

Instructions for using the E-Green File in ARIS/AIMS

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ARIS/AIMS allows for agreement (AIMS) documents and non-AIMS documents to be electronically filed in Work and Active. E-Green is the official file for all agreements. See Bulletin 10-706, *E-Green File Implementation in ARIS/AIMS*, for additional information.

To Add an Agreement (AIMS) Document to Active

- From the Research Documentation/Extramural Agreements Screen, click on Active.

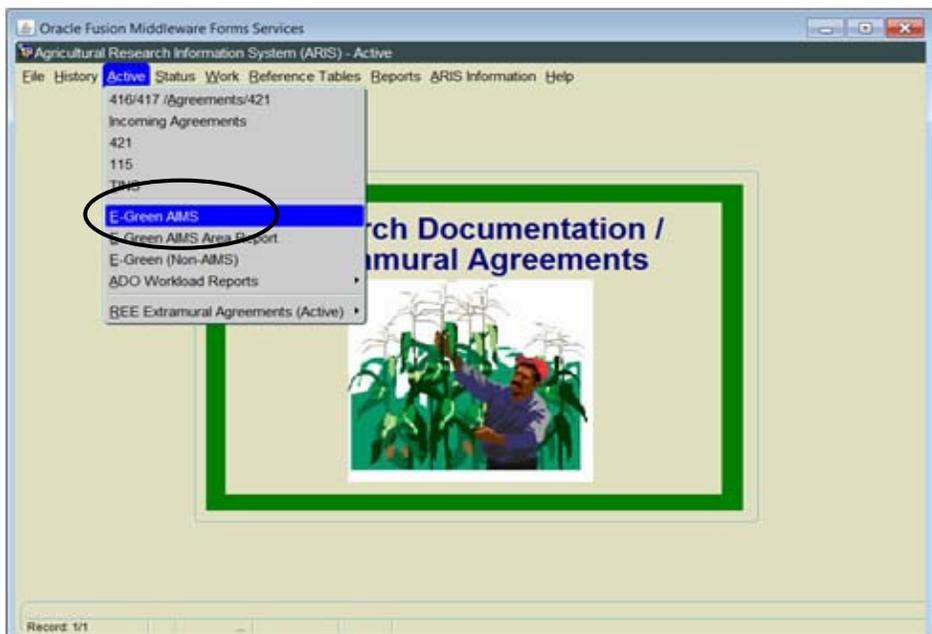


Figure 1 - E-Green AIMS

- Select "E-Green AIMS" from the drop down menu (Figure 1).

The Query screen will display (Figure 2).

Figure 2 - E-Green AIMS Query screen

- Enter the agreement number, accession number, or control number of the record you are locating (Figure 2).
- Hit Enter on your keyboard or click “Query” and “Execute” from the menu bar.

The Agreements Information Management System list screen will display (Figure 3).

The AIMS Scanned Documents screen will display.

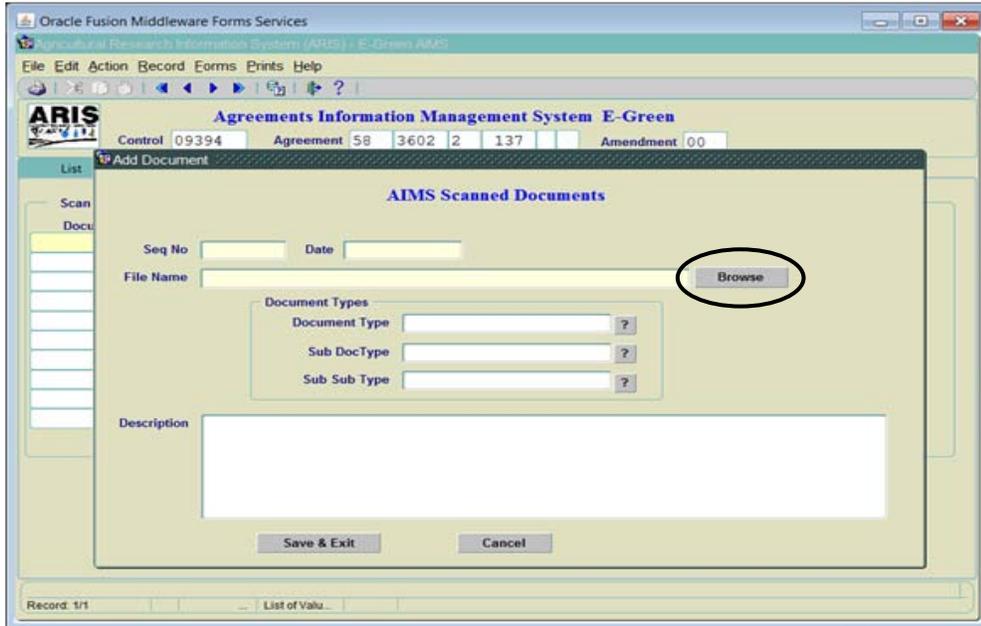


Figure 5 - Add Document screen

- Click on the “Browse” button next to File Name to search for the document you want to load into the E-Green file (Figure 5).

The search dialogue box will display (Figure 6).

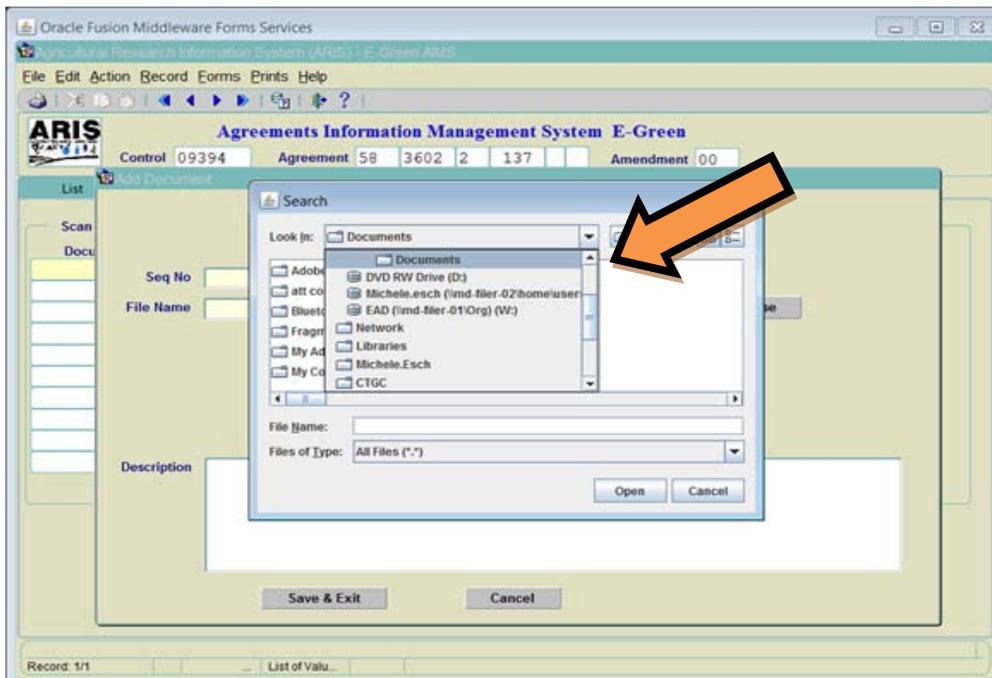


Figure 6 - Search dialogue box

- Select the drive where your document is saved from the drop down menu (Figure 6).

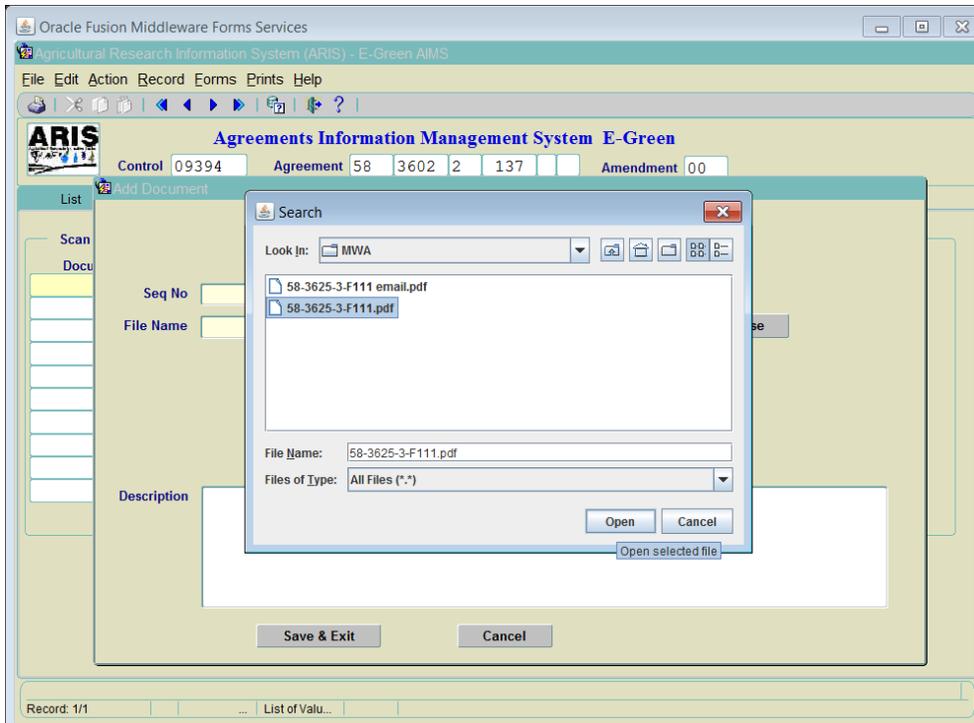


Figure 7 - Document search box

- Highlight the document you want to upload (Figure 7). Click Open.
- The search dialogue box will close and the system will display a status bar that says, "Upload to Database in progress."

Note: You can upload any type of document (i.e., Word, Excel, PDF, or email.). However, PDF is recommended. If you make changes to the document that you downloaded, they will not save. You will need to save the document to your computer and re-upload it into the E-Green module.

Once the upload is complete, the system will display a message that says, "File uploaded successfully to database" (Figure 8).

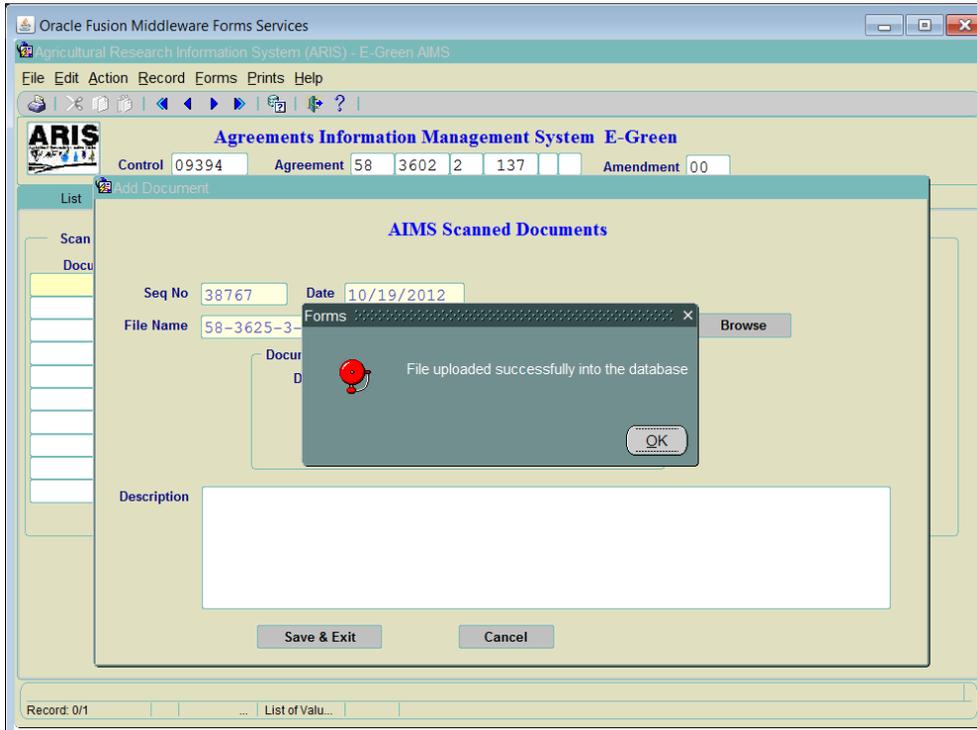


Figure 8 - File uploaded successfully to database

You will now enter the detailed document information (Figure 9).

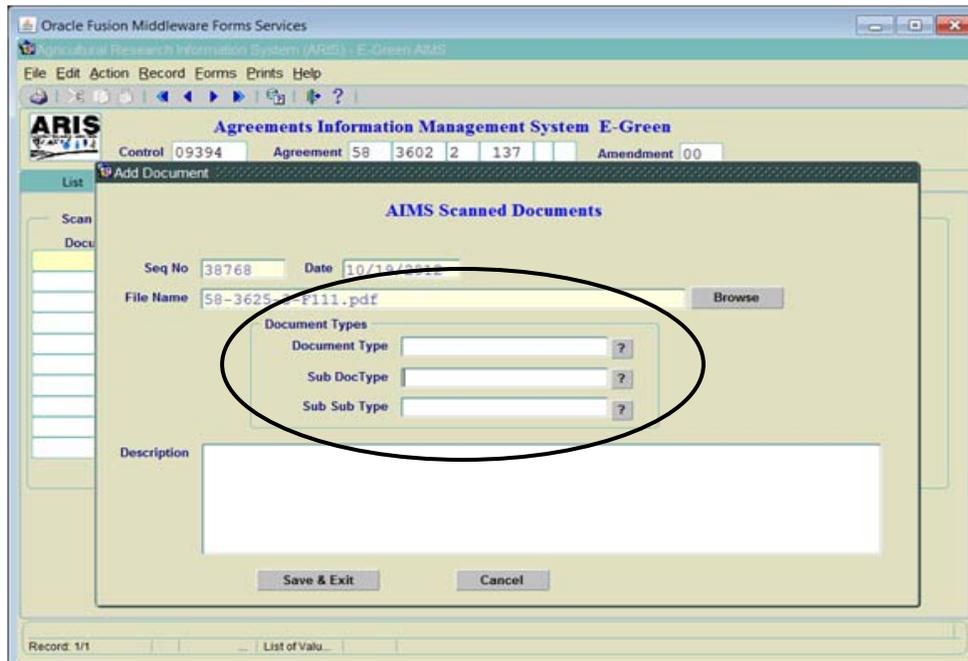


Figure 9 – Add Document Information

Click on the question marks next to the fields to utilize the drop down menu selections. You must fill in the information in order (for example, you must enter the Type then the Sub Type).

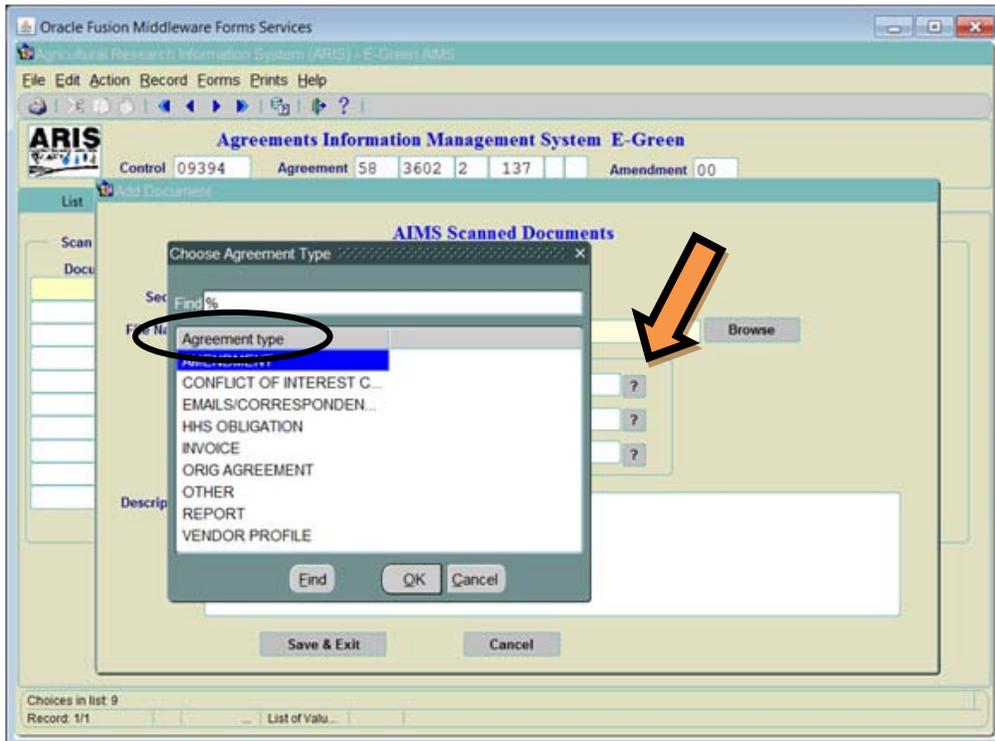


Figure 10 – Agreement Type Selections

- Select the Agreement Type by clicking on the question mark to the right side of the field (Figure 10).

The “Choose Agreement Type” list of values will display (Figure 10).

- Select the corresponding document type.
- Click Ok. The document type will populate and the dialogue box will close.

If necessary, continue down the list until all fields are entered.

Note: Currently, there is no data in the Sub Sub Type.

Type a brief description of the document in the “Description” field.

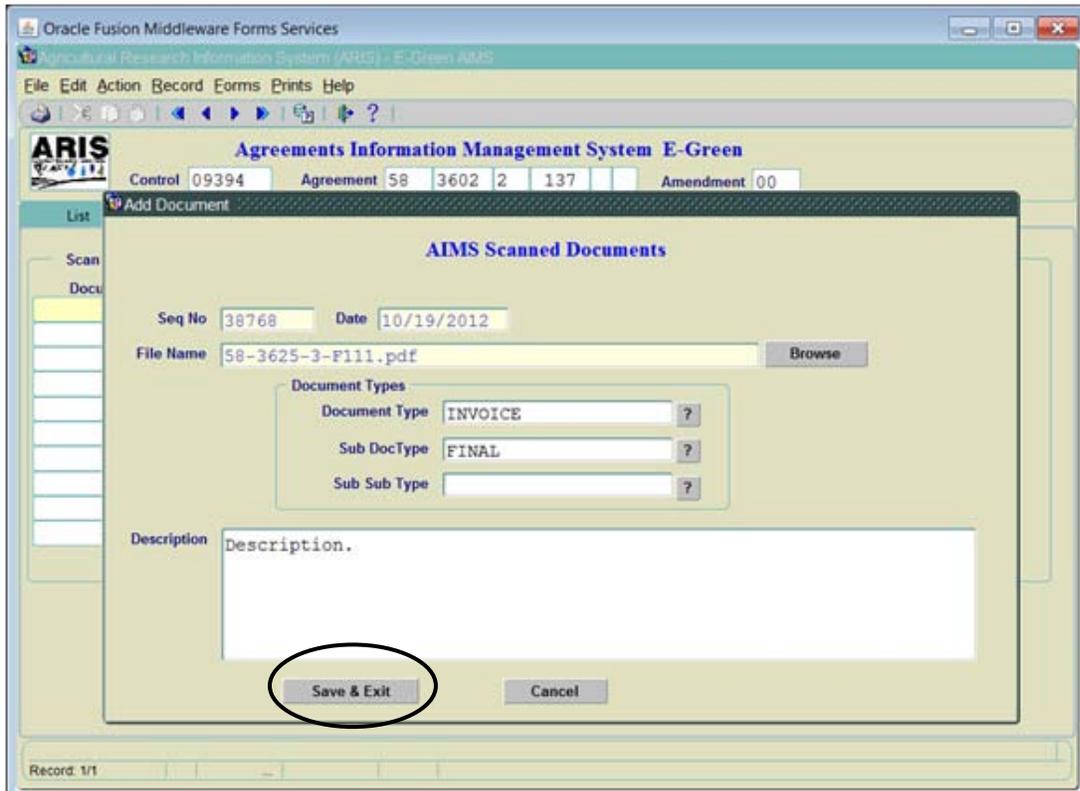


Figure 11 - Save & Exit

Once all of the information is entered, click “Save & Exit” (Figure 12). The AIMS Scanned Documents screen will close and the E-Green tab will display.

You can continue to add documents or exit the system.

To Delete a Document

From the E-Green tab, highlight the document that needs to be deleted.

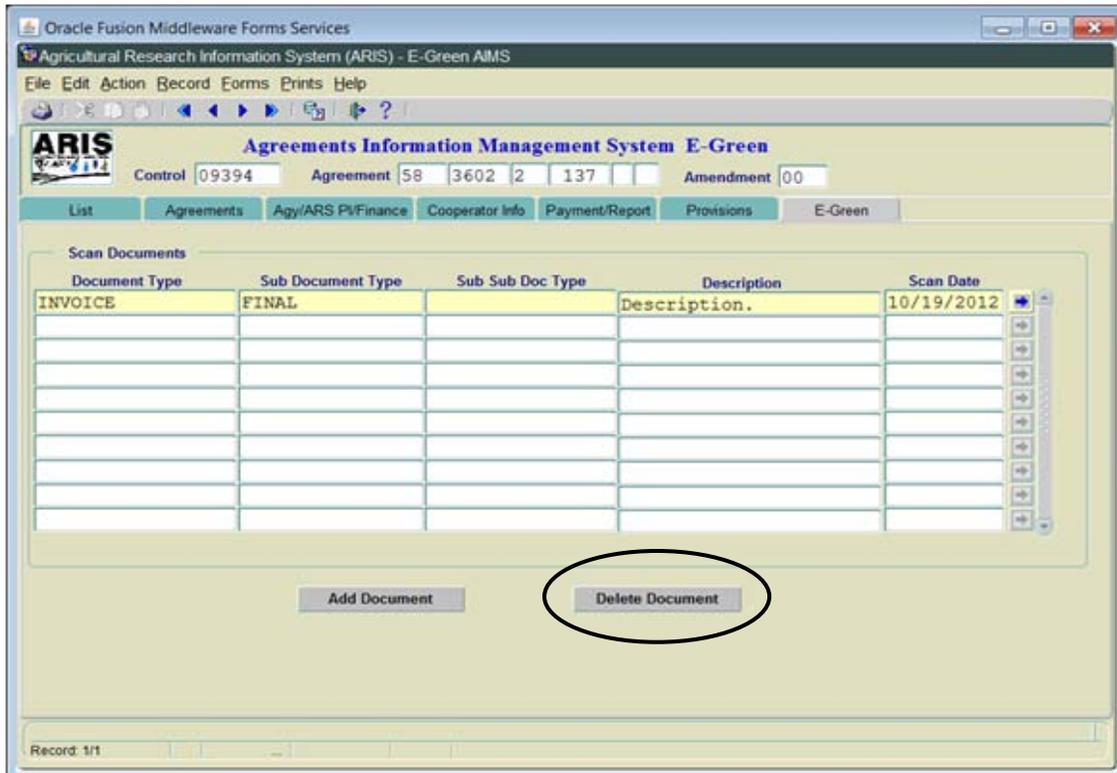


Figure 1 - Delete Document

- Click "Delete Document" (Figure 1).

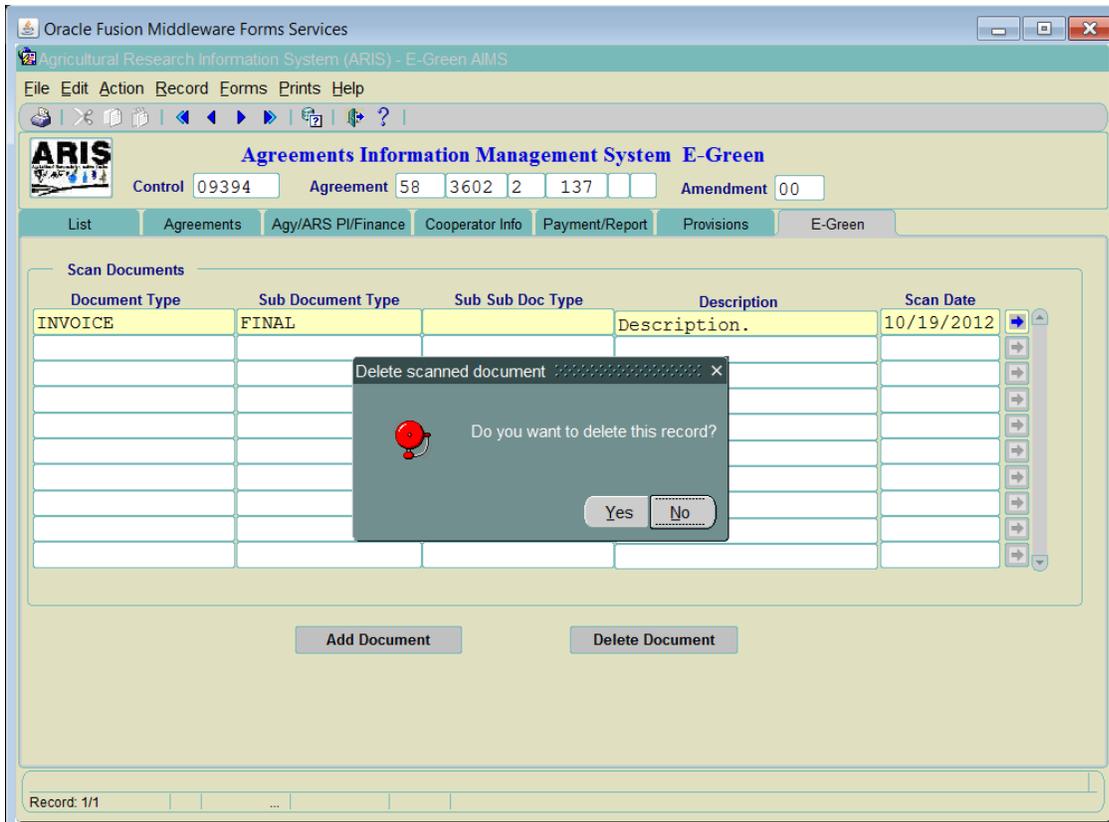


Figure 2 - Delete Document Dialogue box

A dialogue box will appear that asks, "Do you want to delete this record?" (Figure 2).

- Click "Yes" if you want to delete the record.

The document will delete and the E-Green tab will display.

To View a Document

- From the E-Green tab, click on the arrow to the right of the document you want to work with (Figure 1).

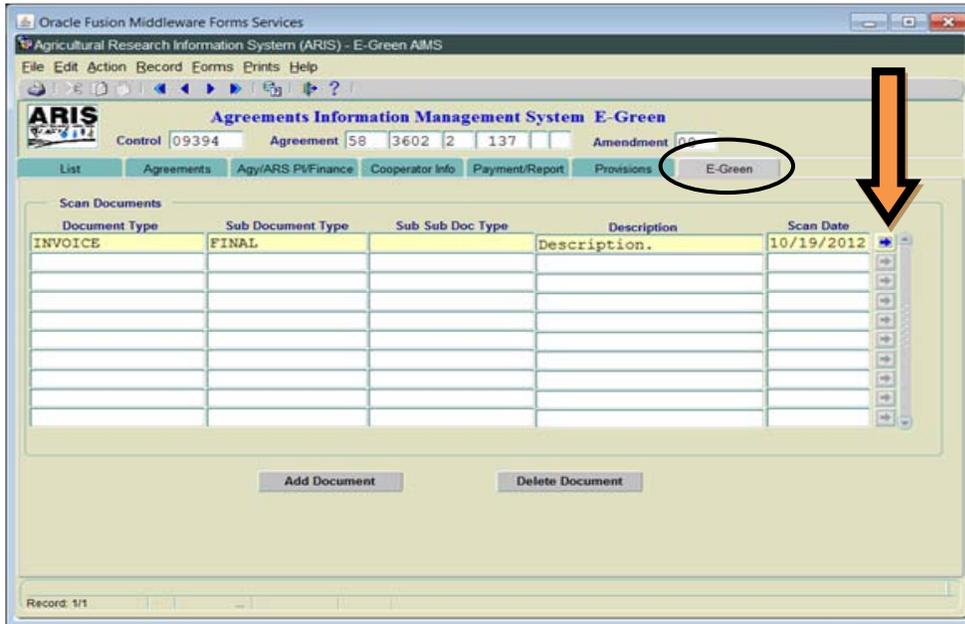


Figure 1 - E-Green Tab

The AIMS Scanned Documents screen will display (Figure 2).

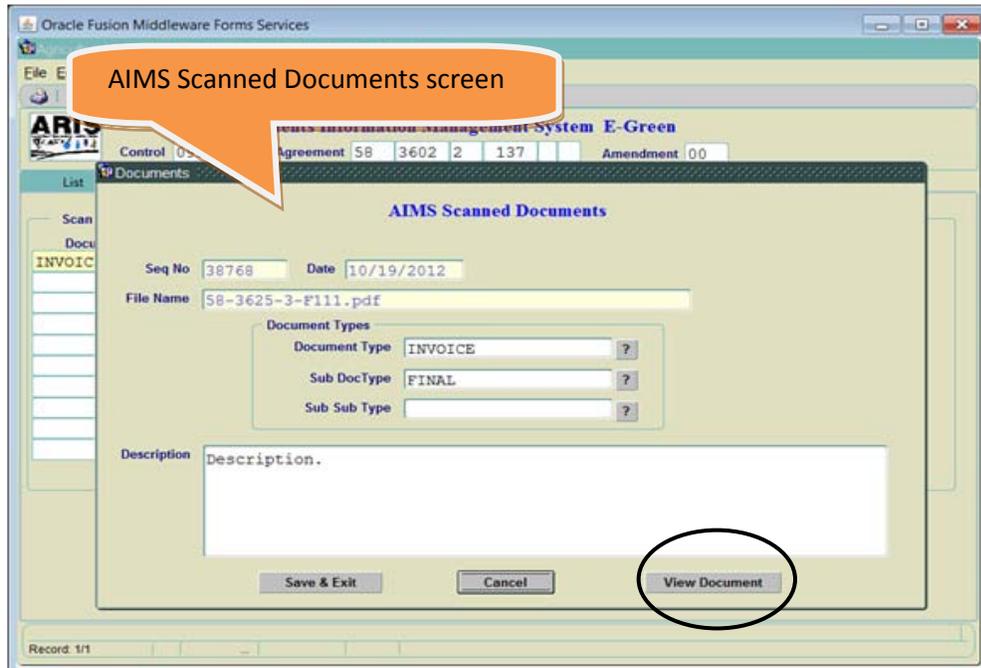


Figure 2 – View Document

- Click on “View Document” (Figure 2).

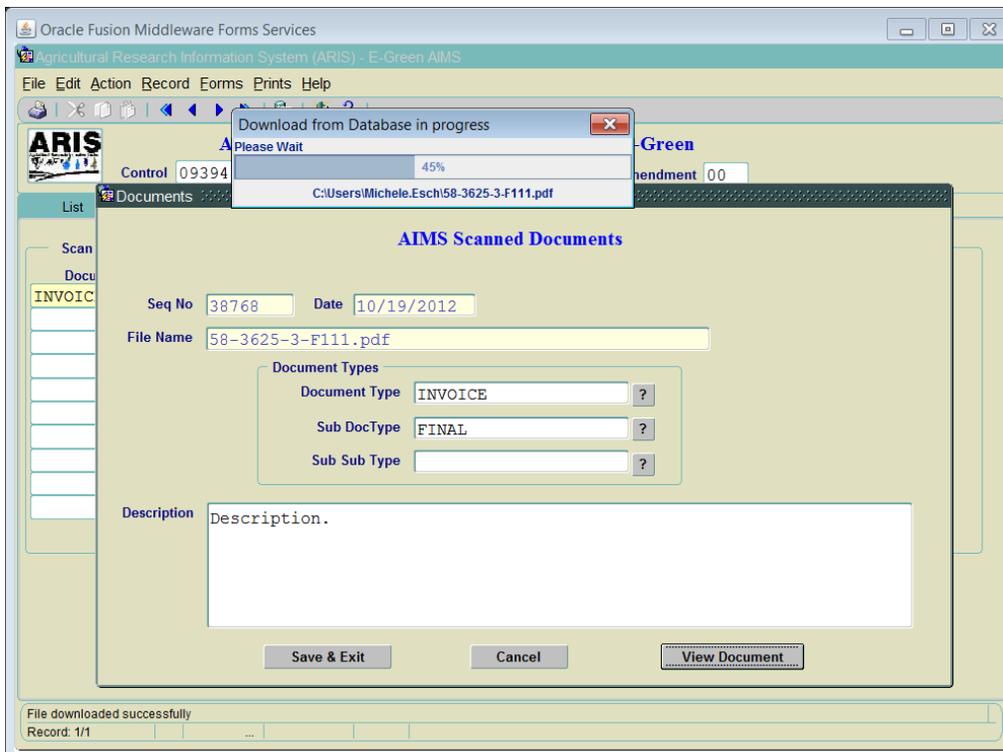


Figure 3 – Download from Database in progress

The system will display a status bar that says “Download from Database in progress” (Figure 3).

The program that the document was created with will launch and the document will display.

Note: If you make changes and save the document, they will not populate the system unless you delete the document and add it back into the system.

Once you are done viewing the document, close the program it was launched in. You will return to the AIMS Scanned Documents screen.

- Click “Cancel” or “Save & Exit” and the AIMS Scanned Documents screen will close.

The E-Green tab will display.