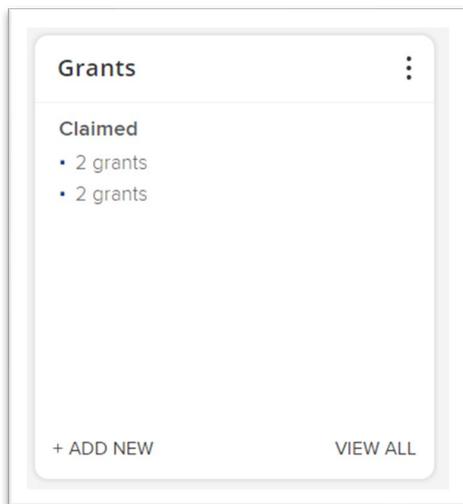




# Grants Module

## Introduction to the Grants Module

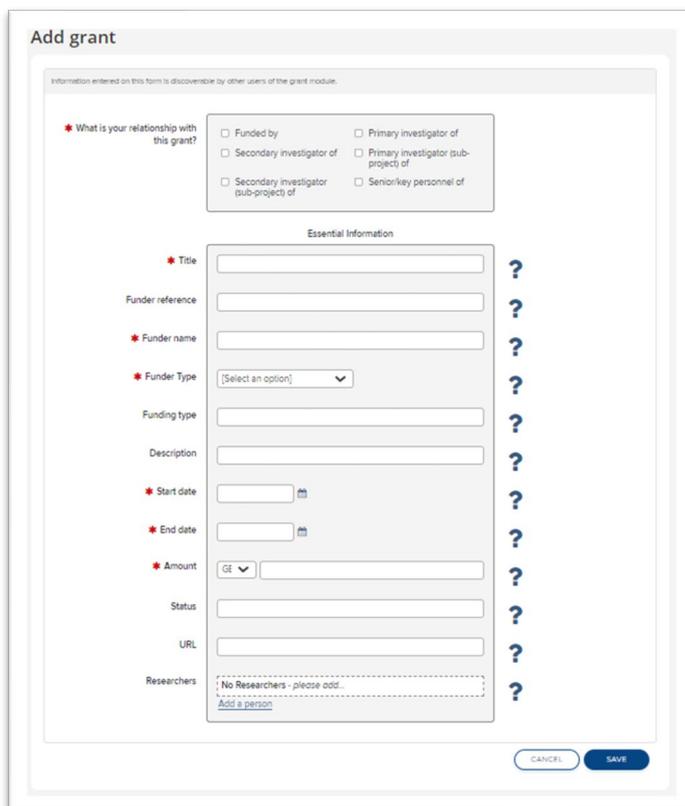
The Grants module can be found on your Elements homepage.



We have a daily feed for grants coming from Agresso PCB, which will populate your Elements profile, with successful grants from the **31st 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](mailto: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 a form titled 'Add grant'. At the top, a small note states 'Information entered on this form is discoverable by other users of the grant module.' The form is divided into several sections. The first section asks 'What is your relationship with this grant?' and includes six radio button options: 'Funded by', 'Secondary investigator of', 'Secondary investigator (sub-project) of', 'Primary investigator of', 'Primary investigator (sub-project) of', and 'Senior/key personnel of (sub-project) of'. The second section, 'Essential Information', contains the following fields: 'Title' (with a red asterisk), 'Funder reference', 'Funder name' (with a red asterisk), 'Funder Type' (with a red asterisk and a dropdown menu), 'Funding type', 'Description', 'Start date' (with a red asterisk and a date picker), 'End date' (with a red asterisk and a date picker), 'Amount' (with a red asterisk, a dropdown menu, and a text input), 'Status', 'URL', and 'Researchers' (with a red asterisk, a dashed box containing the text 'No Researchers - please add...', and a link 'Add a person'). To the right of each field is a question mark icon. At the bottom of the form are two buttons: 'CANCEL' and 'SAVE'.

A form will now appear for you to complete. All fields marked with a red asterisks must be complete as these are mandatory fields and without them being complete, you will be unable to save the record. If you hover over 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.

< RETURN TO THE PUBLICATIONS PAGE

14:38 Grant added. X

## Elements Grant Test

Grant

Labels

There are no labels on this grant. [Add labels](#)

To return to your profile, please click the HOME button.

### 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**.

My Profile Assessment Open Access Reporting

Reports & Dashboards Search

> CVs & Individual Reports > System Search > R

Search:

Simple  Advanced

Select advanced and a form will load.

**System search**

**System Search** ⓘ

**Search criteria**

Mode:  Simple  Advanced

Search for:

Add keywords or names, or enter a wildcard (\*) to use only the restrictions below.

Date from:

Restrict the search with a date in dd/mm/yyyy format, or leave blank.

Date to:

Restrict the search with a date in dd/mm/yyyy format, or leave blank.

Search:

- Publications
- Grants
- Professional activities
- Organisational structures
- Projects
- Pieces of equipment
- Teaching activities
- Records of impact
- Journals
- Deposit advice

Verification status:  ▼

Return:  The items above  The users related to the items above

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.

**Results**

The search returned 1 result. [Save this search.](#)

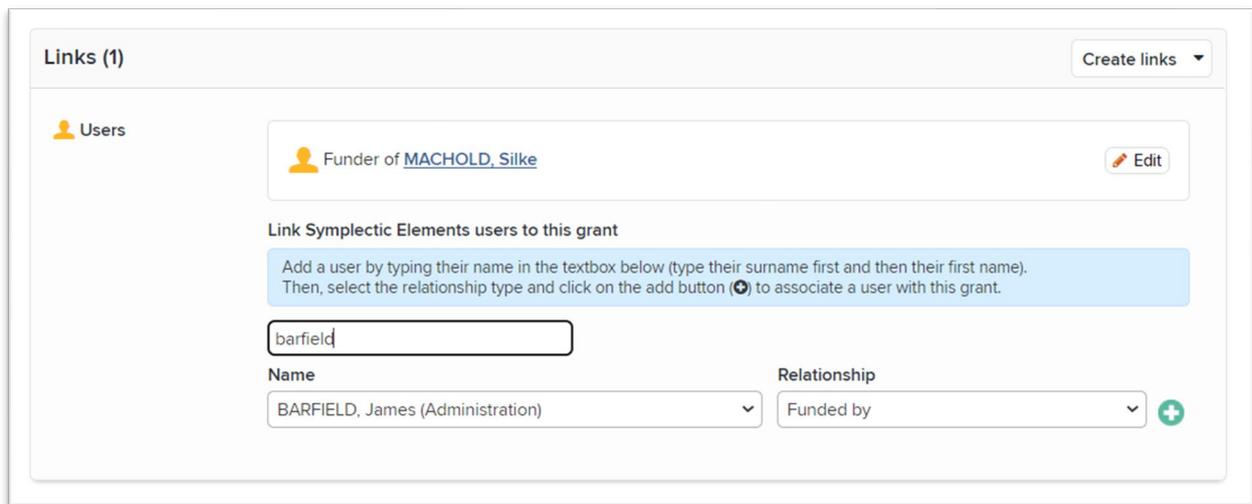
1-1 of 1

**Elements Grant Test**

Title: Elements Grant Test; Funder reference: [not entered]; Funder name: Elements; Description: [not entered]; URL: [not entered]

Grant

Then type your name (Surname first) in the links section, choose the relationship and click the green +. The grant will then appear on your profile.

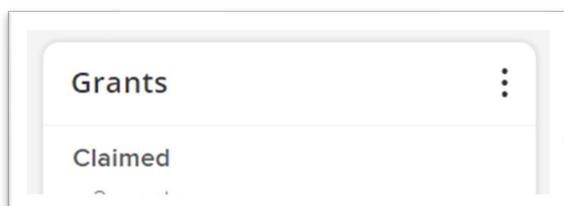


If your grant cannot be found through the search and you think it should be displayed in Elements (i.e. after 31 July 2017), please contact [elementssupport@wlv.ac.uk](mailto:elementssupport@wlv.ac.uk) and we can investigate further.

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

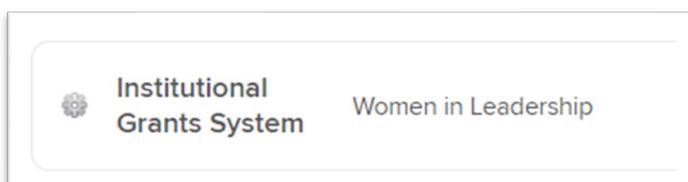
### Viewing Grant Information

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.

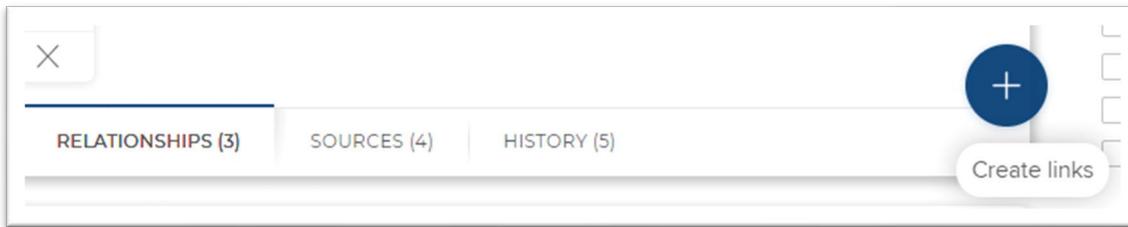
From the view you can see some more tabs – summary, relationships, sources. The summary gives a brief description of the record, relationships details the user relationships to the grant and sources shows where the information is coming from, which for Grants will always be Agresso.



## 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 add a new user relationship

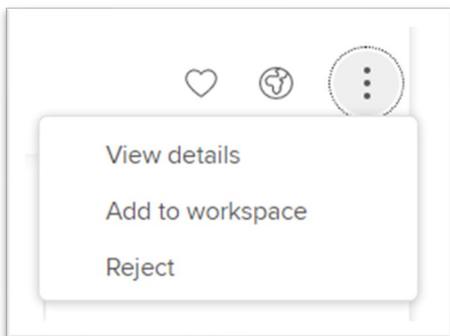


Enter the users name (surname first) in the Filter box provided. Select them and click **Link Selected**.



## 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 hide it from your profile. You will be able to see it, but other Elements users won't be able to view it.
- Click **View details** to view the full details of the publication.
- **Add to workspace**. This is usually used if you are joining together or splitting records.
- **Reject** will disassociate yourself with the item (remove the publication to rejected).