

Grants

Keeping track of the grants that support researchers and research assets helps your institution comply with grant guidelines and measure the impact of each grant.

In this video, we will demonstrate how to manage your list of grants as well as how to add a grant to a research asset.

To manage grants, go to Research Management > Manage Grants.

Notice the tabs for Current, Historical, and All. Current means that the grant is active. After the end date has passed, it becomes Historical.

Press the row actions button to edit or view the grant. You can also view assets that were supported by this grant. You will not be able to delete a grant that is linked to one or more research assets.

To add a new grant to the list, click Add grant.

Start typing the grant name. If there is a match, select it. Esploro will offer to auto-populate the fields with information from Pivot-RP. Click Override existing, unless you have filled in some information and would prefer only to auto-populate empty fields. Or you can choose Do not populate.

Fill in any missing information. Grant ID and funder are required fields. Add investigators, and note their role as Principle or Co-investigator.

Later, when depositing research assets on behalf of these researchers, this grant will be suggested on the research asset form.

Remember to save your changes when you are done.

Note that the Funder must be selected from the list of External Organizations. Esploro has a large database of organizations, but if this funder is not included, you can add it to your local list of External Organizations.

To add a funder to that list, go to Research Management > Manage External Organizations. On the Local tab, click Add External Organization.

When depositing or editing a research asset, you can add a Grant or Funder to the asset. Use Select Grant to link to a grant that is already in your Esploro system. Depending on the researcher associated with this asset, grants that list that researcher as an investigator will be displayed under Researcher Grants.

You can also use Create Grant to add a new grant to the system. However, the funder must already be in your organization list. As before, if you start typing the

Grant name, you will be offered suggestions. Select one and Esploro will auto-populate the other fields.

If you don't have a grant name, you can add just the funder. Again, it must be one that is already in your organization list.

To remove a grant from an asset, select the row action button and then delete. The grant will no longer be associated with this asset, but it will remain in the system.

Remember to save your changes.