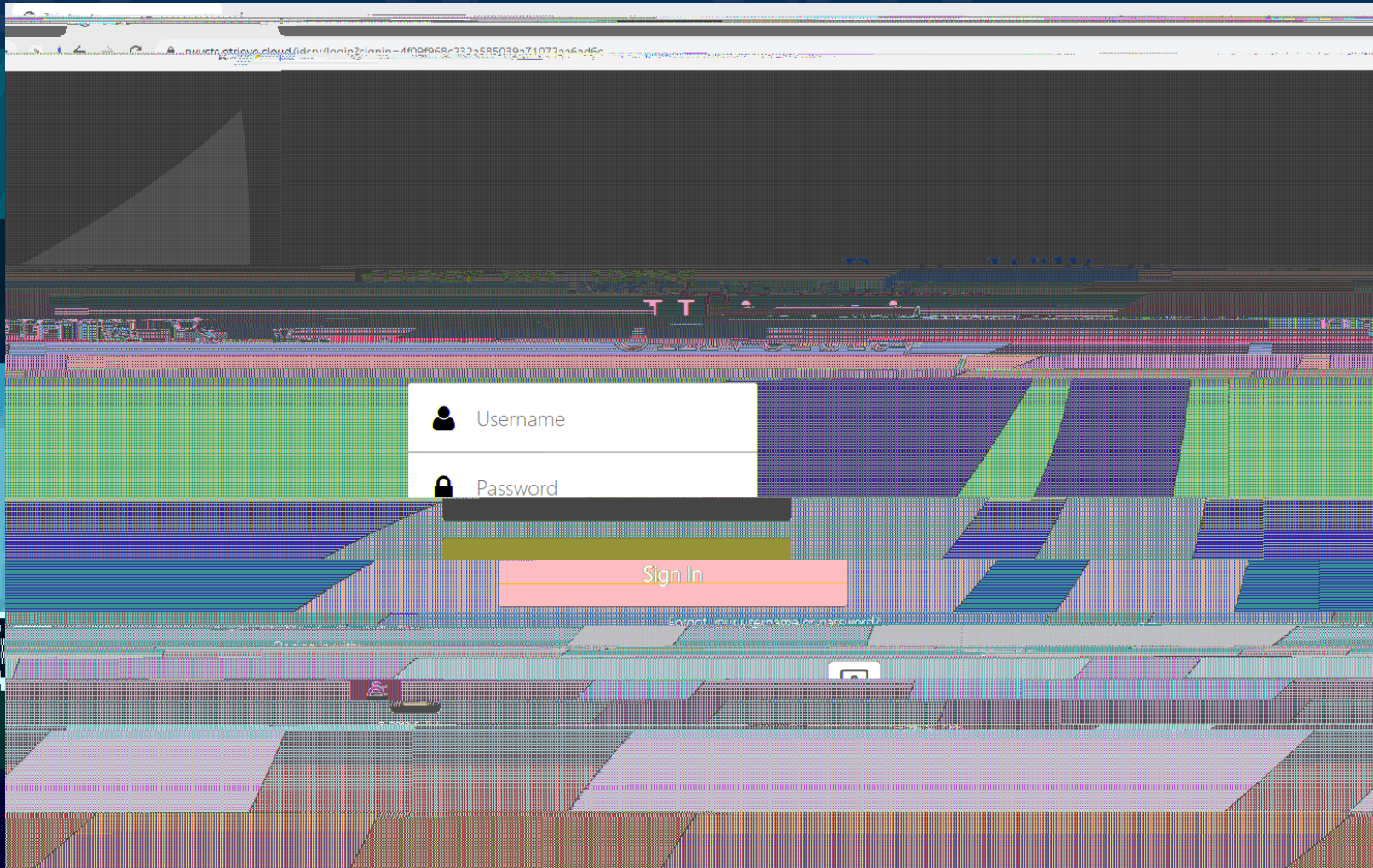


Grant Information Form

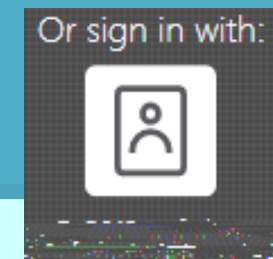
– Logging into Etrieve Central



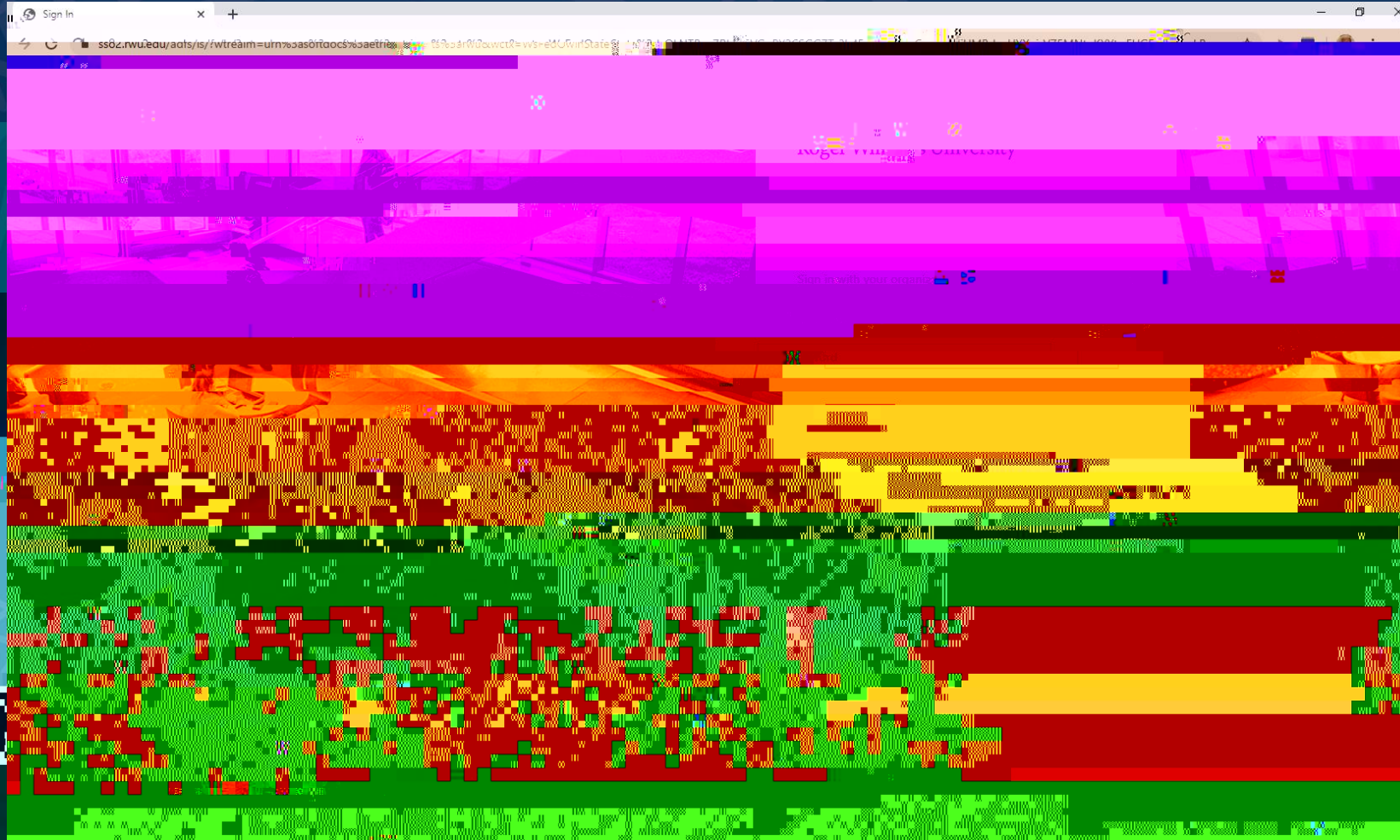
In Google Chrome enter the following link:

<https://rwucentral.etrieve.cloud>

An initial "splash page" will be presented, allowing the user to sign in using an Username and Password. Click on the following icon to login:



Grant Information Form – RWU login



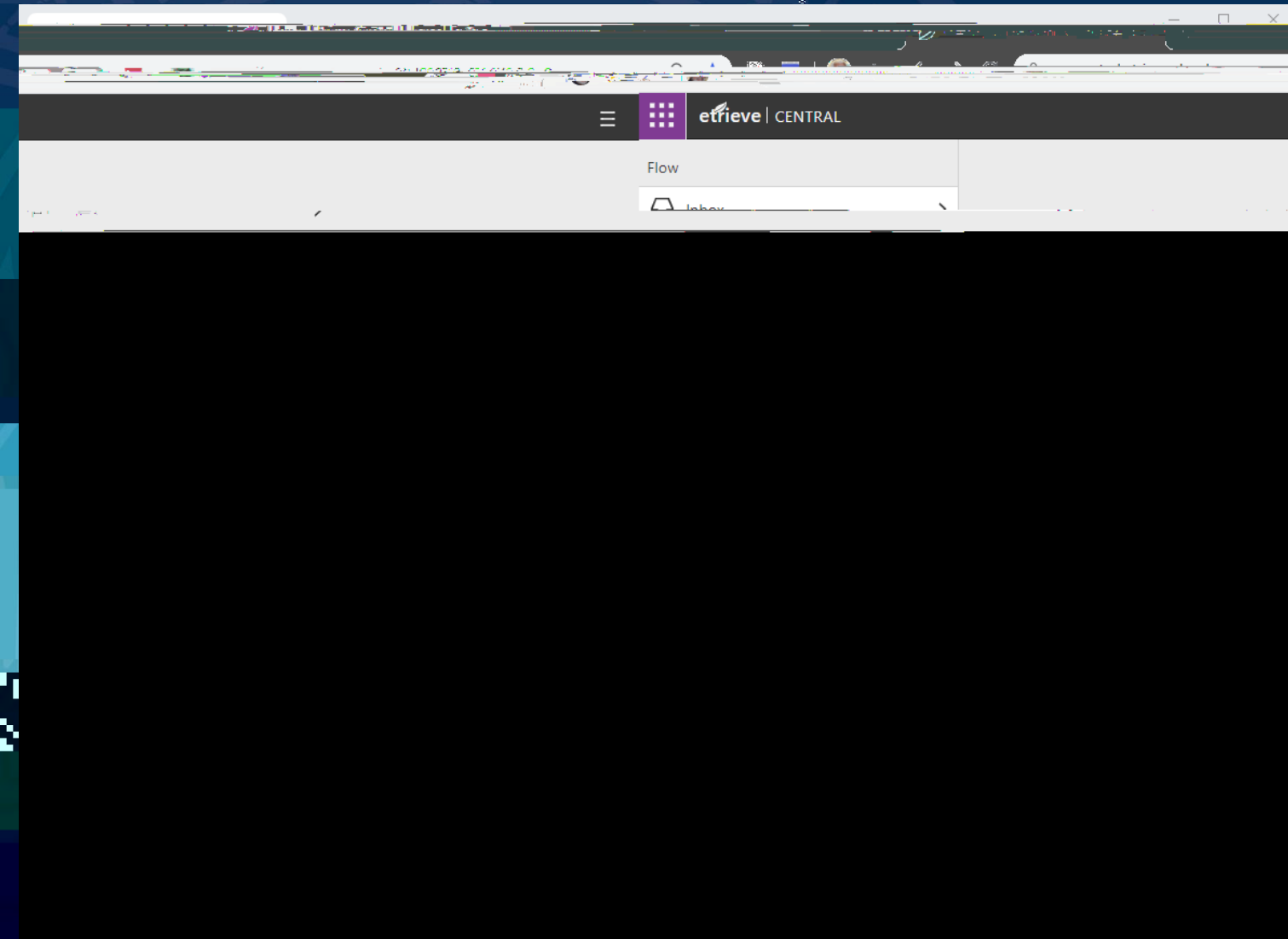
Use the following credentials:
Example:

(Students / Faculty)
username@academics.rwu

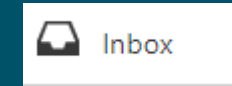
(Employees)
username@rwu.edu

Use your Roger Williams
University username and
password.

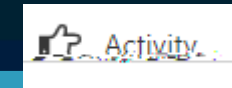
Grant Information Form Central



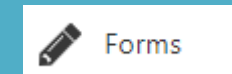
The Primary Navigation Panel is located on the left portion of the home page and consists of two sections, Flow, and Forms options with sub-panels that contain available Flow and Forms options. The sub-panels shows the Inbox, Activity, Forms, Drafts.



The Inbox panel contain requests that have been submitted and assigned to you that need to be



In Activity panel will see all the requests that have been processed by you or your group.



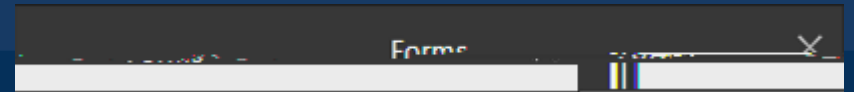
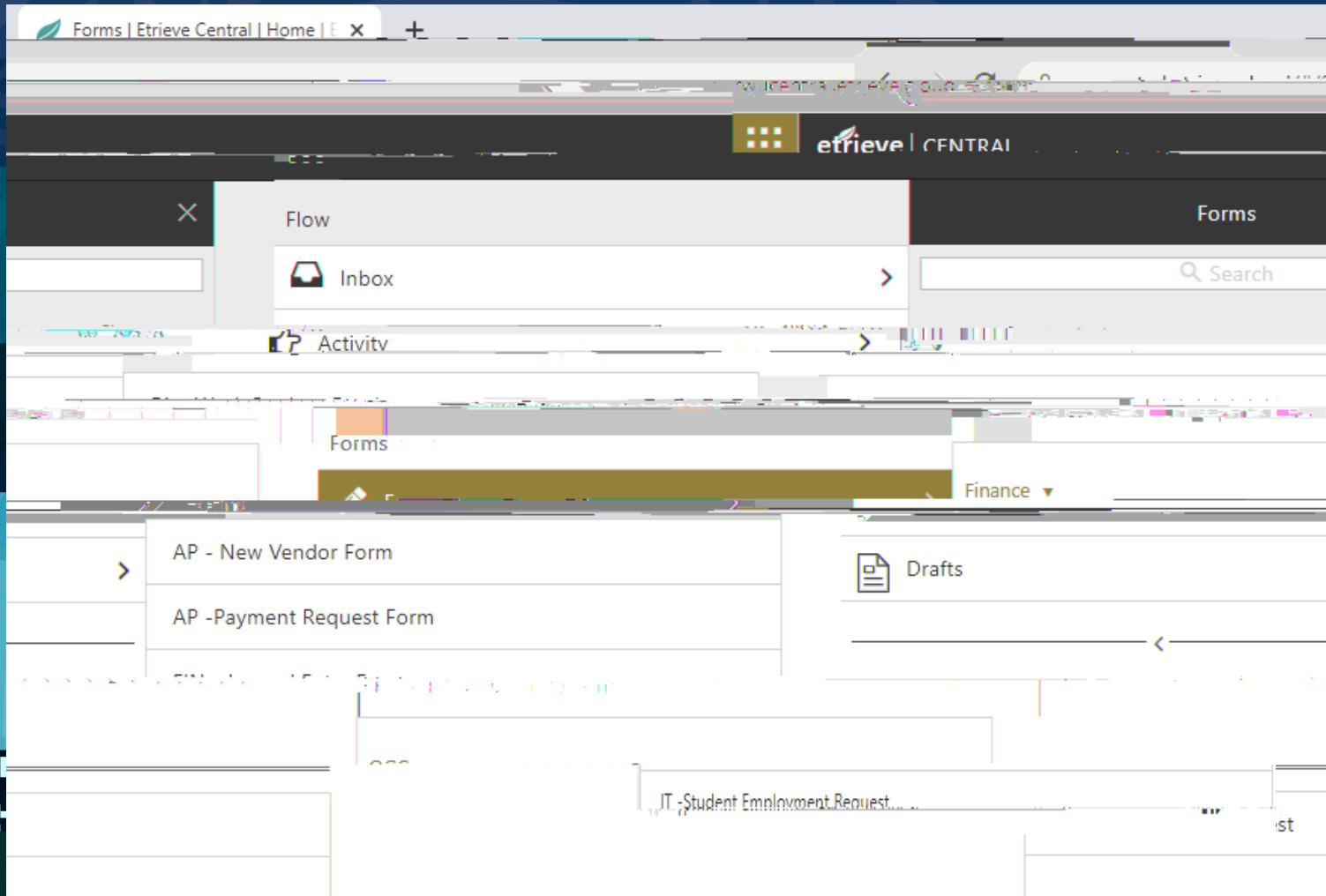
In Forms panel is where a submitter will be able to initiate various requests that have been assigned to you.



In Drafts panel you can keep requests you can access to completed later time, simply do not submit the request.



Forms Panel



Under the Forms Panel you'll see various forms that you have permission to complete and submit.

The 'FIN - Grant Information Form' is accessible by simply clicking on that form title.

The Primary Navigation Panel may be collapsed to increase the screen space available for the Document Viewer by clicking the arrowhead (<) at the center of the line at the bottom of this Panel. Clicking it again will restore the original Panel size.

(****need to redo image)

Principal Investigator / Project Lead Information Section

Principal Investigator / Project Lead Information

Search for Employee

Employee ID

Title

Department

School/Division

Supervisor

Email

Phone

Enter a partial name and click the Search button.

Search for Employee

smith

Search

Click on the -Select- a dropdown will appear. Now click on the employee.

Search for Employee

Employee ID

Search

smith

Name

School/Division

Supervisor

Email

The form will autofill with the employee data in the shaded in.

The email field can be over written. Also the phone number, is a required field.

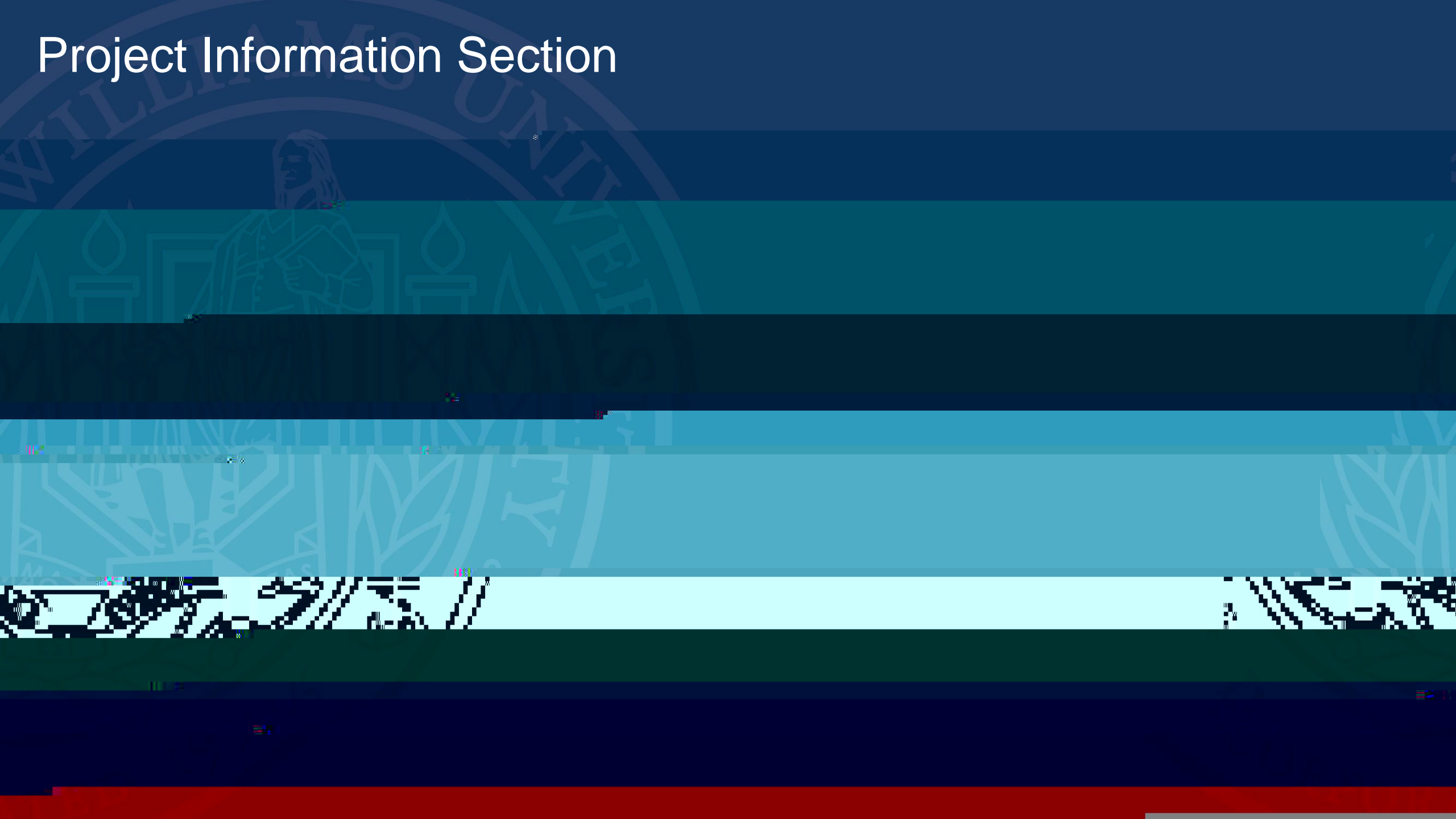
Email

Phone

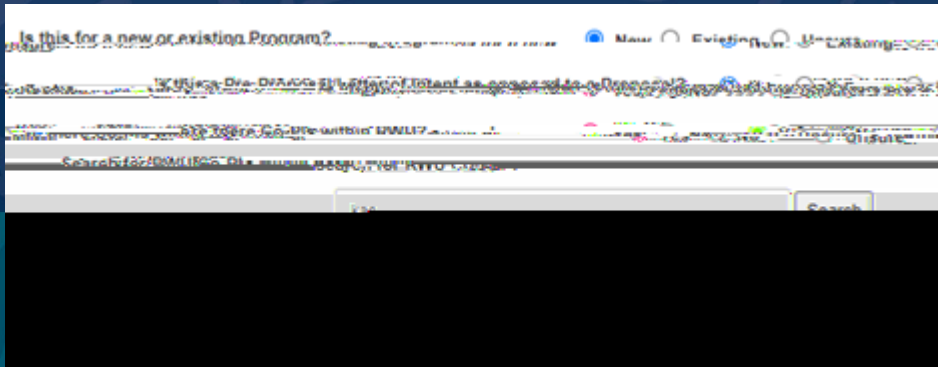
ismith@rwu.edu

Required

Project Information Section



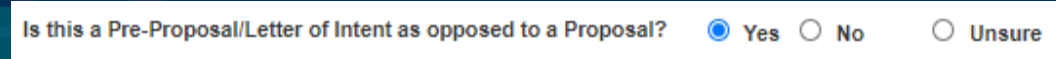
Funding Source Section



Select whether the program is New, Existing or Unsure.



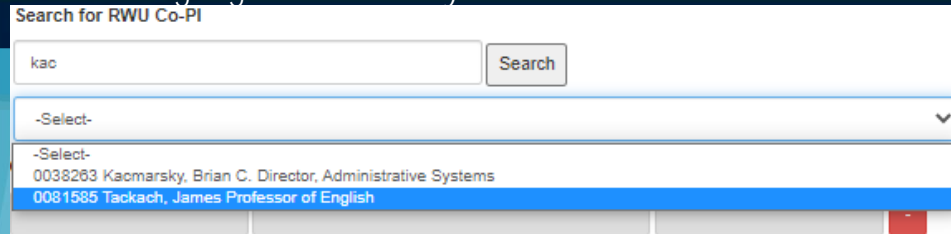
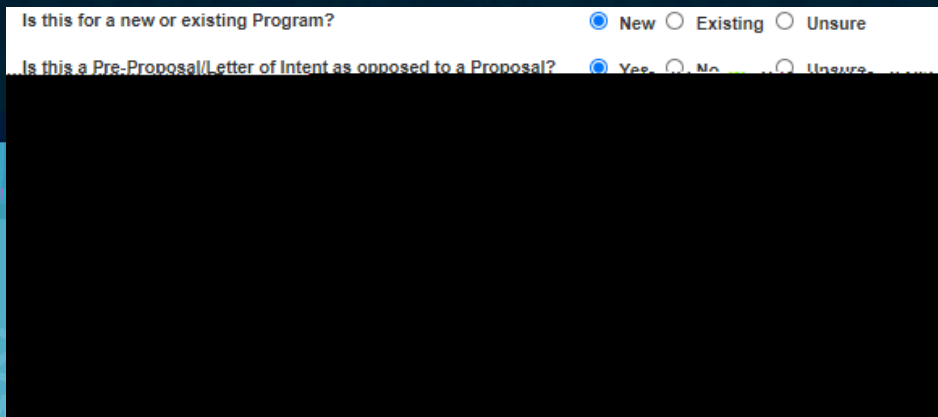
Select if this request is a Pre-Proposal /Letter of Intent as opposed to a Proposal.



Select are there RWU Co-PI's.



If the answer is 'Yes' then the following is displayed. AT that point enter a partial name for the RWU Co-PI for example 'kac' and then click on Search. Then click on '-Select-' and use the arrow to highlight the Name you want.



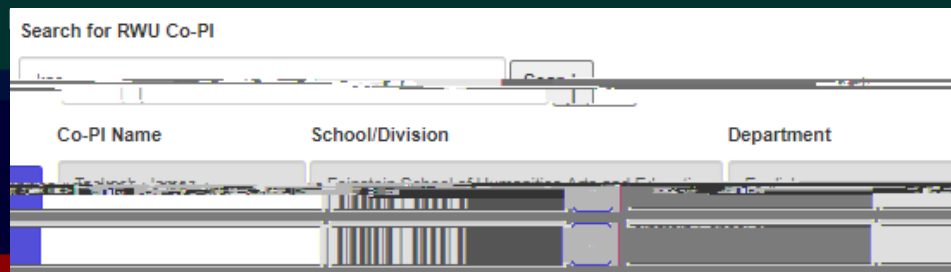
The person you have picked will appear in the row and another blank row will appear for your next selection.

You can have up to four Co-PI's per request.

You will notice a red button on the side of the row.



By clicking on this it will remove the



Grant Information Form

External Funder Deadline Project Start Date

Rolling Unsure Is there an Estimated Completion Date or Rolling Period? Est Compl Date

Approximate Budget Amount and/or Range:

Estimate	Low	High
<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>

By clicking on the External Funder Deadline a calendar will popup so that you can easily select a date.

The same is true for the Project Start Date.

External Funder Deadline Project Start Date

Is there an Estimated Completion Date or Rolling Period? Est Compl Date Rolling Unsure

Estimated Completion Date:

Th	Fr	Sa	Su	Mo	Tu	We
1	2	3				
7	8	9	10			
13	14	15	16	17		11
20	21	22	23	24		18

Yes No Unsure

If you select Est Compl. Date then a calendar is available.

Estimated Completion Date

If you select 'Rolling' then a text box will appear.

Is there an Estimated Completion Date or Rolling Period? Est Compl Date Rolling Unsure

Rolling Period

If you select Unsure then nothing appears.

Is there an Estimated Completion Date or Rolling Period? Est Compl Date Rolling Unsure

Grant Information Form

External Funder Deadline: _____ Project Start Date: _____

Rolling Unsure Is there an Estimated Completion Date or Rolling Period? Est Compl Date

Approximate Budget Amount and/or Range:

Estimate	Low	High
120,000.00	0.00	0.00

Estimate: 0.00 Low: 0.00 High: 0.00

For the Approximate Budget Amount you must enter a Estimated

Estimate	Low	High
120,000.00	0.00	0.00

and/or a Low/High Range.

Approximate Budget Amount and/or Range:

Will this grant require new hires? Yes No Unsure

Will this grant require a commitment of space? Yes No Unsure

Will this grant require any cost-share by the University? Yes No Unsure

Will you be conducting research on human subjects? Yes No Unsure

Will you be conducting research on animal subjects? Yes No Unsure

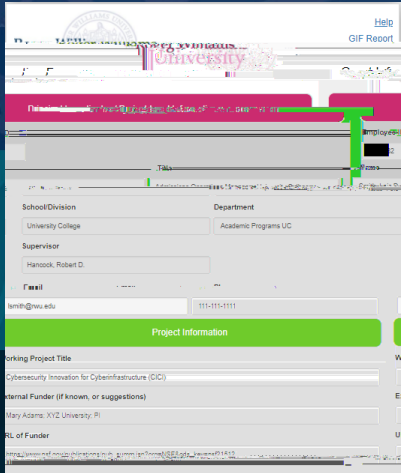
These series of questions are straight forward and have no explanation. Just select the yes, no or unsure that best answers the question.

Other Information: _____

Enter whatever information about this grant in this field.

GIF Receipt Stage

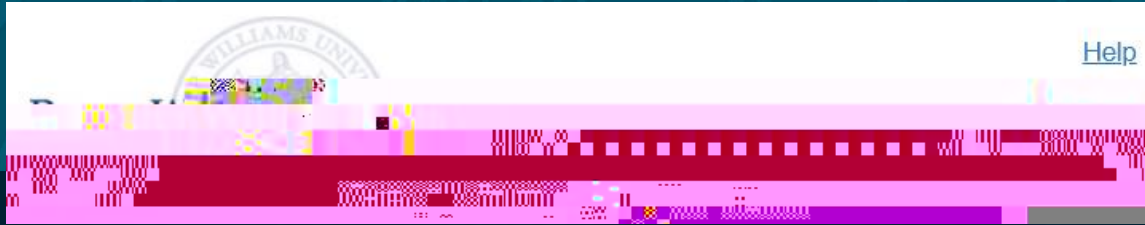
Once the submitter completed the form the request will go to one group called 'GIF –Receipt'. At this point the person within this group will be able to review the request and click on approve to complete the request.



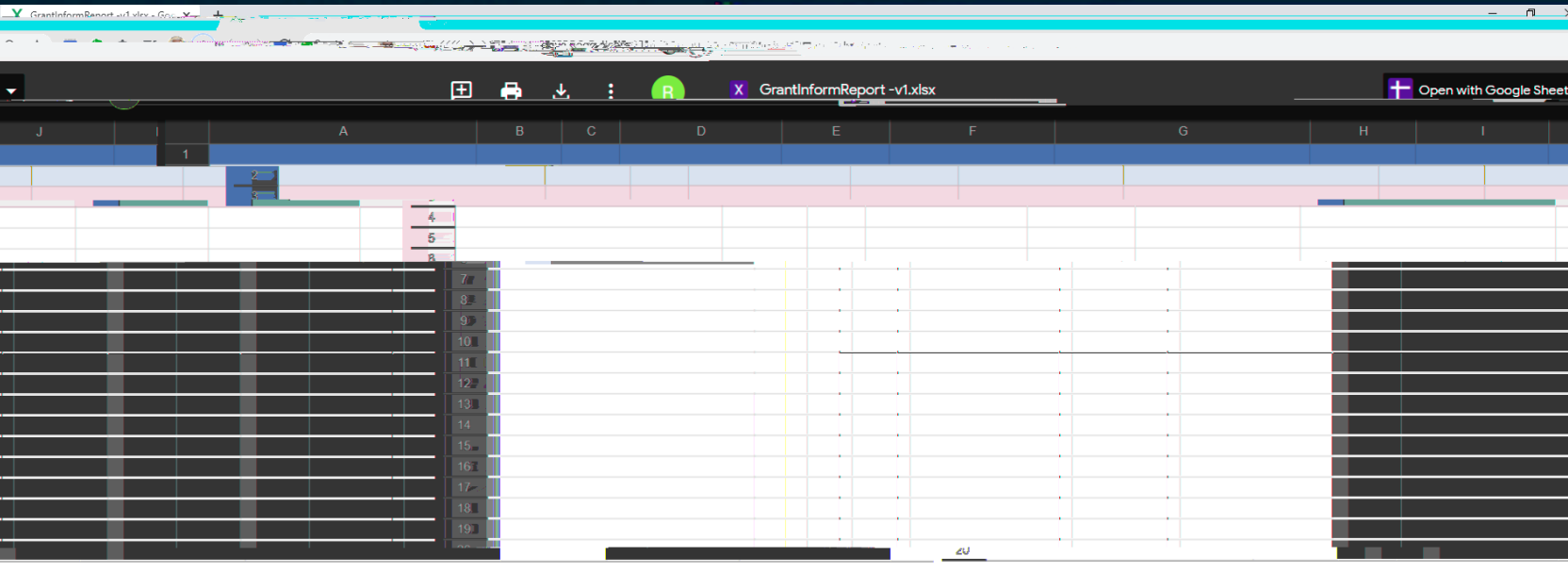
The screenshot shows a web form titled "GIF Receipt" with a "Help" link. The form includes several sections: "School/Division" (University College) and "Department" (Academic Programs UC); "Supervisor" (Hancock, Robert D.); "Email" (rnh@u.edu); "Project Information" (highlighted in green); "Working Project Title" (Cybersecurity Innovation for Cyberinfrastructure (CICI)); "Internal Funder (if known, or suggestions)" (Mary Adams, XYZ University, PI); and "URL of Funder".

Grant Information Form Reporting

The Grant Information Request Workflow - after a submitter submits a request it goes over to the JE Review group to review the request. Once approved it will go to the JE Entry group to enter the Grant Information Request Number and Date. The request can be referred to anyone for approval. At the top of the form you will find a link that you can click on to download an excel report that contains all the Grant Information Request Requests that you have entered. (Click on the Grant Information Request Excel Report link).



You should get the following screen:

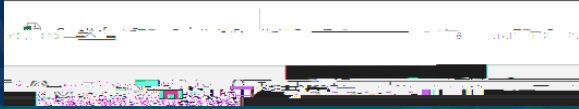


Click on the download icon on the top left:



Grant Information Form Reporting

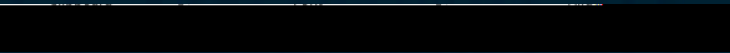
The Excel will appear as downloaded on the lower left hand corner of your window.



Once you click on it, the report will come up in excel. Then click on Enable Editing.



Then click on Enable Content:



Click Yes to the 'Do you want to make this file a trusted Document?'.



Then click on Refresh All in the Data tab



The tabs on the bottom of the spreadsheet reflect where requests are in the workflow. When a request is referred to someone, it will remain in the last stage until the approver approves the request at that stage.