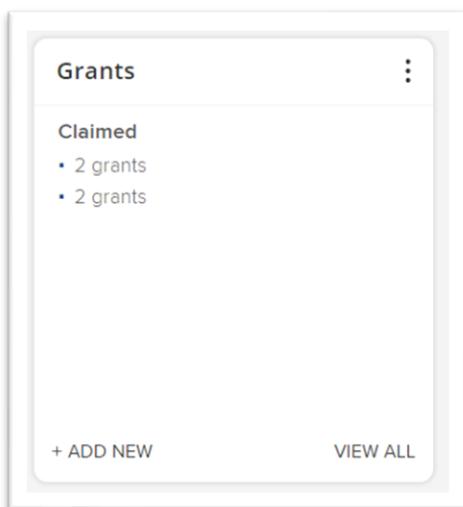




Grants Module

Introduction to the Grants Module

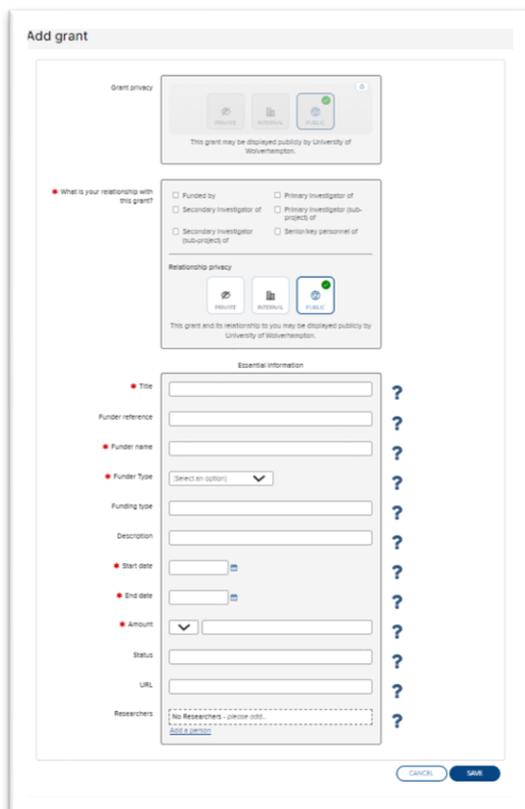
The Grants module can be found on your Elements homepage.



We have a daily feed for grants coming from Agresso PCB, which will populate your Elements profile, with successful grants from the **31st of July 2017**. Alternatively, you can manually add a grant into your Elements profile if your grant was awarded before this date or was awarded outside of the institution. If you are unsure, please contact elementssupport@wlv.ac.uk for further advice.

Adding Manual Grants

If you are missing a grant and it is outside of the July 2017 threshold for PCB, you can manually add a grant to your profile. Click on the **+ Add New** link in the Grants module.

A screenshot of the 'Add grant' form in a mobile application. The form is titled 'Add grant' and is divided into several sections. At the top, there is a 'Grant privacy' section with three icons: 'Private', 'Internal', and 'Public'. Below this is a note: 'This grant may be displayed publicly by University of Wolverhampton.' The next section is 'What is your relationship with this grant?' with four radio button options: 'Funded by', 'Secondary investigator of', 'Primary investigator of', and 'Senior key personnel of'. Below this is a 'Relationship privacy' section with three icons: 'Private', 'Internal', and 'Public', and a note: 'This grant and its relationship to you may be displayed publicly by University of Wolverhampton.' The 'Essential information' section contains several fields: 'Title', 'Funder reference', 'Funder name', 'Funder Type' (a dropdown menu), 'Funding type', 'Description', 'Start date' (with a date picker), 'End date' (with a date picker), 'Amount' (with a dropdown menu), 'Status', 'URL', and 'Researchers' (with a text area and a link to 'Add a person'). Each field has a question mark icon to its right. At the bottom of the form, there are 'CANCEL' and 'SAVE' buttons.

A form will now appear for you to complete. All fields marked with a red asterisk must be completed as these are mandatory fields and without them being complete, you will be unable to save the record. If you click on the blue question marks this will provide you with guidance on what should be included in each field. Once the fields are complete, then click **Save**.

Essential Information

* Title

Funder reference

? Please enter the title of your grant.

?

You will then be presented with the grant record you have just created.

To return to your profile, please click the **HOME** button in the top left corner of the Elements screen.

Missing Grants

If there is a grant missing from your homepage and it is a successful grant that was in progress after July 2017, you can search the system to find it.

Click Menu and then under **Reporting** select **System Search**.

The screenshot shows a 'System search' window. At the top, it says 'System search'. Below that is a 'System Search' section with a search input field. Below the input field are two radio buttons: 'Simple' (selected) and 'Advanced'. A 'Search' button is located at the bottom right of the search section.

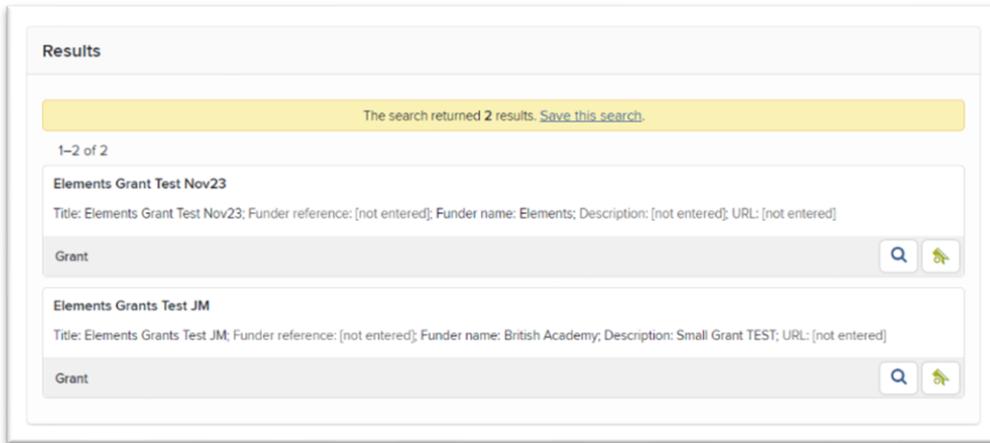
Select **advanced** and a form will load.

The screenshot shows the 'System search' window with the 'Advanced' search mode selected. The 'Search criteria' section includes:

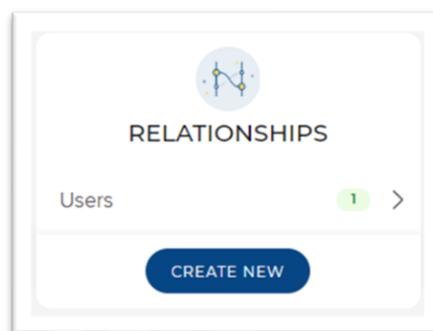
- Mode:** Radio buttons for 'Simple' and 'Advanced' (selected).
- Search for:** A text input field with a clear button (X). Below it is a blue instruction box: 'Add keywords or names, or enter a wildcard (*) to use only the restrictions below.'
- Date from:** A date input field with a calendar icon. Below it is a blue instruction box: 'Restrict the search with a date in dd/mm/yyyy format, or leave blank.'
- Date to:** A date input field with a calendar icon. Below it is a blue instruction box: 'Restrict the search with a date in dd/mm/yyyy format, or leave blank.'
- Search:** A list of checkboxes for search criteria: Publications, Grants, Professional activities, Organisational structures, Projects, Pieces of equipment, Teaching activities, Records of impact, Journals, and Deposit advice. 'Grants' is checked.
- Verification status:** A dropdown menu with '[no filter]' selected.
- Return:** Radio buttons for 'The items above' (selected) and 'The users related to the items above'.
- 1. Restrict search to users:** A blue instruction box: 'Restrict the search to individual users, or leave blank. Type the surname of a user at your institution and a drop-down list will appear. Choose the correct person then click on the plus button to complete the process. Add more than one user if you wish.' Below it is a text input field for 'Name (surname first):'.
- Users:** A yellow box with the text 'You have not selected any users.'
- 2. Restrict search to groups:** A blue instruction box: 'Restrict the search by selecting certain groups, or leave blank.' Below it is a checkbox for 'University of Wolverhampton'.

 At the bottom right, there are 'Reset' and 'Search' buttons.

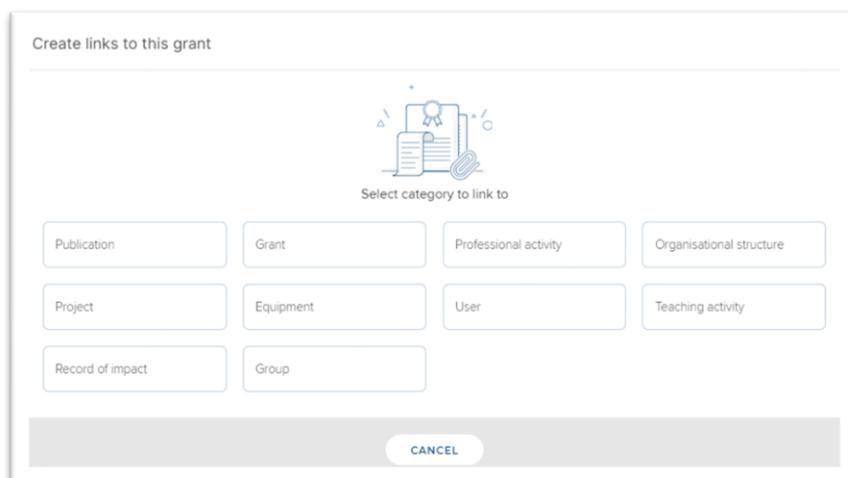
Enter the grant title, uncheck all items from the search list but grants and then click **search**. Scroll down to see your results and click the magnified glass to see the full details of the record.



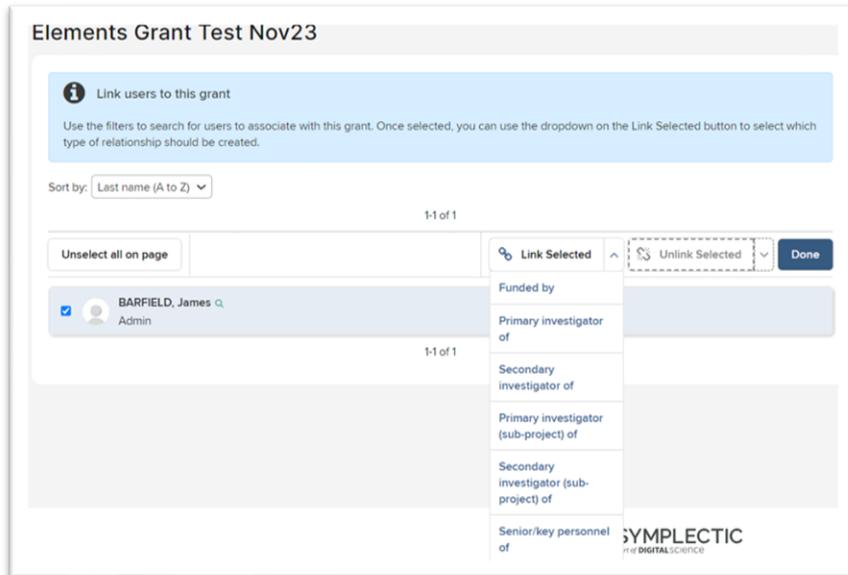
To link your record to this funding, you will need to create a relationship between these records. To do this, select the **create new** button in the **Relationships** section.



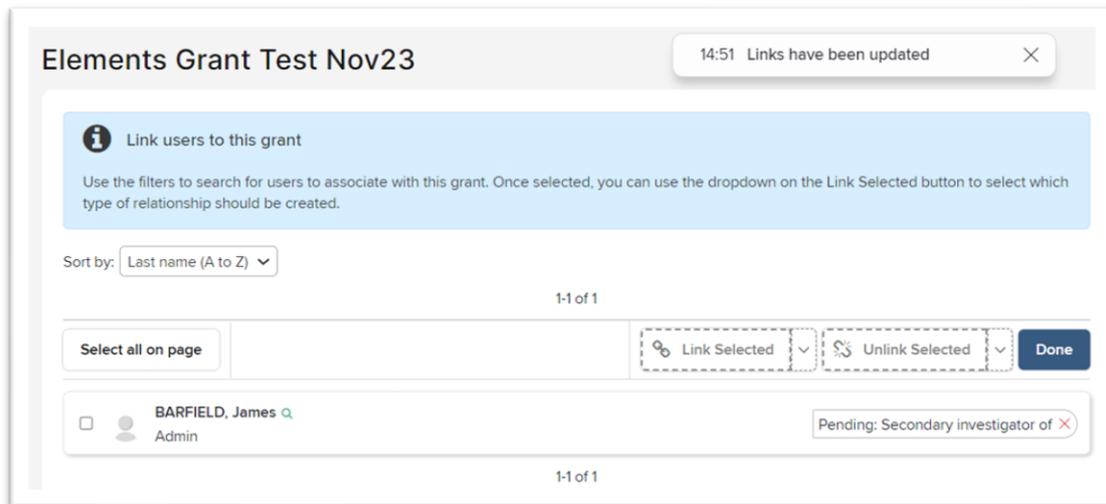
Click on the **user** button to create a link.



Then type your name (Surname first) under the **filters** section, this will bring up your profile. Select the profile, choose the correct relationship from the drop down '**link selected**' menu.



This will create a link between your profile and the grant.



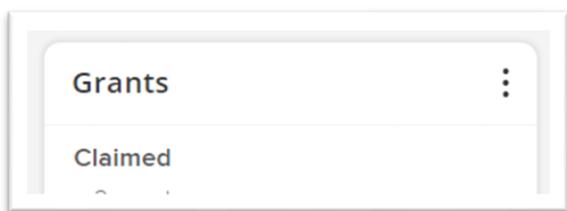
You can follow the same process and **unlink** the selected profile if you make a mistake or click the red cross on the relationship.

If your grant cannot be found through the search and you think it should be displayed in Elements (i.e., after 31 July 2017), please contact elementssupport@wlv.ac.uk and we can investigate further.

If the grant missing was awarded before this date, then follow the “add a manual grant” to your profile steps.

Viewing Grant Information

In order to view the details of your grants, click on the **grants** heading as shown below.



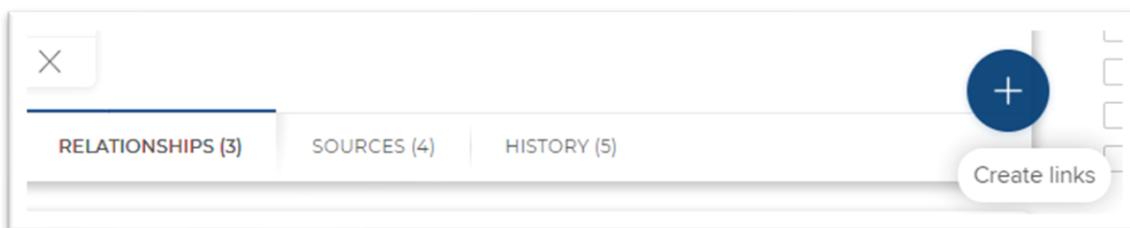
You will then be presented with a list of grants you are associated with.

From this view you can see some more tabs – including summary, relationships, and sources. The **'summary'** gives a brief description of the record, **'relationships'** shows the existing user relationships with the grant, and **'sources'** shows where the information is coming from (which for Grants will always be Agresso).

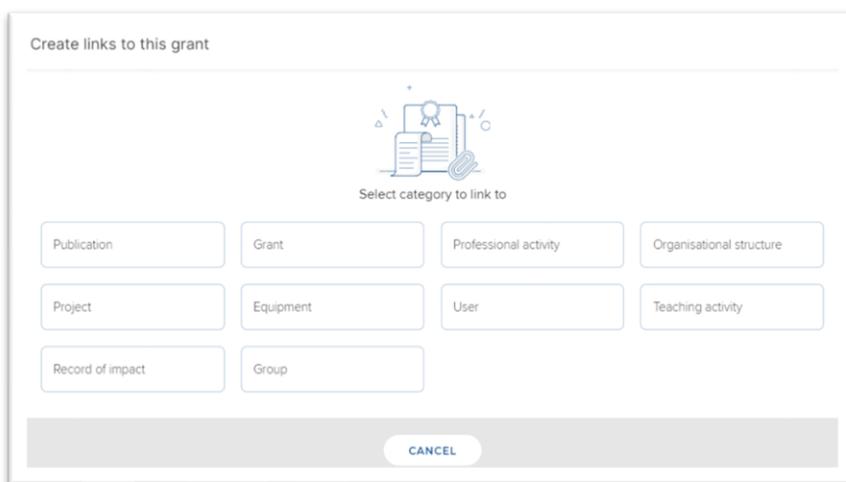
Linking Users

If another Elements user is part of your grant, you can add them to your record. The grant will then appear on their profile too.

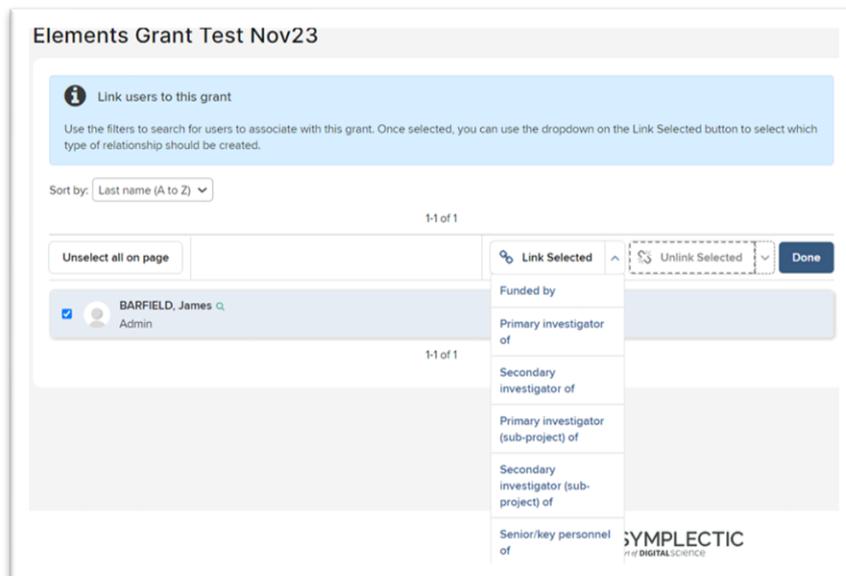
To link a user, select the **Relationships** tab and click the **plus** sign to add a new relationship.



Click on the **user** button to create a link.



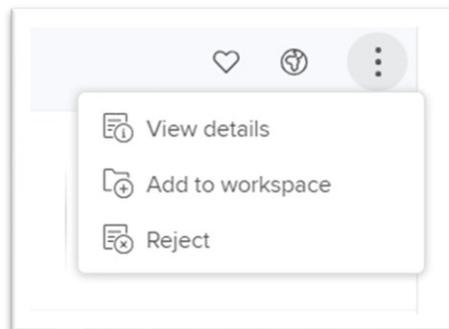
Enter the users name (surname first) in the Filter box provided. Select them and click a relationship from the **'Link Selected'** drop down menu.



This will create a link between the user profile and the grant.

Grant Actions

For each grant record, you will see an action area. These actions are consistently used across the other modules within Elements.



- The **heart** is to mark the publication as a favourite. This will appear at the top of your Elements profile within the Publications section.
- The **Globe** icon is to manage privacy settings – for example to personally see records on your profile but to hide them from other Elements users, or from the public view of your profile.
- Click **View details** to view the full details of the publication.
- **Add to workspace** is usually used if you are joining together or splitting records.
- **Reject** will disassociate yourself with the item (remove the record to rejected).