



Elements

SYMPLECTIC ELEMENTS

Grant Module User Guide for Staff

Version 2

Introduction to Grants

The grants module is displayed within the My Summary page.

Welcome, Miss Melissa Thorneycroft

Administration
melissa@wlv.ac.uk

Go to your profile

My Actions (2) 1 of 2

Record evidence of the impact of your work

[Add impact](#)

My Summary

27 publications [+ add](#)

2017 2018 2019

Claimed publications:

- 6 artefacts
- 1 authored book
- 2 chapter in books
- 1 composition
- 3 conference contributions
- 1 confidential report
- 1 edited book
- 6 journal articles
- 1 performance
- 1 research report

1 grant [+ add](#)

Claimed grants:

- 1 grant

Pending grants:

You have no pending grants.

6 records of impact [+ add](#)

6 records of impact

2 professional activities [+ add](#)

- 1 committee membership
- 1 event participation

0 teaching activities [+ add](#)

You have no teaching activities yet.

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 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 button next to the Grants module on your My Summary screen.

Home > Menu > Research Admin > Module Admin > System Admin

Elements

Welcome, Miss Melissa Thorneycroft

Administration
melissa@wlv.ac.uk

Go to your profile

My Actions (2)

Record evidence of the impact of your work

Add impact

My Summary

28 publications + add

Year	Publications
2017	1
2018	2
2019	16

1 grant + add

Claimed grants: [1 grant](#)

Pending grants: You have no pending grants.

You will then be presented with a pop up screen, please click on the grant button.

28 publications

Year	Publications
2017	1
2018	2
2019	16

1 grant

Claimed grants: [1 grant](#)

Pending grants: You have no pending grants.

Add a new... X

grant

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.

***What is your relationship with this grant?**

<input type="checkbox"/> Funded by	<input checked="" type="checkbox"/> Primary investigator of
<input type="checkbox"/> Secondary investigator of	<input type="checkbox"/> Primary investigator (sub-project) of
<input type="checkbox"/> Secondary investigator (sub-project) of	<input type="checkbox"/> Senior/key personnel of

Essential Information

*** Title:** ✓ ?

Funder reference: ✓ ?

*** Funder name:** ✓ ?

*** Funder Type:** ?

Funding type: ✓ ?

Description: ✓ ?

*** Start date:** ✓ ?

*** End date:** ✓ ?

*** Amount:** ✓ ?

Status: ✓ ?

URL:

Researchers: ?

Add another person:

Last name (required)	First name(s)
<input type="text"/>	<input type="text"/>

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

The screenshot shows a web interface for a grant record. At the top, there is a header "This is a test Grant" and a button "Add a new grant". Below the header is a yellow notification bar that says "Grant added.". The main content is divided into several sections:

- Grant**: A section with a "Labels" box containing the text "There are no labels on this grant. [Add labels](#)".
- Data sources**: A section for a "Manual" data source. It includes an ID: 30C4AD8D-DA07-465F-85D3-5A17D3E315AE and an "Edit record" button. Below this is a table of grant details:

Title	This is a test Grant
Funder reference	11345
Funder name	Wellcome Trust
Funder Type	UK-based charities (open competitive process)
Funding type	Fellowship
Description	Fellowship for University for test
Start date	01 Jul 2019
End date	03 Jul 2022
Amount	GBP 1,800
Status	Ongoing
Researchers	Machold, Silke
- Actions**: A section with two buttons: "Mark as Favourite" and "Add to Workspace".
- Reporting Dates**: A section showing "Start date: 01 Jul 2019" and "End date: 03 Jul 2022", both with edit icons.
- History**: A section showing a list of events: "1. Manual grant created. Reporting date(s) updated. by Miss Melissa Thornycroft 15/07/2019". Below this is a text area for "Add a note:" and an "Add note" button.
- Links (1)**: A section with a "Create links" button. It contains three sub-sections:
 - Users**: A list of users associated with the grant, including "Investigated by (primary) THORNEYCROFT, Melissa" with an "Edit" button.
 - Users with unclaimed links**: A list of users with unclaimed links, including "Funder of MACHOLD, Silke" with green and red status icons.
 - Link Symplectic Elements users to this grant**: A section with instructions: "Add a user by typing their name in the textbox below (type their surname first and then their first name). Then, select the relationship type and click on the add button (⊕) to associate a user with this grant." Below the instructions is an empty text input box.

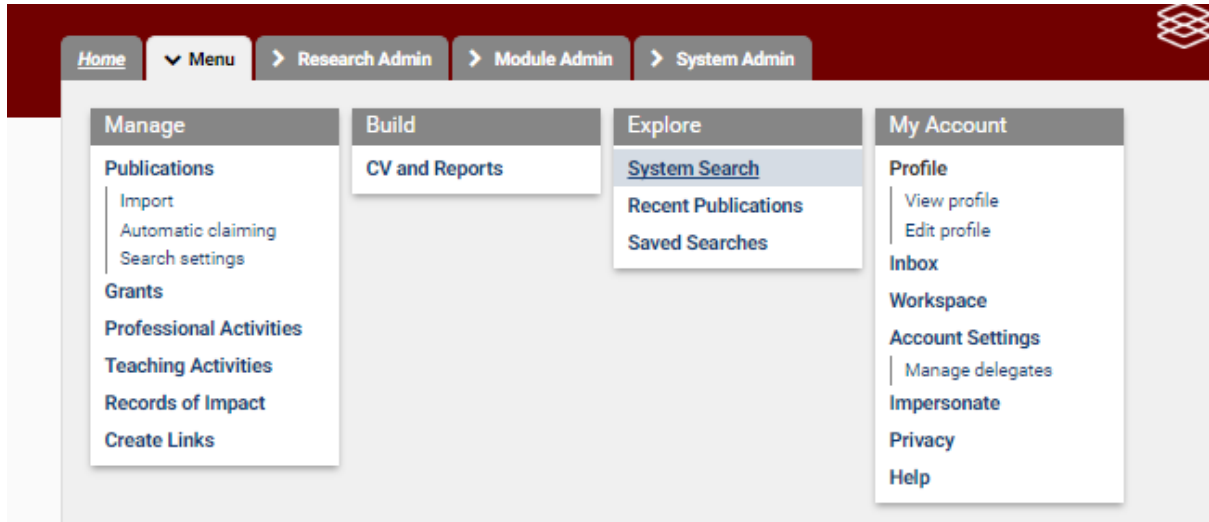
To return to your profile, please click the HOME button.



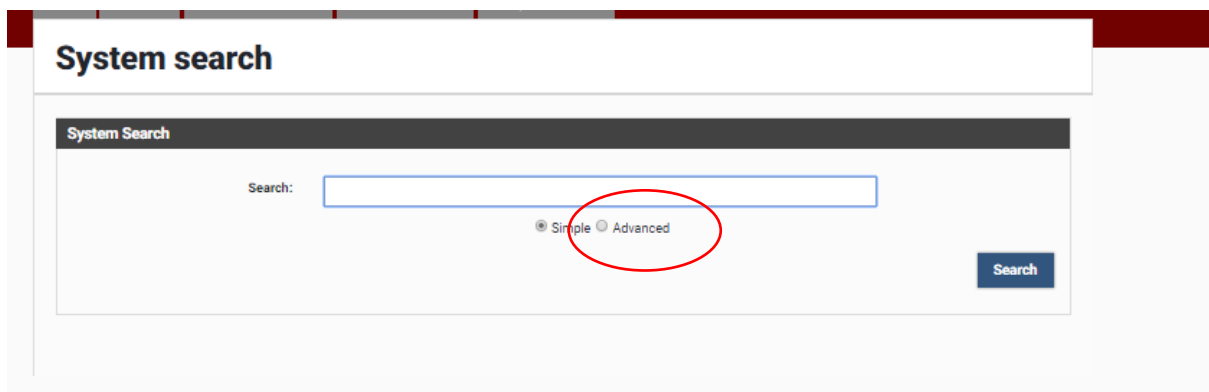
Missing Grants

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 System Search.



Select advanced and a form will load.



Enter the grant title, uncheck all items from the search list but grants and then click search.

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
- Journals
- Deposit advice

Verification status:

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

1. Restrict search to users

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.

Name (surname first):

Users

You have not selected any users

2. Restrict search to groups

Restrict the search by selecting certain groups, or leave blank.

University of Wolverhampton

[Reset](#) [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.](#)

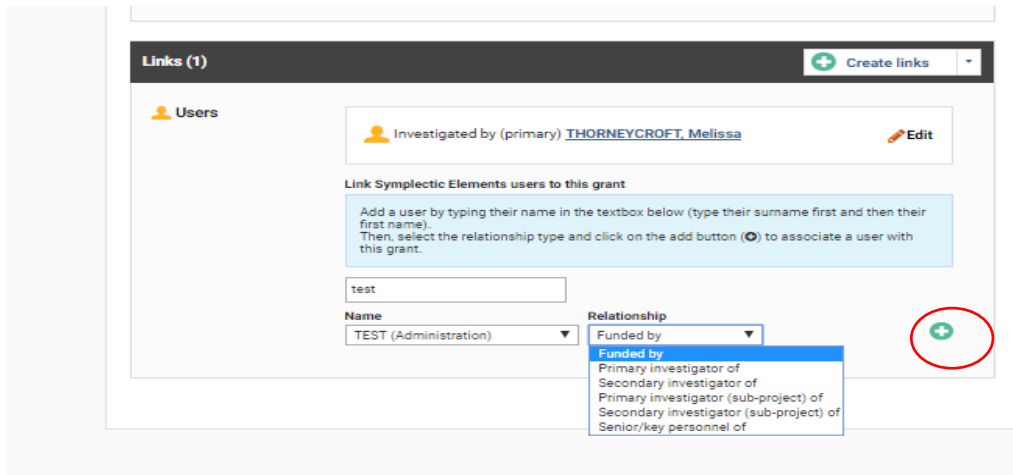
1-1 of 1

TEST GRANT

Funder reference: TESTG001; Funder name: Test Grant Inc.; Title: TEST GRANT; Description: [not entered]; URL: [not entered]

Grant

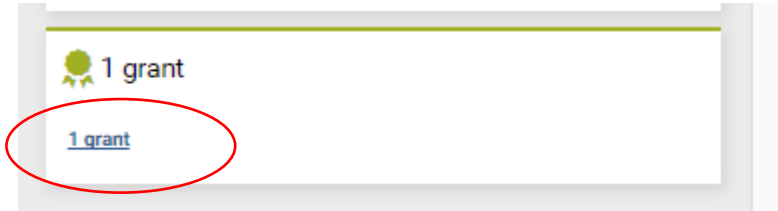
Then type your name (Surname first) in the links section, choose the relationship and click the green +. The grant will then appear on your profile.



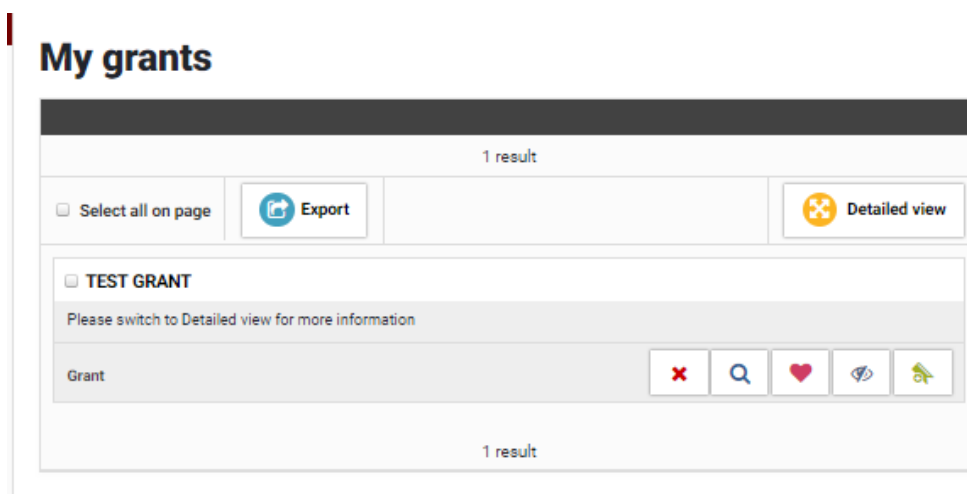
If your grant cannot be found through the search and you think it should be displayed in Elements (i.e. after 31 July 2017), please contact elementssupport@wlv.ac.uk and we can investigate further. If the grant missing was awarded before this date, then follow the “add a manual grant” to your profile steps.

Viewing Grant Information

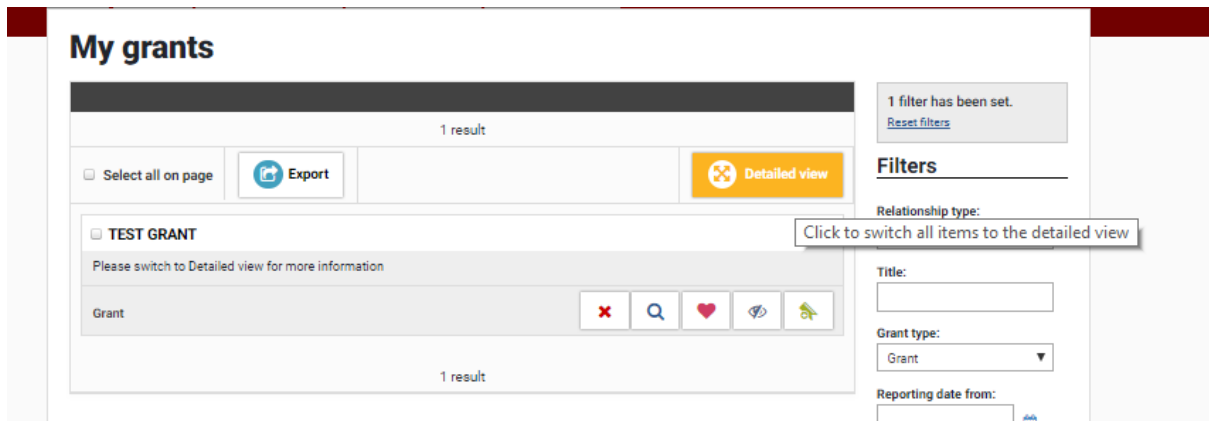
In order to view the details of your grants, click on the grants heading as shown below.



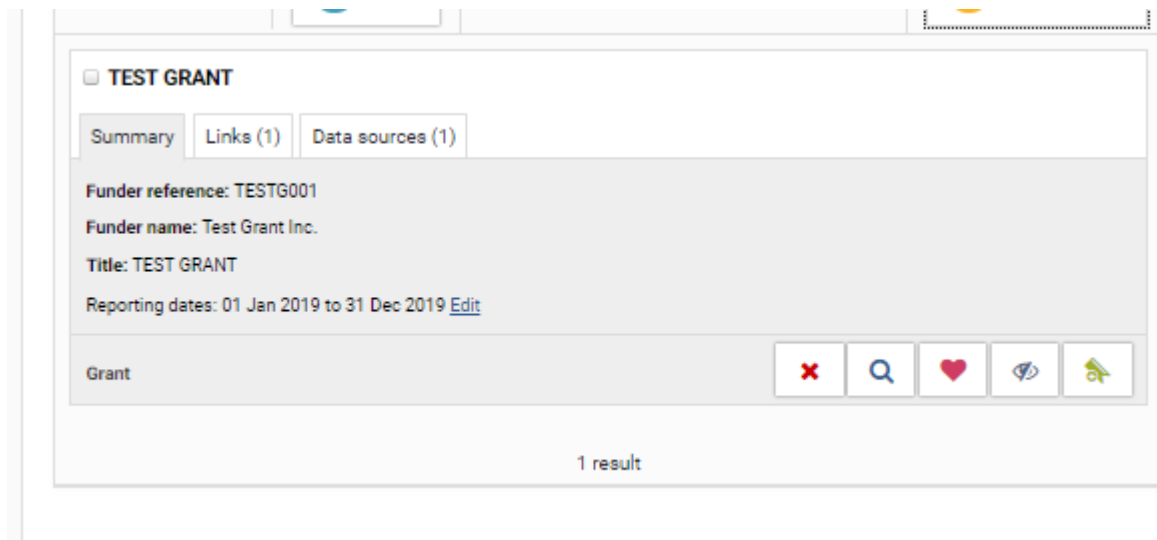
You will then be presented with a list of grants you are associated with.



The above grants are being showed in a compact view. To see more detailed information, change the view by selecting the “detailed view” button.



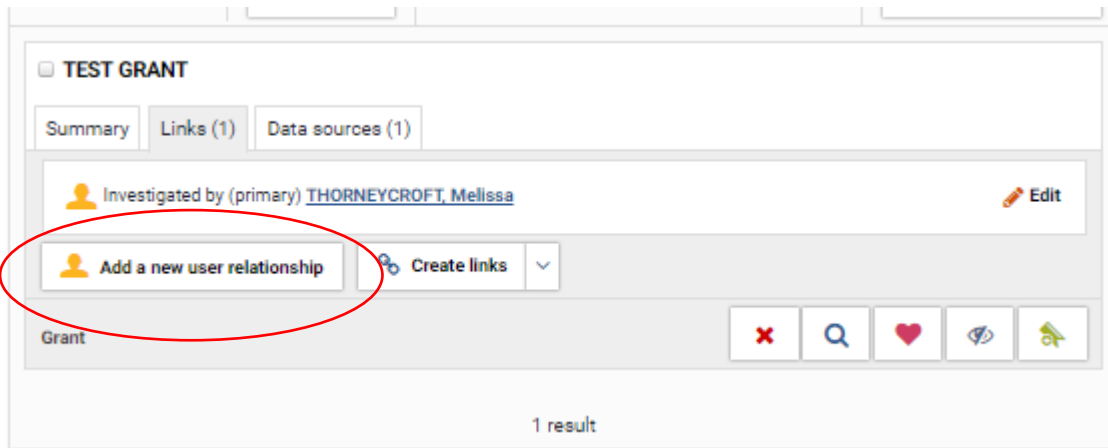
From the detailed view you can see some more tabs – summary, links and data sources. The summary gives a brief description of the record, links details the user relationships to the grant and data sources shows where the information is coming from, which for Grants will always be Agresso.



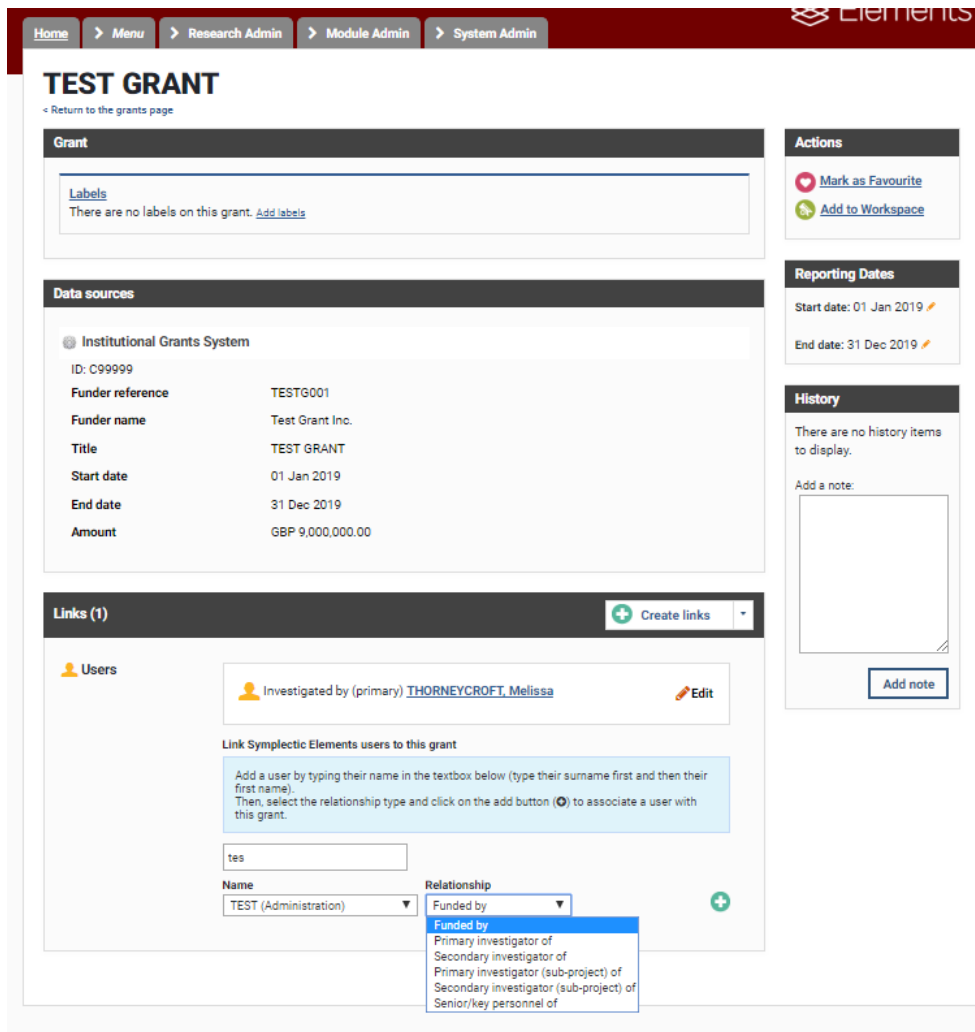
Linking Users

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.

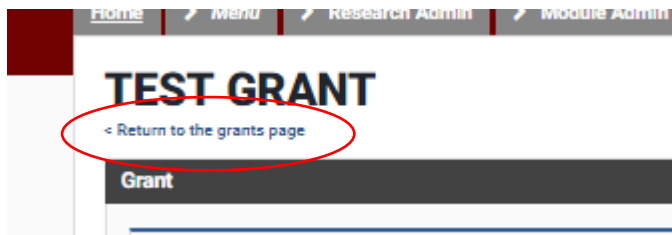
To link a user, select the links tab and click add a new user relationship



You will then be redirected to view the full record. Scroll down to the links section and type the users name (surname first), then select the relationship the user has to the grant and then click the green plus to add the user.

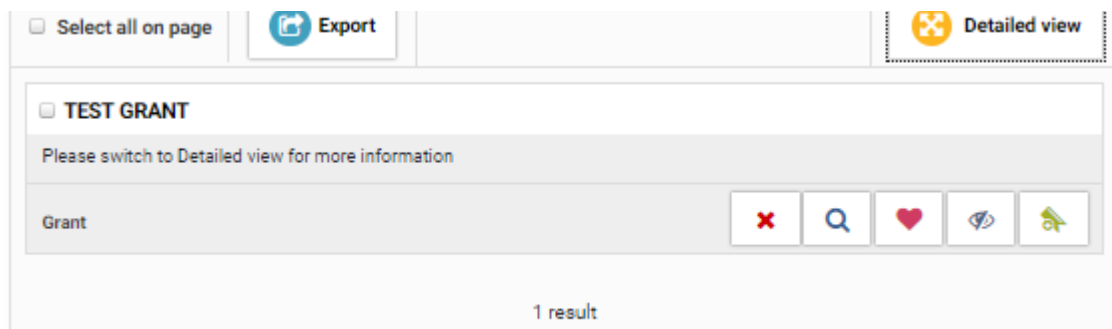


Once you have finished linking users, click 'return to the grants page'.



Action Bar

The Action bar within Elements, allows you to select different actions for your records. You will see the action bar in most of the modules across Elements.



- If you see a grant on your profile which doesn't belong to you then you can disassociate yourself by clicking on the Red Cross. This will remove the grant from your profile.
- From this bar, you are also able to mark the grant as a 'favourite' by selecting the red heart, this will then move the grant to the top of the grants list as displayed in your profile.
- If you do not want the grant to be viewable on your profile, you can mark it as invisible by selecting the grey eye icon. The grant will still be displayed in your My Summary page but will not be viewable on your profile to others.
- If there are two records that are the same, you may wish to join them into one record, you can do this by clicking the green 'add to workspace to join them together'.
- To view the full details of the grant, then you can click on the title of the grant or you can click on the magnified glass as shown on the action bar above.

Feedback on Training Materials

Many thanks for taking the time to review the training materials for Elements. If you have any comments on what you would like to see in the future or any feedback on the materials or system please email elementsupport@wlv.ac.uk.

You can view other self-help guides for Elements by visiting; www.wlv.ac.uk/elements