Specialist Greensheets User's Guide

National Cancer Institute (NCI)

Center for Biomedical Informatics and Information Technology (CBIIT)

Version 2.0

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Record of Changes

Version Number	Author	Section Number/ Paragraph Number	Summary of Changes	Date of Change
2.0	Karrell Kennedy	Reformatted Entire Document and added Selection a Revision Greensheet section on page 13.		05/10/2017

Reviewer

Name	Job Title	Date of Review
Gaby Tulchinskaya	Business Analyst	5/10/2017

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GREENSHEET OVERVIEW

A Greensheet is a management document used by members of the Program Staff and Office of Grants Administration (OGA) 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 grant Type and Mechanism; each combination has a different Greensheet to address the specific criteria. Every grant application requires that separate Program and Specialist Greensheets be completed for the appropriate Type and Mechanism.

Having a set of standard checklists helps NCI Program and OGA 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.

In order to access this application, users must have a valid username and password, and be set up with the appropriate roles within the Enterprise database.

ACCESSING THE APPLICATION

1. User's must first log in the Greensheets application via https://i2e.nci.nih.gov/greensheets/.

2. Access will requires your Network User Name and Password.

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SELECTING A GRANT

The application provides a default list of grants that is 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.

Figure 2: Specialist Grants List

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 Backup Specialist.

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.

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Principle 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'.

Figure 3: PI Name Search and Result Set

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.

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Figure 4: Grant Number Search and Result Set

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 (.J) or descending (t). By default, the list is sorted in descending order by the "Program Greensheet Status". 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.

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

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

Figure 5: Budget Date in Ascending Order

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

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.

Figure 6: Page Navigation

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.

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 (G) 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.

Figure 7: Selecting a Specialist Greensheet

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 (G) 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.

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Figure 8: Selecting a Program Greensheet

Selecting a Revision Greensheet

Ultimately, completed Greensheet Forms are needed for award of the grant. However, a grant can be awarded only via 'actions' in GPMATS. GPMATS actions can be of two types: AWARD or REVISION.

- Program and Specialist types of Greensheets are related to AWARD type of action in GPMATS; these Greensheets have different sets of questions depending on grant type and mechanism.

- Revision type of Greensheets is related to Revision type of action in GPMATS; ALL grant types and ALL mechanisms have the same set of questions on Revision Greensheets.

Revision type of Greensheets can be accessed only via GPMATS system https://i2e.nci.nih.gov/gpmats/. Revision Greensheets CANNOT be found via Search in Greensheets system.

1. Once logged into GPMATS, search for Revision type of action.

- User will see the [G] icon for Revision type of action on two screens: Action Queue and Action Details screen

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Figure 9: Greensheet Icon in GPMATS on Action Queue Screen

Figure 10: Greensheet Icon in GPMATS on Action Details Screen

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 icon is NOT displayed in the following cases:
- If grant is NOT an NCI grant
- If a Revision action is in "Cancelled" status
- If a user did not fill-out a Revision GS and the action has been closed

2. Clicking the icon will open the Revison Greensheet in the Greensheets application.

Figure 11: Revision Greensheet

User workflow for a Revision type of Greensheet is the same as for a Specialist type of Greensheet.

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. The user can print the Greensheet as well. The application also allows users to attach files or insert comments for each question on the Greensheet.

NOTE: If the Greensheet has a "F" next to the Greensheet icon , this 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.

Figure 12 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.

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Figure 12: Sample Greensheet Form

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
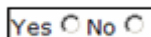
Figure 13: Radio Button

    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.
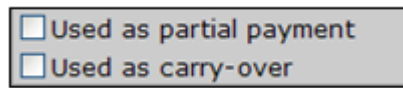
--Select an option-- ▼

Figure 14: Drop-Down List

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

Figure 15: 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 16: Check Boxes

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

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 Green arrow icon ▶ next to the question for which you wish to see sub-questions.

Figure 17: Viewing an Individual Sub-question Option

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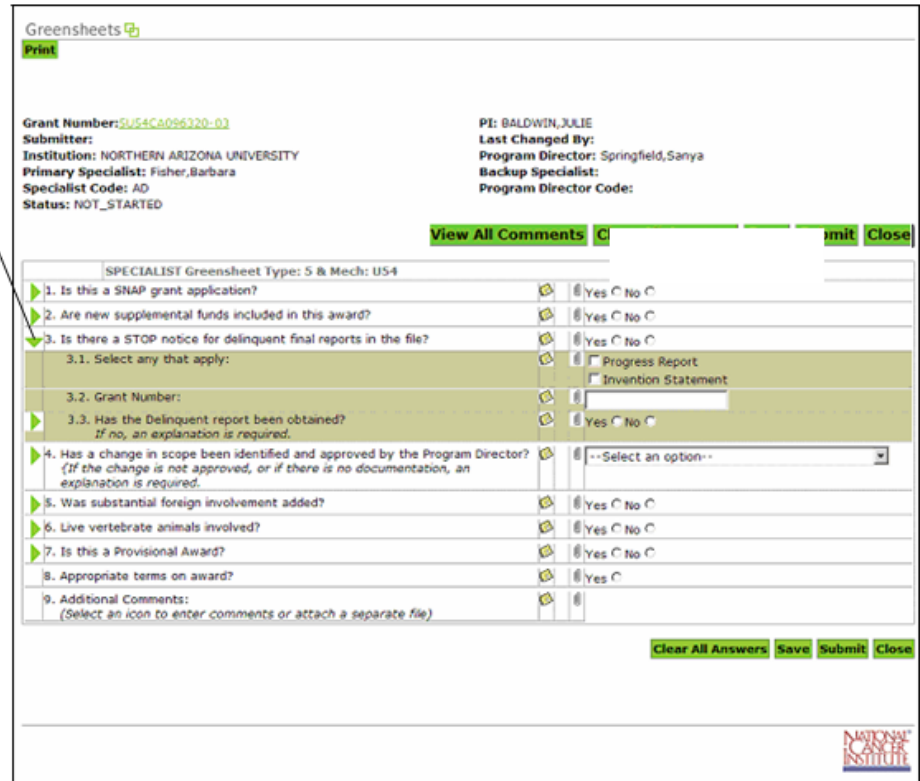3. To hide the sub-questions, click on the "Sub-questions Hide icon ▼ .

Figure 18: Hide Sub-question Option

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.

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.

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Figure 19: Attached File Option

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.
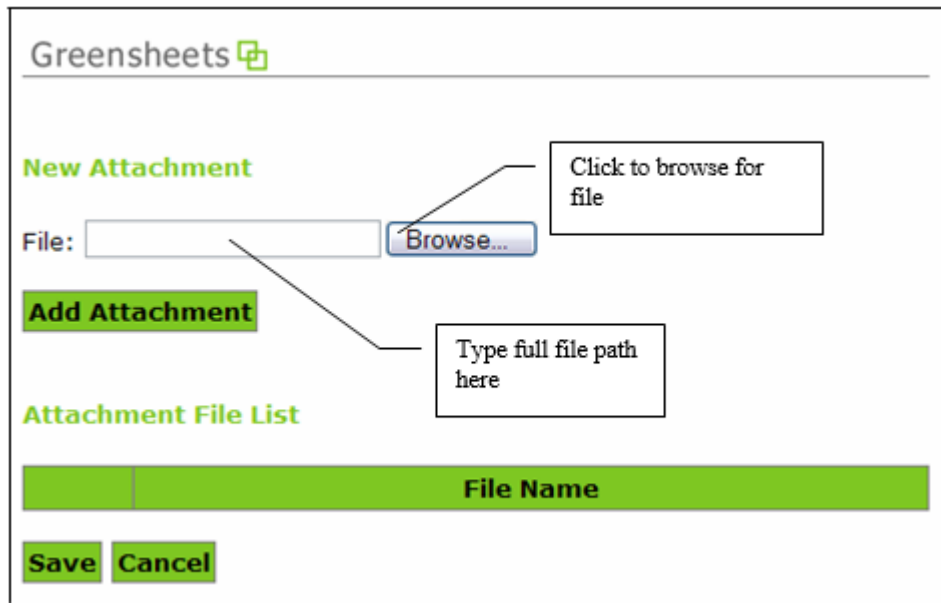
Figure 20: File Attachment Screen

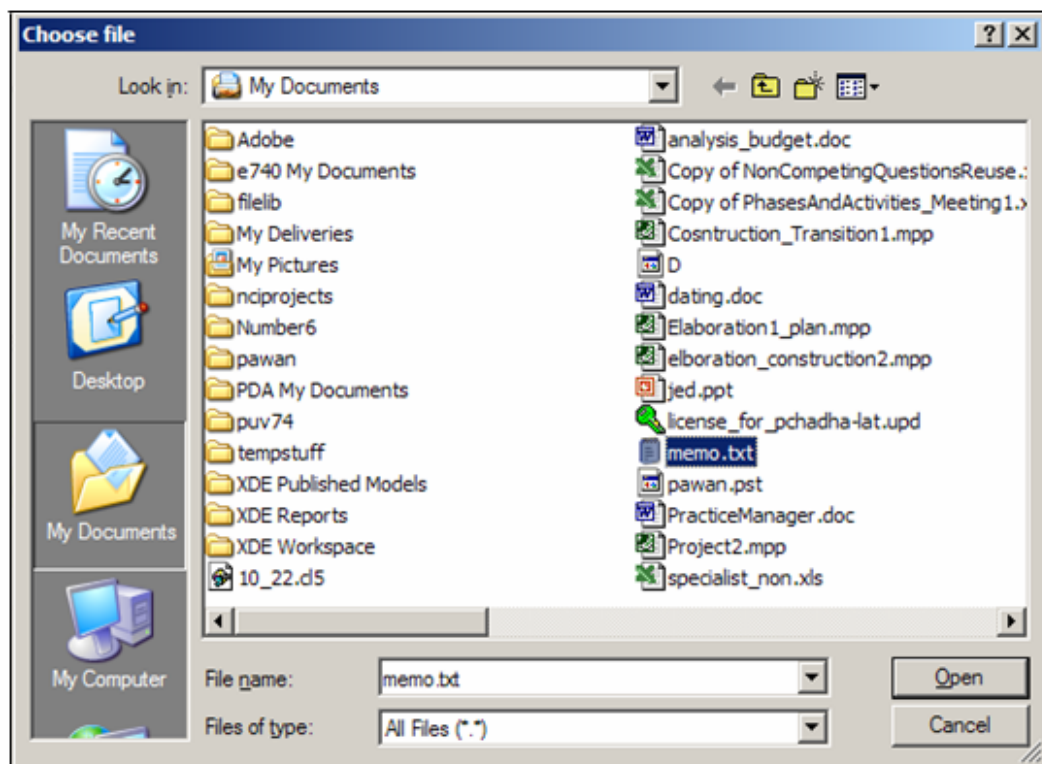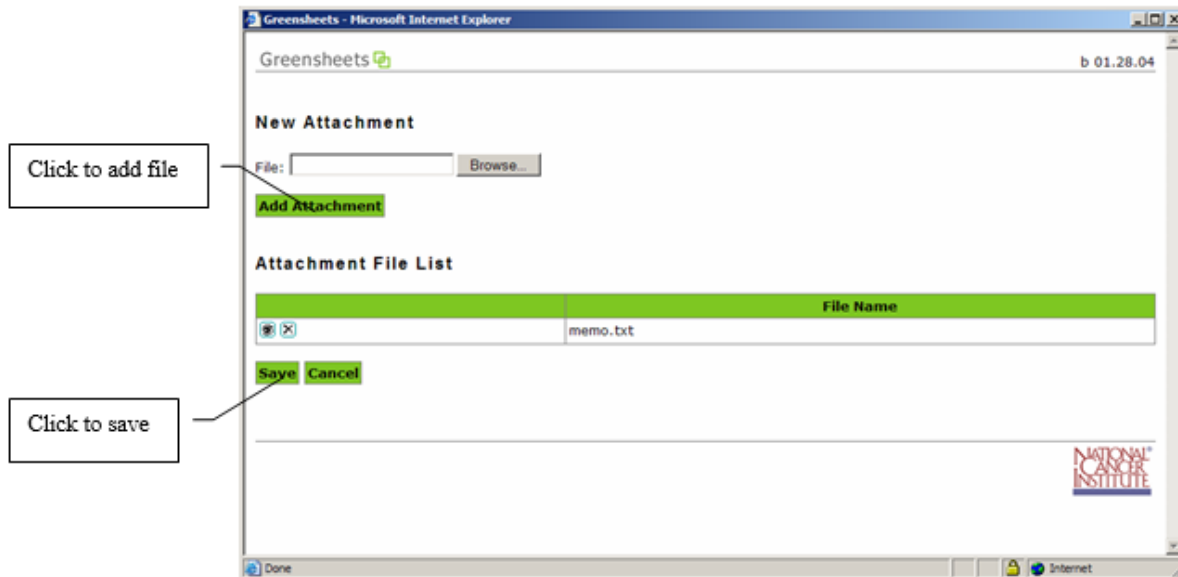   b. Users can navigate to the appropriate file, highlight it, and click "Open".

Figure 21: Choose File Screen

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    c. This will then close the Choose File Screen and return the user to the file attachment screen.

3. Click "Add Attachment" option to add the file and then "Save".

Figure 22:File Attachment Window

4. Additional files can be added by repeating steps two and three above.
5. Once all files are added, click the "Save" option.
6. To remove all files without saving them, click the "Cancel" option.

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.

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 question.

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Figure 23: Remove Attached File Option

2. Click on the Delete File icon ⊠ located on the row of the file to be deleted.

Figure 24: Attachment Screen with File Options

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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.
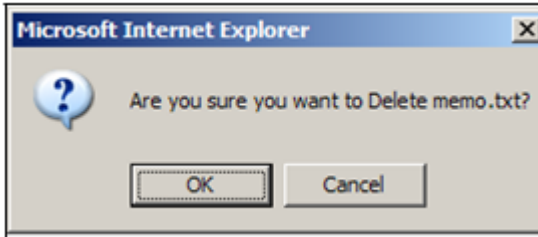
Figure 25: Delete Confirmation Option

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 question.

Figure 26: Viewing an Attachment Option

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2. Click the View File icon ⊚ located on the row of the file to be viewed.
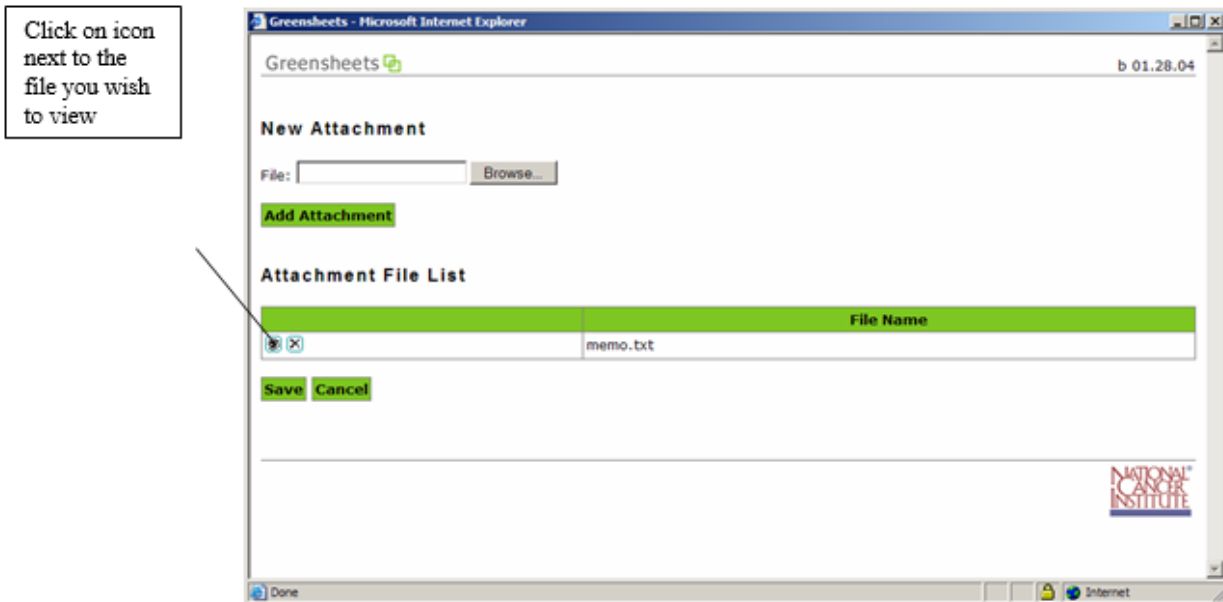
Figure 27: View File Option

3. They system will present a File Download box that will prompt the user to either open the file or save it to your local machine.
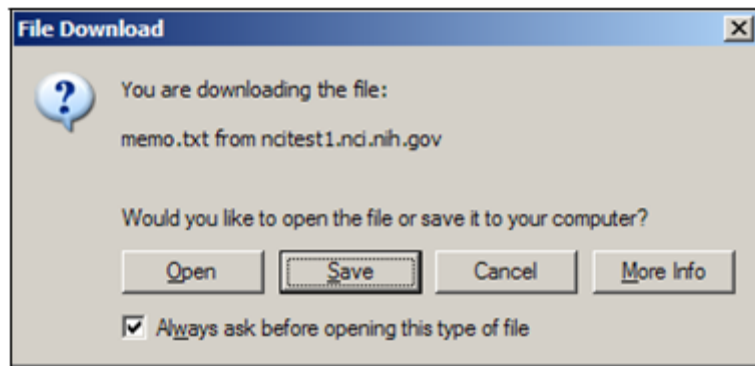
Figure 28: File Download Box

a. Select the "Open" option.
    i. The file will only open if the appropriate software is available to view the 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.

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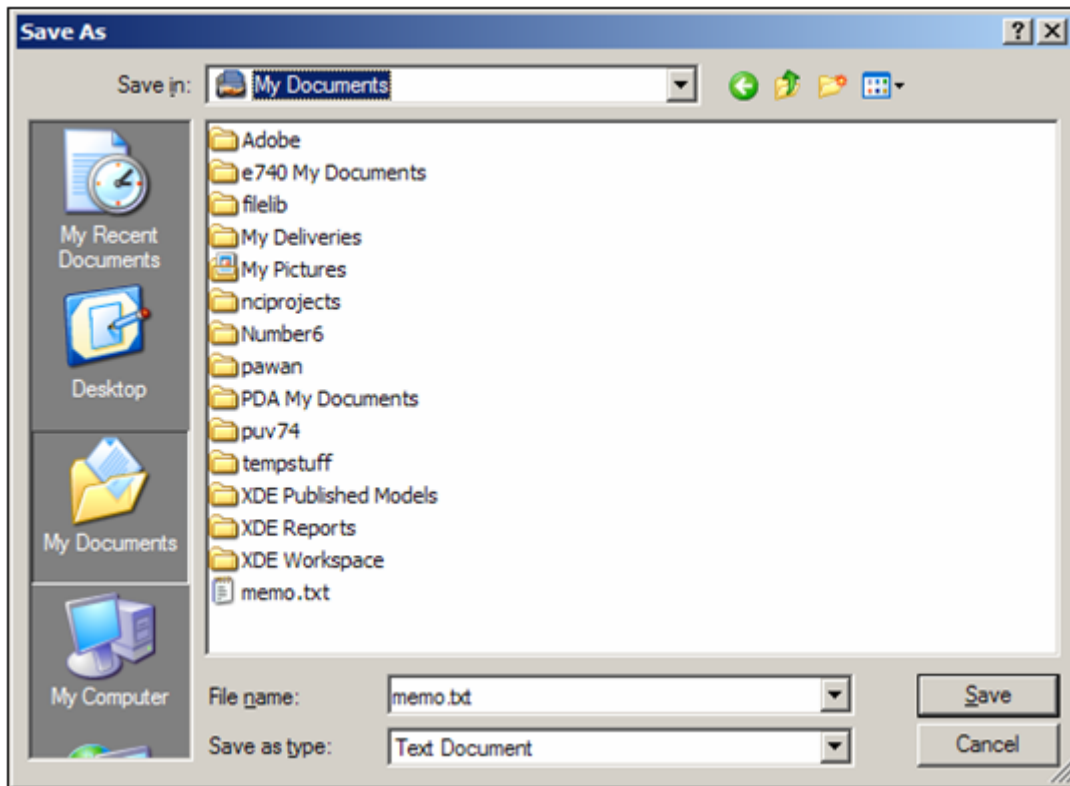
Figure 29: "Save As" Dialogue Box

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

Entering Comments

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

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.

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Input comment text here

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

Figure 30: Enter Comment Option

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 ( ).

Viewing Comments

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

To view an 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 31: Viewing Existing Comment Option

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 32: View All Comments Options

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.

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.

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Figure 33: Clearing a Greensheet Option

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 34: Removing an Attached File Option

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

Figure 35: File Atachment Window

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 36: Delete Confirmation Box

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

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 37: Save Greensheet Option

2. The system will also change the status of the Greensheet to

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"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.

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 38: Submitting a Greensheet Option

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").
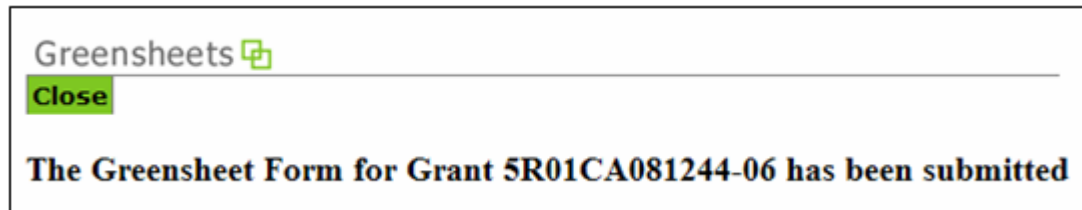
Figure 39: Submission Confirmation Message

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.

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Figure 40: Validating a Greensheet

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 41: Closing a Greensheet

2. A Close Confirmation box is displayed
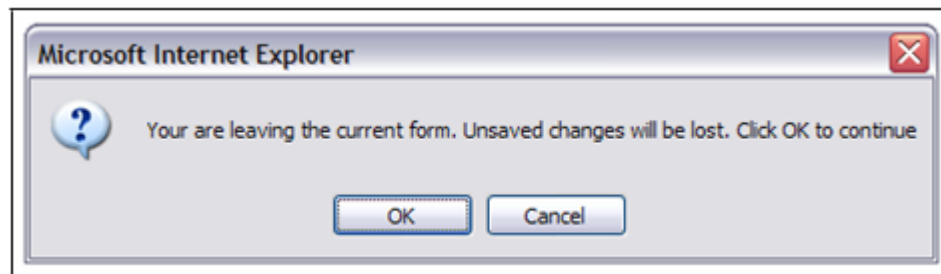
Figure 42: Close Confirmation Dialogue Box

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.

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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 43: Submitting a Greensheet

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3. The Print Selection screen will open.
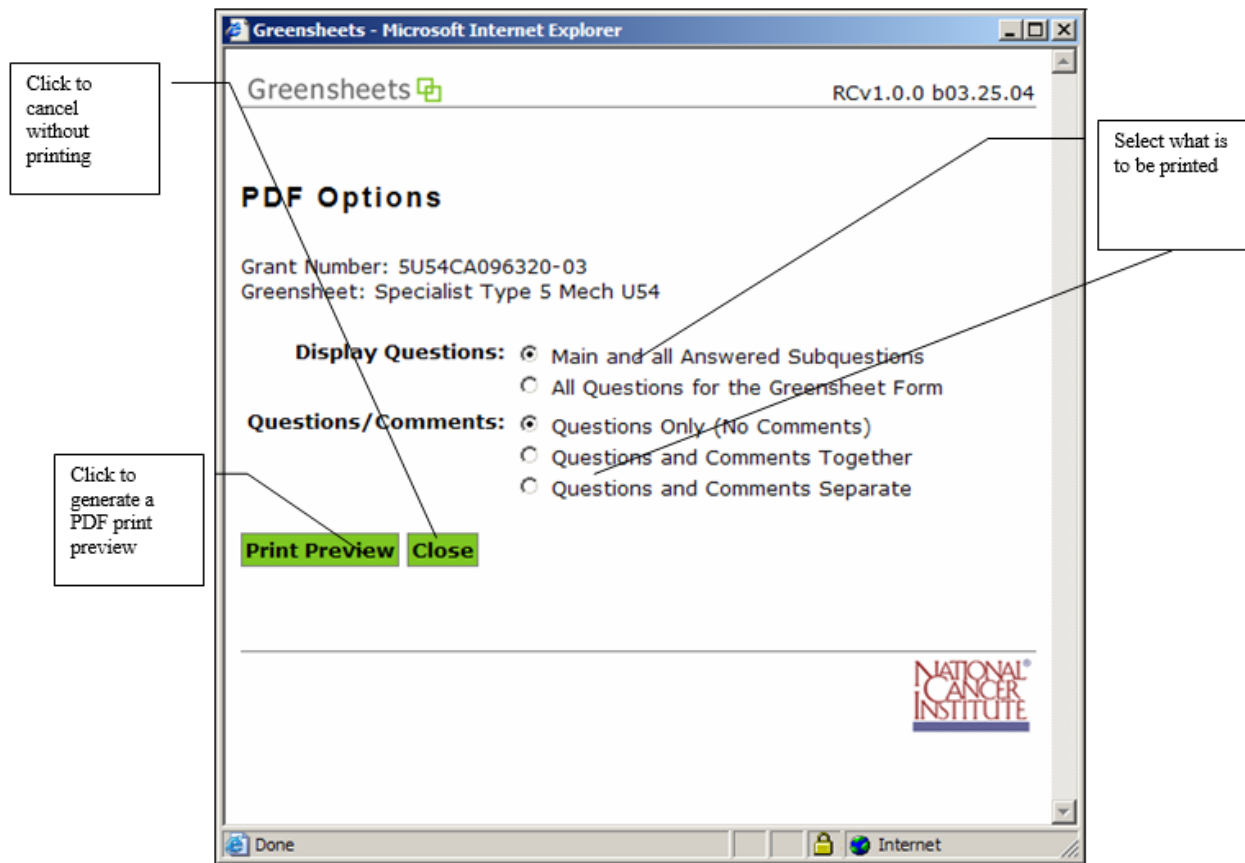
Figure 44: Print Selection Window

4. Select the appropriate format and click the "Print Preview" button. This will generate a pdf version of the Greensheet.
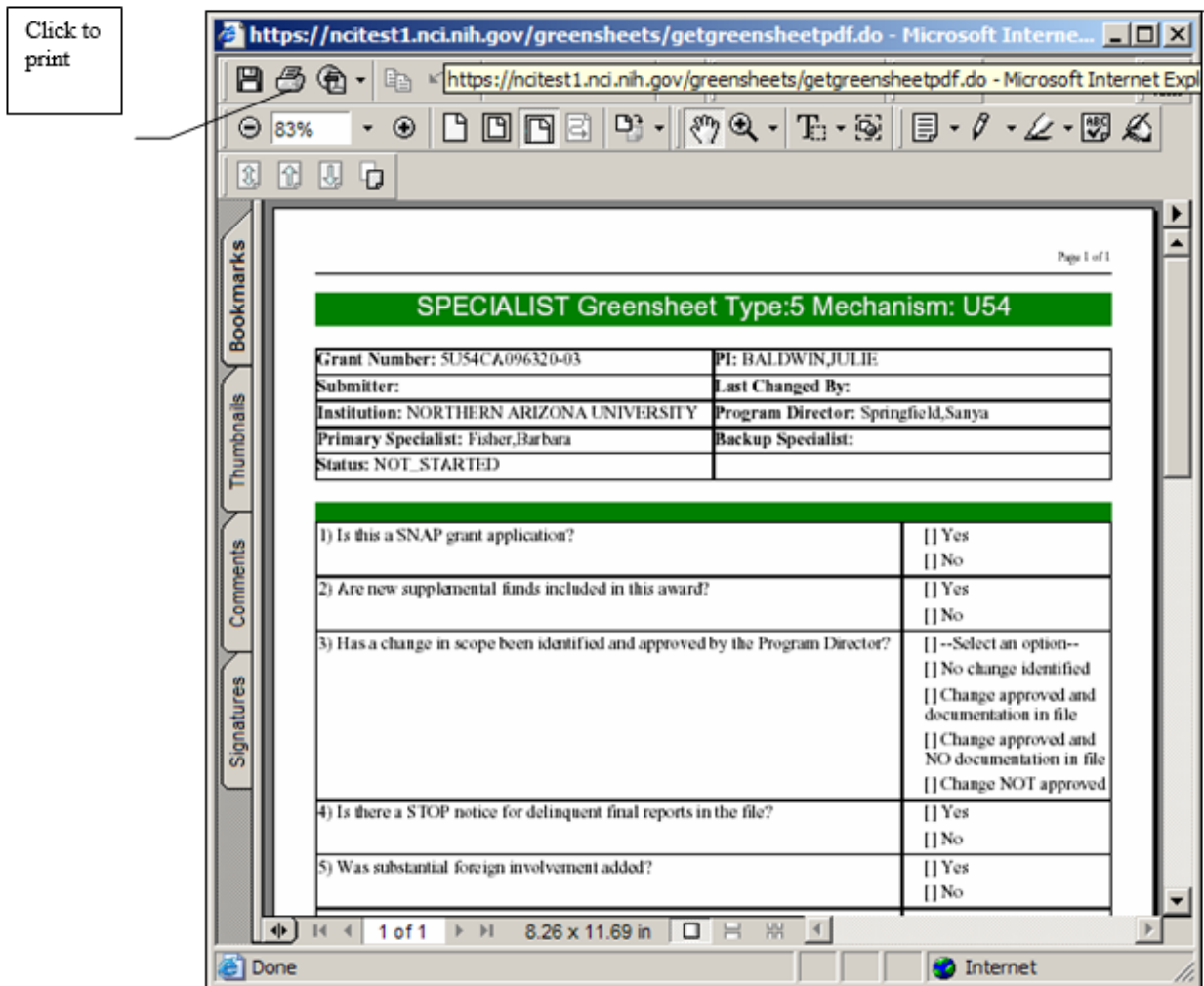
Figure 45: PDF Print Preview

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

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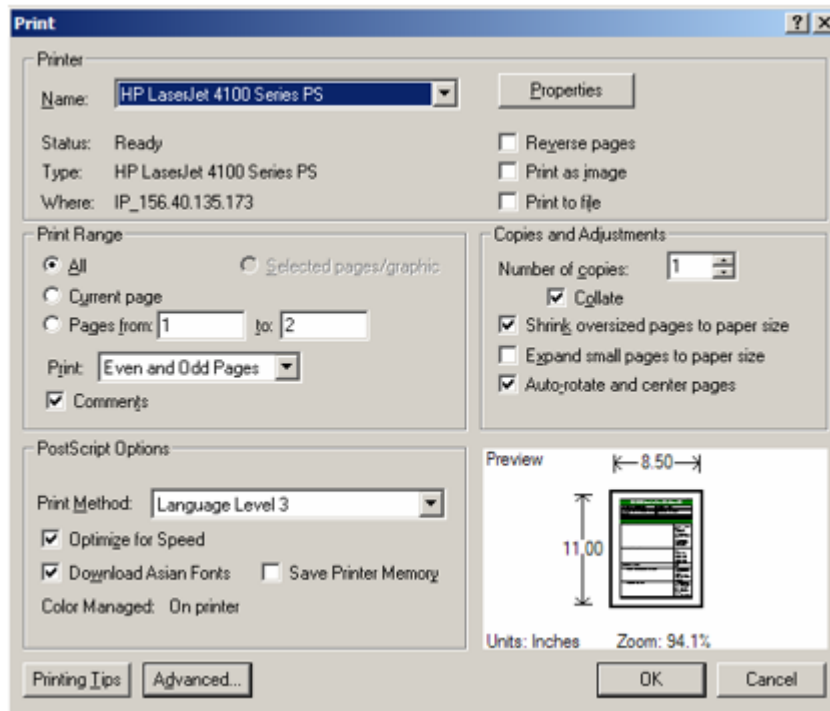
Figure 46: Print Dialogue Box

6. Select the appropriate printer name and click "OK" to print form.

7. Close the window to return to the Greensheet.

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.

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.

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Figure 47: 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.

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.

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Figure 48: 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.

Unlocking a Revision Greensheet

The ability to unlock a submitted Revision Greensheet is provided in the GPMATS system only. Any GPMATS user with the Specialist role can unlock submitted Revision Greensheets using the icons on Action Details screen.

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Figure 49: Unlocking Revision Greensheets

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.

Status Icon

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

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

3. ![icon] **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. ![icon] **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. ![icon] **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.

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.

INFORMATION AND ASSISTANCE

Please direct comments, questions, or requests for further information to the Scientific Management Team at nci-now-l@list.nih.gov.

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