Grant Information Form – Logging into Etrieve Central

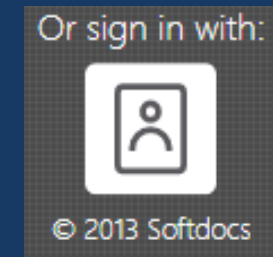In Google Chrome enter the following link:
https://rwucentral.etrieve.cloud

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:
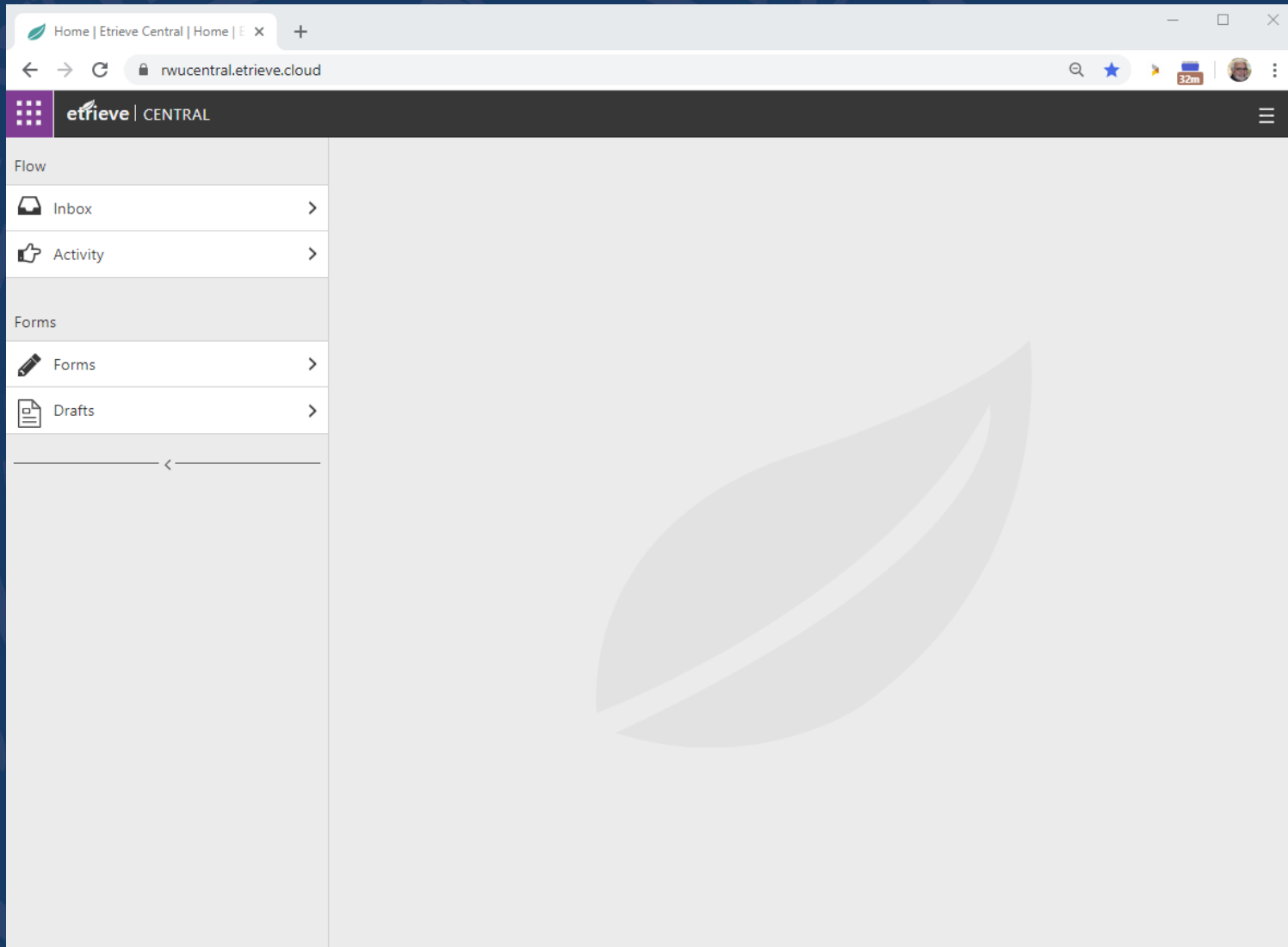
Grant Information Form – RWU login

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.
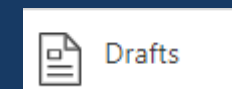

The Inbox panel contain requests that have been submitted and assigned to you that need to be
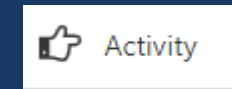
In Activity panel will see all the requests that have been processed by you or your group.
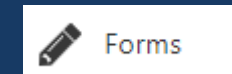
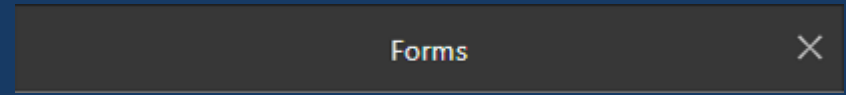In Forms panel is where a submitter will be able to initiate various requests that have been assigned to you.

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
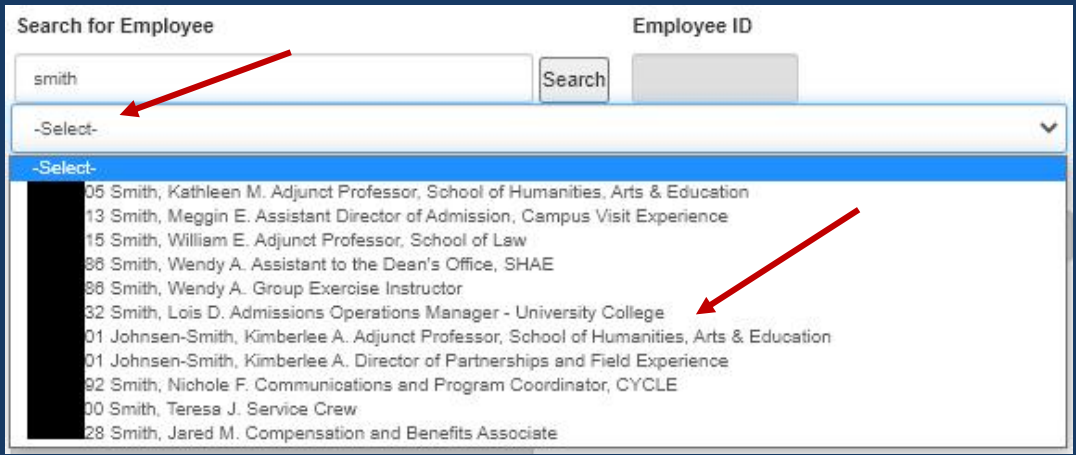
Enter a partial name and click the Search button.

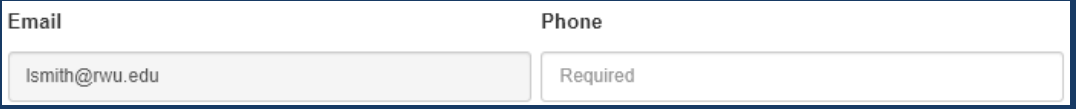Click on the -Select- a dropdown will appear. Now click on the employee.

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

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

Project Information Section

The Working Project Title, is a required field.

The External Funder is not a required field.

The URL of Funder is not a required field.

The Project Description is Required.

Funding Source Section

Select wither 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

If you select 'Yes' then the following questions will appear.

Will there be external Project Collaborators?	● Yes ○ No ○ Unsure
Is this a subaward to RWU?	○ Yes ○ No ○ Unsure
Does this involve contractors or subaward outside RWU?	○ Yes ○ No ○ Unsure

If you select 'Yes' for the 'Is this a subaward to RWU. A text two text box areas will appear. These are required fields.

Will there be external Project Collaborators?	● Yes ○ No ○ Unsure
Is this a subaward to RWU?	● Yes ○ No ○ Unsure

Name/Phone/Email

> Required

Lead PI Institution

> Required

Does this involve contractors or subaward outside RWU?	○ Yes ○ No ○ Unsure

If you select 'Yes' for the 'Does this involve contractors or subaward outside RWU?'. A another text two text box areas will appear. These are required fields.

Does this involve contractors or subaward outside RWU?	● Yes ○ No ○ Unsure

Name/Phone/Email

> Required

Contractor / Subaward Organization(s)

> Required

Grant Information Form

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.

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

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

If you select Unsure then nothing appears.

Grant Information Form

External Funder Deadline   **Project Start Date**

___/___/_____   ___/___/_____

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

Approximate Budget Amount and/or Range:

Estimate	Low	High
0.00	0.00	0.00

For the Approximate Budget Amount you must enter a Estimated

Approximate Budget Amount and/or Range:

Estimate	Low	High
120,000.00	0.00	0.00

and/or a Low/High Range.

Approximate Budget Amount and/or Range:

Estimate	Low	High
0.00	5,000.00	6,000.00

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.

Enter whatever information about this grant in this field.
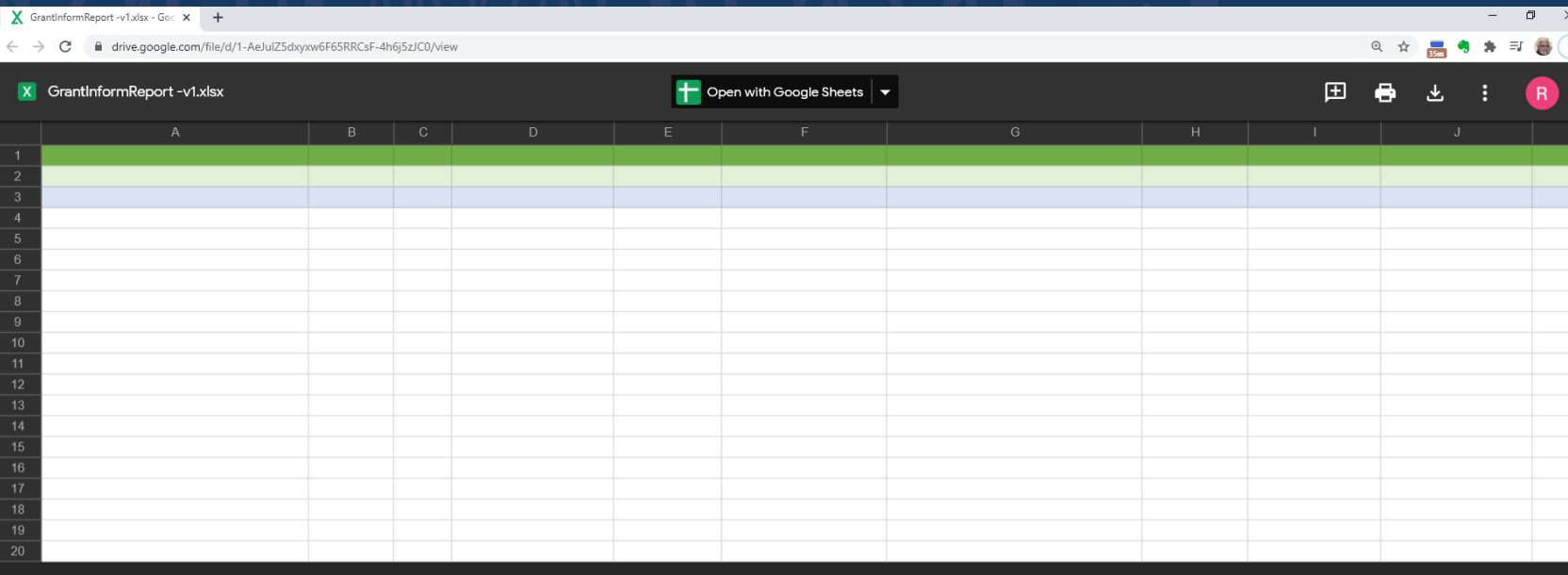
Other Information

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.

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 the go to the JE Entry group to enter the Grant Information Request Number and Date. The request can be refer to anyone to approval.
AT the top of the from 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).
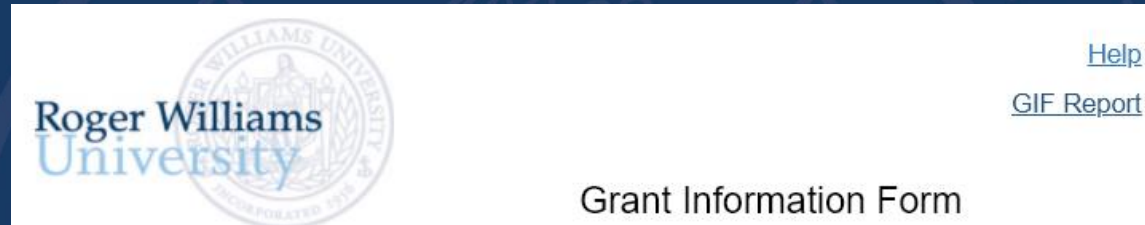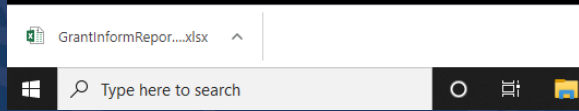

You should get the following screen:

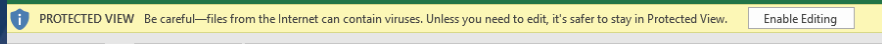Click on the download icon on the top left:
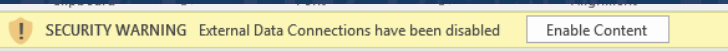
Grant Information Form Reporting

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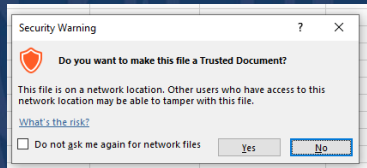

Once you click on it, the report will come up in excel. Then click on Enable Editing.
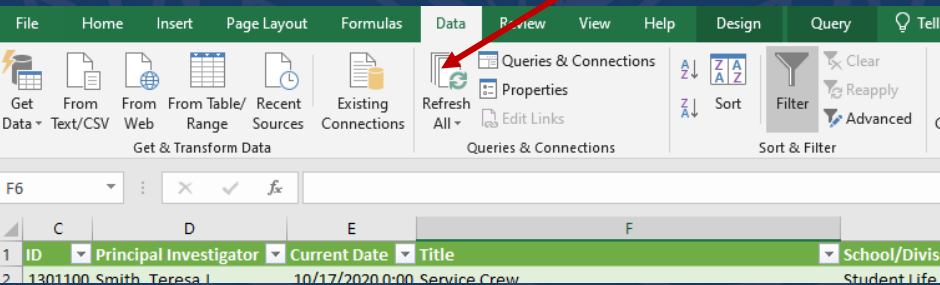

Then click on Enable Content:

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.