**#5 - Purdue Elements: Adding and Editing Records – Scholarly & Creative Works**

If the user's scholarly and creative works have not been automatically harvested or imported, the user can enter them into Purdue Elements manually.

**I. Adding Records**

Scholarly works can be added via the "Scholarly & Creative Works" tile located on the user's Homepage, by clicking on the "Add New" option (alternately, by clicking on "View All" option and then on ➕ icon in the top right corner).
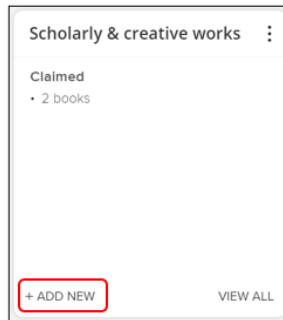


A pop-up window will appear. Select an option for scholarly work type, for instance, "Journal Article."
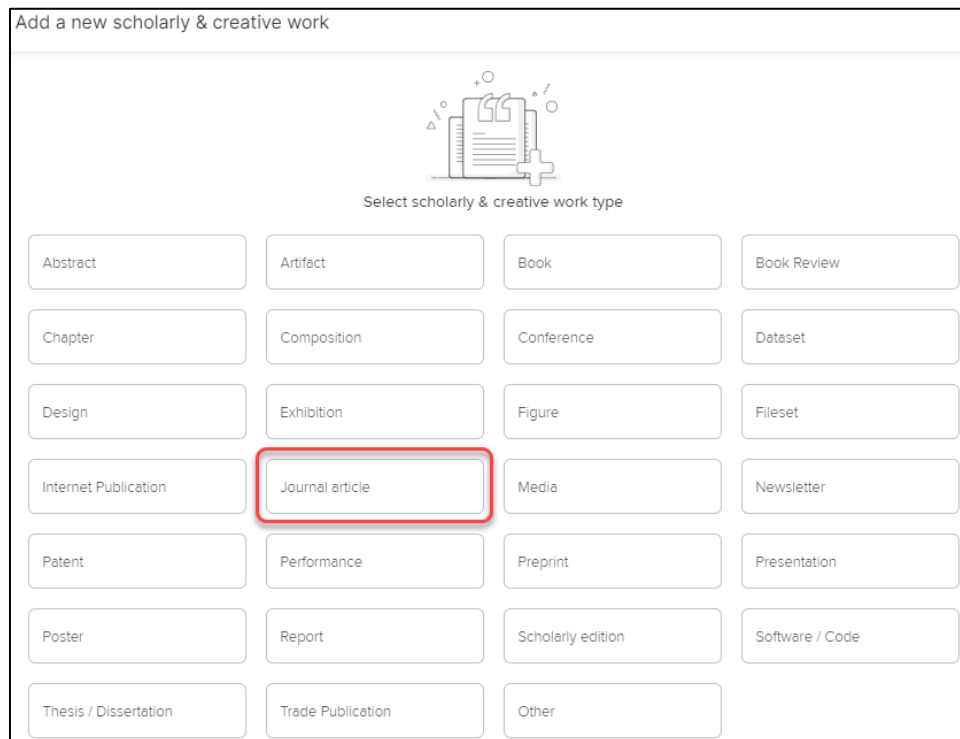
In most cases, the process of adding a publication consists of three steps:
- Let's get Started
- Tell us More
- Link to Funding

1. **Let's Get Started** – to check whether the publication already exists in Elements, the user may search by publication title, publication title, keywords or DOI.

Note: This step can be <u>skipped</u> by clicking on the "Skip" option – this action will <u>take the user directly to the entry form under the "Tell us More" step.</u>

Searching by publication title, title keywords or DOI may locate publication in either Elements or an external database. Then, the user can <u>claim</u> publication by clicking on the "Claim" button. The publication will be <u>placed on Claimed Scholarly & Creative Works List.</u>

If a publication has been previously claimed, the search result will indicate "Already Claimed." In that case, no further action is necessary.

In Elements - Showing 1 result                                    Explain these results

[blurred title] · 10 Aug 2007
[blurred text]                                                    Already claimed

If the user's publication was not located by the search, proceed to the entry form by clicking on the "Go to next step" button:

Add journal article

| Let's get started | Tell us more | Link to funding |

🛈 Enter your journal article title or DOI

Your journal article may already exist in **Elements**, so to save time you can search for it here and claim it. Titles returned may contain **any** of your search words.

Title or DOI

[text field]                                              Skip  Search

In Elements - Showing 0 results                                  Explain these results

In External Database - Showing 0 results                         Explain these results

                                                                 Go to next step

2. **Tell Us More** step is an entry form where the user provides publication details.
   - Required fields are marked with red asterisks (*).
   - Guidance is provided for some fields marked with a large question mark (**?**).
   - In the "Scholarly & Creative Work Privacy" section the user can set up overall privacy level for the publication (each level is described when the user clicks on the corresponding button). This step is optional.
   - In the next required section - "What is Your Relationship with this (publication type)?":
     - First, the user should select their role with the publication (Author, Editor, Translator or Contributor)
     - Then select privacy level for this section only, i.e., their relationship with this publication (each level is described when the user clicks on the corresponding button).
   - As the "Essential Information" section fields are populated, the user should make sure to provide all required information.

- If the user adds other publication authors, the publication will be added to the other users' pending list of publications, and they will need to claim (or reject) it.
- Note: the last field in the section, "AACSB Classification," is only used by the Daniels School of Business.
- When done filling out the form, click "Save." The publication was claimed and placed on the user's Claimed Scholarly & Creative Works list. A confirmation will be displayed that the publication has been added.

3. **Link to Funding** – the user can link their publication to the corresponding funding held in Purdue Elements - if there is one:
    ▪ Select a grant from the list; filters on the right can be used to locate the appropriate funding more easily
    ▪ Click on "Link Selected"
    ▪ Click "Done"
    ▪ A message will be displayed indicating that the publication is linked to funding



More Actions:
    ▪ <u>Not Externally Funded</u> – Click on this option if there is no external funding for the publication. The publication was claimed, and a message will be displayed indicating that the publication is marked as not externally funded.
    ▪ <u>Grant not Listed</u> - If a grant is not listed, this step can be skipped for now (by clicking on the "Grant not listed" button) and the publication details can be edited later.
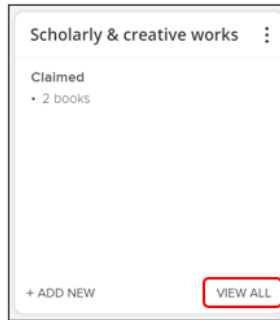
## II. Editing Records

Manually added records can be edited to ensure all information is correct and/or to add new information.

The user should access their scholarly works via the "Scholarly & Creative Works" tile located on the Homepage, by clicking on the "View All" option.



The Claimed list will be displayed by default.

Note: Only records with manual sources should be edited. To determine a record's source(s), the user should click on the "Sources" tab and the source(s) will be displayed. In the example below, the first record's source is Manual, while the second record was sourced from Google Books. The first record can be edited.
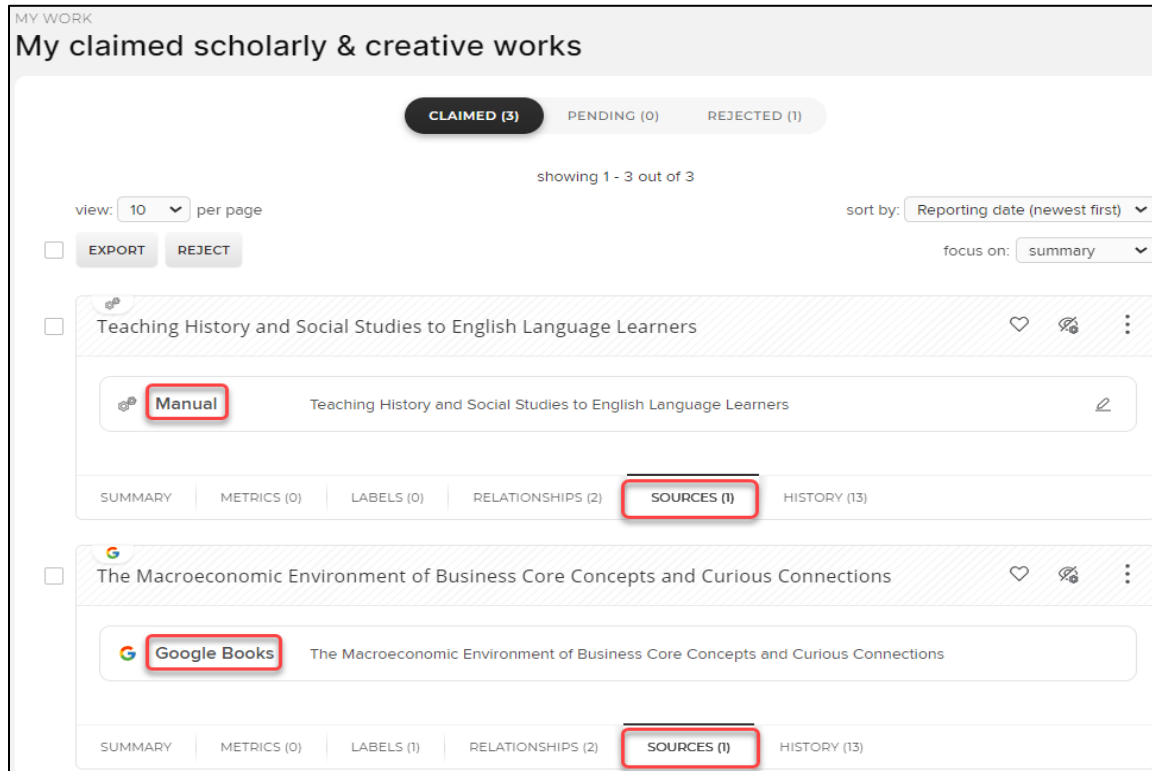
On the publication record that needs to be edited, the user should click on the vertical ellipsis (⋮) icon and select "View Details." Alternately, the user can click on the title of the publication.
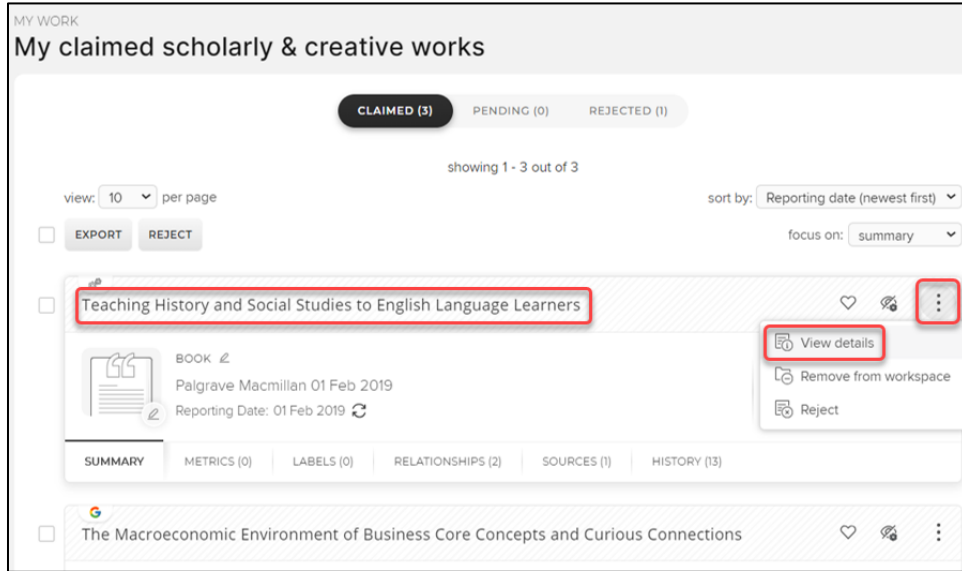


A page with record details will open:
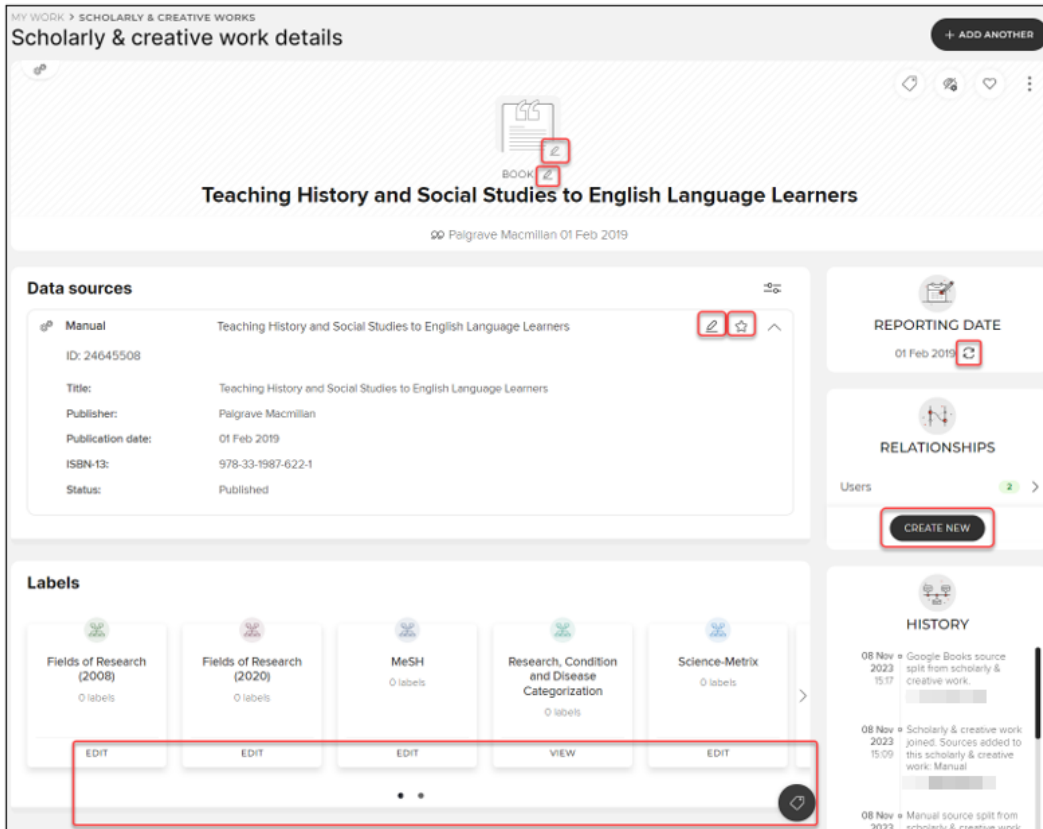
There are several optional fields that can be edited from this view:

- Thumbnail –click on the pen icon and upload an image of the publication in one of the specified formats.
- Publication Type – click on the pen icon and select one of the types from the pop-up menu.
- Record – a new page with record form will open – for instructions, see the "Tell us more" step in the "Adding Records" section above.
- Set preferred record –click on the "Star" icon to make this a top record on the user's record lists
- Labels – click on a specific label tile to edit a single label or click on the "Manage labels" icon to edit all labels.
- Reporting Date – click on the "Free circular arrows" icon, switch from automatic to manual date management and enter the desired date (the provided calendar feature can be used, or the user can enter reporting date in DD MMM YYYY format, for example: 08 Nov 2023).
- Relationships – click on the "Create new" button to create a new relationship link for a record. A pop-up window with menu options will open:



Example:

Create a new link between a Scholarly & Creative Work and another Scholarly & Creative Work, Grant, Service, or Learning & Teaching record:

- The user should click on the desired category
- A new page will open

In the top section, the left side indicates the record type the user is creating a link for, while the right side indicates the record type the user is linking it to.

In the bottom left section, the record the user is creating a link for is displayed. There is an option to use filters to locate the desired record. Also, additional records can be added here to link along with the already selected record.

In the bottom right section, the user should use DOI or filters to locate the record the user would like to link to. Then, the user should click "Go!" A list of available records will be displayed.

Note: If the user already has scholarly works, they may appear in this section (instead of the filter fields). In such case, the user should select the desired record from the list. To change current filters, the user should click on the "Change" button and filter fields will appear.

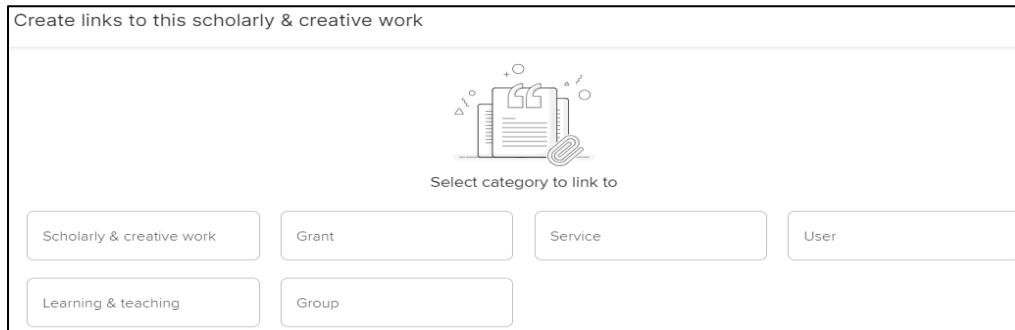After a record is selected from the list, the following message will be displayed:
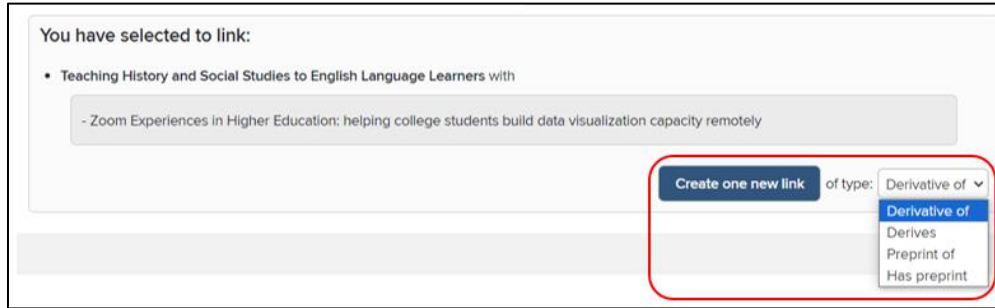


Select the record type from the dropdown menu and click "Create one new link." The records will turn green to denote the linking.

Example: Create a new link between the user's Scholarly & Creative Work and User or Group
- Click on the record category to link to (User or Group)



- A new page will open with a list of available Users/Groups
- Use "Name" filter on the right to find a User/Group
- Then, click on the checkmark associated with the User/Group
- Click on the "Link Selected" dropdown menu to specify User's/Group's role (Author, Editor, Translator or Contributor)
- Click "Done" – the Scholarly Work and User/Group are now linked.