

Project Portal User Guide

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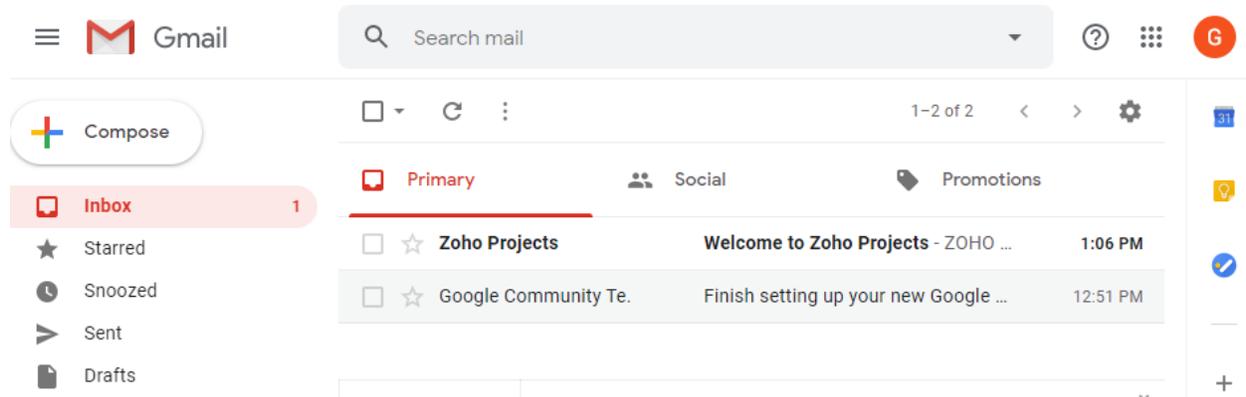
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Getting Started

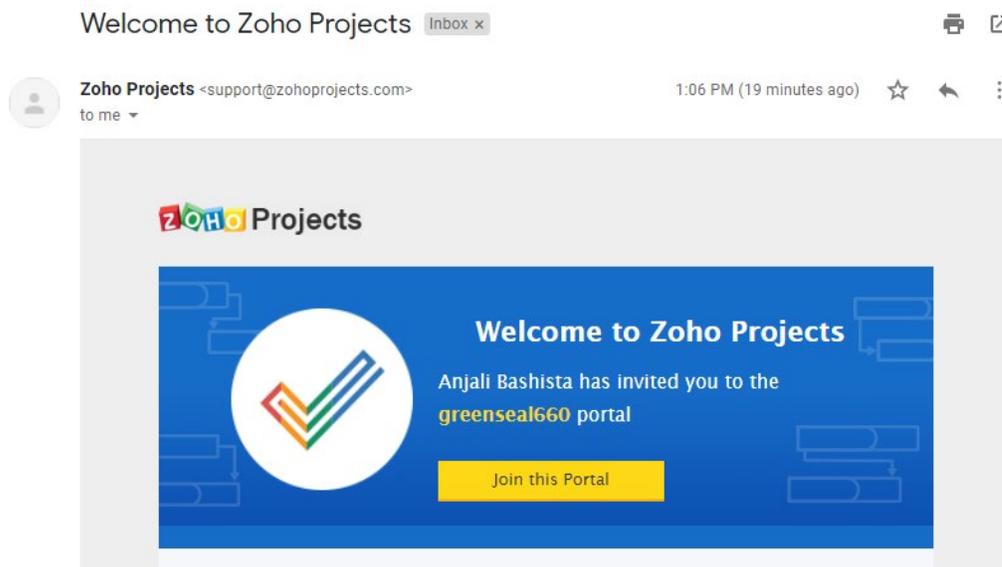
Welcome to your project with Green Seal! This guide will help you through the initial project set-up process and detail how you can add documents, give feedback, and successfully complete your project. At any time, please feel free to reach out to your project manager, or certification@greenseal.org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

Creating Your Project Portal Account

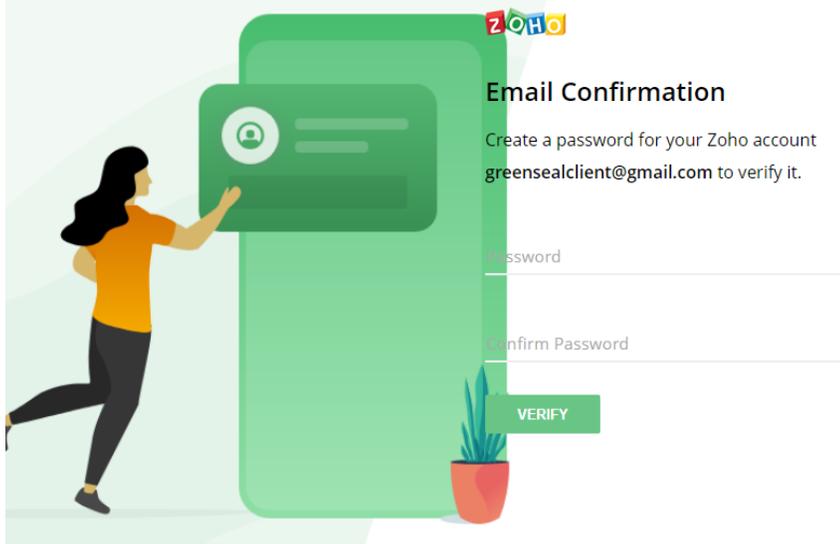
1. When you begin a new Green Seal certification project, you will receive an e-mail invitation to join Green Seal's Project Portal. An e-mail will be sent to your preferred e-mail address from Zoho Projects entitled Welcome to Zoho Projects. Check your spam folder if your project manager has sent you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



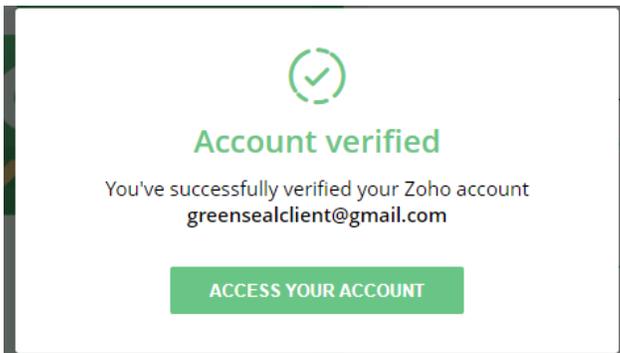
2. In the e-mail, click Join this Portal.



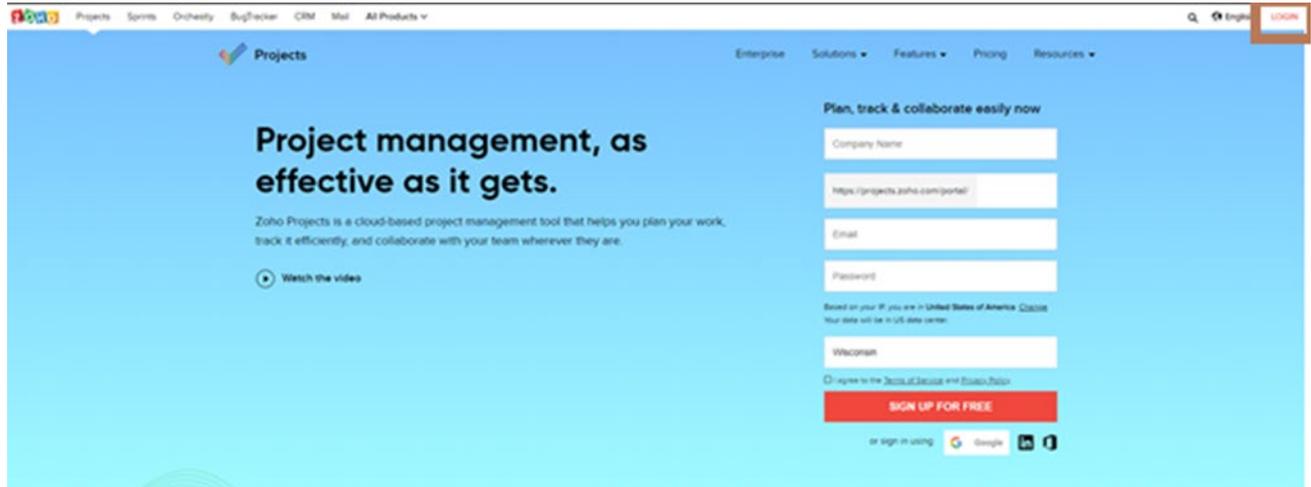
3. You will be taken to a page where you can enter a portal password and verify your account.



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



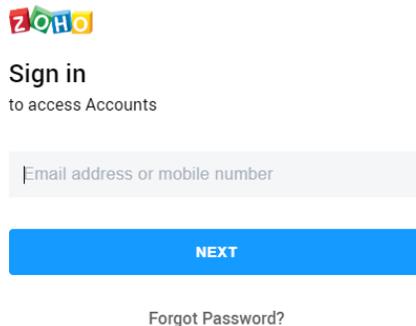
5.



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

6.

Log into Zoho with your e-mail and password.



7. 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

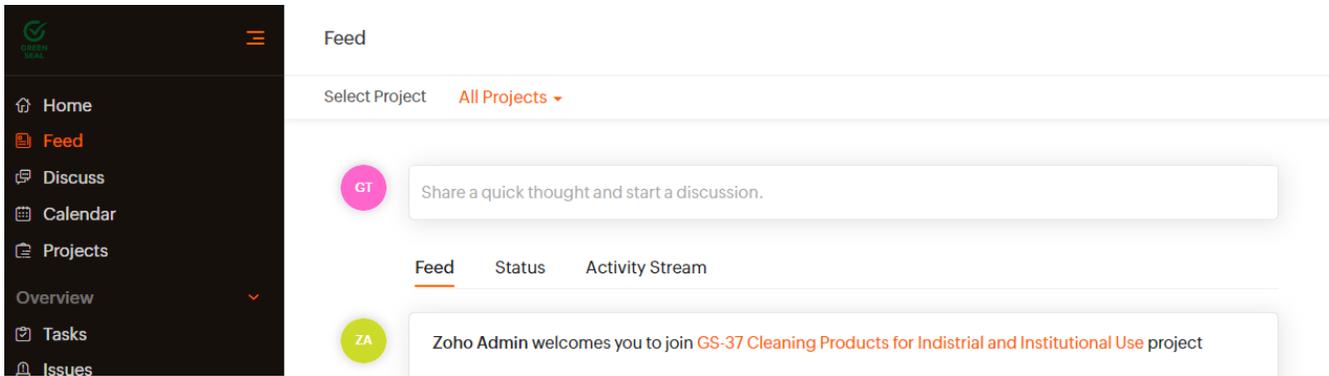
Once your account is set up, you can log in to the portal at any time via this URL:

<https://projects.zoho.com/portal/greenseal660>

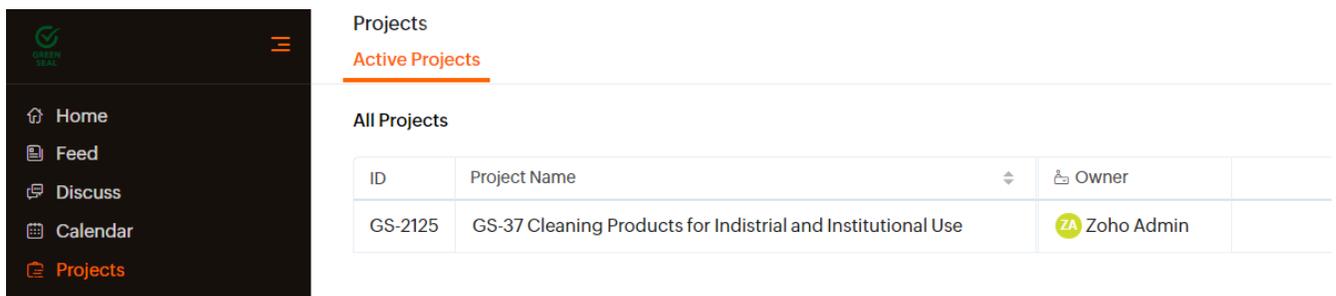
Navigating within Your Project

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

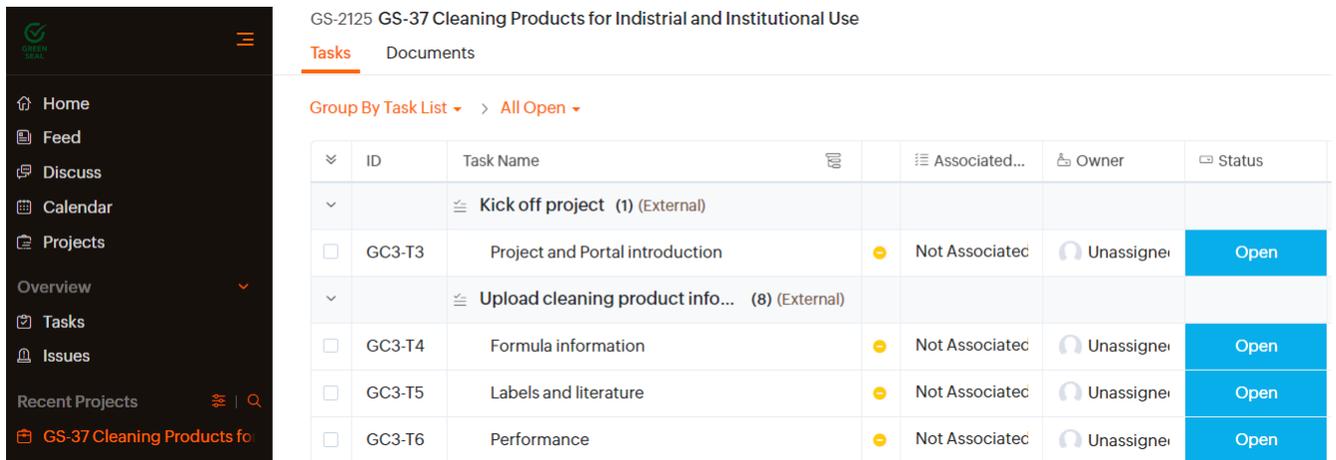




2. Click on the Projects module in the left panel, then click on your Project.



3. The project opens in the Tasks view. The project's name is highlighted in the left panel's Recent Projects list.



4. 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

1. 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.
2. Attach a safety data sheet (SDS) for each raw material in the product formulas.
 - You can upload a zip file rather than individual files.

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. You may upload a maximum of 10 files at a time to a Task.
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 Tasks 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.



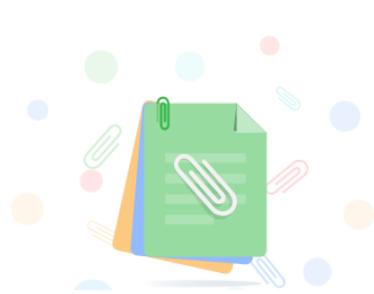
Task GC3-T4

Formula information

By Zoho Admin | GS-37 Cleaning Products for Industrial and In... |  (1) | 

● Open  Not Available
CURRENT STATUS NEXT TRANSITIONS

Comments Subtasks Documents Dependency Status Timeline Activity Stream Checklist



No documents associated

Drop or attach relevant documents here.

Attach Files / Whiteboard

4. Click Attach Files.

Task GC3-T4

Formula information

By Zoho Admin | GS-37 Cleaning Products for Industrial and In... |  (1) | 

● Open  Not Available
CURRENT STATUS NEXT TRANSITIONS

Comments Subtasks Documents Dependency Status Timeline Activity Stream Checklist

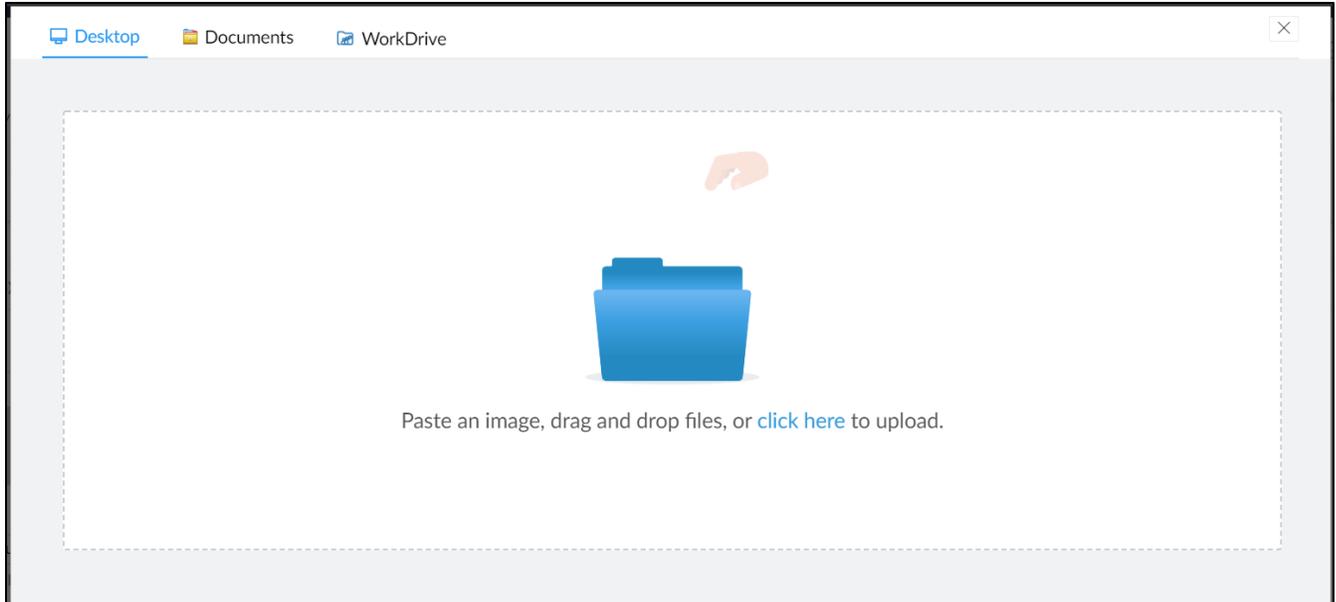


No documents associated

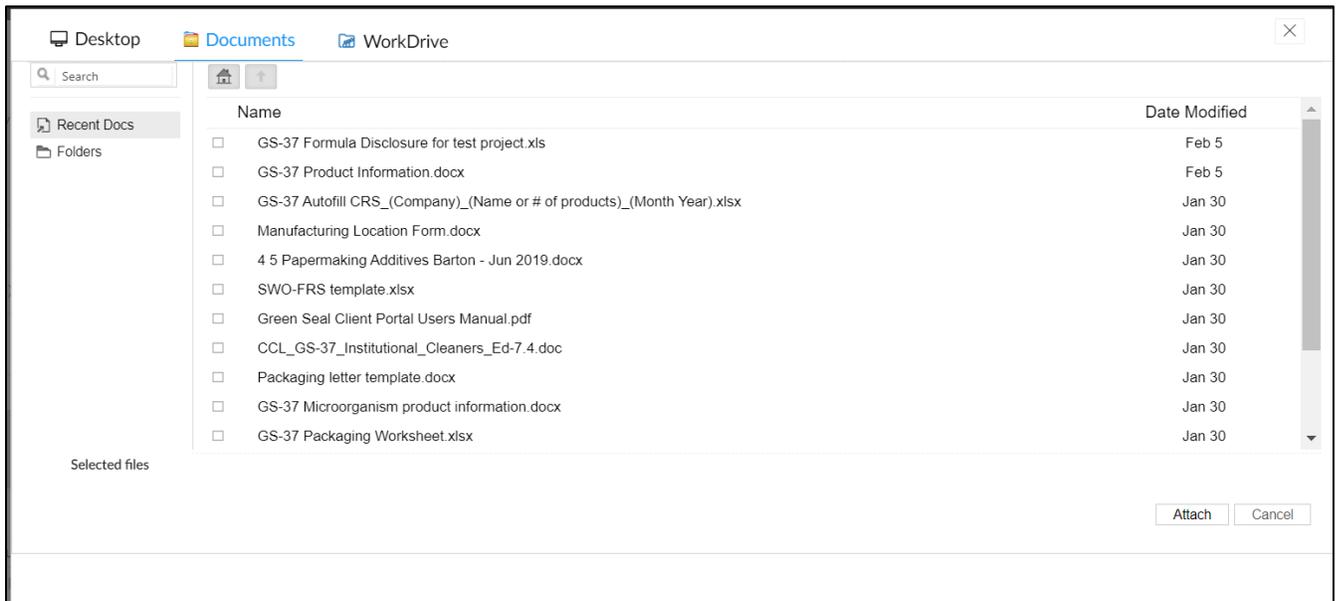
Drop or attach relevant documents here.

Attach Files / Whiteboard

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.



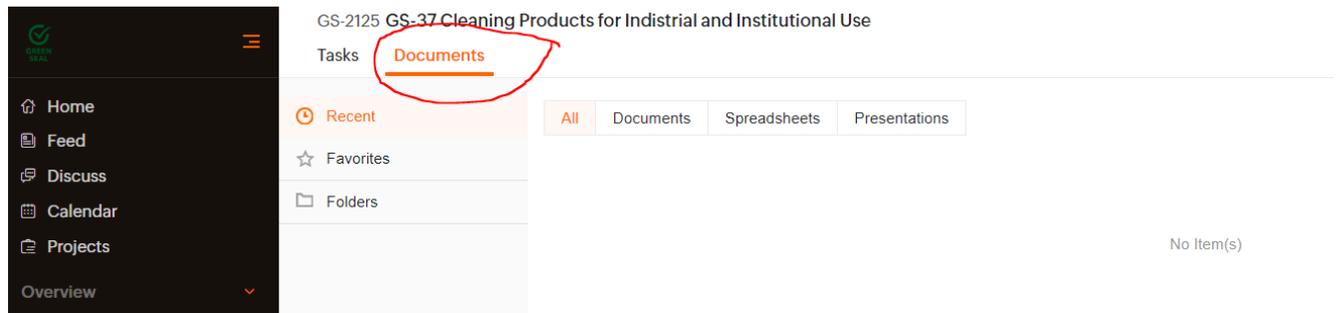
You can also add files via the Documents tab in the view below. These are all the documents that have been uploaded to the project. If you have already uploaded a document and want to attach it to a specific Task, you can do so through this view at the Task level.



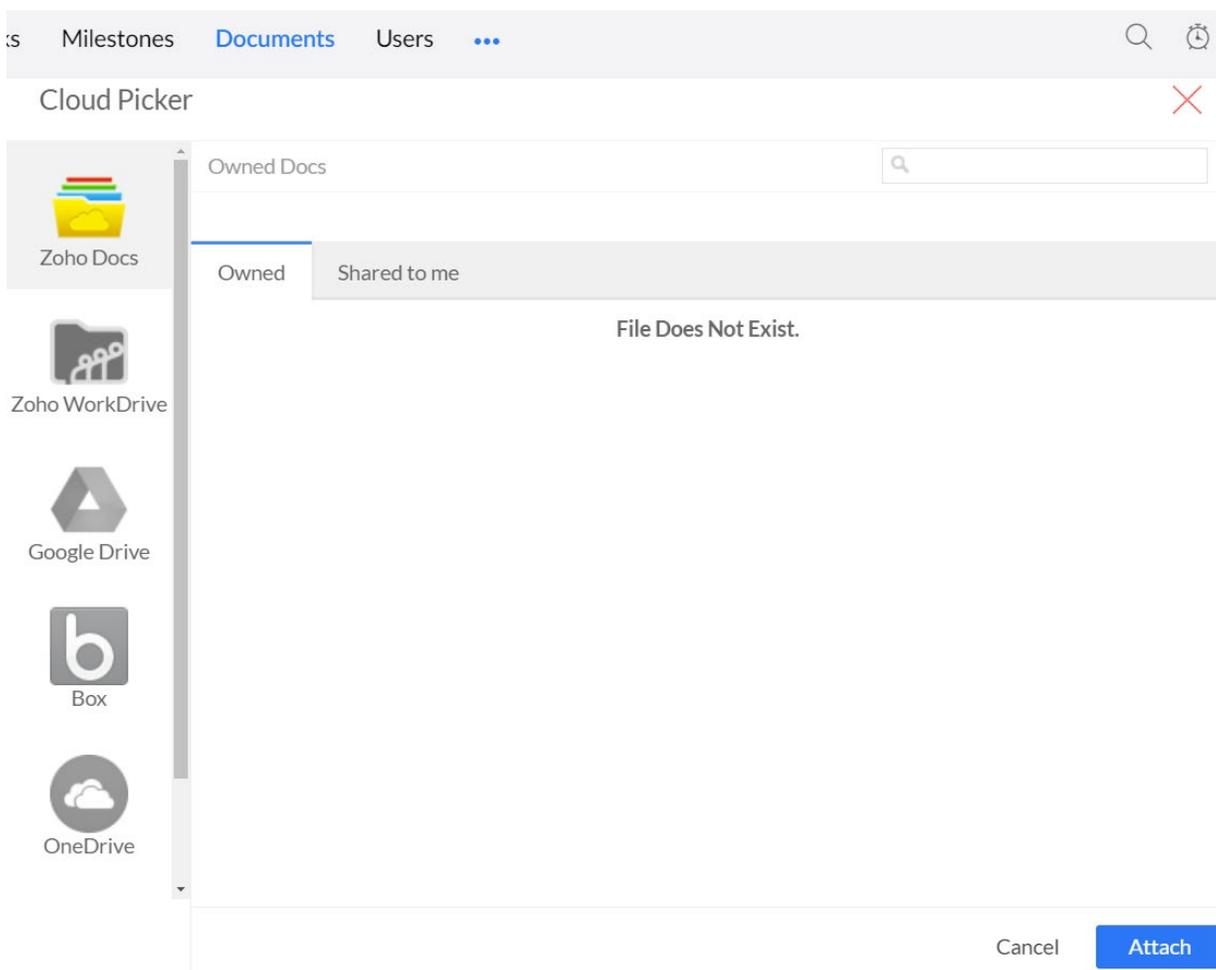
To upload files to the Documents module:



1. Go to the Documents module.



2. Click New in the upper right corner.
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.



TZ5-T6

Formula information

By Anne Shudy Palmer · 3 ·

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

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

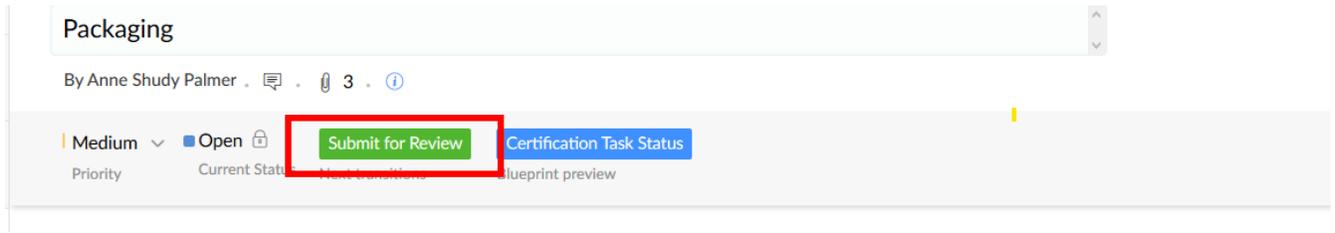


Create Checklist

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.

4.0 Manufacturing Sustainability Data Submission by Client

By Anne Shudy Palmer  (1)  

Medium  Open 
Priority Current Status

Completion Percentage 0

Tags

Reminder  None

Comments (1) Subtask Documents Dependency Activities Checklist



Anne Shudy Palmer

ajsp 1.30.20:

The text of the social responsibility statement looks good, but it needs to be signed by an authorized representative of the company, and we'd prefer for it to be on company letterhead.

Additionally, I've added a new task about an industrial hygiene plan, which is a requirement of the Enzymes Annex.

02-29-2020 03:35 PM

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.

4.0 Manufacturing Sustainability Data Submission by Client

By Anne Shudy Palmer  (1)  

Medium  Open 
Priority Current Status

Comments (1) Subtask Documents Dependency Activities Checklist



B I U  Lato  12                 

 Attach files

Add Comment

Cancel

Learning More About the Portal

Project Modules

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



Tasks

The Tasks 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.

GS-2125 GS-37 Cleaning Products for Industrial and Institutional Use

Tasks Documents

Group By Task List > All Open

ID	Task Name	Associated...	Owner	Status
Kick off project (1) (External)				
GC3-T3	Project and Portal introduction	Not Associated	Unassigned	Open
Upload cleaning product info... (8) (External)				
GC3-T4	Formula information	Not Associated	Unassigned	Open
GC3-T5	Labels and literature	Not Associated	Unassigned	Open

Tasks module, Classic view

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

- **List:** This is a simple list of all Tasks
- **Gantt:** This shows a Gantt chart view of the tasks, durations and dependencies (if applicable).
- **Kanban:** This lists the Tasks as 'cards' that can be grouped by a few fields including by 'Status' and 'Task List':

GS-2125 GS-37 Cleaning Products for Industrial and Institutional Use

Tasks Documents

Group By Task List > All Open

List

ID	Task Name	Associated...	Owner	Status	Tags	Start Date	Due Date	Duration
Kick off project (1) (External)								
GC3-T3	Project and Portal introduction	Not Associated	Unassigned	Open				3 days
Upload cleaning product info... (8) (External)								
GC3-T4	Formula information	Not Associated	Unassigned	Open				5 days
GC3-T5	Labels and literature	Not Associated	Unassigned	Open				5 days

Tasks module, List view



GS-2125 GS-37 Cleaning Products for Industrial and Institutional Use

Tasks Documents

Group By Task List > All Open

Gantt

ID	Task Name	UNASSIGNED
	Kick off project (1) (External)	
GC3-T3	Project and Portal introduction	3 days Unassigned
	Upload cleaning product info... (8) (External)	
GC3-T4	Formula information	5 days Unassigned
GC3-T5	Labels and literature	5 days Unassigned
GC3-T6	Performance	20 days Unassigned
		5 days Unassigned

Tasks module, Gantt view

GS-2125 GS-37 Cleaning Products for Industrial and Institutional Use

Tasks Documents

Status > All Open

Kanban

Show Option

Open (9)

- GC3-T4
Formula information
Upload cleaning product information
- GC3-T5
Labels and literature
Upload cleaning product information

Completed by Customer

Drag an existing Task and drop it under this category.

On Hold

Drag an existing Task and drop it under this category.

Not Applicable

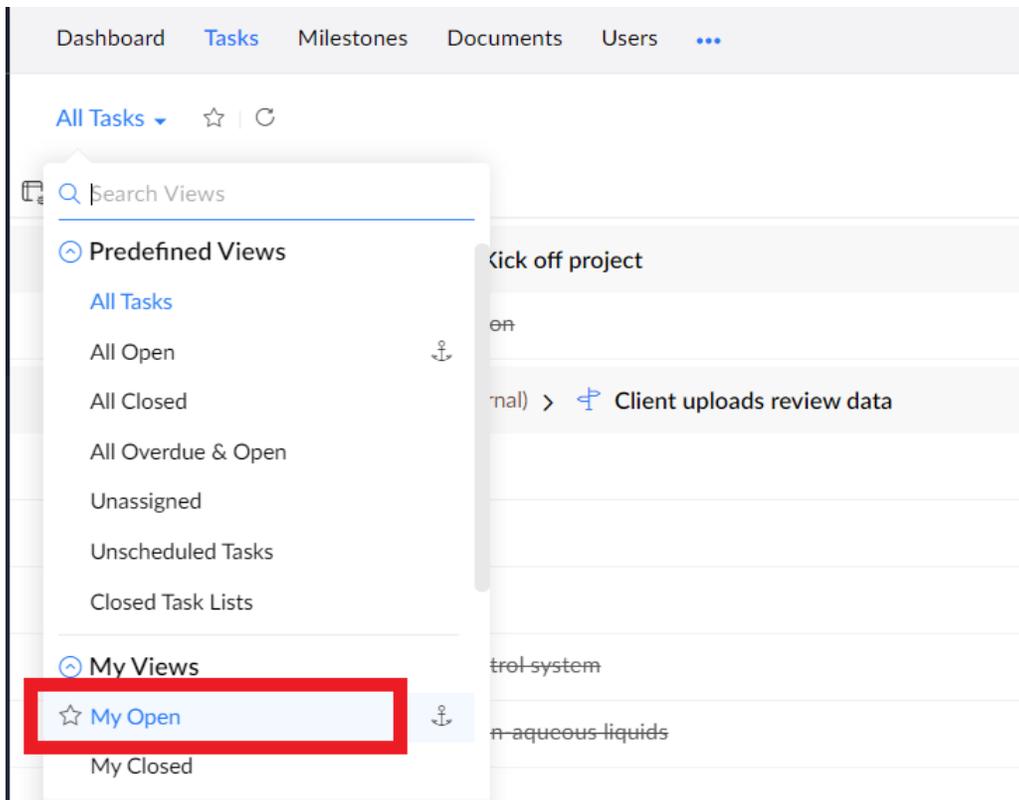
Drag an existing Task and drop it under this category.

Closed

Drag an existing Task and drop it under this category.

Tasks module, Kanban view

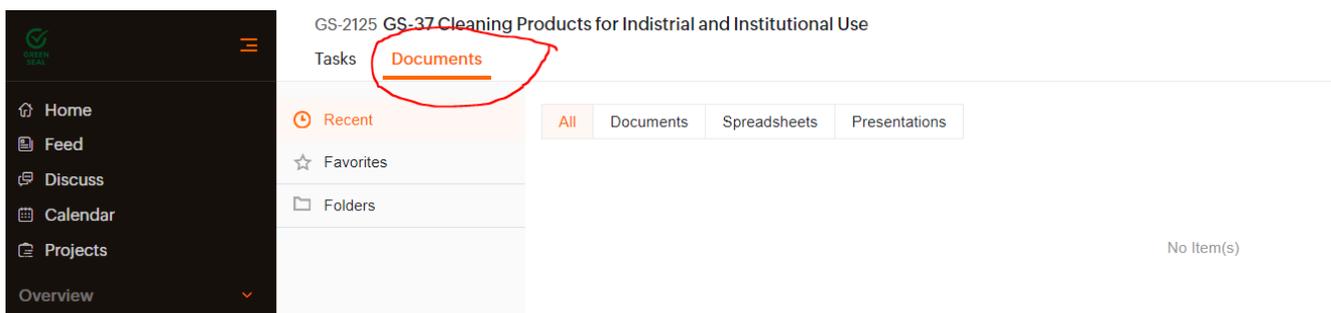
To focus in on the Tasks you need to complete, you can filter the Task view to just show 'My Open' tasks.



Tasks module, Classic view, My Open filter

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.

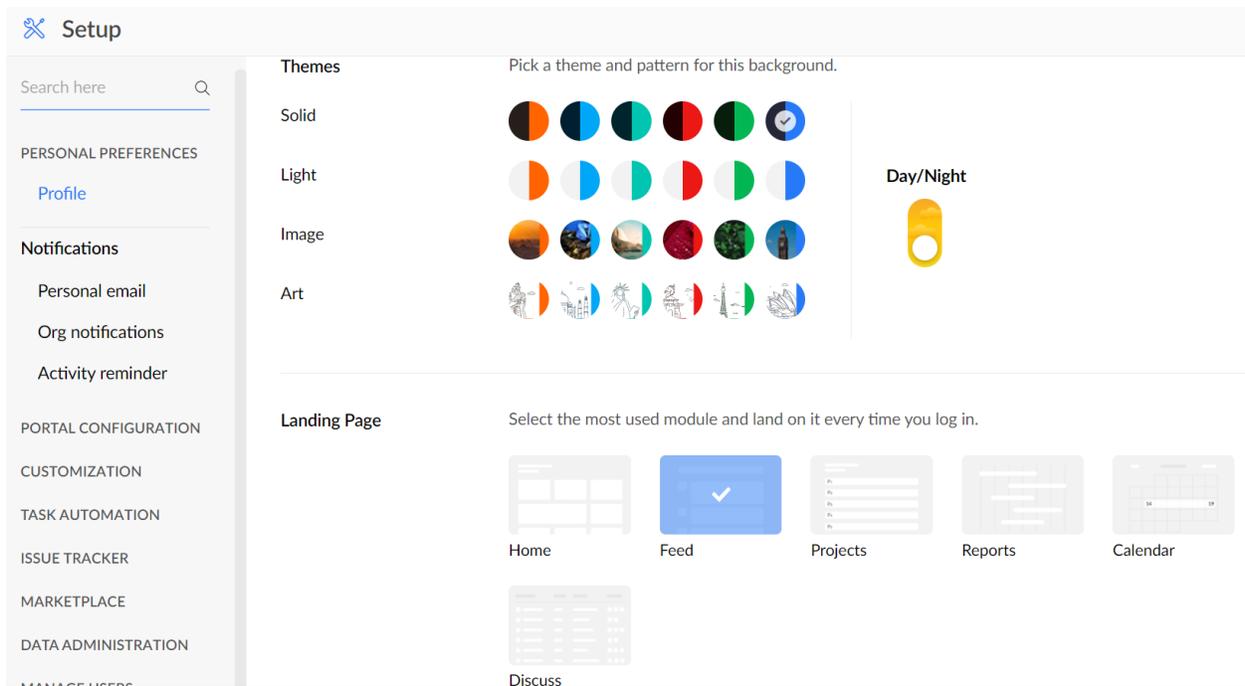


Change Your Default View

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



2. Under Profile, you can select a color theme as well as Home, Feed, or Projects as the default Landing Page 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 Setup 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*	Last Name*
<input type="text"/>	<input type="text"/>
Office Phone No <input type="text"/>	Home Phone No <input type="text"/>
Mobile No <input type="text"/>	Language English

Collapse Task List

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 blue bars icon to expand the Task.

Upload product information ▾ ☰ TZ6-T9

Task ID	Task Name	Owner	Status
TZ6-T7	Labels and literature	Anne Shudy Palmer	Not Applicable
TZ6-T8	Performance	Anne Shudy Palmer	Not Applicable
TZ6-T10	Marketing	Anne Shudy Palmer	Not Applicable
TZ6-T11	Annex: Closed dilution control system	Anne Shudy Palmer	Not Applicable
TZ6-T12	Annex: Powders/Solids/Non-aqueous liquids	Anne Shudy Palmer	Not Applicable
TZ6-T5	Product information	Anne Shudy Palmer	Not Applicable
TZ6-T6	Formula information	Anne Shudy Palmer	Not Applicable
TZ6-T9	Packaging	Anne Shudy Palmer	Not Applicable

Packaging

By Anne Shudy Palmer | [🗨](#) | [👤 \(3\)](#) | [ℹ](#)

● Not Applicable ▾
CURRENT STATUS

🔍 Description ✎

- Complete and upload the **Packaging Worksheet**.
- Upload **letters from your packaging suppliers** attesting that:
 - Lead, mercury, cadmium, and hexavalent chromium, are not intentionally introduced to primary packaging
 - The sum of the concentration levels of these metals present does not exceed 100 ppm by weight (0.01%)
 - (*plastic packaging only*) Phthalates, bisphenol A, and chlorinated packaging material are not intentionally introduced to plastic packaging

Suppliers may use the attached Packaging Letter Template for this attestation.
- Additionally, upload the **following documentation as applicable**:
 - Resin Identification Code for plastic packaging: Photo, spec sheet, or other documentation showing that plastic packaging is marked with the Code
 - Recyclable packaging: Documentation that the package is recyclable in a substantial majority of communities
 - 25%+ post-consumer material: Supplier documentation describing the packaging and percent post-consumer content
 - Source-reduced packaging: Completed Packaging Source Reduction worksheet
 - Refillable packaging: A description of the take-back program including how the program is communicated to the end-user and the percentage for recycling or reuse
 - Alternative approach: A description of the approach and its life-cycle benefits

🔍 Task Information

Owner: Anne Shudy Palmer x

Work Hours: 🕒 Completed on: 02-02-2021

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

TZ6-T9

Packaging

By Anne Shudy Palmer | | (3) |

● Not Applicable ▾
CURRENT STATUS

Description

1. Complete and upload the **Packaging Worksheet**.
2. Upload **letters from your packaging suppliers** attesting that:
 - Lead, mercury, cadmium, and hexavalent chromium, are not intentionally introduced to primary packaging
 - The sum of the concentration levels of these metals present does not exceed 100 ppm by weight (0.01%)
 - (*plastic packaging only*) Phthalates, bisphenol A, and chlorinated packaging material are not intentionally introduced to plastic packaging

Suppliers may use the attached Packaging Letter Template for this attestation.
3. Additionally, upload the **following documentation as applicable**:
 - Resin Identification Code for plastic packaging: Photo, spec sheet, or other documentation showing that plastic packaging is marked with the resin code
 - Recyclable packaging: Documentation that the package is recyclable in a substantial majority of communities
 - 25%+ post-consumer material: Supplier documentation describing the packaging and percent post-consumer content
 - Source-reduced packaging: Completed Packaging Source Reduction worksheet
 - Refillable packaging: A description of the take-back program including how the program is communicated to the end-user and the percent of packaging that is refillable
 - Alternative approach: A description of the approach and its life-cycle benefits
4. Complete the Checklist for this task. Checked boxes mean the item is complete *or* not applicable.

Task Information

Owner Anne Shudy Palmer

Work Hours Completed on

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

By Anne Shudy Palmer ·  ·  2 · 

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:

TASK	OWNER	STATUS	STAR
GS-33 2.1 Waste Minimization, Reuse and Recycling (External) on 4 Mar, 2020 in Information Collection			
TGA3-T1 2.1.1 Recycling Program	kuzi4444 kuzi4 444	Not Yet Started	-
TGA3-T2 2.1.2 Composting Program			
TGA3-T3 2.1.3 Refillable Amenities			
TGA3-T4 2.1.4 Double Sided Printing			
TGA3-T5 2.1.5 Food Donation Program			
TGA3-T6 2.1.6 Food Service Items			

Assign this task to

- Me
- Anne Shudy Palmer
- Brittany Maule
- Jeff Kuziemko
- Kamal Singh
- Client Users
- pmclev

[Add Task](#)

