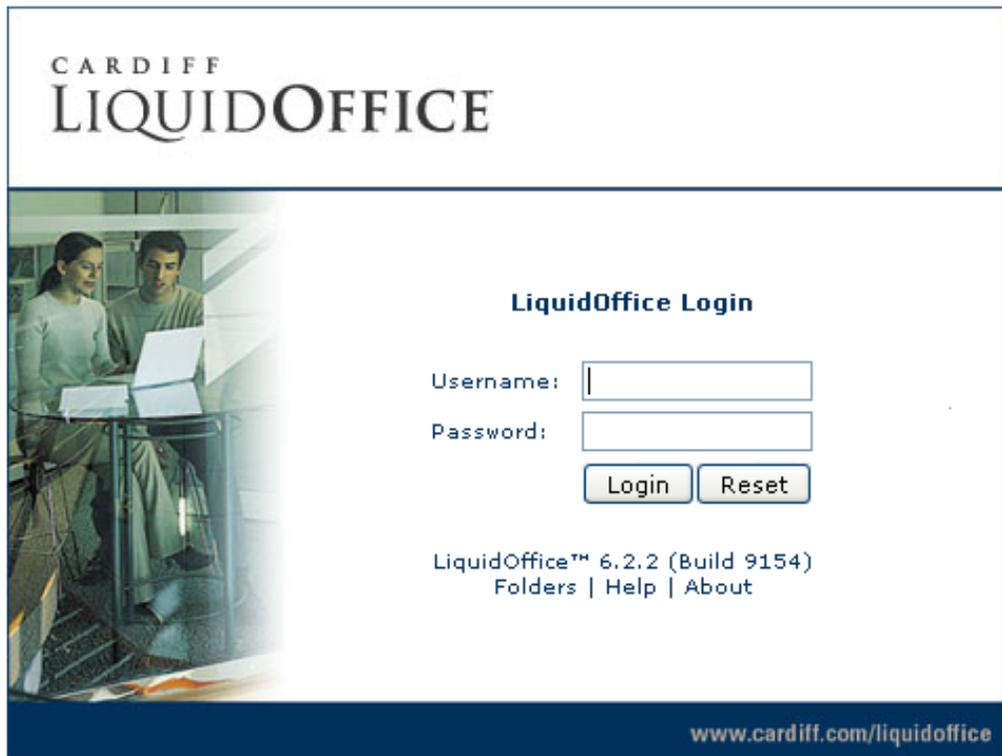


Iowa State University
Office of Sponsored Programs Administration

GoldSheet & Routing
TRAINING MANUAL

June 2010



CARDIFF
LIQUIDOFFICE

LiquidOffice Login

Username:

Password:

LiquidOffice™ 6.2.2 (Build 9154)
[Folders](#) | [Help](#) | [About](#)

www.cardiff.com/liquidoffice

Questions regarding the GoldSheet:
4-5225 or eGoldSheetSupport@iastate.edu

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Things to Know Before You Get Started

Software Requirements

Macintosh users

Supported Browsers (Note: Internet Explorer & Safari are not supported)

- FireFox

Windows users

Supported Browsers

- Internet Explorer
- FireFox

Preferred attachment file types are Word, RTF, TXT, Excel, PDF, GIF, JPG, or TIFF

Definitions - Originators and Approvers

Originator – The Originator is the person who enters the GoldSheet information and submits it for electronic routing. This person can be the Lead PI or a departmental Grant Coordinator or secretary. The Originator is responsible for:

1. Entering all the required GoldSheet data
2. Attaching documentation in file form (including the proposal draft, budget, justification, guidelines)
3. Selecting all the individual approvers for the routing tree
4. Monitoring the routing process

Approver – An Approver can be the Lead PI, a Co-PI, an authorized departmental representative, an authorized distribution unit representative, and an authorized Center or Institute representative.

Tip: E-Mail notifications will be sent automatically by the system. Please check your SPAM and other e-mail filters to see that these e-mails are not junked.

Know your routing tree

Before you route a GoldSheet, you'll have to know your routing tree. This is a sequential list of all individuals, departments, center, institutes and distribution units that must sign off on the proposal before it is approved by the Vice Provost for Research Office (VPR) and Office of Sponsored Programs Administration (OSPA). The proposal will be routed to these individuals, including all the Co-PI's, all departmental, center and institute representatives, and all distribution units. Work Queues have been created in LiquidOffice so that it isn't necessary for the originator or Lead-PI to know which individual they should route their proposal to in departments and distribution units. For example you can search for "Entomology" in the department list, choose it, and the GoldSheet will automatically route the proposal to the correct person or persons through their Work Queue. There is more detail about this process later in the manual.

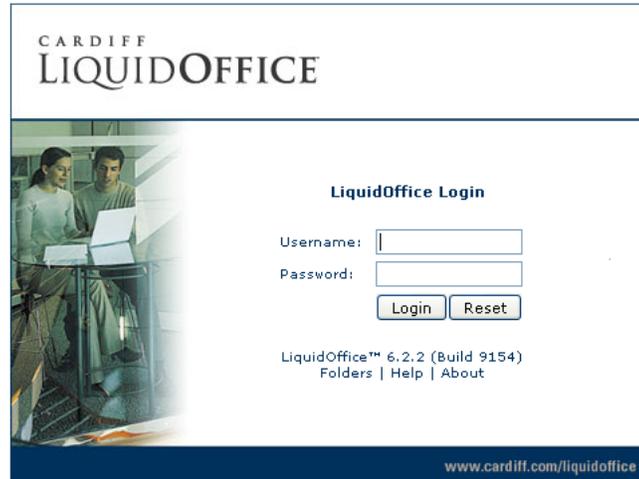
Logging in to LiquidOffice

Logging In

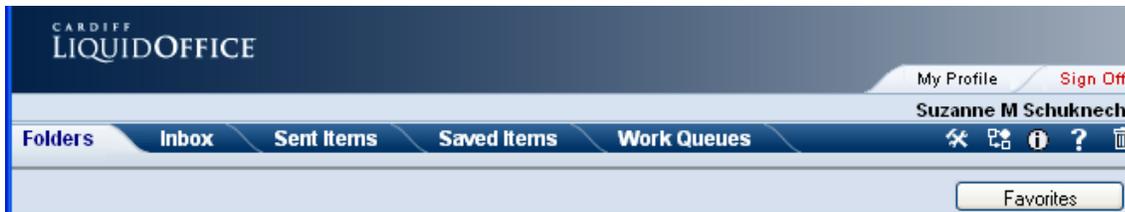
Go to the ISU GoldSheet site: <https://grant001.ats.iastate.edu/index.html>

Or at www.ospa.iastate.edu click on the Login Link.

This is the login screen you will see where you log in with your username and password. Without any activity, your session will be active for only about 75 minutes. If you leave the GoldSheet (or any form) open for an extended period of time (more than 75 minutes), you may lose the information and form. The option to “**Save For Later**” and work on it later is explained in the manual in the sections below.



Menu Options



When you login to the GoldSheet you'll see these menu items listed on the top of the screen.

Folders – This lists all the forms you have access to for data entry, including the Gold_Start form and the GoldSheet_Status_HTML form.

Inbox – This itemizes all the forms that need your attention. These include links to GoldSheets that need your approval, GoldSheets that have been approved, and draft GoldSheets that you have “Saved for Later”.

Sent Items – The Sent Items folder allows the logged in user to view the forms he/she participated in or originated. This folder displays the Form name (of the Subject), Location, Sent To, Date Sent, Originator and Origination Date.

Saved Items – If you save an item from your Inbox or Deleted Items screen, it will be saved in this screen.

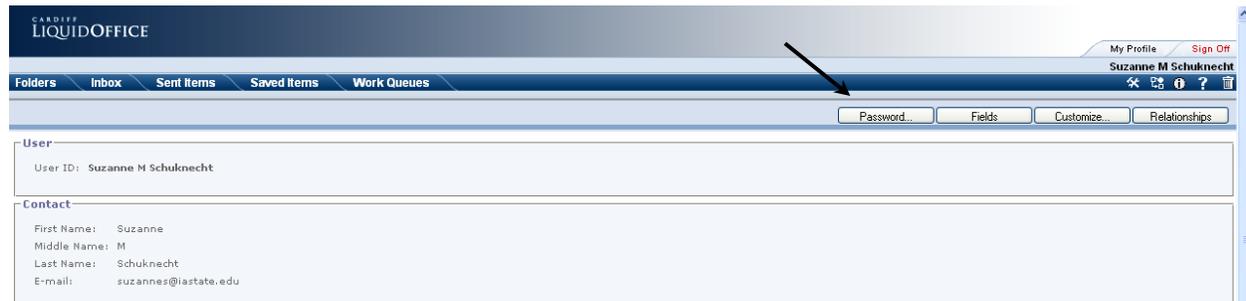
Work Queues – This will only appear if you are a member of a Work Queue. This lists any proposals that have been directed to a Work Queue in which you are a member.

User Profile – This is where you customize your profile, change your password, and enter basic data about yourself for autofill in the GoldSheet.

Sign Off – Use this when you are finished with your session and wish to exit.

Configuring Your User Profile

To establish your account and password in LiquidOffice, contact ospa-proposals@iastate.edu with your name, department, contact information, and ISU ID number.



Password – Click on Password in your User Profile. We strongly recommend that you change your default password the first time you log in. Just type in your old password and your new password twice.



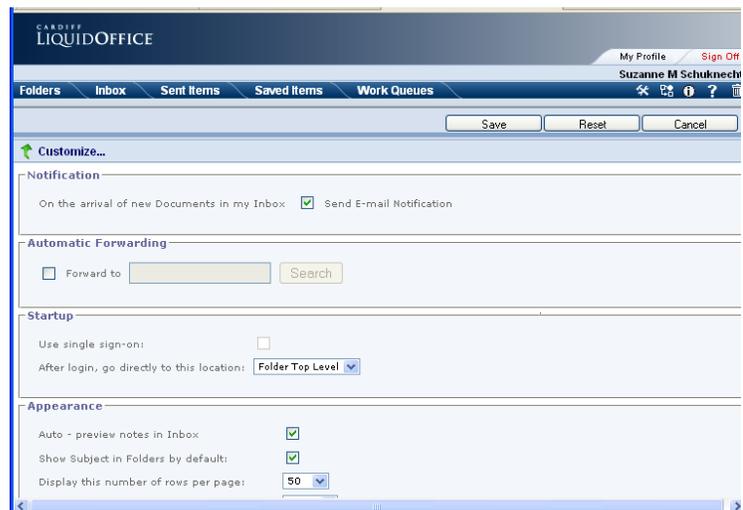
Fields – You should fill out all these fields to assist in the auto-fill function in the GoldSheet – it means less for you to fill in each time you enter a new GoldSheet. Enter data by clicking in the check box to the left of each item and entering data in the fields to the right. When you're finished, click on the Submit Changes button at the top.

Customize:

Notification – Be sure there is a check in the box to receive email notification when an item appears in your inbox.

Automatic Forwarding – Because there are multiple users in a Work Queue, you shouldn't need to forward your Work Queue mail to a proxy.

Startup – You can select either the Folder Top Level or your Inbox as the first screen that opens when you log into the system.



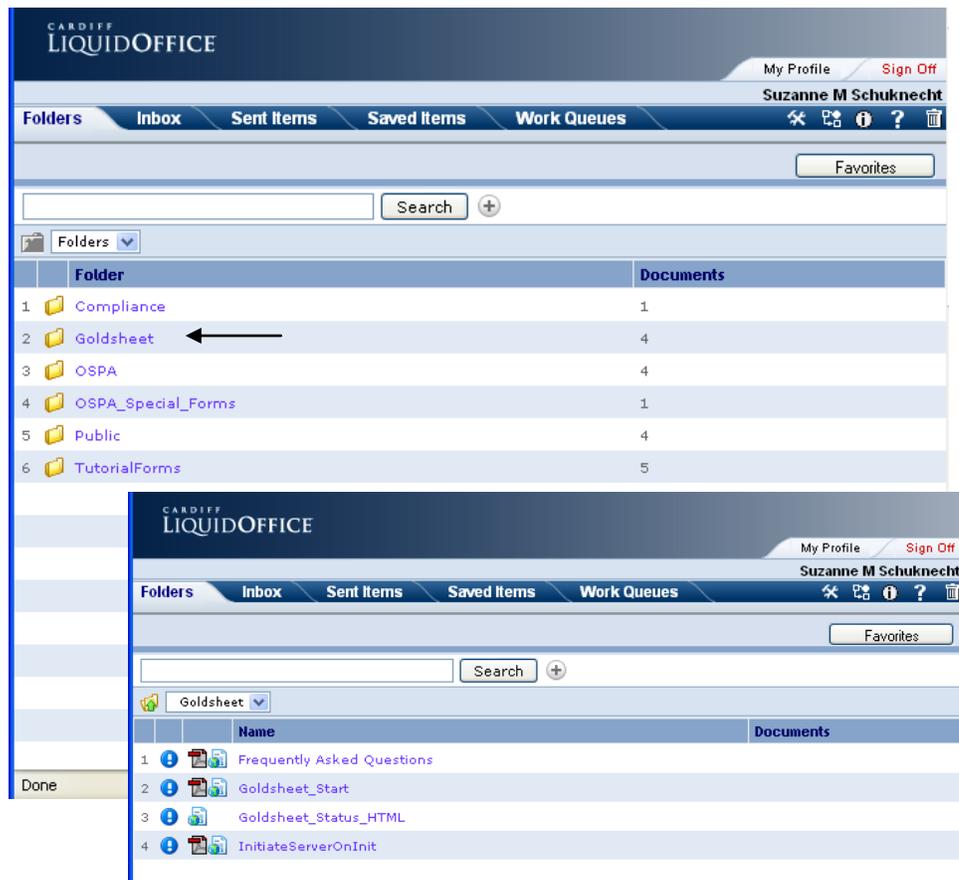
Appearance – Items you may want to alter in this section are the number of rows displayed per page, and your preferred color theme. Mac users or PC users using the HTML form of the GoldSheet must change the “Select the default format for viewing forms:” to HTML, then click on Save to save any changes.

Selecting the GoldSheet Form

Once you're logged in and your User Profile is set up, you can click on Folders tab. This opens the Folders you have access to, this is also where you'll click on the **Goldsheet** folder. Inside this folder are the forms used to route GoldSheets, plus the Status form.

Goldsheet_Start –

This is the form an Originator uses to enter a GoldSheet and initiate the electronic routing process.



Goldsheet_Status_HTML – This is the form anyone can use to track the progress of the approval routing process for a particular GoldSheet.

These are the only two forms you will be using, and once you have actually used the Goldsheet_Start and Goldsheet_Status forms, these two forms will appear in your **Favorites** folder. When this happens, it's easier to find the proper form by going directly to your **Favorites** folder, rather than the **Goldsheet** folder.

Opening and Using the Goldsheet_Start

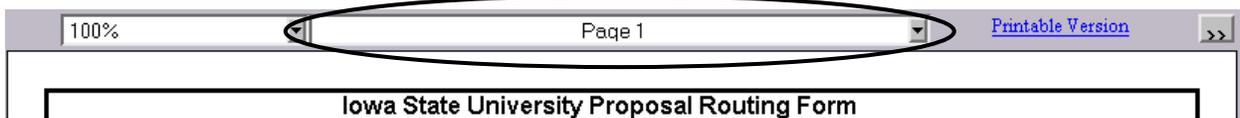
When you open the Goldsheet_Start form, the GoldSheet will launch the internet browser on your computer before the form is actually displayed on your screen. Be patient, this may take a few seconds.

ID number – When the GoldSheet opens you'll see an ID number in the upper right hand corner. This ID number is very important. If you have any paperwork or attachments that must be hand delivered to OSPA, these hard copies MUST have an identifying the GoldSheet ID or we won't know which GoldSheet to match it with. This ID also allows you to track the progress of the approval process using the Goldsheet_Status_HTML form.

Tabbing through the form – The GoldSheet is designed for you to tab through each field, box and button. However, you can also use your mouse to select a field and enter data.

Moving from page to page –

To move to another page, drop down the navigation menu at the top or bottom of the page and select the page you want to go to.



Hyperlinks – Any blue text on the GoldSheet is a hyperlink to a detailed explanation about the topic.

Clearing data from a partial

GoldSheet -- go to the bottom of the Addendum page, select **Reset** from the drop-down list, and click on the **Go** button. This will clear out the data from the record you are working on and allow you to start editing with the same ID number.



Saving a partial GoldSheet – If you get part way through a GoldSheet and need to stop, you can save your work and come back later. At the bottom of the Addendum page there's a drop-down list with an option to **Save for Later**. If you select this option and click on **Go**, your GoldSheet will be saved as a Draft in your **Inbox**.

Deleting a GoldSheet you don't want to route – Click **Cancel**.

Entering Data into the GoldSheet

Almost all of the fields are required. The GoldSheet review process will automatically review the information entered into the GoldSheet and will prompt for completion of mandatory fields before the form will route.

PI Info Section

- **PI Lastname Search Field** –

Type in all or part of a last name (you can use wildcards for partial names – either * or %).

Tab out of the search field and the GoldSheet will return results.

If there is only one name returned, all data will be displayed in the appropriate fields. If there is more than one name returned, click on the pull-down arrow on the **PI Name** field and select a name.

- **Campus Phone Number** – If this isn't automatically filled when you select the PI, enter the number.

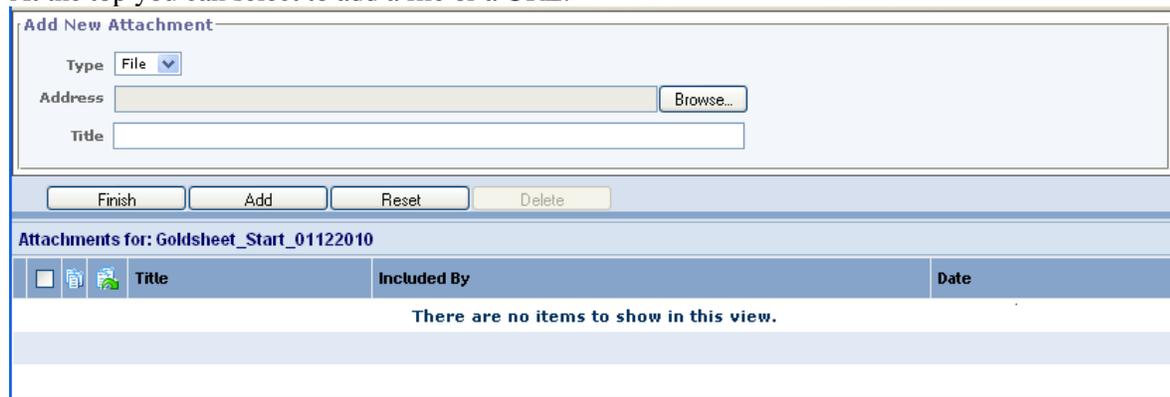
- **ISU e-mail address** – Again, if this doesn't fill automatically, type it in yourself.

Sponsor Info Section

- **Sponsor Name/Address** – Select the Sponsor from the drop down menu; if the sponsor is not in the menu, select “Other” and type in the Sponsor name and address.
- **Prime Contractor** – If this is a subcontract, then select the prime contractor’s name in the drop down menu.
- **Type of Sponsor** – Select the appropriate sponsor type from the pull-down menu. If you select Other, type in a description of the agency in the next field.
- **Type of Submission** – Select your submission type. Click on the blue text and a hyperlink will take you to definitions for each type.
- **Sponsor Deadline/Postmarked/Received** – Enter when the proposal due.
- **Submission Method** – Select if the proposal is being submitted through Cayuse, Other Electronic method or if the PI is sending it.
- **Program Guidelines** – Click the appropriate field when attaching guidelines.
- **Web address** – Fill out this field if an address for additional guidance for the program.

Adding Attachments

When you click on the **Add Guidelines** or **Add Documentation** buttons, you’ll be taken to this screen. At the top you can select to add a file or a URL.



Attachments for: Goldsheet_Start_01122010		
<input type="checkbox"/>	Title	Date
There are no items to show in this view.		

File – Liquid Office can accept Word documents, RTF, Excel spreadsheets, scanned images and PDF files. Filenames should not contain any spaces or special characters and should have an appropriate extension (i.e. doc, xls, pdf, jpg, and etc.). To add a file, just click on **Browse** to select the appropriate file. Once selected and opened, the file path will appear in the File field. If you’d like to give this file an explanatory title to identify it more readily, you can do that in the **Title** field. **You can’t use spaces for your file name or titles**, so use underscores (program_guidelines is acceptable, program guidelines is not). It is helpful for subsequent reviewers if you add the file extension to the title. Example-cover_page.doc. To add this file to your list of attachments, simply click on the **Add** button and your file will appear in the list. If you want to remove a file, click on the check box to the left of the file and click on the **Delete** button.

URL – Attaching web addresses works just like the file attachment process except that you copy and paste the web address into the URL field. Again, give it an explanatory title if you wish.

Adding multiple documents – You can add all your documents at once if you like – there’s no need to continually jump between the GoldSheet and the attachment screen. Just click on the **Add** button each time you want to add a document, and click on **Finish** when you are all done adding documents.

Finish – When you’re ready to return to the GoldSheet, click on the **Finish** button at the bottom and the GoldSheet will return you to the top of the GoldSheet.

Administering Unit Section

- **Department/ Institute / Center / Extension Unit (DICE)** – Select the unit that will manage the account.
- **Administering Unit (RRC)** – This will automatically fill in dependent on the DICE.
- **Budget Contact** – Type in information for someone who can answer questions about your budget, most likely yourself, a Co-PI, the Grant Coordinator for your department, or some other support staff.
- **Other Contact** – If there is another contact person that can help with any non-budget questions about your proposal, enter their information here.

Administering Unit (10% IDC Return):	
Department / Institute / Center / Extension Unit that will manage the account:	
-- Select a Unit-RRC --	
Administering Unit (RRC):	
Name of Contact for budget:	Contact for Other Issues (If Different):
Phone:	Phone:
E-mail:	E-mail:

Proposal Info Section

- **Title of Proposal** – Type the title in here. There is a limit of 180 characters. If the title is longer than that, please provide the full title in the Notes to OSPA and we can update it later.
- **BioCentury Research Farm** – If the research is related to the BioCentury Research Farm, click the box.
- **Purpose** – Use the drop-down menu to make a selection. Click on the blue text to follow the hyperlink to detailed descriptions about your selection options. If you select **Miscellaneous**, you must type in a description of the purpose in the next field.
- **Program Name** – If the Sponsor has identified a Program Name for this submission, type it here.
- **Space/Utilities/Remodeling** – If you select yes, please attach all approved documentation.

Proposal Information:	
Title of Proposal:	BioCentury Research Farm <input type="checkbox"/>
Purpose:	
If Miscellaneous, describe Purpose:	
Program Name:	
Does acceptance of the award require additional space, utilities or remodeling? If yes, please attach documentation.	
<input type="radio"/> Yes <input type="radio"/> No	
<input type="button" value="Add"/>	

Funding Info Section

- **Previous Agency Award Number** – If this proposal is either a continuation or renewal, please enter the previous agency award number.
- **Previous ISU Account Number** – If it exists, please enter the previous ISU account number.
- **Period from/to** – Beginning and ending dates for this submission using the format: m/d/yyyy.
- **Direct** – Enter the direct cost for the entire period.
- **Indirect** – Enter the indirect cost for the entire period.
- **Total** – This will be automatically calculated for you.
- **F&A/Indirect Cost Rate (IDC)**

Funding Information:	
Previous Agency Award Number:	<input type="text"/>
Previous ISU Account Number:	<input type="text"/>
Duration	Period from: <input type="text"/> to <input type="text"/>
Amount	
Direct <input type="text"/>	Indirect <input type="text"/> Total <input type="text"/> \$0
F&A / Indirect Cost Rate:	
<input type="radio"/> On-Campus Rate (ISU Properties)	Primary On- or Off-Campus Address: <input type="text"/>
<input type="radio"/> Off-Campus Rate (Non-ISU Properties)	<input type="text"/>
<input type="radio"/> Other - Specify Rate <input type="text"/>	<input type="button" value="Add"/>

On-Campus – This selection is for projects that take place primarily *on* ISU property, and the rate will default to the negotiated on-campus rate.

Off-Campus – This selection is for projects that take place primarily *off* ISU property, and the rate will default to the negotiated off-campus rate.

Other – If your IDC rate is different than the on- or off-campus rate, then select this and enter the rate manually. You are required to provide supporting documentation to justify the rate. To do this, simply click on the Add Documentation button and attach the appropriate document.

- **Primary Address** – This field must be filled regardless of the IDC rate selected. This should be the location where the majority of the work will take place, and should correspond with your on- or off-campus selection.

- **Federal Flow Through** – If the Sponsor is using federal flow-through funds for this project, select the federal agency source from the pull-down menu and click on the **Add Documentation** button to attach any pertinent documentation.

Are Federal Flow Through Funds Involved?	<input type="radio"/> Yes <input type="radio"/> No
If yes, list Federal Source <input type="text"/>	<input type="button" value="Add"/>
Is Cost Sharing/Matching required ?	<input type="radio"/> Yes <input type="radio"/> No
Is Cost Sharing/Matching included ?	<input type="radio"/> Yes <input type="radio"/> No
If yes to either, please attach documentation.	<input type="button" value="Add"/>
Will subcontracts be issued to others under the award to ISU?	<input type="radio"/> Yes <input type="radio"/> No
If yes, please attach Institutional Approval for each.	<input type="button" value="Add"/>

- **Cost Sharing/ Matching** – Both questions must be answered: Is cost sharing/matching *included*, Is cost sharing *required*. If you select yes to the first question, when you tab out of the yes/no boxes you'll be sent to page four where you can enter the cost share amount and source for as many sources as you have. If you have included cost sharing, you must attach supporting documentation by clicking on the **Add Documentation** button.
- **Subcontracts** – Are there any subcontract recipients in this proposal? If you click on Yes, when you tab out of the Yes/No boxes you'll be sent to page four where you can enter as many subcontractors as you have. You also need to attach institutional approval, budgets, justifications, and statements of work for each subcontractor. Just click on the **Add Documentation** button to attach that documentation.

Compliance Issues Section

Export and Intellectual Property related questions – These questions ask for information related to export issues and intellectual property issues. Non-USA countries are countries that are not part of the United States of America or its territories

Foreign nationals are persons who are not citizens or permanent residents (green card holders) of the United States.

ISURF Background IP is ISURF owned intellectual property such as patented inventions or copyrights or software owned by ISURF that will be used in the project proposed under the GoldSheet.

MTAs are material transfer agreements. MTAs transfer materials such as biological organisms, vectors, germ plasm, etc. between entities and spell out the rights and responsibilities of the parties.

CAs are confidentiality agreements (also called non-disclosure agreements). Confidentiality agreements assist parties to determine if information is or is not confidential and what their rights and responsibilities are with regard to the confidential information.

- **Animal, Biohazard, Radiological, Human** – The blue text for each of these compliance issues is a hyperlink to additional information about compliances. If there is a compliance issue(s) for your proposal, select Yes and then, if it's already approved, enter the approval ID/Log# and date, OR, if it isn't yet approved, click on Pending.

If you select Yes for any of these compliances, the appropriate committee will be notified of your submission so the compliance process can be monitored.

Compliance Information:	
Are any Non-USA countries involved?	<input type="radio"/> Yes <input type="radio"/> No
Are any Foreign nationals involved?	<input type="radio"/> Yes <input type="radio"/> No
Are any ISURF background IPs involved?	<input type="radio"/> Yes <input type="radio"/> No
Are any MTA's or CA's involved?	<input type="radio"/> Yes <input type="radio"/> No
Will human subjects be used in this project? <input type="radio"/> Yes <input type="radio"/> No	
If yes, provide Assigned IRB ID	Date of Approval
<input type="text"/>	<input type="text"/>
OR check here if Pending. <input type="radio"/>	
Will vertebrate animals be used in this project? <input type="radio"/> Yes <input type="radio"/> No	
If yes, provide IACUC LOG #	Date of Approval
<input type="text"/>	<input type="text"/>
OR check here if Pending. <input type="radio"/>	
Will recombinant DNA, human or animal pathogens, or biological toxins be used in this project? <input type="radio"/> Yes <input type="radio"/> No	
If yes, provide IBC LOG #	Date of Approval
<input type="text"/>	<input type="text"/>
OR check here if Pending. <input type="radio"/>	
Will Radioactive Materials be used in this project? <input type="radio"/> Yes <input type="radio"/> No	
If yes, include Approval Date for Radioisotope Use	Approval Date for Radiation Producing Device use
<input type="text"/>	<input type="text"/>
and/or	
<input type="text"/>	<input type="text"/>
OR check here if Pending. <input type="radio"/>	

PI/Co-PI Information and Incentive Distribution/Project Contribution Section

- **PI/Dept/Center** – In this section the Lead PI name will automatically be filled in from the first page. You should select the Department or Center/Institute fields. You should also fill in the PI Incentive percentage and the percent contribution made by the PI.
- **Percent of PI Incentive** – Fill this field with the Lead PI’s percent of the incentive monies. Total incentive for all PI/Co-PI’s must equal 15%. If there is no incentive to be received, please enter 15% for the PI to satisfy the form requirements.
- **Percent of PI Contribution** – Fill this field with the Lead PI’s contribution to the project. Total contribution must equal 100%. This figure is used to aid RRCs in figuring the RRC percentage of IDC return.

Investigator Information				
For each investigator, list the home department, extension unit or other unit and its associated Resource Responsibility Center (RRC). Also, if applicable, you may acknowledge one or more a centers/institutes/extension units that have helped or will help to facilitate the research by providing services you deem important to the success of the proposed project, such as start-up funding, seed funding, facilities, editing, unique expertise, access to research collaborations, etc.				
For each Co-PI, type the last name into the "Co-PI Lastname Search Field". You may use * as a wildcard. Use dropdown boxes to change the units as needed.				
Investigator Incentive Distribution and Project Contribution (15% IDC Return)				
For each investigator please adjust the values of incentive distribution and project contribution as necessary. Note that incentive and contribution do not need to be proportional. Click the (+) sign to add more COPI(s).				
Principal Investigator	Department/Unit/RRC	Institute/Center/Extension Unit	15% IDC Return Incentive %Contribution	
<input type="text"/>	-- Select a Unit-RRC --	-- Select a Center or Institute --	0.000	0.000
Co-PI Lastname Search Field	Co-PI Selection Field	Department/Unit/RRC	Institute/Center/Extension Unit	Incentive %Contribution
<input type="text"/>	Select a COPI	-- Select a Unit-RRC --	-- Select a Center or Institute --	<input type="text"/> <input type="text"/>
				+

- **Co-PI Lastname Search Field** – Use this field just like the PI Lastname Search Field on page one. Remember that you can use * and % as wildcards. When you tab out of the search field the data for that PI will be automatically filled in (if there’s only one name returned), or select a name from the drop-down list. Make your selection and that person’s data will automatically be filled in. Again, if any of the data is incorrect or incomplete, you can correct it here. If your Co-PI is not in the list, please contact OSPA (4-5225). If there is no Co-PI, just skip this section. You should also fill in the PI Incentive and percent contribution information for the Co-PI(s). To add another Co-PI, click on the plus button to the right next to the % contribution column. Use the + sign to add more Co-PIs.
- **Percent of Co-PI Incentive** – This field will be blank, so make changes as necessary. Keep in mind that the total PI Incentive must equal 15% whether or not this proposal is eligible for PI Incentive.
- **Percent of Co-PI Contribution** – Fill this field with the Co-PI’s contribution to the project. Total contribution must equal 100%. This figure is used to aid RRCs in figuring the RRC percentage of IDC return.

ISU Authorizing Personnel Selection for Routing (Who has to “Sign” Your GoldSheet?)

The only institutional signatures required on the GoldSheet, in addition to all investigators are departments, distribution units, and the VPR Office. In some cases Centers and Institutes may also require review and approval. In this case, Centers and Institutes should follow the Department approvers’ process.

Departmental approvers – In the second half of page three, you enter departmental approvers. If the department is set up with a Work Queue (see listing at back of manual), please use the Work Queue. Just enter the Work Queue name (or a portion of it with a wild card, i.e. wq* or wqc* or just c*) in the search field and tab out. For Centers and Institutes that have required review/approval for GoldSheets, please identify the appropriate Work Queue.

Resource Responsibility Center (RRC) approvers – On page four you enter the Resource Responsibility Center approvers. Just enter the Work Queue name or wq* in the search field and tab out.

All ISU Departments and RRCs have Work Queues set up. Please route the form to those Work Queues not an individual name.

VPRED and OSPA Offices – You do NOT have to enter the VPRED or OSPA Offices – these last two stops on the routing tree will happen automatically for every GoldSheet submitted electronically. OSPA is not restricted by read-only access, so OSPA can make alterations to the GoldSheet if necessary.

Entering a wrong name – If at any time you enter the wrong person and need to make a change, just re-enter a new name in the search field. If you need to delete a name and not replace it, then just open the drop-down list for the individual’s name and select the blank entry at the top of that list, then manually delete the person’s department, center and incentive (if any was entered).

Submitting the GoldSheet

Before you submit the GoldSheet, be sure to either print out a paper copy for your records or save the file on your hard drive. This way you will always have access to the ID number for each record.

- **Attachments** – If you haven’t done this already, do it now. You can attach a draft of the proposal if you don’t have a final copy ready. You must attach a final copy of the budget and budget justification. You must also attach the Program Guidelines and any subcontract documentation. Remember no spaces in the file name or title of the attachments.
- **Non-PI Submit** – If you’re NOT the lead PI entering the GoldSheet, then you need to click on the Go button under 2. in the middle the page. The GoldSheet is not in the data base until the PI signs off on it. Therefore, you cannot use the GoldSheet_Status_ HTML form if the PI has not signed off on a GoldSheet.
- **Conflict of Interest** – If you’re the lead PI who is entering the data, review the conflict of interest statement and then choose yes or no.
- **PI Submit** – When you’re satisfied that you’ve entered all the data correctly and attached all the appropriate documents, click on the gray PI Signature button in the middle of the page.

SIGNATURES
I hereby assign copyright and patent rights to the Iowa State University Research Foundation, Inc. ("ISURF") in accordance with the terms and conditions stated in the Faculty Handbook or to another entity if required by the terms and conditions of the grant or contract, provided that such assignment to an entity other than ISURF shall not be operative unless and until the grant or contract has been properly executed by the Vice President for Research and Economic Development. I certify that I have not been debarred, suspended, or declared ineligible to receive federal agency funds.

Lead PI Signature and Submit (electronic)
Step 1 click the big gray box; Step 2 Choose Submit and click the Go button.
If you are an Originator and not the PI, go to 2. and select "Submit" from the drop down menu. Then click on GO submit the form to the PI.

Add or View Attachments

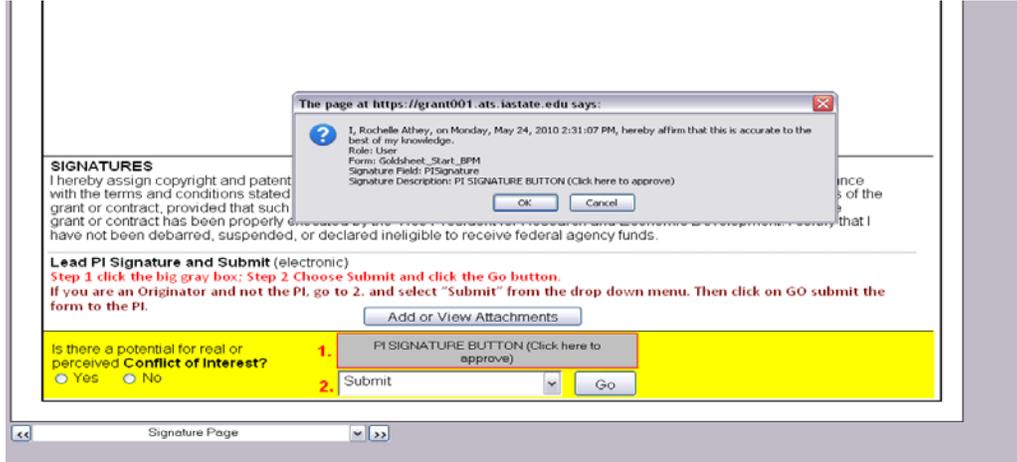
Is there a potential for real or perceived **Conflict of Interest?**

1. Yes No

2.

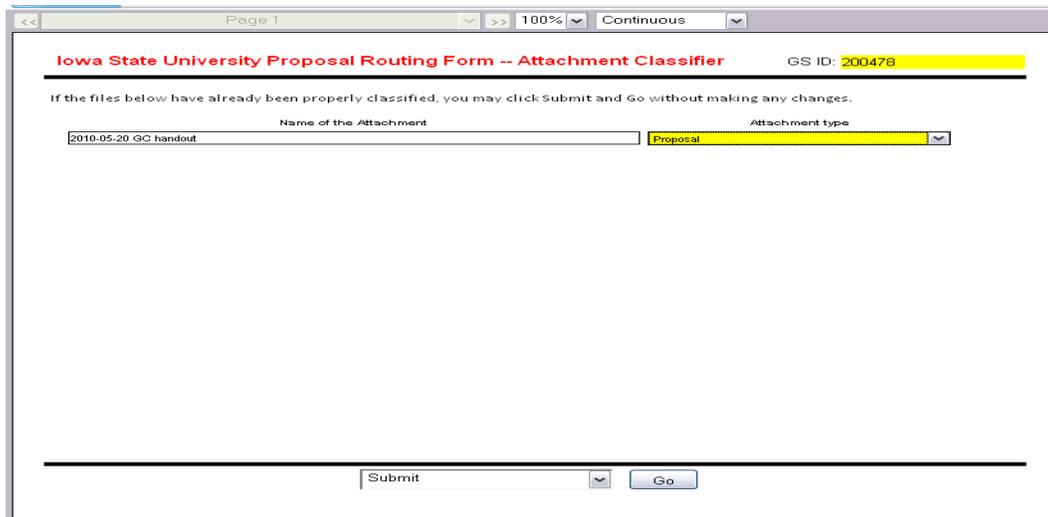
<< Signature Page >>

A box will pop up with your name and signature information. Click on the OK button to continue with the signature process or click on Cancel to stop the signature process.



To complete the signature process, select Submit from the drop down box in 2. and click the Go button to submit your GoldSheet for electronic routing.

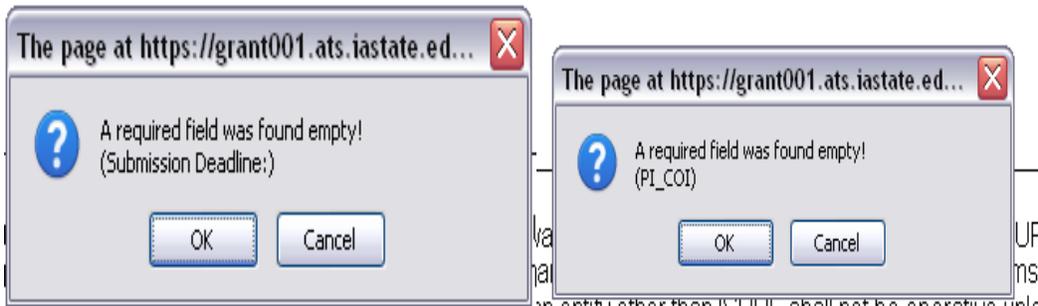
Attachments - If you have completed all mandatory fields, but have added attachments, Liquid Office take you to an Attachment Classifier so that you can classify your documents.



The categories to choose from are: eGoldsheet, Proposal, Budget, Negotiation, Compliance Docs, Subrecipients, Advance Account.

Check for mandatory data– After you click in the 1. PI Signature and then select Submit from 2. and click the Go button, the GoldSheet will go through your entire GoldSheet checking for missing data. This may take a moment. If there are blanks in any mandatory fields, you'll get a window that identifies the missing data field. When you click on OK, you'll be taken directly to that field. When it's filled, go back to the bottom of page three and try the submit plus Go button again. This process will repeat until all required fields are completed.

Examples of the validation messages you might see --



Final Submission: When Liquid Office has reviewed all mandatory fields, and after any attachments have been classified, the system will indicate the GoldSheet is processing and will show the following message when the GoldSheet has begun routing:



Check the Status: OSPA recommends you (Originator/PI) check the status of the GoldSheet as frequently as you feel necessary to ensure you meet the sponsor deadline. The status form displays routing and approval information regarding who approved the GoldSheet (PI/COPI/Department/College). In the event an approver (PI/COPI/Department/College) has not approved your GoldSheet within the timeframe you expected or desire, you should contact the respective approver.

The Electronic Routing Process

Using Your Inbox – Items That Need a Response

Email notification of submittal/approval – If you have marked in your User Profile to be notified by email, then you will receive an email that looks something like this:

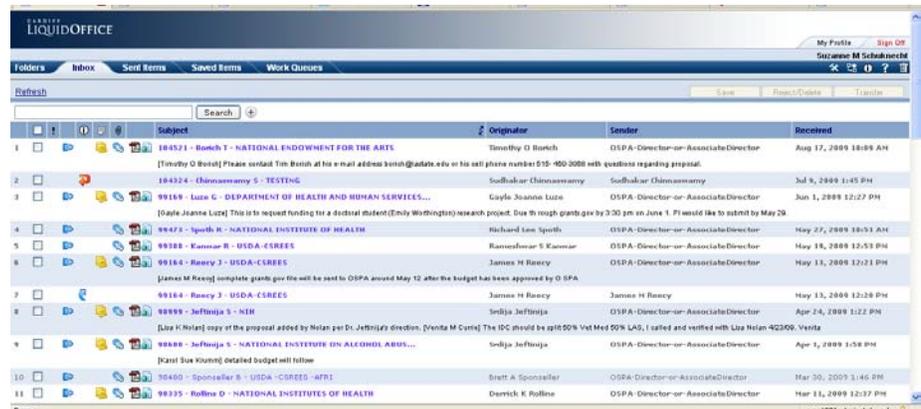
The "Goldsheet_Start" form has been sent to you for your review.

Form created by: Liz Zuercher
Form created on: Jul 22, 2009 2:37 PM

Please click on the link below to access the form.

https://grant001.ats.iastate.edu/index.html?lp=/fserver?DFS_Action=RouteGetInbox&DFS_Client=JSP

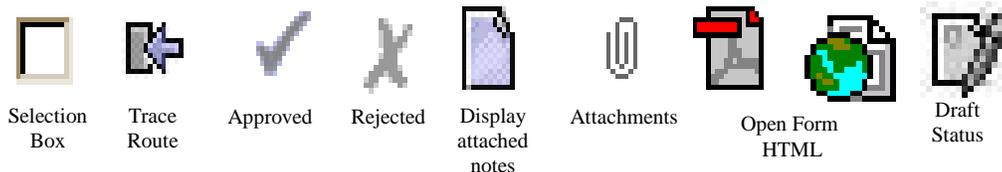
When you get an email notification, it will come with a link to take you to the GoldSheet system. If you're not already logged into the GoldSheet, the email link will launch the GoldSheet and display the login screen. After you log in, it will take you directly to the GoldSheet system.



Opening forms for approval –Forms for your approval as an individual (i.e. Co-PI) will appear in your Inbox. Forms for approval by a Work Queue will appear in the appropriate Work Queue. After you have opened a document in your Inbox or Work Queue, it's title will no longer be highlighted – this way you can distinguish between documents you have opened at least once, and ones that you have never viewed.

You can select a form and save it to the **Saved Items** folder or reject/delete it from your list using the buttons at the bottom.

The icons associated with each form allow you to do or know several things.



Work Queues

If you are a member of a Work Queue, you will receive an email notification of a proposal that needs approval. When you open up your Work Queue folder, click on the Work Queue name and all the listings in your Work Queue will appear. Any member of your Work Queue can approve a proposal, so you should establish some protocol for who will actually be approving proposals and under what circumstances. The Work Queues are an attempt to make it easier when an approver is out of the office – when a primary approver is absent, the secondary approver can take over the Work Queue duties. When an Approver selects a proposal to open, that proposal form is automatically locked. If you need to approve a locked proposal, you can select the locked proposal and click on **Remove Lock** or **Override Lock**.

How to review but not approve a GoldSheet

If you simply need to look at a GoldSheet and you will not be approving it, you must open the GoldSheet in “Open Read Only”. Click on the box adjacent to the form you would like to open then at the top of the page click on “Open Read Only”. This keeps the form “unlocked” for the approver.

How to “Sign” (Approve) a GoldSheet Electronically

Co-PI approvers – The form that Co-PI’s see will contain all the completed fields of the original GoldSheet, with the Lead PI’s signature and identifying data, plus a place for the Co-PI to approve the GoldSheet. The Co-PI form is read-only; as a result, the Co-PI cannot change any fields but can add notes, attach files, view any attachments (but not change them), and they must fill out the Conflict of Interest statement.

Principal Investigator	Department/Unit-RRR	Institute/Center/Extension Unit	Incentive	%Contribution
RICK CHARLES	Agricultural Education & Studies-AES/CALS	Bioeconomy Institute	10,000	50.00
Rochelle Athey	Agricultural & Biosystems Engineering-EXT	Center for Advanced Host Defenses, Immunobiolo	5,000	50.00

- **Conflict of Interest** – All Co-PI’s must respond to this question before their approval will be accepted.
- **Add Notes for OSPA** – This is where Co-PI’s can add any comments about the proposal
- **View Attachments** – The Co-PI’s can look at all the accompanying attachments and add more if appropriate.

- **Sign** – Click on the **1**. COPI Signature Button. Click OK on the pop up box to continue or click Cancel to stop the signature process.

Principal Investigator: RICK CHARLES
 Department/Unit: Agricultural Education & Studies-RES/OALS
 Institute/Center/Extension Unit: Biosciences Institute
 Incentive: 10,000
 %Contribution: 50.00

Rochelle Athey
 Department/Unit: Agricultural Education & Studies-RES/OALS
 Institute/Center/Extension Unit: Biosciences Institute
 Incentive: 5,000
 %Contribution: 50.00

The page at https://grant001.ats.iastate.edu says:
 I, Rochelle Athey, on Tuesday, May 25, 2010 9:39:06 AM, hereby affirm that I approve this document.
 Role: User
 Form: Goldsheet_COPI_BPM
 Signature Field: COPISignature_1
 Signature Description: COPI SIGNATURE BUTTON (Click here to approve)

After the pop up box disappears, if proceeding with signature, select Submit from the drop down menu under **2**. and click Go. Liquid Office will display the message “Please wait for processing to complete.” It will then display a box indicating the form has been submitted.



Departmental approvers – Departmental approvers will be able to see the Lead PI and all Co-PI signatures, plus they can add notes, view attachments or add attachments of their own. The Lead PI and Co-PI signatures will appear on Page 2 of the GoldSheet.

- **Add Notes for OSPA** – This is where Approvers can add any comments about the proposal
- **View Attachments** – The Approvers can look at all the accompanying attachments and add more if appropriate.

Iowa State University Authorizing Department / Center / Institute / Extension Unit Signature
This application has been reviewed and is judged to be consistent with the objectives and capabilities of the unit represented by the signature below. The proposed effort is considered compatible with other University duties of the investigator(s) and consistent with University policies.

Department / Center / Institute / Extension Unit Authorizing Signature Field Required
Approver Signature (electronic)

Department Signature

Add Notes for OSPA Add or View Attachments

Submit Go

Page 3

- **Sign** – Click on the gray Department Signature button. A pop up box will be displayed. If you want to proceed with signature, click the Ok button. If you want to cancel signature, click the Cancel button.

Iowa State University Authorizing Department / Center / Institute / Extension Unit Signature
This application has been reviewed and is judged to be consistent with the objectives and capabilities of the unit represented by the signature below. The proposed effort is considered compatible with other University duties of the investigator(s) and consistent with University policies.

Department / Center / Institute / Extension Unit Authorizing Signature Field Required
Approver Signature (electronic)

Department Signature

Add Notes for OSPA Add or View Attachments

Submit Go

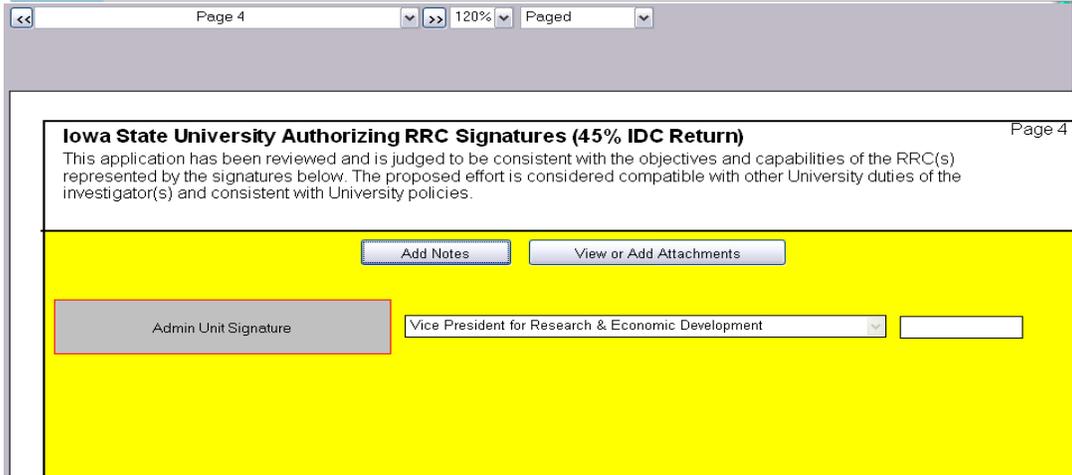
The page at <https://grant001.ats.iastate.edu> says:

I, Rochelle Athey, on Tuesday, May 25, 2010 9:52:35 AM, hereby affirm that I approve this document.
Role: User
Form: Goldsheet_Approver_BPM
Signature Field: DepartmentSignature_1
Signature Description: Department Signature

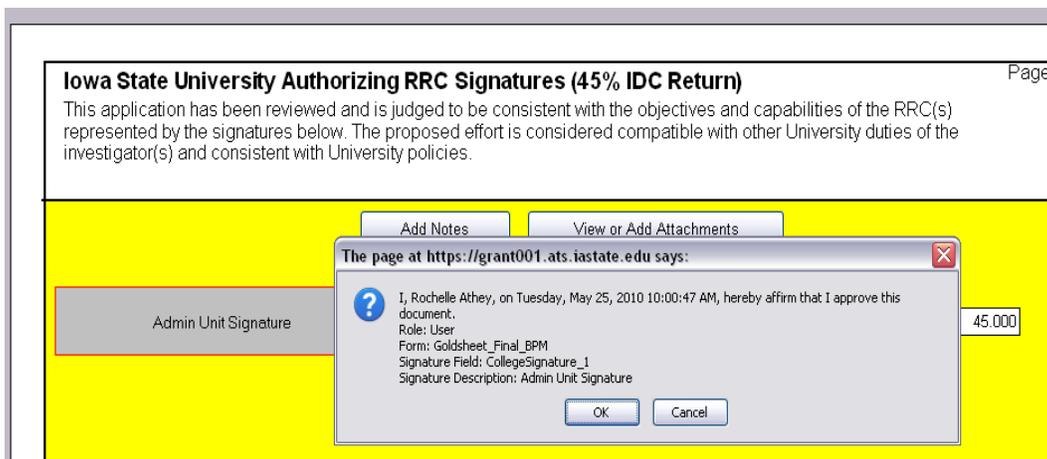
OK Cancel

If you clicked Ok, you must then continue the signature process by selecting Submit from the drop down menu at the bottom of the yellow signature section and click Go. Liquid Office will display the message “Please wait for processing to complete.” It will then display a box indicating the form has been submitted.

Resource Responsibility Center (RRC) approvers – These approvers can see all the signatures of those before them, the Lead PI and Co-PI’s, departmental approvers, and any other RRC approvers who have approved prior to them.



- **Percent of IDC returned** – This section must be filled out before approval will be accepted. This percentage is negotiated between the RRCs involved and must total 100% when all have signed.
- **Add Notes for OSPA** – This is where Approvers can add any comments about the proposal
- **View or Add Attachments** – The Approvers can look at all the accompanying attachments and add more if appropriate.
- **Sign** – Use the Admin Unit Signature button. A pop up box will appear. If you want to continue the signature process, click Ok. If you want to cancel the signature process, click Cancel.



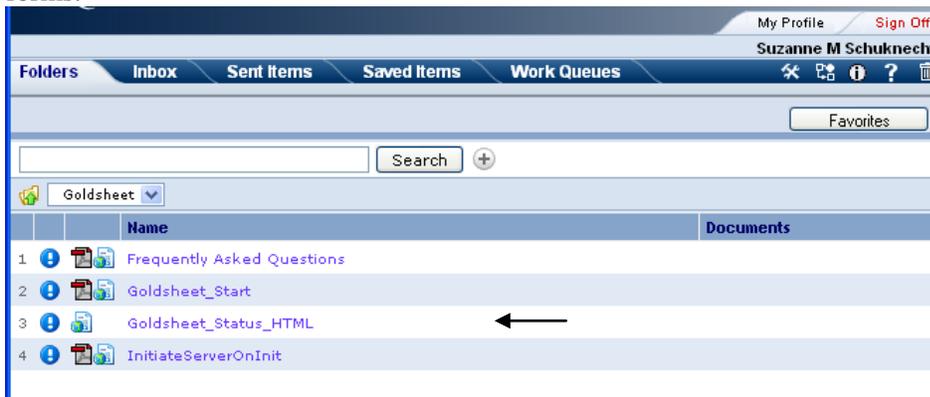
If you clicked Ok, you should then continue the signature process by selecting Submit from the drop down menu at the bottom of the page and click Go. Liquid Office will display the message “Please wait for processing to complete.” It will then display a box indicating the form has been submitted.

How to Tell Where You Are In the Routing Process

The PI will receive email notifications as the GoldSheet moves through the approval process. The originator, PI, or anyone with the Proposal ID number can use the Goldsheet_Status_HTML form to look for routing information.

GoldSheet_Status_HTML Form

Once the routing process has begun, probably the easiest way to track the progress of your proposal is to open the Goldsheet_Status_HTML form in the GoldSheet. This form is located with the other GoldSheet forms.



When you click on the form, you will see a GoldSheet Status Report form. To pull up the data for your proposal, simply enter the ID number in the GoldSheetID field and hit the Tab key.

Goldsheet Status Form

Goldsheet ID (Enter GS ID & Hit Tab)

Originator & PI Assigned Date & Time Completed by User, Date & Time

<input type="text"/>	GSLoc1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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COP(s) Assigned Date & Time Completed by User, Date & Time

<input type="text"/>					
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Department(s) Assigned Date & Time Completed by User, Date & Time

<input type="text"/>					
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Admin Unit(s) Assigned Date & Time Completed by User, Date & Time

<input type="text"/>					
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VPRED and OSPa Assigned Date & Time Completed by User, Date & Time

<input type="text"/>					
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Done

The report will return all the routing data and display the names and work queue names of all approvers who have already signed off on the proposal, plus the date and time of signature. You can scroll down through the form to see all the names of approvers.