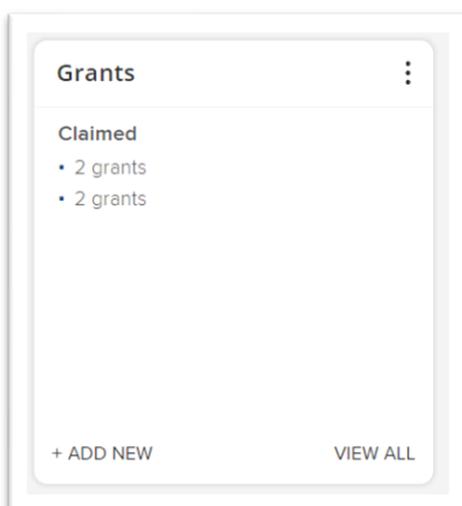




Grants Module

Introduction to the Grants Module

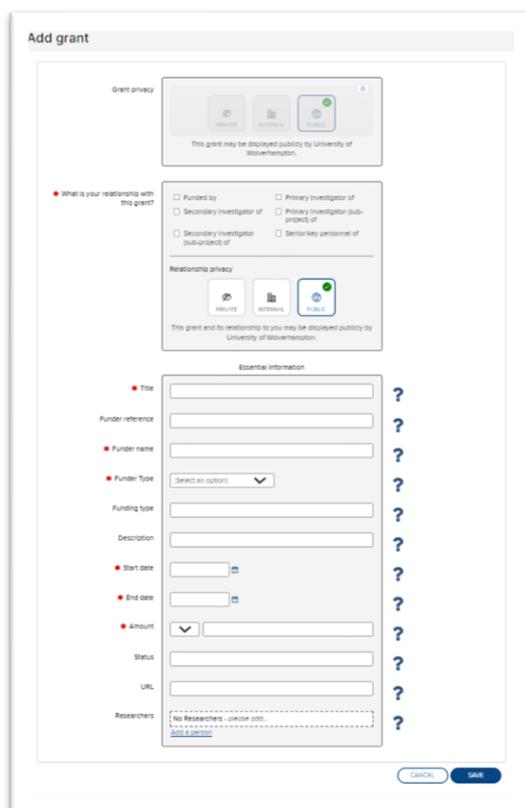
The Grants module can be found on your Elements homepage.



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.

GRANT

Elements Grant Test Nov23

Data sources

Manual Elements Grant Test Nov23

ID: FDEAF1E6-15F4-4661-82BE-78A3A29888F1 View source only

Title: Elements Grant Test Nov23

Funder name: Elements

Funder Type: Other sources

Start date: 01 Nov 2023

End date: 30 Nov 2023

Amount: GBP 500

Labels

- Fields of Research (2008) 0 labels [EDIT]
- MeSH 0 labels [EDIT]
- Science-Matrix 0 labels [EDIT]
- UN Sustainable Development Goals 0 labels [VIEW]
- Unclassified 0 labels [EDIT]

REPORTING DATES

01 Nov 2023 - 30 Nov 2023

RELATIONSHIPS

Users [GREATE NEW]

HISTORY

17 Nov 2023 - Manual grant created. View [View Meta](#) [ADD NOTE]

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**.

My Profile Assessment Open Access Reporting

Reports & Dashboards Search

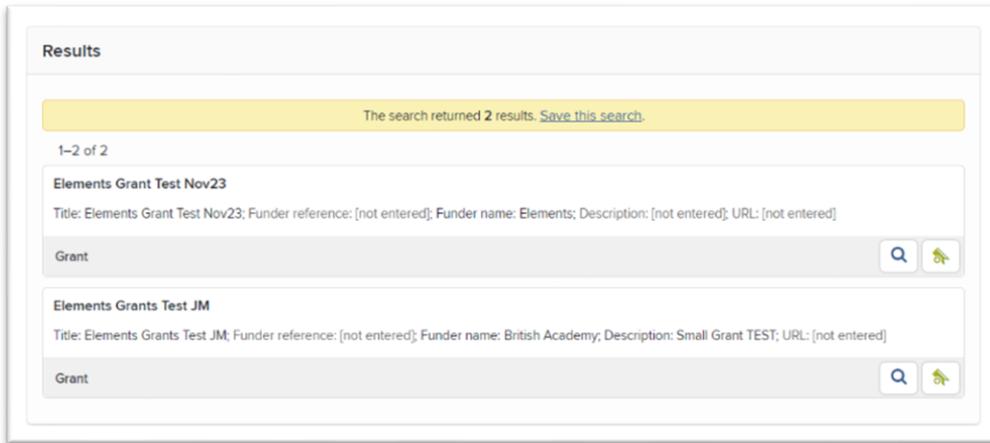
> CVs & Individual Reports > System Search > R

The screenshot shows a 'System search' window with a search bar and two radio buttons: 'Simple' (selected) and 'Advanced'. A 'Search' button is located at the bottom right.

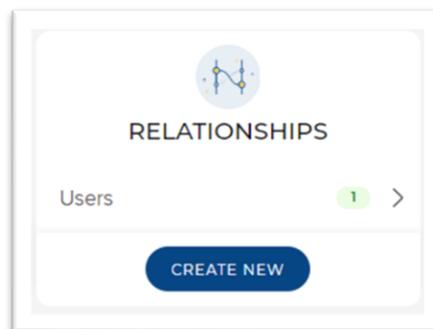
Select **advanced** and a form will load.

The screenshot shows the 'System search' window with 'Advanced' search mode selected. It includes a search bar, date range fields, a list of search criteria with checkboxes, a verification status dropdown, and a return type selection. The search criteria list includes: Publications, Grants, Professional activities, Organisational structures, Projects, Pieces of equipment, Teaching activities, Records of impact, Journals, and Deposit advice. The return type is set to 'The items above'. There are also sections for restricting search to users and groups.

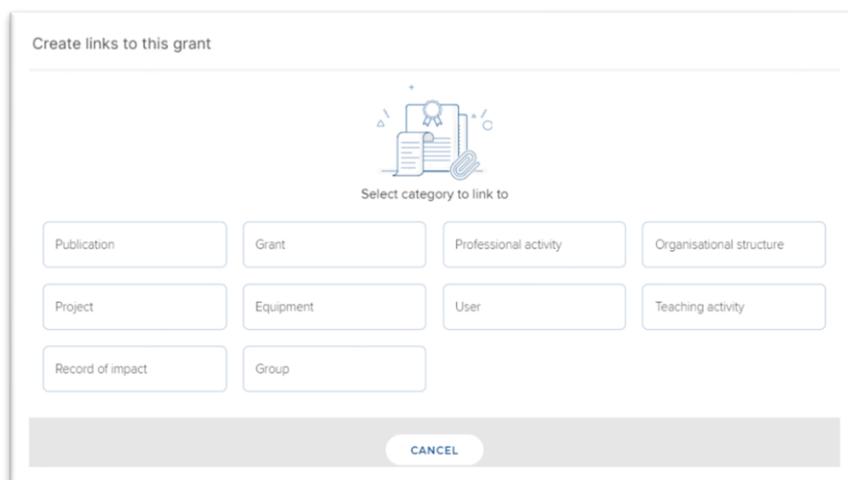
Enter the grant title, uncheck all items from the search list but grants and then click **search**. Scroll down to see your results and click the magnified glass to see the full details of the record.



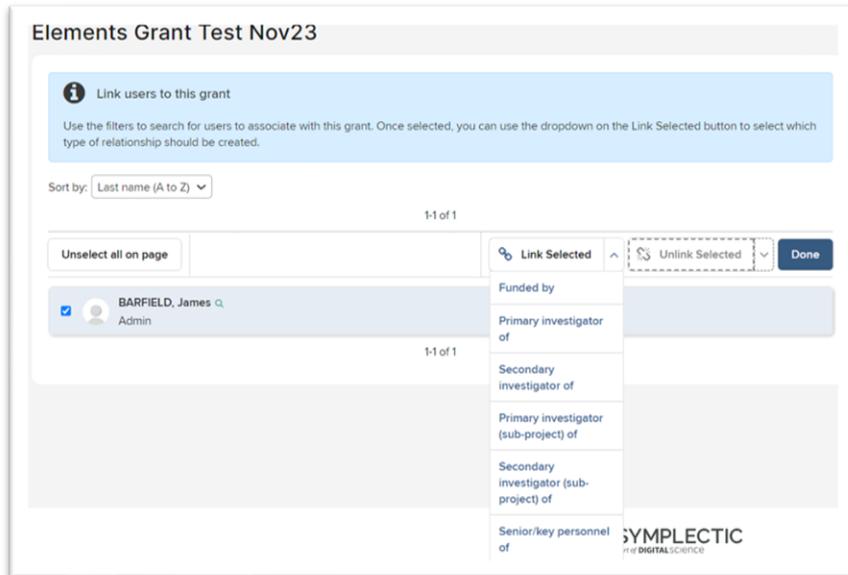
To link your record to this funding, you will need to create a relationship between these records. To do this, select the **create new** button in the **Relationships** section.



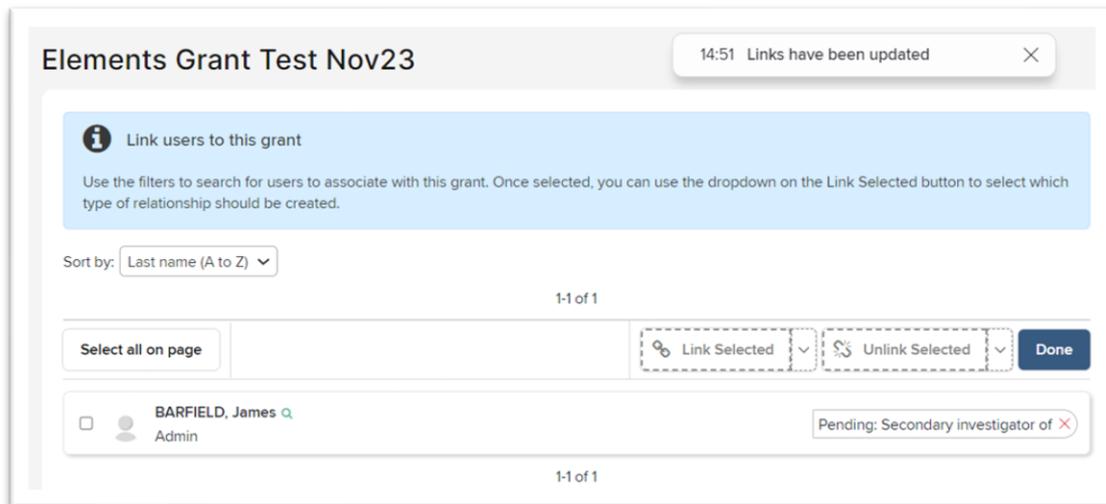
Click on the **user** button to create a link.



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.



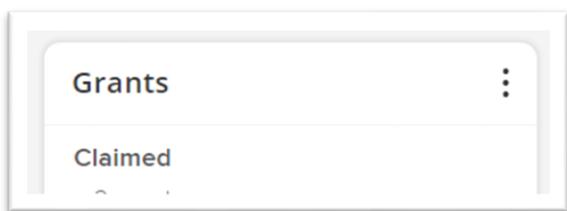
You can follow the same process and **unlink** the selected profile if you make a mistake or click the red cross on the relationship.

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.



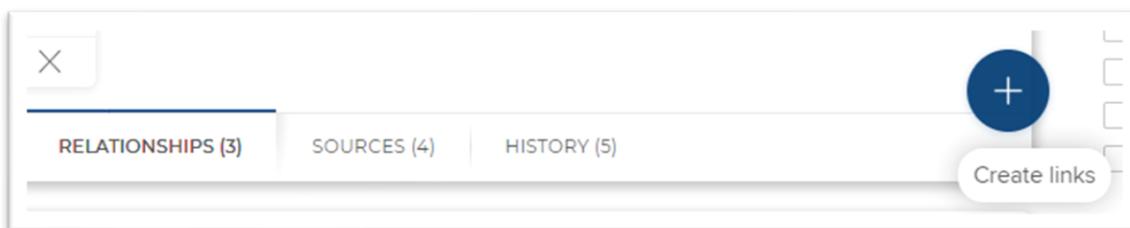
You will then be presented with a list of grants you are associated with.

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).

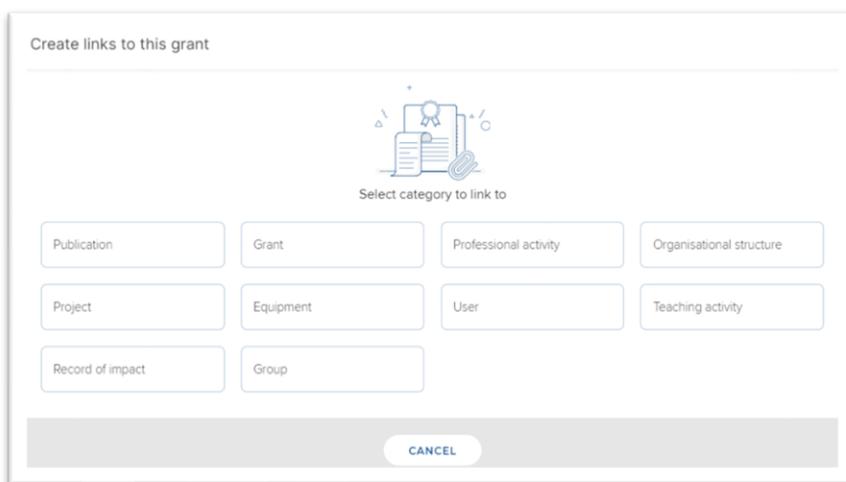
Linking Users

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.

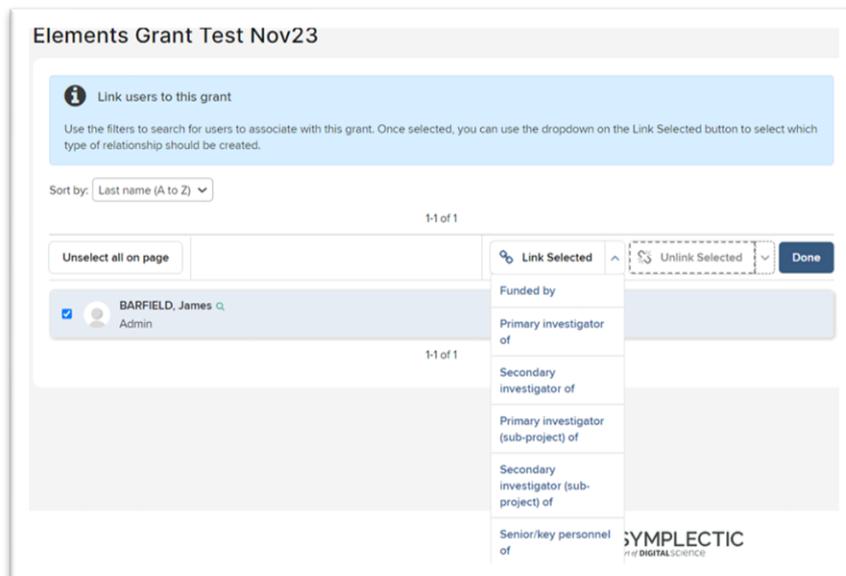
To link a user, select the **Relationships** tab and click the **plus** sign to add a new relationship.



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



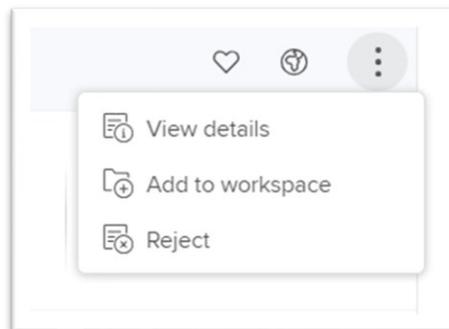
Enter the users name (surname first) in the Filter box provided. Select them and click a relationship from the **'Link Selected'** drop down menu.



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).