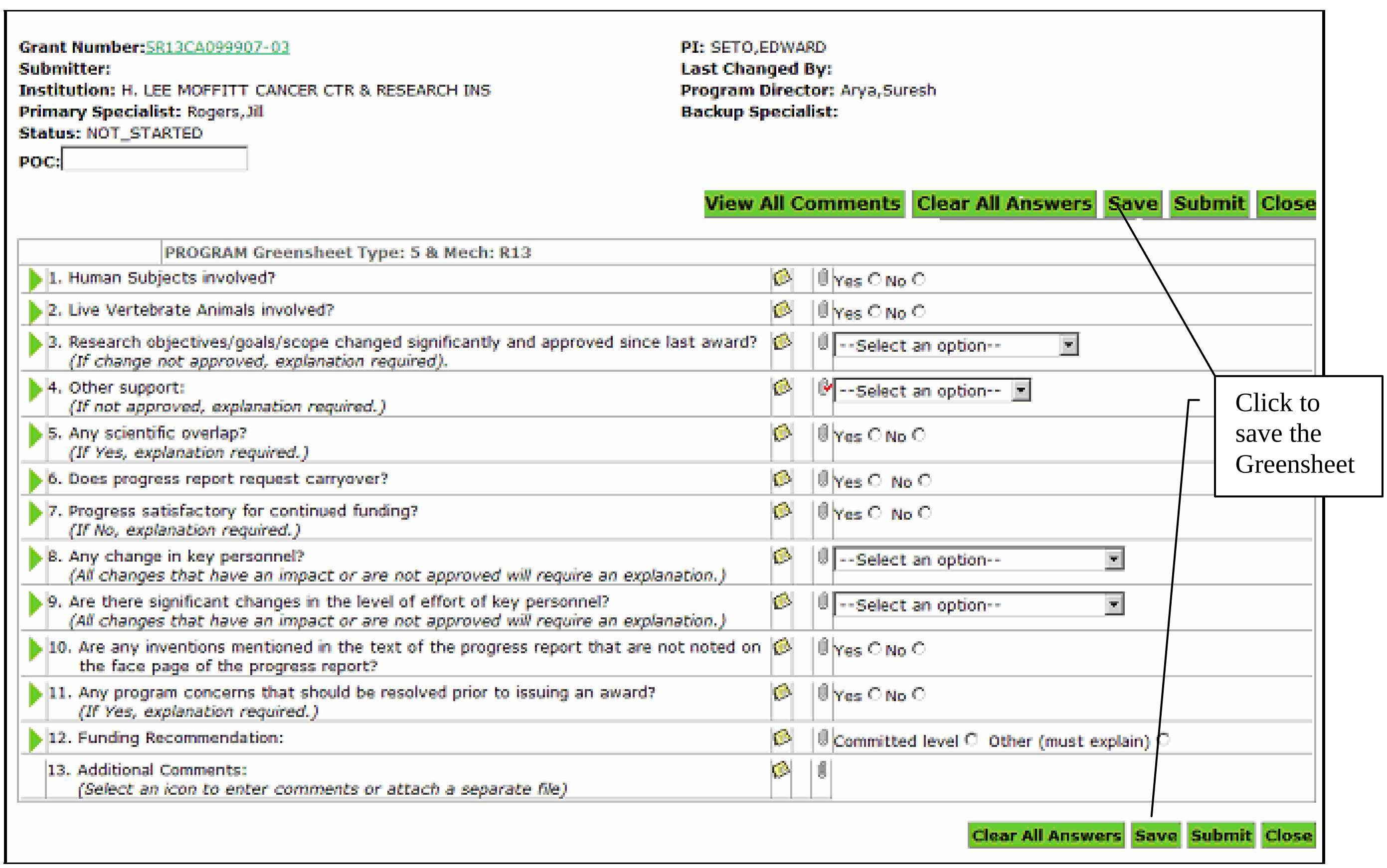


Figure 4-27 Saving a Greensheet

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.

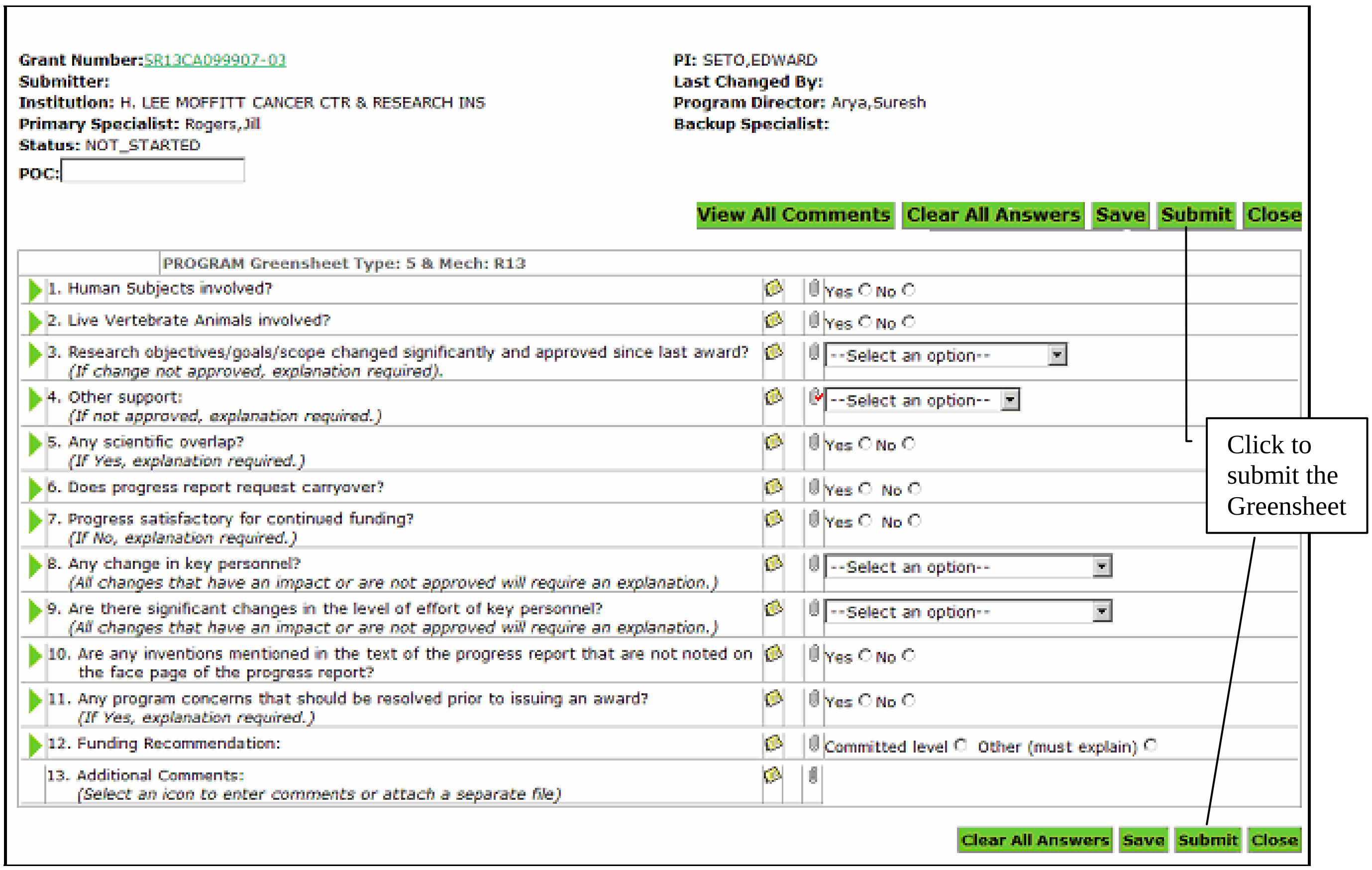


Figure 4-28 Submitting a Greensheet

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”).

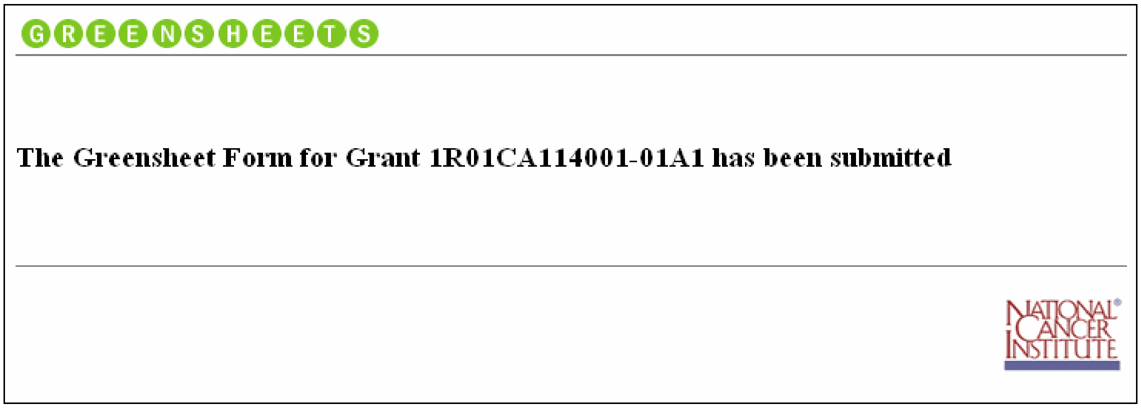


Figure 4-29 Submission Confirmation Message

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.

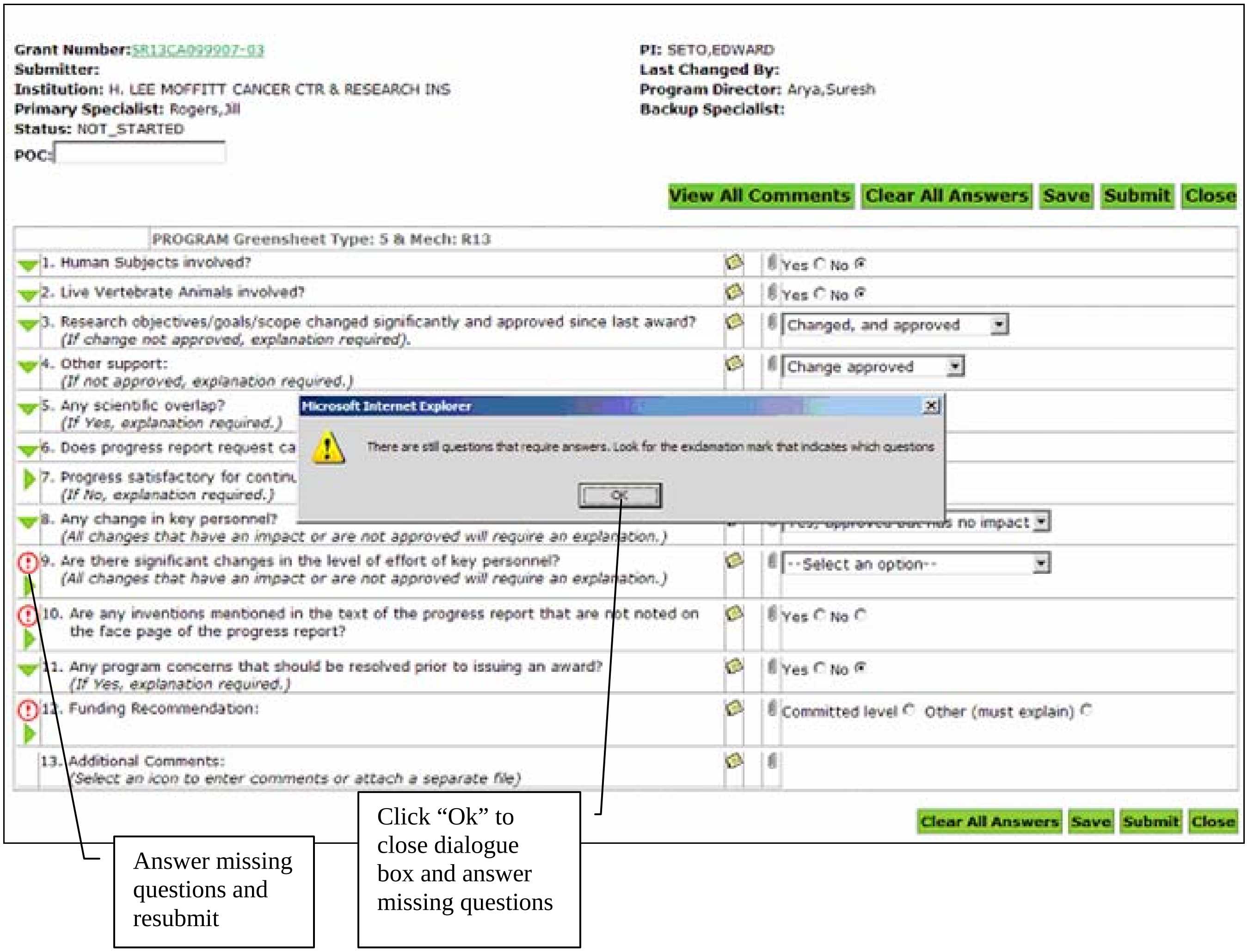


Figure 4-30 Validating a Greensheet

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.

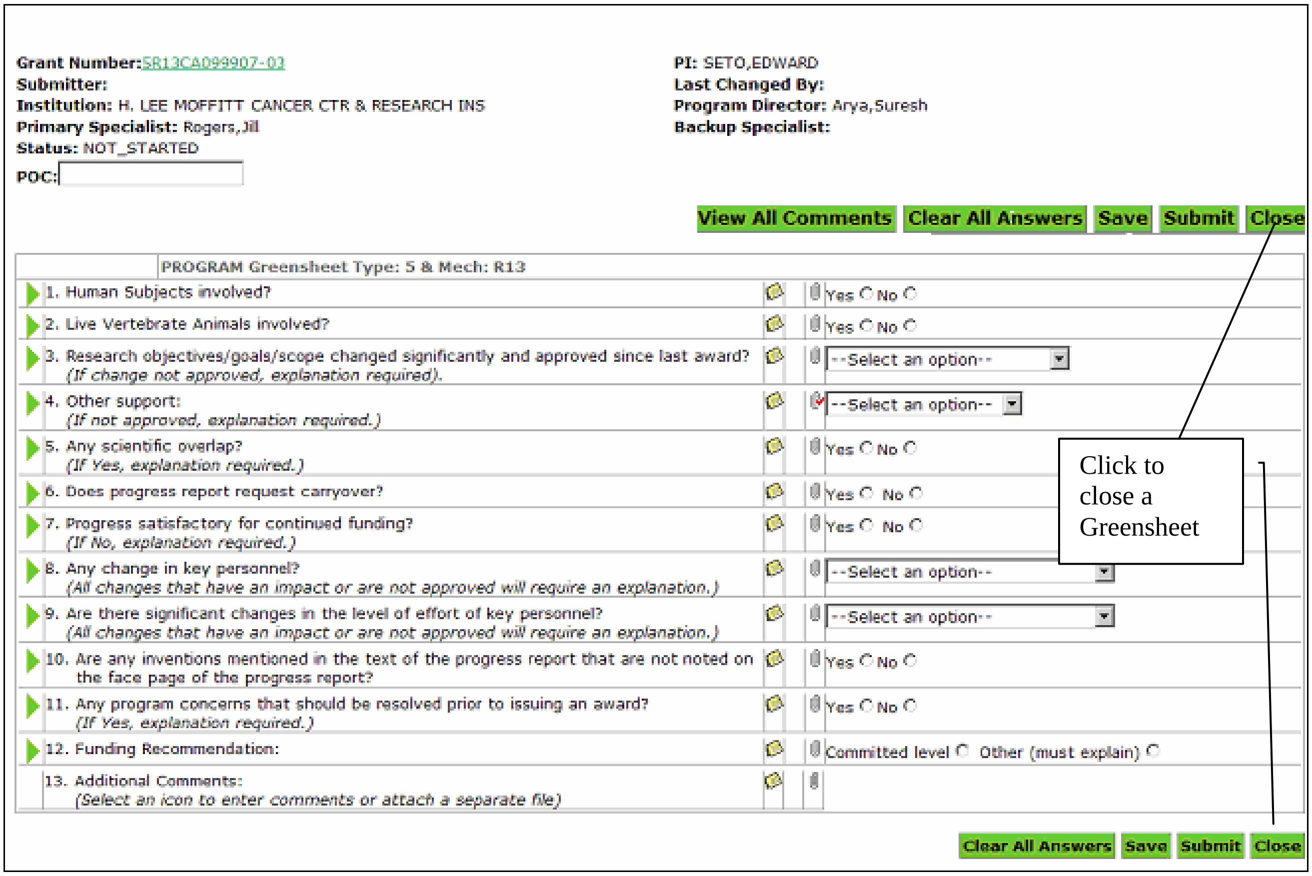


Figure 4-31 Closing a Greensheet

2. A Close Confirmation dialog is displayed.

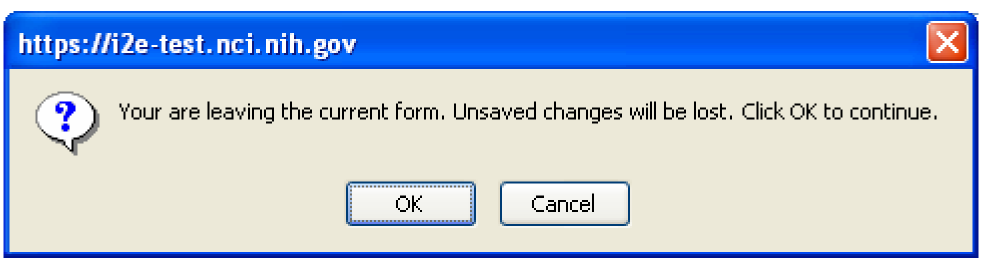


Figure 4-32 Close Confirmation Dialogue Box

   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.

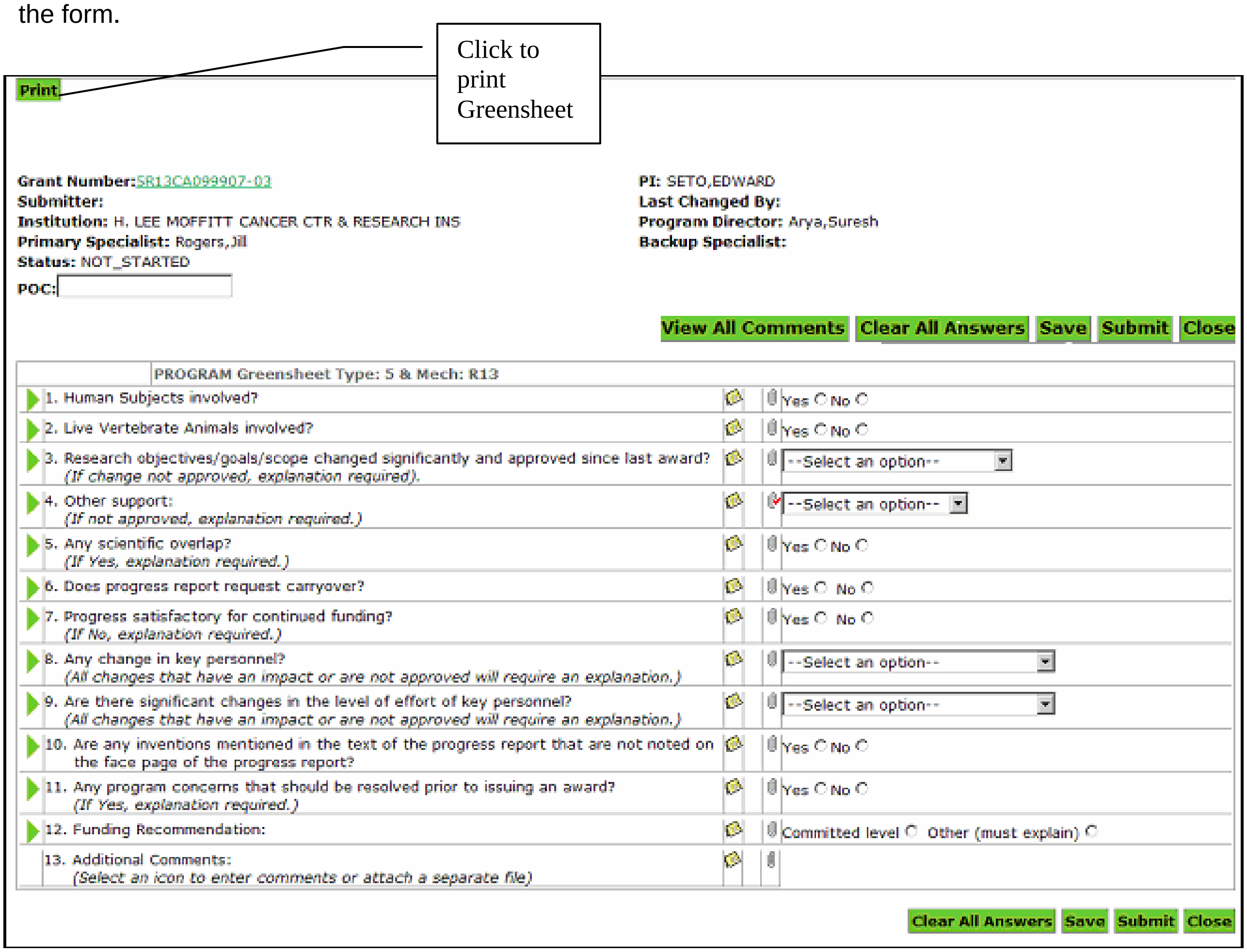


Figure 5-1 Submitting a Greensheet

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

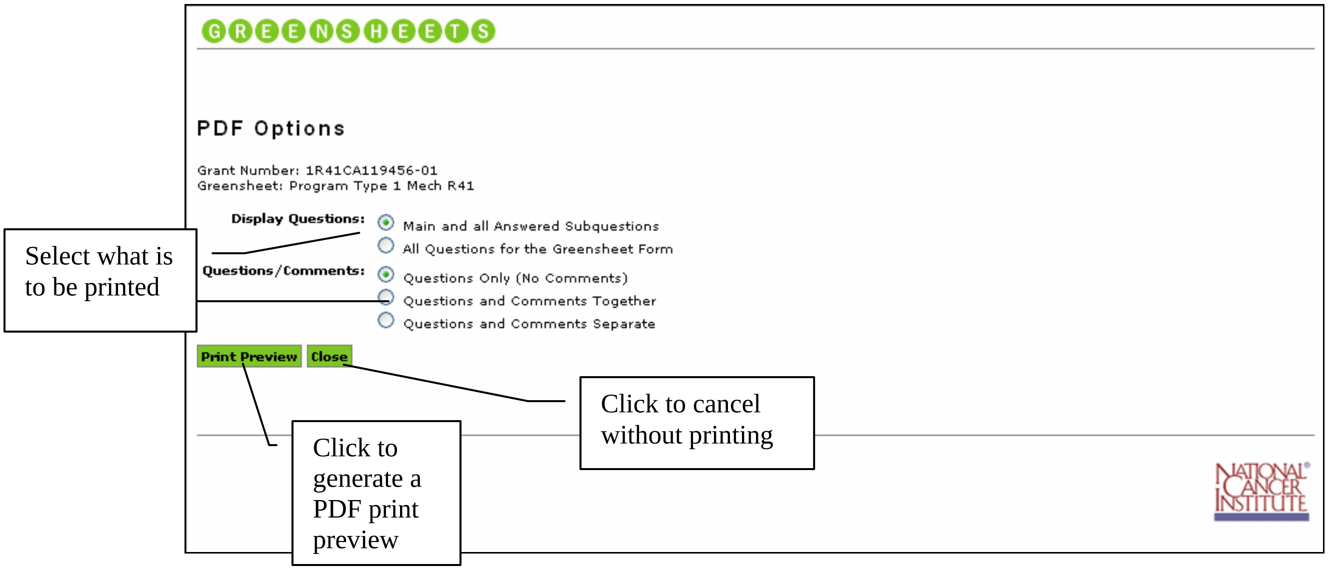


Figure 5-2 Print Selection Window

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

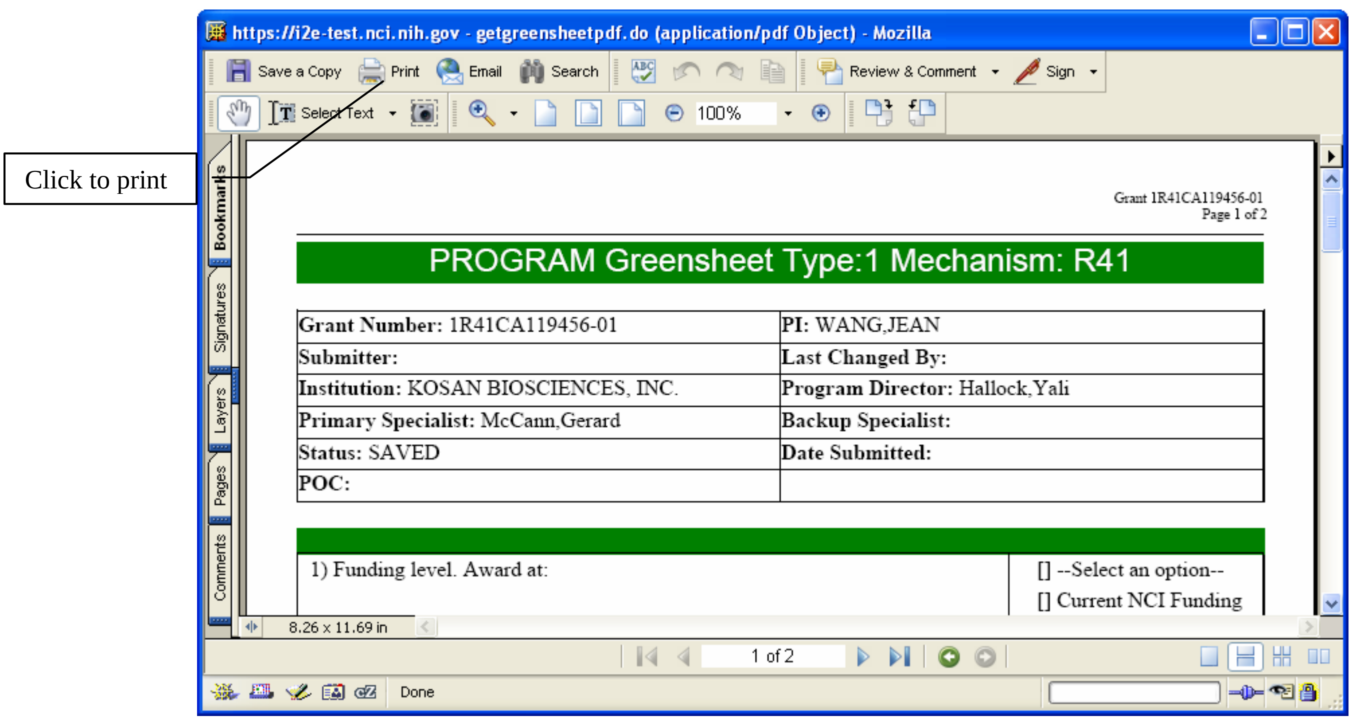


Figure 5-3 PDF Print Preview

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

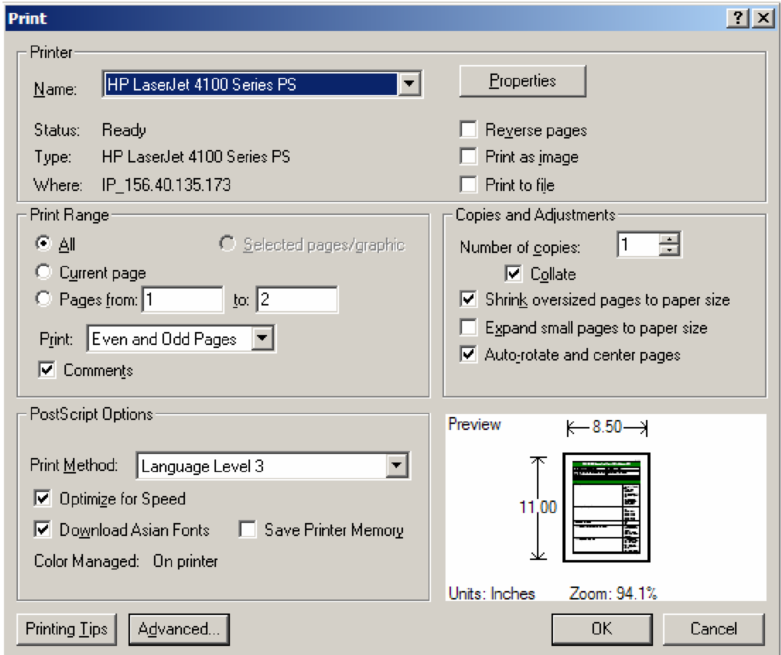


Figure 5-4 Print Dialogue Box

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 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.

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

2. * **Greensheet on Control –** indicates that the greensheet is in the Control system and can be submitted. Clicking on the will open the greensheet**.**

3. S **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.