

Green Seal®

Project Portal User Guide



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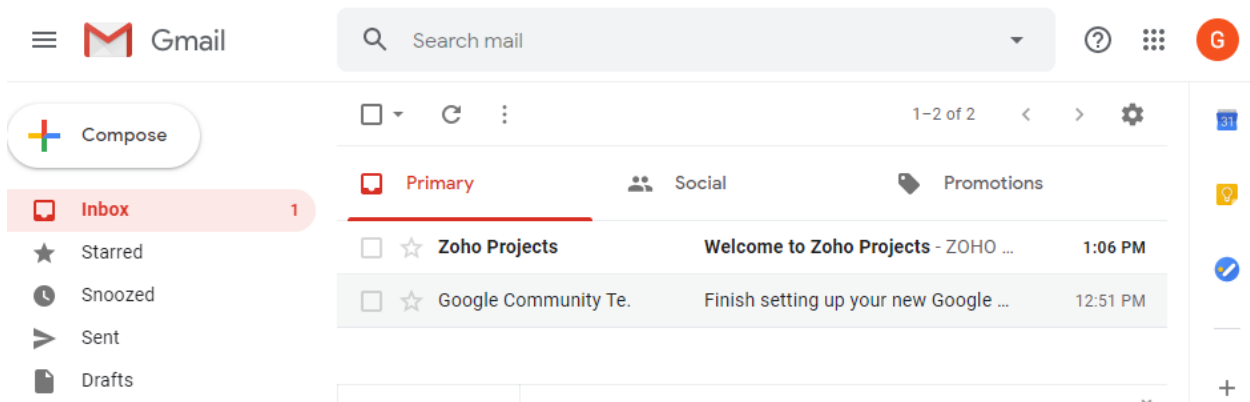
Frequently Asked Questions

Getting Started

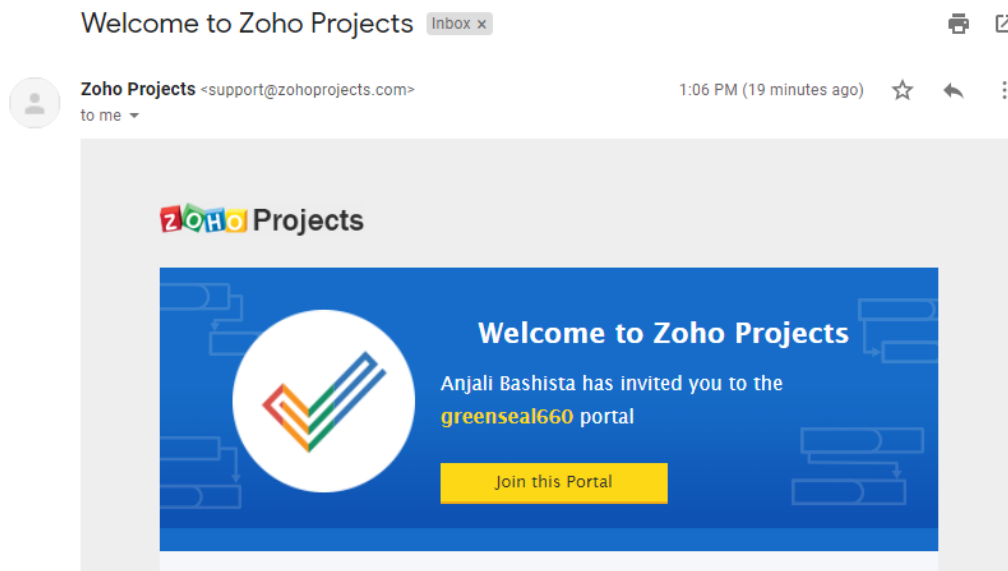
Welcome to your project with Green Seal! This guide will help you through the initial project set-up process and detail how you can add documents, give feedback, and successfully complete your project. At any time, please feel free to reach out to your project manager, or certification@greenseal.org with any questions.

Creating Your Project Portal Account

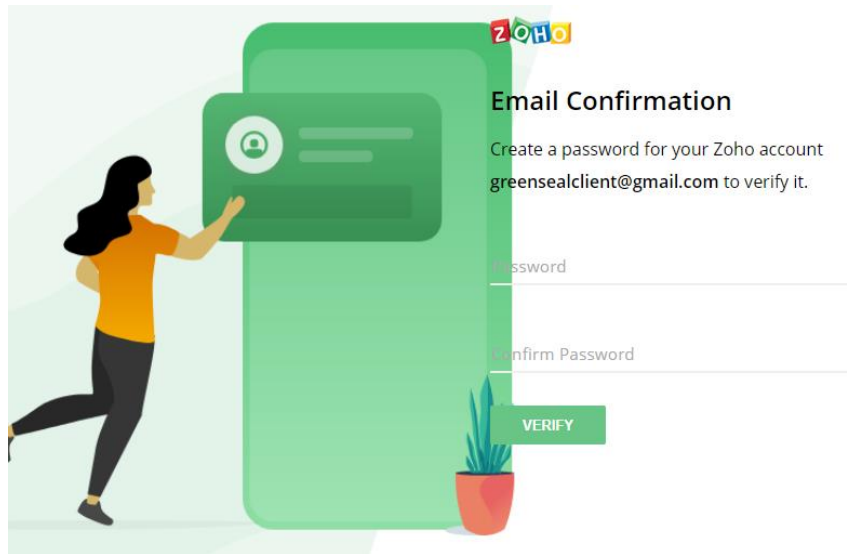
1. When you begin a new Green Seal certification project, you will receive an e-mail invitation to join Green Seal's Project Portal. An e-mail will be sent to your preferred e-mail address from Zoho Projects entitled Welcome to Zoho Projects. Check your spam folder if your project manager has sent you an invitation but you cannot find it in your inbox.



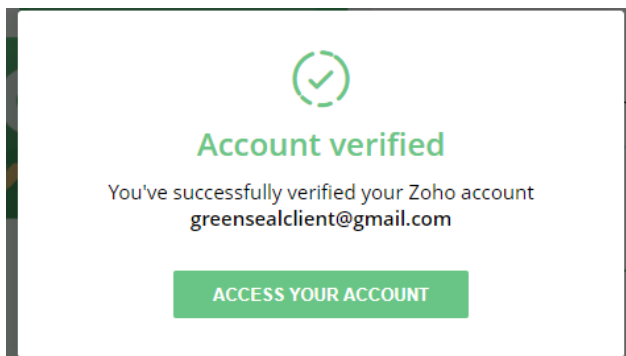
2. In the e-mail, click Join this Portal.



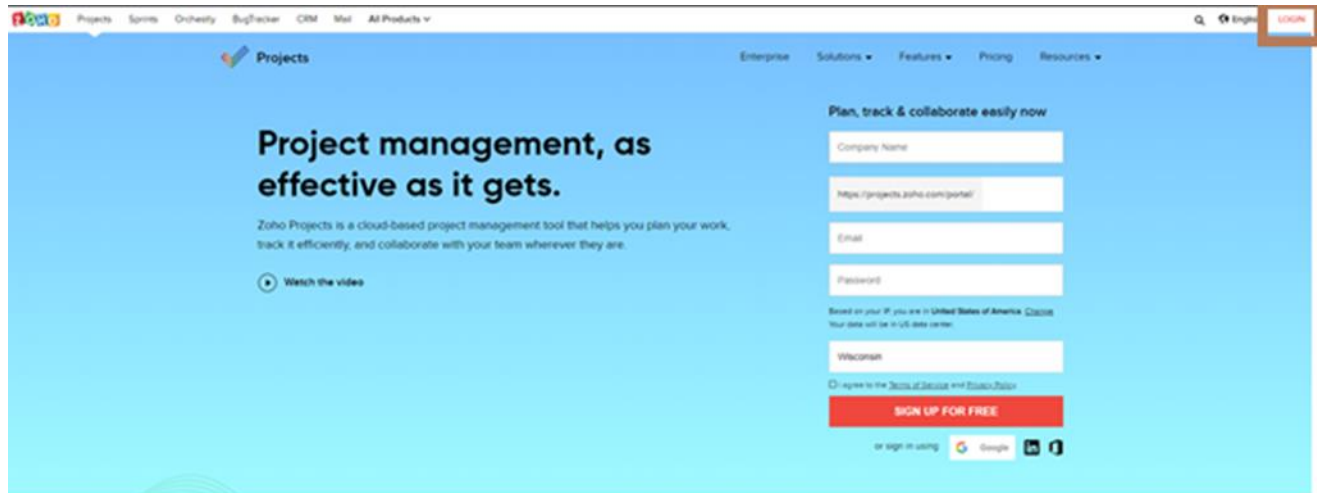
3. You will be taken to a page where you can enter a portal password and verify your account.



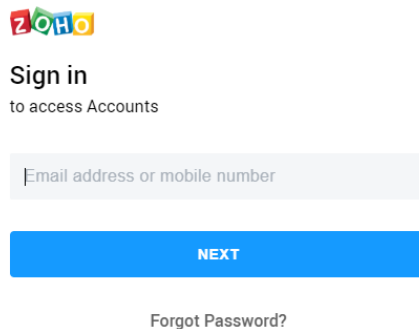
4. After your account is verified, click Access Your Account.



- Click on the Login icon in the upper right-hand corner of the screen.



- Log into Zoho with your e-mail and password.



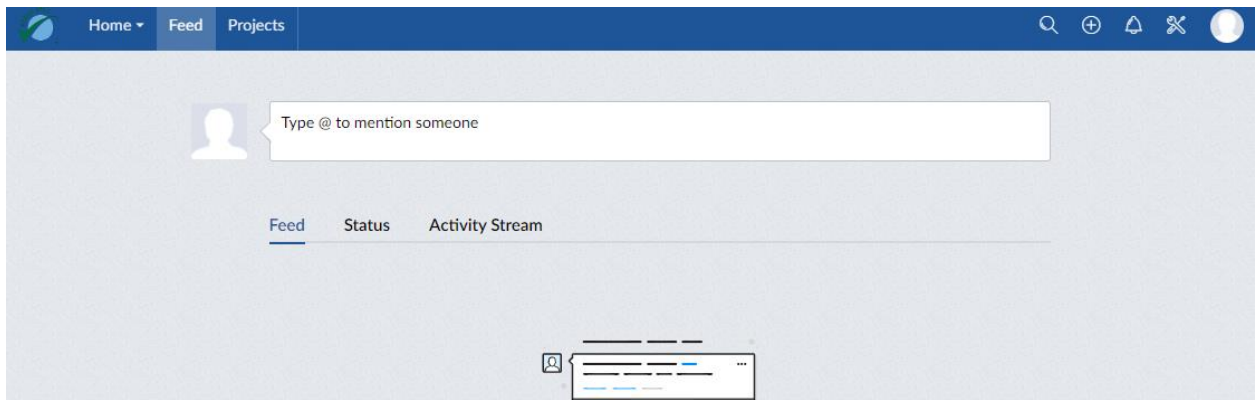
- Zoho may prompt you to enable two factor authentication or update your country. Please note, this information is requested by Zoho but not needed by Green Seal. Should you choose not to complete these steps, click Remind Me Later or Not Now.

Portal Login URL

Once your account is set up, you can log in to the portal at any time via this URL:
<https://projects.zoho.com/portal/greenseal660>

Navigating within Your Project

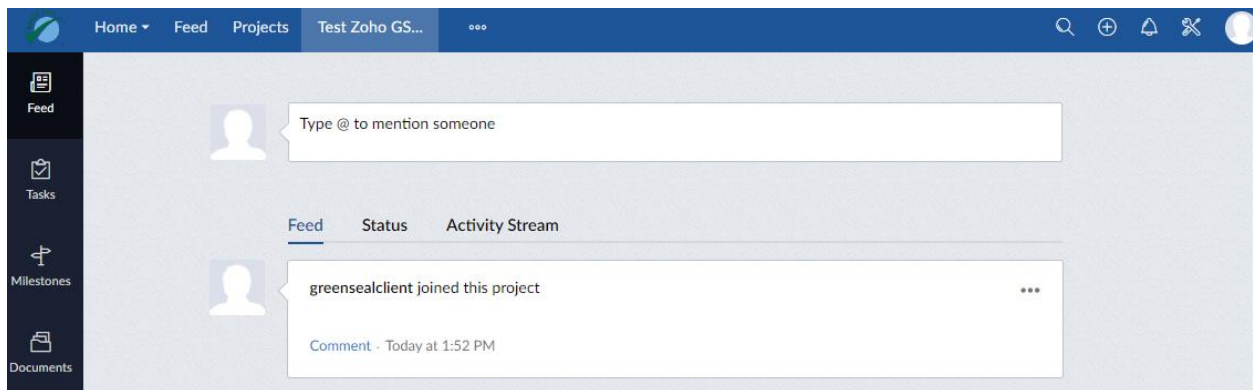
- By default, the Project Portal opens in the Feed view.



2. Click on the Projects header at the top of the page, then click on your project.



3. The main page of the Project will display a project-specific feed with information from your project manager.



4. Your tasks are in the Tasks tab on the left side of the screen.

<div> <div>Home</div> <div>Feed</div> <div>Projects</div> <div>Test Zoho GS...</div> <div>...</div> </div> <div> <div>Feed</div> <div>Tasks</div> <div>Milestones</div> <div>Documents</div> </div> <div> <div>Classic</div> <div>Plain</div> <div>Kanban</div> <div>All Open</div> </div> <div> <div>Add Task</div> <div></div> </div>				
TASK	OWNER	STATUS	TAGS	
<div> <div></div> <div>Kick off project (External) on 12 Mar, 2020in Kick off project</div> </div> <div>TZ6-T4 Project and Portal introduction</div> <div>Add Task</div>	Unassigned	Not Yet Started		
<div> <div></div> <div>Upload product information (External) on 21 May, 2020in Client uploads review data</div> </div> <div>TZ6-T5 Product information</div>	Unassigned	Not Yet Started		
<div> <div></div> <div>TZ6-T6 Formula information</div> </div>	Unassigned	Not Yet Started		
<div> <div></div> <div>TZ6-T7 Labels and literature</div> </div>	Unassigned	Not Yet Started		

5. Click the task name to see what you need to do to complete the task.

TZ7-T6

Formula information

By Anne Shudy Palmer · 3 ·

High

Open

Priority

Current Status

Description

- Upload the formula for each product, by raw material and weight percent.
 - You can use the Formula Disclosure form in the Documents section or your own format.
- Attach a safety data sheet (SDS) for each raw material in the product formulas.
 - You can upload a zip file rather than individual files.
- For any fragrances used, upload supplier documentation that they follow the current IFRA Code of Practice (i.e., IFRA certificates).
- If your product contains enzymes or microorganisms, fill out the Enzyme or Microorganism Product Information form and provide any additional documentation requested by your Project Manager.
- Upload a completed batch ticket from a recently-produced batch of each product.
- Complete the Checklist for this task. Checked boxes mean the item is complete or not applicable.

Working on Your Project

Through the Green Seal Project Portal, you can communicate directly with your project manager to ask or answer questions, give feedback, and complete tasks.

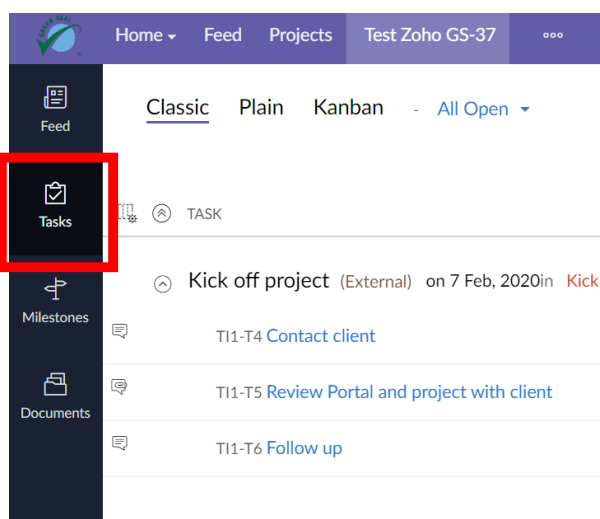
Adding Documents

The Green Seal Project Portal allows you to upload all the required documentation and supporting information in order to complete a Green Seal project. The main part of your Green Seal project is providing the necessary documentation for your project manager to review. You can view templates you need to fill out and upload files in two areas of the project:

1. Within a task itself: Do this when the file is for a specific task, and it is stored in a local or network location.
2. In the Documents module: Use this option when the file is not relevant to a specific task (uncommon), or when the file is stored in a cloud location like Dropbox or OneDrive.

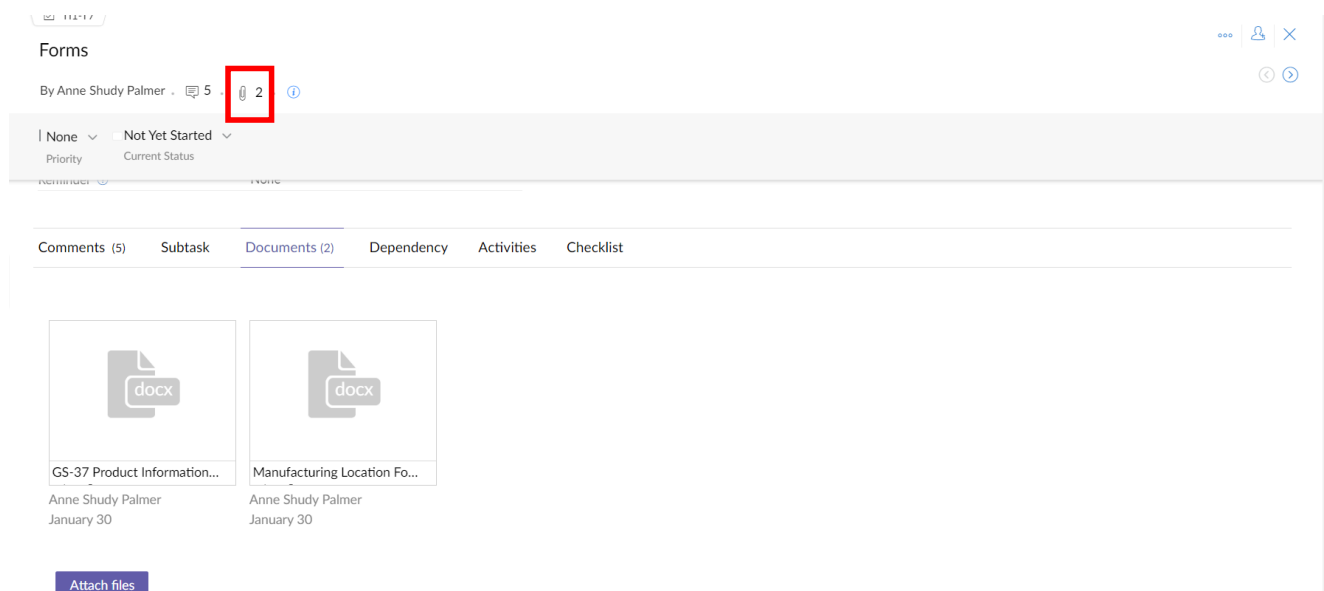
To upload a file within a task:

1. Click on the Task Module.



2. Click on a task to open it.

3. Scroll down on the right-hand side until you see the Documents section. Or, click on the paperclip icon at the top of task to jump down to the Documents section. Here you will see any documents that have been uploaded to the task, including any project templates you need to fill out.



4. Click Attach Files.

Comments (5) Subtask Documents (2) Dependency Activities Checklist



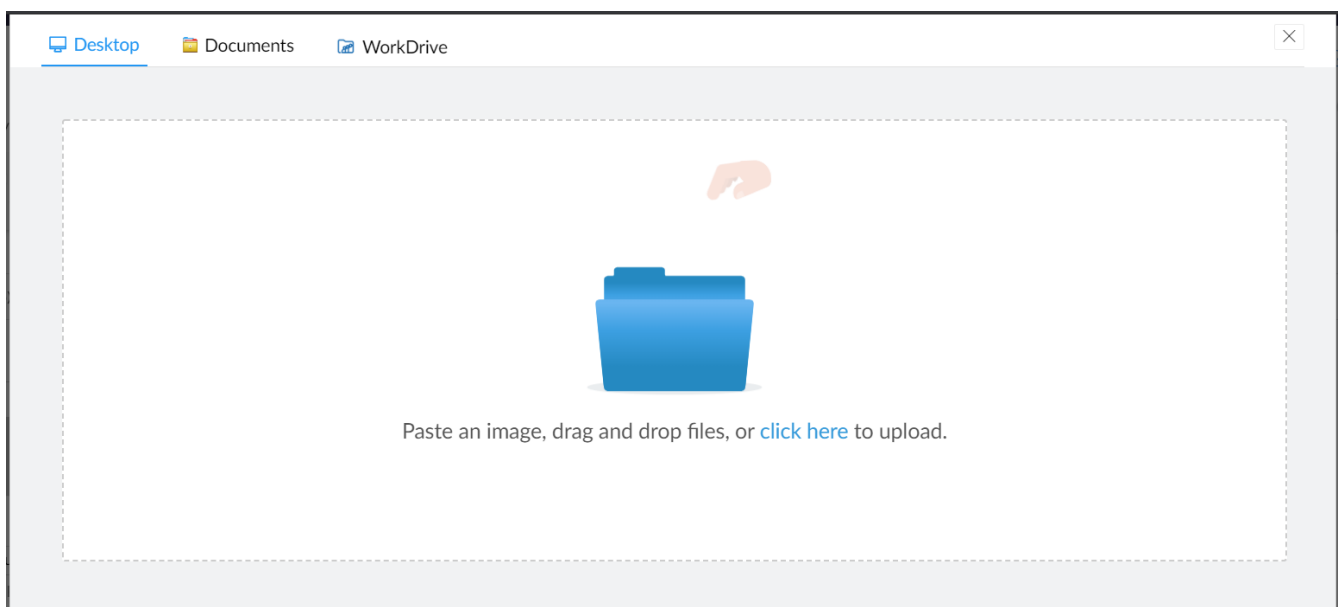
Anne Shudy Palmer
January 30



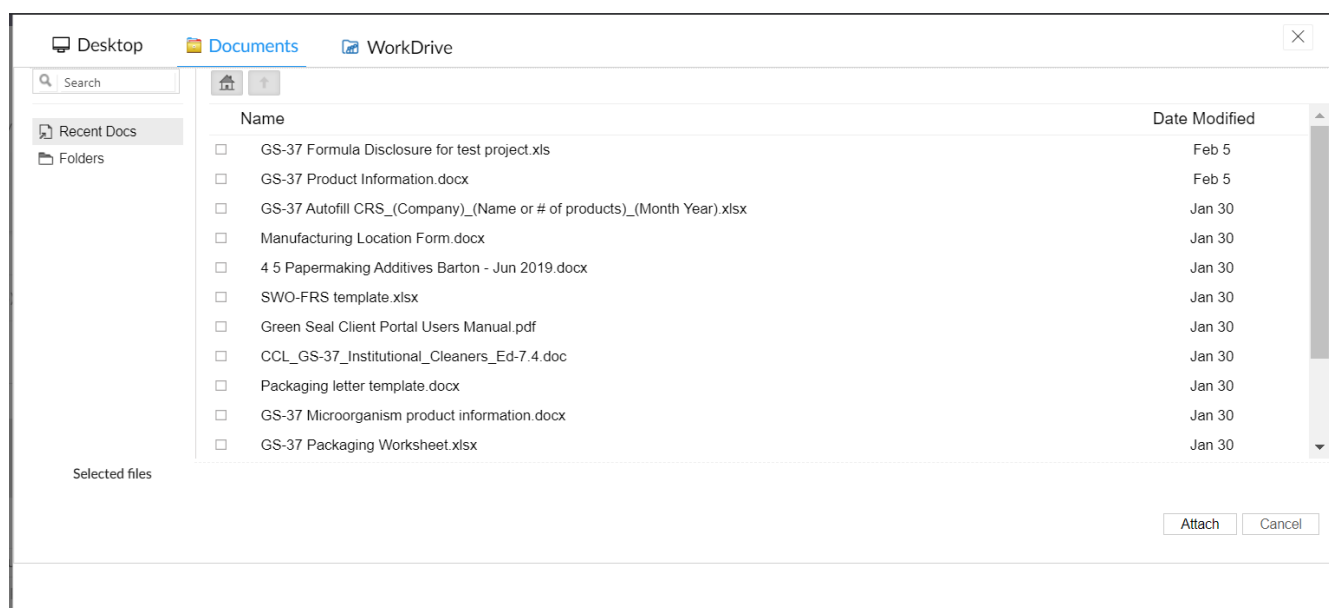
Anne Shudy Palmer
January 30

Attach files

5. A pop-up screen appears with options for uploading files to the project. *This is a secure method of upload.* You can upload files directly from your computer by choosing the Desktop option and dragging a file onto the screen, or pressing Click Here to bring up a Windows Explorer window where you can select files from your device.

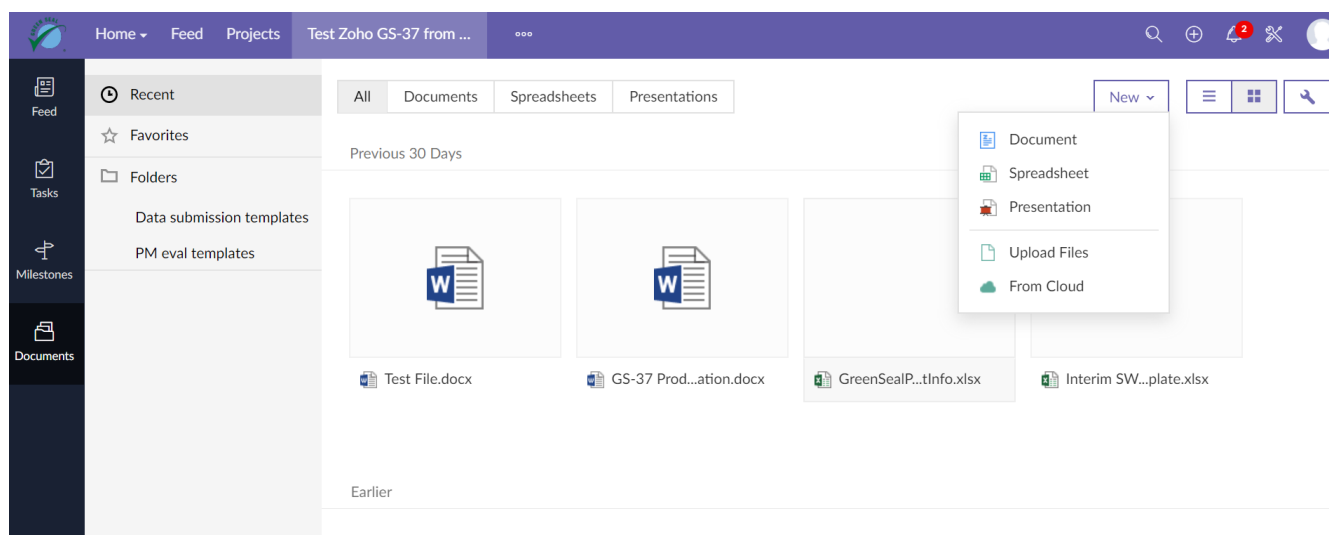


You can also add files via the Documents tab in the view below. These are all the documents that have been uploaded to the project. If you have already uploaded a document and want to attach it to a specific task, you can do so through this view at the task level.



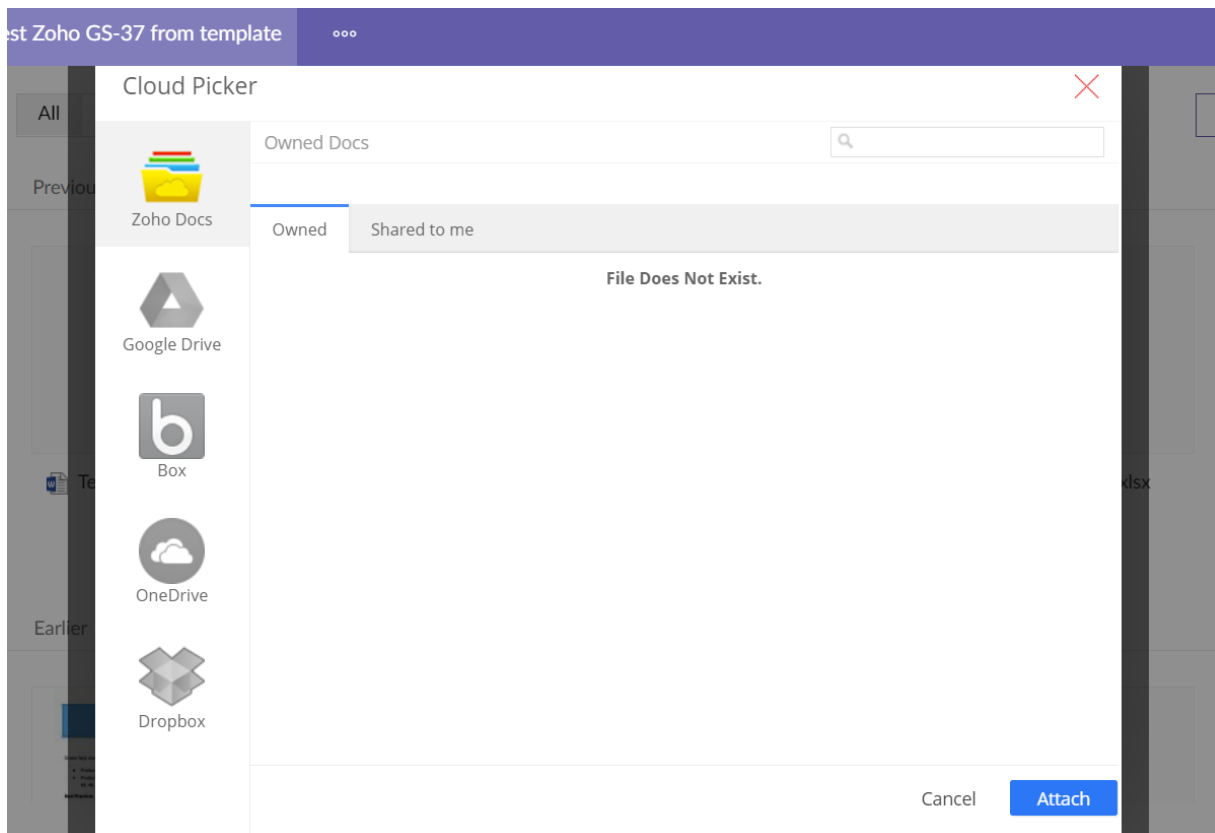
To upload files to the Documents module:

1. Go to the Documents module.
2. Click New.



3. From the dropdown menu, select Upload Files to bring up a Windows Explorer window (or a Finder window for Mac users) where you can select files from your device.

4. You may also select From Cloud if you want to add files from a cloud storage location such as Google Drive, OneDrive etc.



Editing Templates

At either the task level or in the Documents module, you can access the templates you need to fill out to complete your Green Seal project. For templates, you have two options to complete.

1. Open the template in an online browser and edit it directly. Spreadsheet and document files open in a Zoho app (Zoho Sheets and Zoho Writer, respectively). Any edits you make in this online view are saved automatically.

★ GS-37 Formula Disclosure.xls

File Edit View Insert Format Data Tools

Calibri 11 B I U S A

THE ORIGINAL GREEN SEAL OF APPROVAL SINCE 1989

Formula Disclosure for Certification GS-37 Cleaning Products for Industrial and Institutional Use

Product Name: Certification Template

(Please fill out one form for each product formula)

Product pH (of concentrate/RTU):

Raw Material Name	Component chemical name(s) 1	Chemical Abstract Number (CAS#)2	Percent by weight (wt %) in formula3	Supplier Information				
				Company Name	Contact Name	Address	Phone Number	Email Address
Glycerin	glycerin	56-81-5	2.50%	ChemSupplier	Ann Jones	555 Road, City, State Zip	555-555-5555	ajones@chemsupplier.com
Chem100	50% water, 50% sodium bicarbonate	144-35-8	4.20%	ChemSupplier	Ann Jones	555 Road, City, State Zip	555-555-5555	ajones@chemsupplier.com

1 If the raw material is a solution or mixture list the percentages of known components, including contaminants, and the percentage of water.

2 Make it consistent with the IFRA Code of Practice.

Example GS-37 Template opened in Zoho Sheets

2. Download the template and fill it out on your own device, then upload it to the task. See the steps above in the [Adding Documents](#) section to upload a file to a task.

Completing Tasks

Within tasks assigned to you, you may be instructed to complete a checklist at the end of the task to signify you have completed all the requirements.

TZ5-T6

Formula information

By Anne Shudy Palmer · 3 · 1

None Not Yet Started
Priority Current Status

Description

Upload the formula for each product, by raw material and weight percent.

- You can use the Formula Disclosure form in the Documents section or your own format.

Attach a safety data sheet (SDS) for each raw material in the product formulas.

- You can upload a zip file rather than individual files.

For any fragrances used, upload supplier documentation that they follow the current IFRA Code of Practice (i.e., IFRA certificates).

If your product contains enzymes or microorganisms, fill out the Enzyme or Microorganism Product Information form and provide any additional documentation requested by your Project Manager.




Upload a completed batch ticket from a recently-produced batch of each product.

Complete the Checklist for this task.

To complete the checklist:

1. Scroll down on the right-hand side of the screen until you see the Checklist section.

Formula information

By Anne Shudy Palmer ·  ·  3 · 

| None ▾ ☐ Not Yet Started ▾
Priority Current Status

Comments Subtask Documents (3) Dependency Activities Checklist

Expand

Create Checklist

Formula information (2/6) ⋮

- ☒ Formula for each product
- ☒ SDS for each raw material in the products
- ☐ IFRA certifications for fragrances (uploaded or n/a)
- ☐ Enzyme form (completed or n/a)
- ☐ Microorganism form (completed or n/a)
- ☐ Completed batch ticket for each product

Back Contacts

2. Click the box next to each task until all tasks have been completed.

Comments Subtask Documents (3) Dependency Activities Checklist

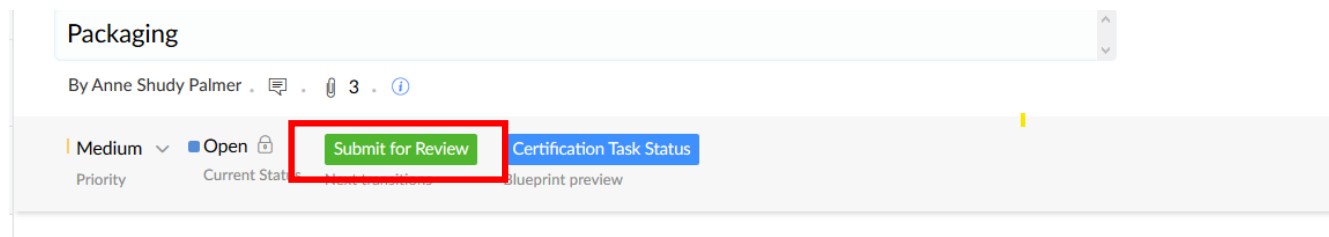
Create Checklist

Formula information (6/6) ⋮

- ☒ Formula for each product
- ☒ SDS for each raw material in the products
- ☒ IFRA certifications for fragrances (uploaded or n/a)
- ☒ Enzyme form (completed or n/a)
- ☒ Microorganism form (completed or n/a)
- ☒ Completed batch ticket for each product



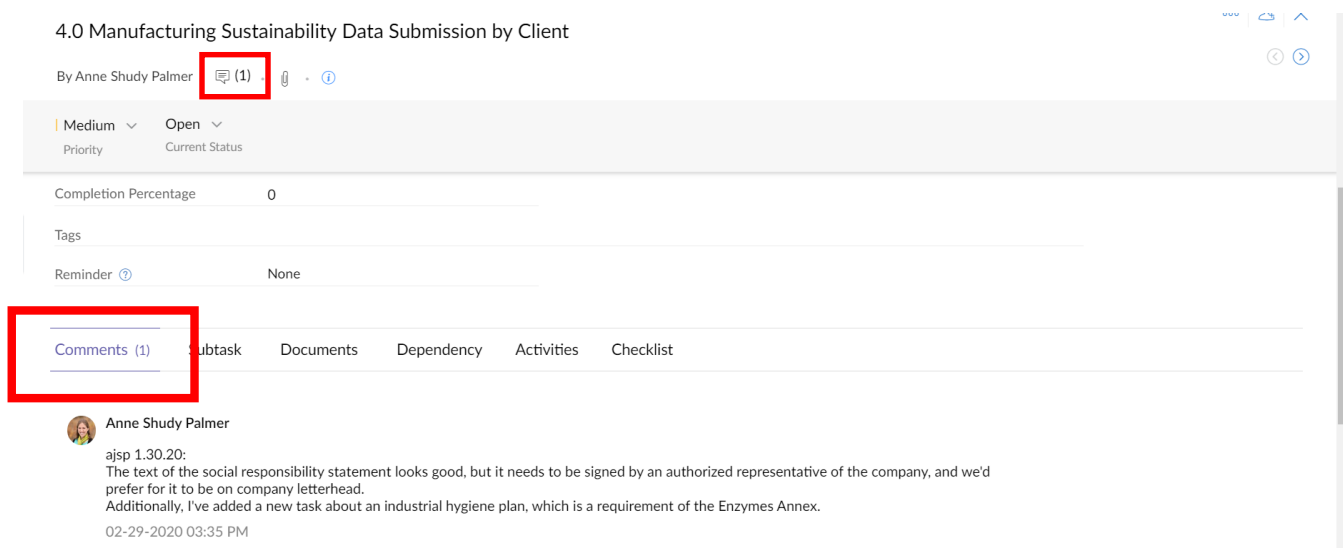
After you've completed all steps in the task description, click Submit for Review in the task header. This notifies the Green Seal project manager to review the task.



Giving Feedback / Asking Questions

Any comments that you make in a task will be seen by your project manager. To leave a comment:

1. Click on any task to open it.
2. Scroll down on the right-hand side of the screen until you see the Comments section. Or, on the message icon at the top of the task to jump to that section.



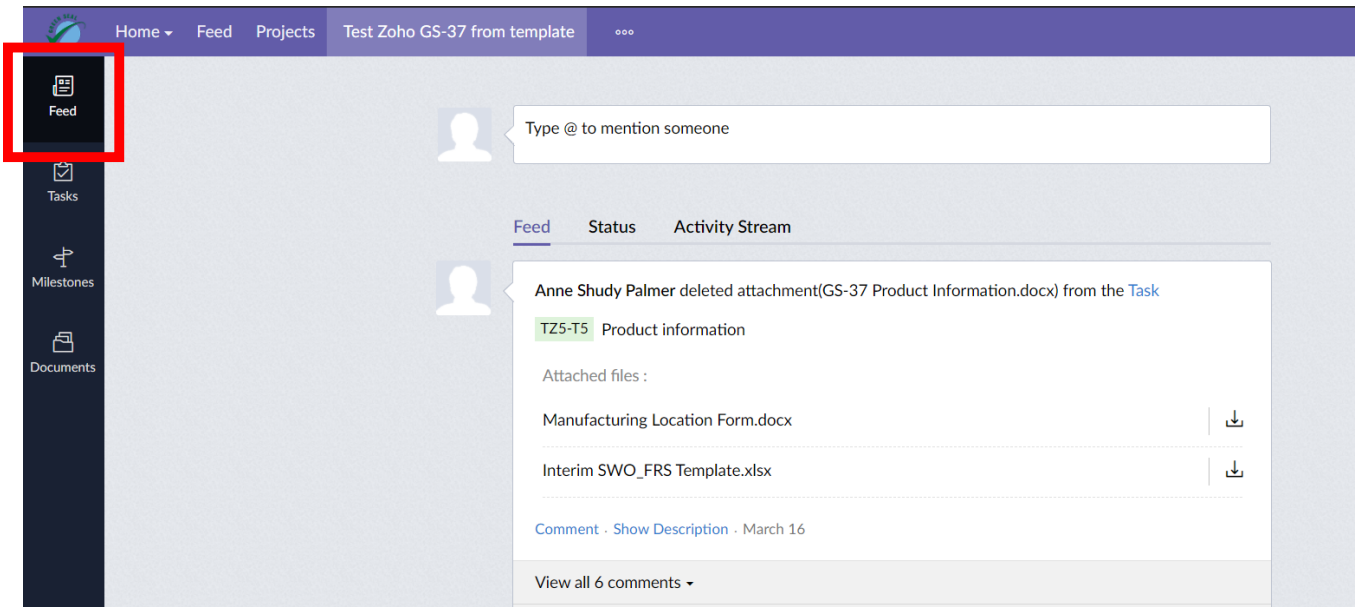
3. You can add a comment by clicking first in the open comment area and pressing Add Comment. You can also attach files directly to your comment by clicking Attach Files. This brings up the same options to attach files explained in the [Adding Documents](#) section above.

By Anne Shudy Palmer · (1) · ·

Learning More About the Portal

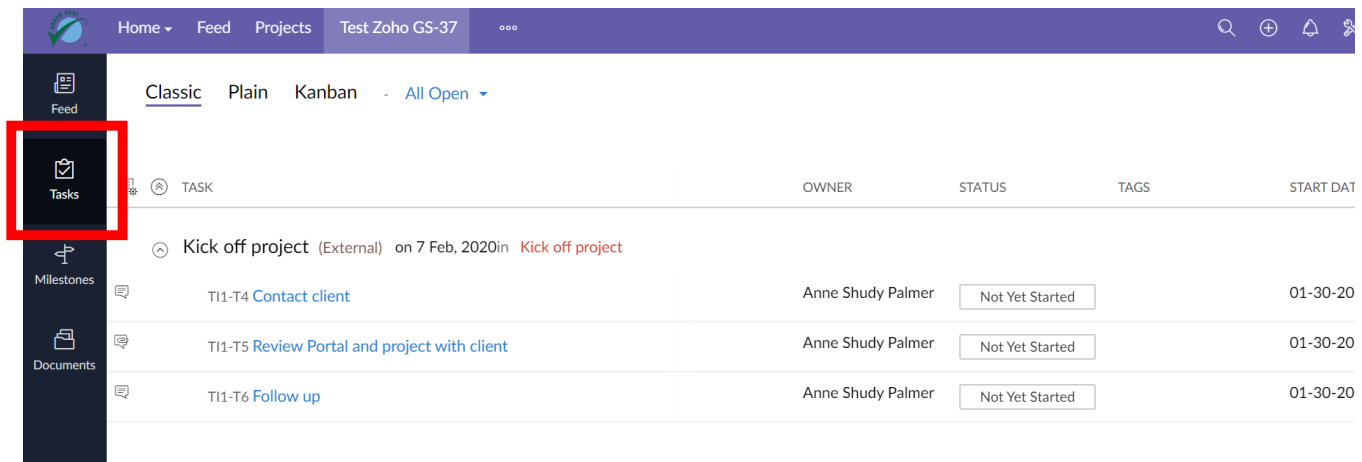
The tabs on the left side of the screen are called Modules. Each one contains different views and information about the project.

The Feed module is a summary of all changes and activity on a project. Comments and changes you or the project manager make will show up here.



Tasks

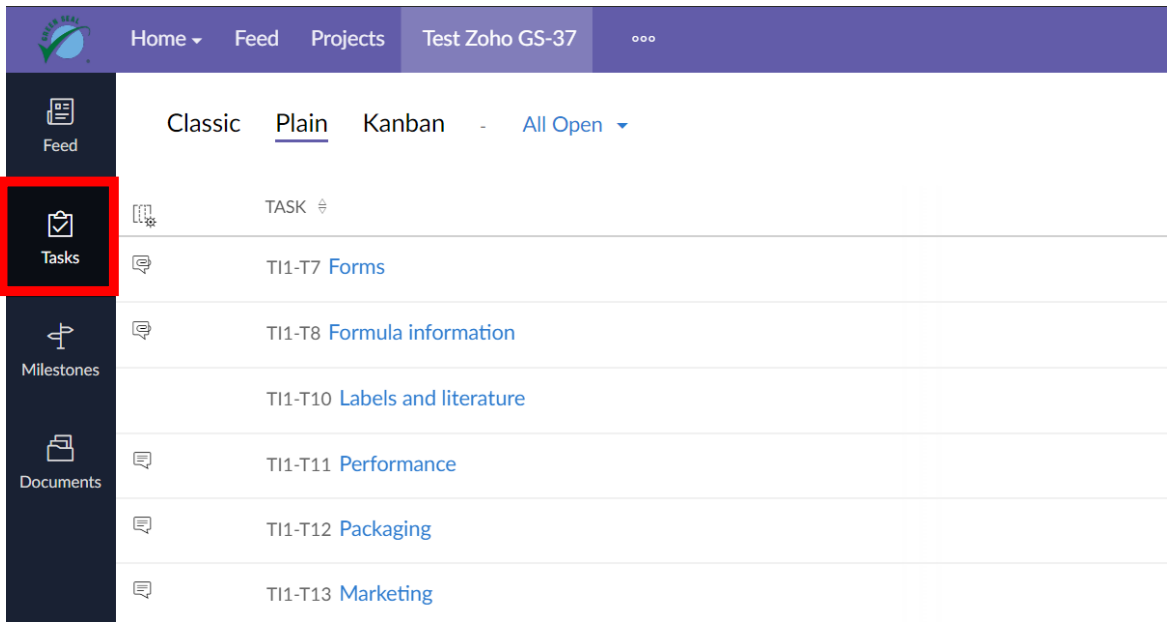
The Task module contains all of the tasks assigned to you as part of your project. This is the primary tab you will use to submit information, provide feedback, and track progress on your project.



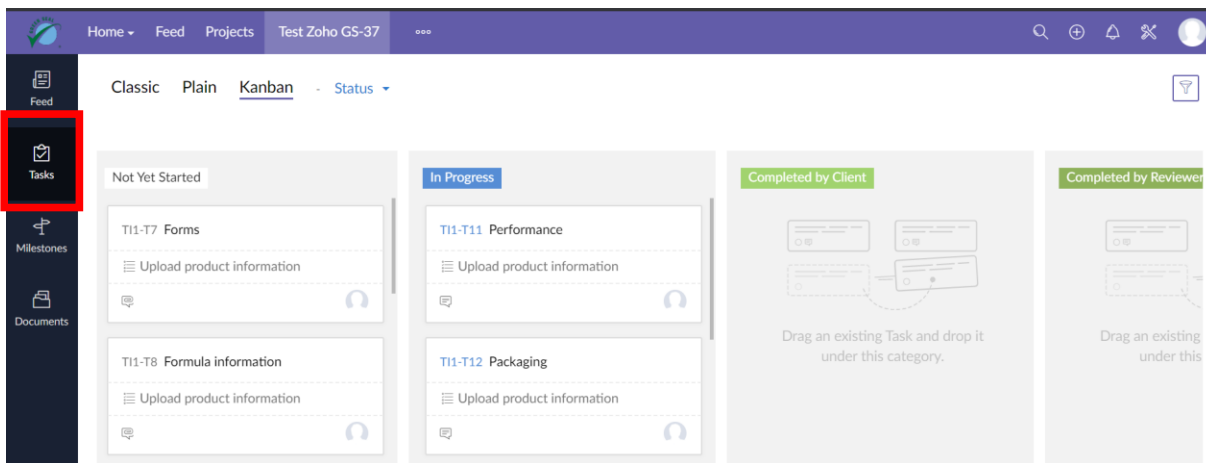
Tasks module, Classic view

Within the Tasks tab, there are a few views of the Tasks you can utilize:

- **Classic:** This groups Tasks under Task Lists and can be seen in the above screenshot (Kick off project is a Task List).
- **Plain:** This removes the Task Lists and simply lists all Tasks
- **Kanban:** This lists the Tasks as 'cards' that can be grouped by a few fields including by 'Status' and 'Task List':



Tasks module, Plain view



Tasks module, Kanban view

To focus in on the Tasks you need to complete, you can filter the Task view to just show 'My Open' tasks.

The screenshot shows the Zoho Projects interface. The top navigation bar includes 'Home', 'Feed', 'Projects', and 'Test Zoho GS-37'. The left sidebar has icons for 'Feed', 'Tasks', 'Milestones', and 'Documents'. The 'Tasks' icon is highlighted with a red box. The main area shows the 'Tasks' module in 'Classic' view with the 'My Open' filter selected, also highlighted with a red box. Below the filter, a list of tasks is displayed, including 'Upload product information (External) on 13 Mar, 2020in Client uploads review d', 'T11-T7 Forms', 'T11-T8 Formula information', 'T11-T10 Labels and literature', 'T11-T11 Performance', and 'T11-T12 Packaging'.

Tasks module, Classic view, My Open filter

Milestones

Milestones give a high-level overview of the project, allowing you to see tasks assigned to Green Seal staff in addition to your client tasks.

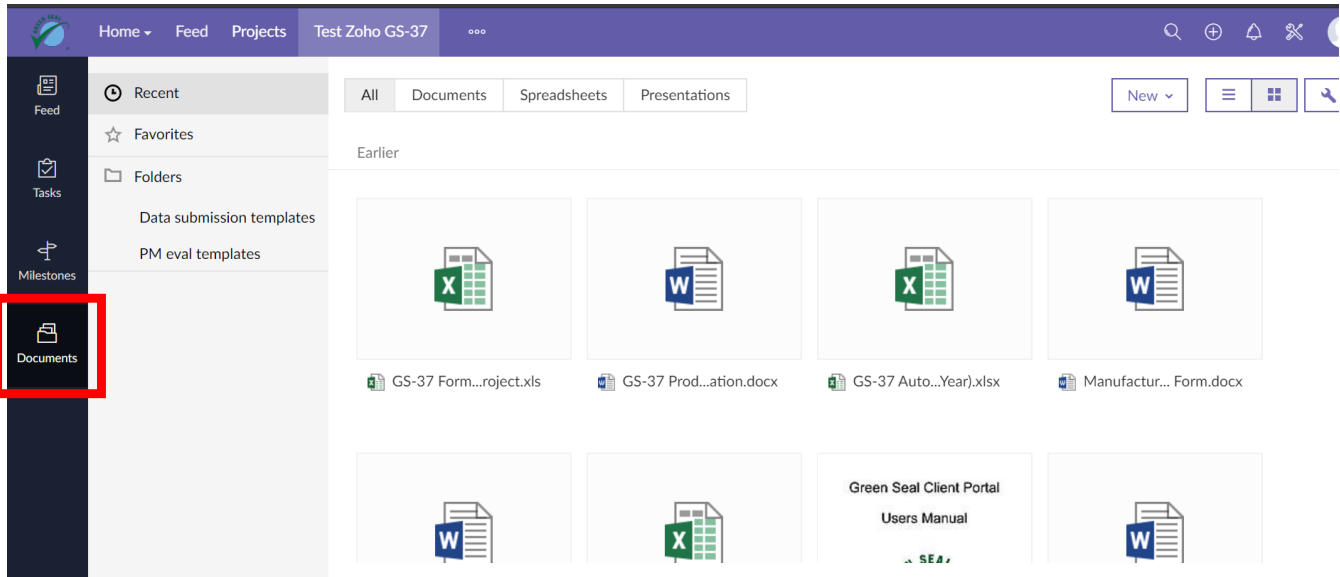
Once all tasks associated with a certain milestone are complete, the % column updates to 100%, allowing you to track the project's progress. Reach out to your project manager if you have questions about the status of your project.

The screenshot shows the Zoho Projects interface with the 'Milestones' icon highlighted in the left sidebar. The main area displays the 'Active Milestones' section. A table lists milestones with columns for 'MILESTONE', '%', 'OWNER', and 'TAGS'. The milestones listed are 'Kick off project (External)', 'Client uploads review data (External)', 'Project manager collects and reviews data (External)', 'On-site audit (External)', 'Final review (External)', and 'Certification issued (External)'. All milestones show 0% completion and are owned by 'Anne Shudy Palmer'.

MILESTONE	%	OWNER	TAGS
Kick off project (External)	0%	Anne Shudy Palmer	
Client uploads review data (External)	0%	Anne Shudy Palmer	
Project manager collects and reviews data (External)	0%	Anne Shudy Palmer	
On-site audit (External)	0%	Anne Shudy Palmer	
Final review (External)	0%	Anne Shudy Palmer	
Certification issued (External)	0%	Anne Shudy Palmer	

Documents

The Documents module shows you all of the documents that have been uploaded to a project, by you (e.g., labels) or by Green Seal (e.g., data collection templates). You can upload documents here directly, or within the tasks to which they apply.



Customizing Your Experience

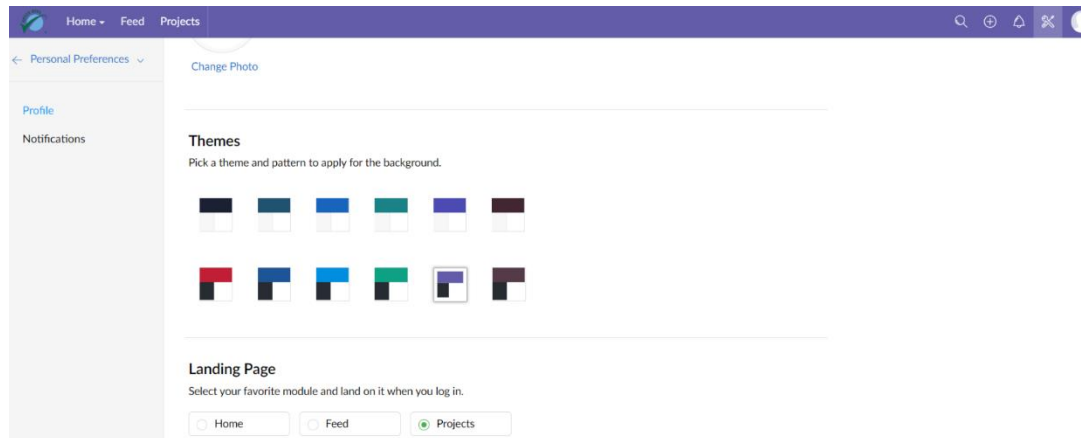
The Green Seal Project Portal has options for you to customize the view of your projects and how your information displays.

Change Your Default View

1. Access your Settings tab, found in the bar at the top of the page.



2. Under Profile, you can select Home, Feed, or Projects as the default view that appears when you log in to the Green Seal Project Portal. We recommend selecting Projects to see and access your list of current projects as your home screen.
3. Click Update to save any changes.



Edit Your Display Name

You can update how your name displays when you log into the Green Seal Project Portal. By default, your name displays as the first part of the email address you use to log in to Zoho Projects. To update your display name:

1. Click on the Settings tab, found in the bar at the top of the page.



2. Under Profile, click the pencil icon next to your name
3. A screen titled Edit User Profile will appear. Edit the First Name and Last Name fields to your desired display name.

Edit User Profile

First Name: greensealclient

Last Name:

Office Phone No:

Home Phone No:

Mobile No:

Language: English

Update Cancel

Collapse Tasks

Within your project, you can update a setting so when you click on a task, you only see the current task you are working on.

1. Open a task and click on the gray box with block dots forming an arrow pointing to the left-hand column.

Upload product information...

T11-T7 Forms
Brittany Maule

T11-T8 Formula information
Brittany Maule

T11-T10 Labels and literature
Brittany Maule

T11-T11 Performance
Brittany Maule

T11-T12 Packaging
Brittany Maule

T11-T13 Marketing
Brittany Maule

T11-T14 Annex: Powders/Solids/Non-Aqueous Liquids
Brittany Maule

T11-T10 Labels and literature

By Anne Shudy Palmer

None Not Yet Started

Priority Current Status

Description

Upload a label for each container size and configuration. You can upload a zip file rather than individual files.

Upload a safety data sheet (SDS) for each product.

Upload product and/or equipment training information (e.g., tech data sheets).

Task Information

Owner: Me

Work hours Status: Not Yet Started

Start Date Due Date

Duration Priority: None

2. The entire left-hand column collapses. Doing this once will update the setting for every task you click on in the current project.

TI1-T10

Labels and literature

By Anne Shudy Palmer · · ·

None

Not Yet Started

Priority

Current Status

⌵

Description

Upload a label for each container size and configuration. You can upload a zip file rather than individual files.

Upload a safety data sheet (SDS) for each product.

Upload product and/or equipment training information (e.g., tech data sheets).

⌵

Task Information

Owner

×

Me

Work hours

Status

☐ Not Yet Started

Start Date

Due Date

Duration

Priority

None

Collapse Task Information

Within a task, you can also collapse the Task Information section. The fields in this section are relevant for project managers, but you do not need to review or update them.

1. Open a task and click on the arrow inside a circle next to Task Information to collapse the section.

Product information

2

By Anne Shudy Palmer · · ·

Medium

Completed by Customer

Priority

Current Status

⌵

Description

1. Complete the forms in the Documents section:
 - Product Information Form
 - Manufacturing Location Form
2. In the Comments section below, please:
 - Describe any current third-party ecolabeling certifications for the products (e.g., UL ECOLOGO, Safer Choice, EU Ecolabel)
 - Specify whether there are other SKUs/packaging sizes of the products under review that you are *not* submitting for certification
3. Complete the Checklist for this task. Checked boxes mean the item is complete *or* not applicable.

⌵

Task Information

Owner

Select User

Frequently Asked Questions

- 1) Who should I contact if I have questions about using the Green Seal Project Portal?
 - a) You can contact your current Project Manager directly. If you have an urgent question, please call 202-872-6400.
- 2) What do I do if I forget my password?
 - a) On the Zoho Sign in page, click the link that says Forgot Password. Green Seal cannot reset this for you.
- 3) Why does the invitation email come from Zoho One, and not Green Seal?
 - a) Zoho One is the secure, third-party service Green Seal is using for internal and external project management. Because it is a third-party service, the email and log-in interface is through the Zoho One platform.
- 4) How do I control the email notifications I receive from the Project Portal?
 - a) You can do this through the Settings of your profile in the Project Portal. Reach out to your Project Manager directly if you have questions about managing your email preferences.
- 5) I'm uploading sensitive formula information. Is this platform secure?
 - a) Yes. Your information is stored on Zoho's secure web servers. Read about Zoho's security practices [here](#).
- 6) Do I have to use this platform to upload my information?
 - a) We encourage you to use the Green Seal Project Portal, which provides a user-friendly and modern interface to upload your documentation as well as a centralized place for all of your questions and communication with your project manager. However, we will continue to work with you in whatever way is easiest for your organization, and you are always able to send us information via email or another mechanism.
- 7) How big of a file can I upload?
 - a) The maximum file size for uploading a file in the Documents module is 500MB. The maximum size for uploading a file directly to a task is 20MB.
- 8) Can I still access the old Client Portal?
 - a) No. If you need to access any files you previously uploaded to the client portal, please reach out to your project manager or certification@greenseal.org.
- 9) I want access to older letters sent to my organization; how do I get them?
 - a) Please reach out to certification@greenseal.org with any requests for past letters related to completed projects. Please include the product or service name you are looking for in your email.
- 10) Why do I have to submit these items for my project?
 - a) These items show how your product or service meets the requirements of the Green Seal Standard under which it is being reviewed

11) Why can't I see all my tasks?

- a) Check your task view. If you've closed some tasks and the view is set to All Open, the closed tasks do not appear. Change the view to All Tasks to see open and closed tasks.

12) What is the best browser to use for Zoho Projects?

- a) Zoho Projects supports the following browsers:
 - i) Google Chrome - 68 and above.
 - ii) Mozilla FireFox - 60 and above.
 - iii) Safari - 11 and above
 - iv) Microsoft Edge - Latest version

13) How can I assign tasks to other members of my team?

- a) If you have other team members that have been added to the Project Portal, you can reassign any tasks that should go to those team members:

