

#6 - Purdue Elements: Adding and Editing Records -

Grants, Service and Learning & Teaching

Grants and Learning & Teaching will be automatically harvested at regular intervals as summarized in the table below. Additional details on data sources can be found on the Purdue Elements website listed in the footer.

Type of Data	Data Source	Timing
Grants	SPS / Digital Measures	Month end close
Learning & Teaching	Banner/ Watermark	Term end freeze
Service	Not harvested	Manual entry

If specific records have not been automatically harvested or imported, users can enter them into Purdue Elements manually.

I. Adding Records: Grants, Service, and Learning & Teaching

Grants/Service/Learning & Teaching records can be added via the respective tiles located on the Homepage, by clicking on the "Add New" option (alternately, users can click on "View All" option and

then on icon in the top right corner).

Grants	:	Service		Learning & teaching	
Claimed • 2 grants • 1 contract		 1 award/honor 1 committee membership 1 editorial 1 grant application review 		 2 courses taught 1 course developed 	
+ ADD NEW	VIEW ALL	+ ADD NEW	VIEW ALL	+ ADD NEW	VIEW ALL

A pop-up window will appear. Select the Grants/Service/Learning & Teaching record type from the options provided, for instance, "Grant":

Add a new grant			
		Select grant type	
Grant	Contract	Donation	Fellowship
Gift	In-Kind		



Provide Details About the Record

A new page will open to provide details about the record.

- Required fields are marked with red asterisks (*).
- Guidance is provided for some fields marked with a large question mark (?).
- In the "<u>Grants/Service/Learning & Teaching Privacy</u>" section the user can set the overall privacy level for the Grant/Service/Learning & Teaching (each level is described when the user clicks on a corresponding button). This step is <u>optional</u>.



- In the next, <u>required</u> section "<u>What is your Relationship with this Grant/Service/Learning &</u> <u>Teaching?</u>":
 - First, select the role with the Grant/Service/Learning & Teaching
 - Then, select the privacy level for this section only, i.e., the user's <u>relationship</u> with this Grants/Service/Learning & Teaching (each level is described after clicking on a corresponding button).

What is your relationship with this grant?	Funded by Funded by Co-principal investigator of			
	Relationship privacy			
	Ø PREVATE IN		O PUBLIC	
	This grant and its relationshi users of Elements and sh	Contraction and the second second		



 When populating "<u>Essential Information</u>" section fields, the user should make sure to provide all required information.

	Essential Information
≭ Title	
* Status	[Select an option]
* Sponsoring Organization	
Sponsoring Organization Agency	
Sponsoring Organization Type	[None]
Sponsoring Organization Subagency	
Total Proposal Amount	
Total Award Amount	
Direct Cost	
Indirect Cost	USD V
External Reference	
Grant Number	

- Note: if offered, 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 Grant/Service/Learning & Teaching will be placed on the user's Claimed Grants/Service/Learning & Teaching list.



Office of the Provost

II. Editing Records: Grants, Service, and Learning & Teaching

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

Access the Grants/Service/Learning & Teaching records via the respective tiles located on the Homepage, by clicking on the "View All" option.

Grants	:	Service		Learning & teaching	
Claimed • 2 grants • 1 contract		 1 award/honor 1 committee membership 1 editorial 1 grant application review 		 2 courses taught 1 course developed 	
+ ADD NEW	VIEW ALL	+ ADD NEW	VIEW ALL	+ ADD NEW	VIEW ALL

The Claimed list will be displayed by default.

Note: Only records with manual sources should be edited. To determine a record's source(s), click on the "Sources" tab. The record source(s) will be displayed. Only a manual-source record will have a pen icon on the right – the user should click on it to edit the record form. Steps to edit the record are the same as for "Adding Records" listed above on page 2 (Provide Details About the Record).

ී Computer Graphics	\heartsuit	¶₀	:
Manual Computer Graphics		2	
SUMMARY LABELS (0) RELATIONSHIPS (1) SOURCES (1) HISTORY (4)	\heartsuit	¢,	:
PINSTITUTIONAL Grants System Dataset of US Central Hardwood bark images			
SUMMARY LABELS (0) RELATIONSHIPS (1) SOURCES (1) HISTORY (2)			



In order to <u>edit a Grant/Service/Learning & Teaching record comprehensively</u>, the user should click on the vertical ellipsis (:) icon and select "View Details." Alternately, the user can click on the record name:

MY WORK My claimed grants			
	CLAIMED (3) PENDING (0) REJECTED (1)		
	showing 1 - 3 out of 3		
view: 10 🗸 per page		sort by:	Reporting date (newest first) 🗸
EXPORT REJECT			focus on: summary 🗸
Computer Graphics			♡ % :
GRANT		(🗄 View details
Status: Pen			$\fbox{\begin{tabular}{ll} \hline \hline \hline \hline \hline \hline \end{array}}$ Add to workspace
	Organization: National Science Foundation tes: 15 May 2023 - C		🗟 Reject
SUMMARY LABELS (0)	RELATIONSHIPS (1) SOURCES (1) HISTORY (5)		

A page with record details will open:

	t details					+ ADD ANOTHER
6 ⁰			Com	CRANT CRANT CRANT		⊘ & ♡ :
Data	asources				-5=	Ē
0 ⁰	Manual ID: CAD5A2BE-A7C9-48A0	Computer Graphics				REPORTING DATES
	Title: Status:	Computer Graphics Pending	More source into			
	Sponsoring Organization: Sponsoring Organization	National Science Found	lation			RELATIONSHIPS
	Type: Total Proposal Amount:	USD 150,000				Users 1 >
	Total Award Amount: Direct Cost:	USD 140,000				CREATE NEW
	Indirect Cost: Grant Number:	12345678				
	Proposal Submitted Date:	15 May 2023				HISTORY
						14 Nov 2023 • Manual source 14:38 (BC82DF) updated.
Labe	els					31 Oct 2023 • Relationship to DOE, John 13:44 (User) updated.
Fle	elds of Research (2008)	MeSH 0 labels	Science-Metrix 0 labels	UN Sustainable Development Goals	Unclassified O labels	31 Oct 2023 • Grant privacy level user 13:36 override altered to private.
	0 labels			0 labels		11 Oct 2023 • Manual source 10:38 (BC82DF) updated.
	EDIT	EDIT	EDIT	EDIT	EDIT	04 Oct 2023 • Manual grant created. 13:39



There are several fields that can be edited from this view:

- Thumbnail click on the pen icon and upload an image of their <u>Grant/Service/Learning &</u> <u>Teaching</u> in one of the specified formats.
- Record a new page with record form will open for instructions, see "provide details about the record" on page 2 above.
- Set preferred record click on the "Star" icon to make this a preferred record.
- 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 the user can create a new relationship link for a record by clicking on the "Create new" button. A pop-up window with menu options will open:

Create links to this grant			
	+	egory to link to	
Scholarly & creative work	Grant	Service	User
Learning & teaching	Group		

Example:

<u>Creating a new link between the user's Grant and Scholarly & Creative Work, Grant, Service, or Learning</u> & Teaching record:

- Click on the desired category
- A new page will open:



reate links				
Create links between		and		
○ Scholarly & creative works	Grants	Scholarly & creative works	○ Grants	
O Service	○ Learning & teaching	O Service	○ Learning & teaching	
Grants		Scholarly & creative w	orks	
You are currently defining links f filters instead.	or a single grant. <u>Click here</u> to use	DOI:		
		Or:		
You specified 1 item:		Title: 🔞		
Select all		Linked to:	John Doe	~
Computer Graphics View	к. — — — — — — — — — — — — — — — — — — —	Туре:	Any	~
Section 2 Sectio		Journal:		
Or you could		Published after: 🕼	16/11/2020	f
🔂 Add a new grant 💌		Published before:		

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

<u>In the bottom left section</u>, 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 can use DOI or filters to locate the record the user would like to link to. Then, click "Go!" A list of available records will be displayed.

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

Scholarly & creative works	
Current filters:	Change
Linked to:	
• Published: from 27/11/2020	
We've found 3 matching results:	
Select all	
View Q	
Section 2 Sectio	
Section 2 (3 to users)	
Sexisting links (1 to a user)	



Office of the Provost

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

You	have selected to link:	
• 0	computer Graphics with	
	- Teaching History and Social Studies to English Language Learners	
	Create one new link	

The user should click "Create One New Link." The records will turn green to denote the linking.

Example: Creating a new link between the Grant and User or Group

Click on the record category to link to (User or Group)

Create links to this grant							
		+ Select category to link to					
Scholarly & creative work	Grant	Service	User				
Learning & teaching	Group						

- A new page will open with a list of available Users/Groups
- Use the 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 (Funded by, Senior/Key Personnel, Principal Investigator, or Co-Principal Investigator)
- Click "Done" the Grant and User/Group are now linked.

Computer Graphics	
Link users to this grant	0 filters have been set.
Use the filters to search for users to associate with this grant. Once selected, you can use the dropdown on the Link Selected button to select which	Filters
Use the ments to search for users to associate with this grant. Once selected, you can use the diopotom of the Link selected button to select which type of relationship should be created.	Fillers
gpe or relationant partoard be created.	Name
	Name
Sort by: Last name (A to Z) 🗸	
10 v results per page 1-10 of 5521 1 2 553	
Select all on page Select all on page Select all on page Done	
ABBOTT, Angela R Q	
College of Agriculture	
ABDEL-KHALIK, Hany S Q	
College of Engineering	
conego or Engineering	
ABEBE, Ephrem Q	
College of Pharmacy	