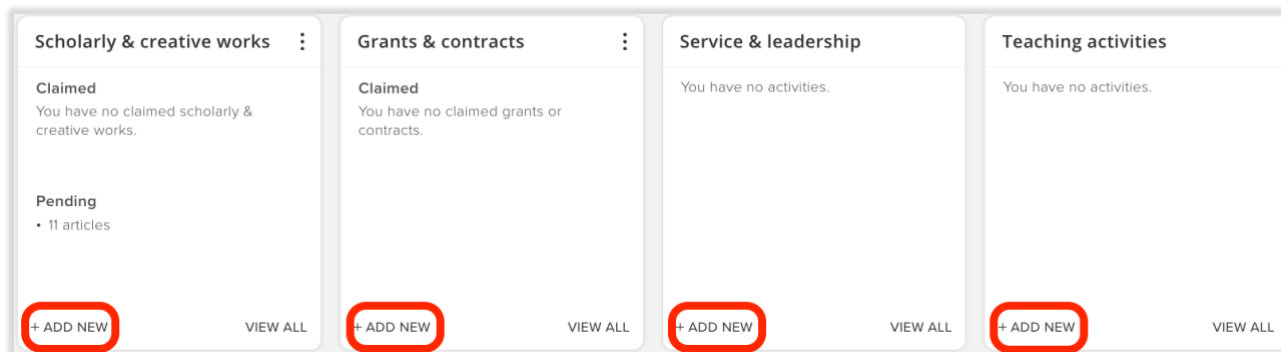# ELEMENTS @ IU

**Elements: Adding and Editing Records**

- **Adding Records**

    You can manually add records via the respective tiles located on the Homepage, by clicking on the "ADD NEW" option (alternately, users can click on the "VIEW ALL" option and then on the ⊕ icon on the top right corner).

    In the below example, we'll click on the +ADD NEW button under the 'Service & leadership' tile.

    A pop-up window will appear, to add a manual record for example for "Review" click on the Review item.
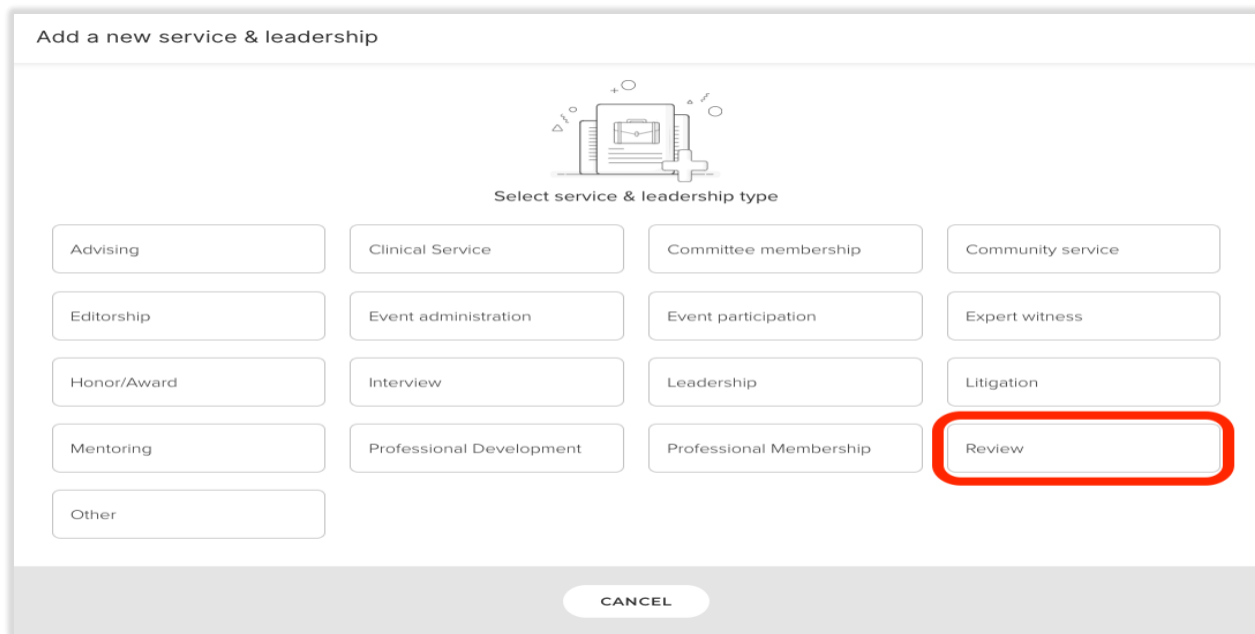
Fill in the details about the record:

A new page will open to provide the details about the record.
- o Required fields are marked with red asterisks (*).
- o More Help/Guidance is provided for some fields marked with a large question mark (?).
- o In the next, <u>required</u> section the "Relationship privacy" will come in as "Public", you may change the "Relationship privacy" setting, each level is described after clicking on a corresponding button.

o If an activity type does have Additional fields, click on the "Additional Information" down arrow to display additional fields.
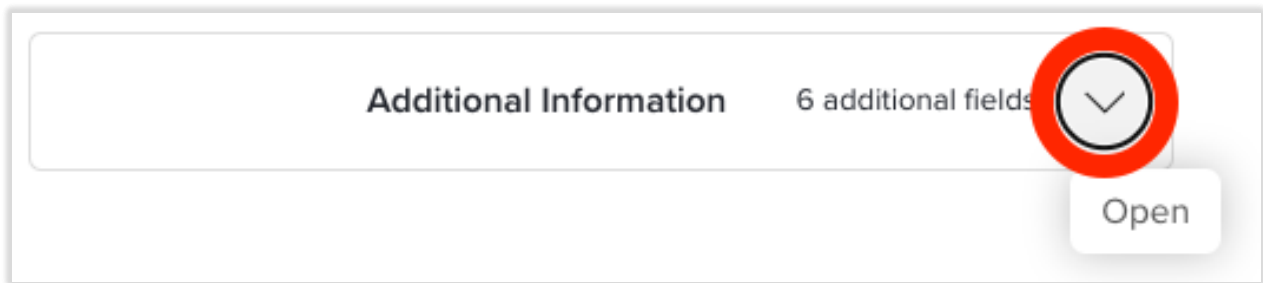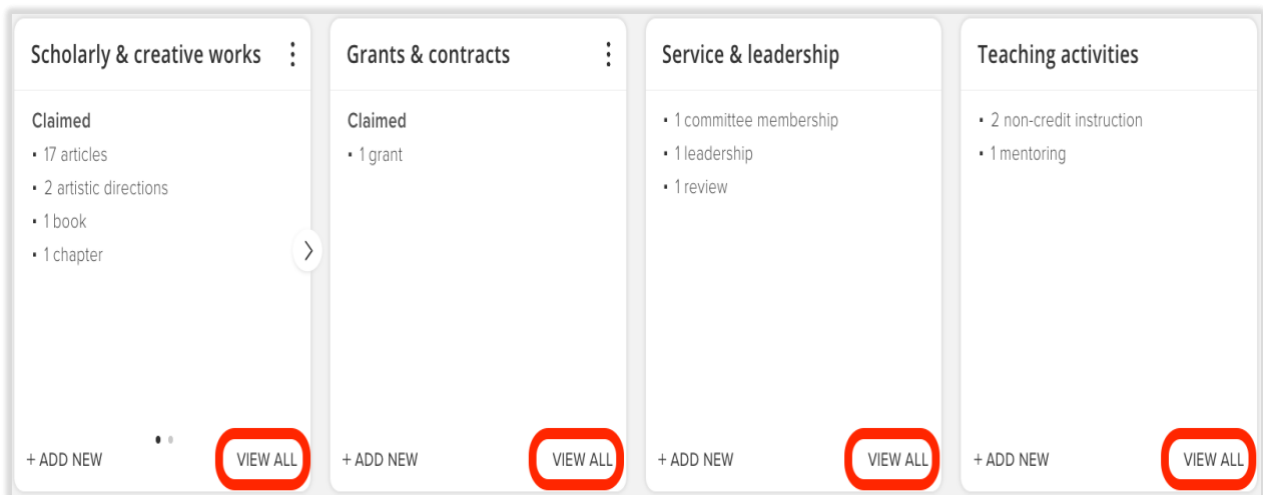

o After you are finished entering the data, click on the "SAVE" button at the bottom of the page.

- **Editing Records**

Manually added records can be edited to ensure all information is accurate and to include any new details.

o To edit a manually entered record, click on the VIEW ALL button on the appropriate tile that you'd like to edit the record.

o Click on the three dots ⋮ icon on the far right of the record you want to edit/modify.
o Next click on the "<u>View details</u>"

MY WORK
My service & leadership

showing 1 - 3 out of 3

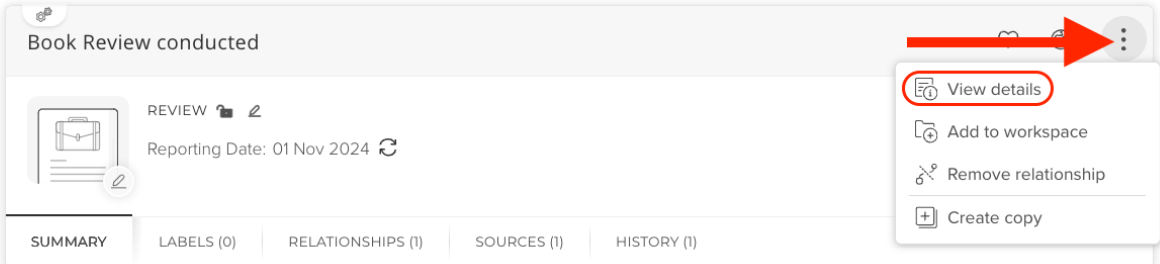view: 10 ▾ per page   sort by: Reporting date (newest first) ▾

☐ EXPORT   focus on: summary ▾

☐   Book Review conducted   ♡   ⊟   ⋮

       REVIEW 💼 ✎   ▭ View details
       Reporting Date: 01 Nov 2024 ↻   ▭ Add to workspace
                                               ⤲ Remove relationship
                                               ⊞ Create copy

SUMMARY | LABELS (0) | RELATIONSHIPS (1) | SOURCES (1) | HISTORY (1)

MY WORK > SERVICE & LEADERSHIP
Service & leadership details

REVIEW 💼 ✎
Book Review conducted

Data sources   ⇌

   Manual   Book Review conducted   ✎ ☆ ∧

   ID: 1A091E87-2C89-432B-A3AC-25647B9105CA   **Click on the "Pencil" Icon to Edit/Modify the record**

Work Reviewed/Review Venue:	Book Review conducted
Sub-Type:	Book Review
Role:	Author
Start Date:	01 Nov 2024
Additional Information/ Explanation:	Additional information for the book review
Ex-officio:	false

o Make the updates and then click the "SAVE" button at the bottom of the page to save the updated entry.

- **Edit Category Activity Type**

  o You can quickly change Activity Types from within a particular category.
  o To do that, click on the "VIEW ALL" link on the tile that you'd like a record activity type changed.
  o Click on the PENCIL icon ✎ next to the activity type.
  o Select the activity type that you'd like the item record to be changed to.

MY WORK
My service & leadership

showing 1 - 2 out of 2

view: 10 ⌄ per page

sort by: Reporting date (newest first) ⌄

☐ EXPORT

focus on: summary ⌄

☐ Mentoring a student ♡ 🌐 ⋮

LEADERSHIP 💼 ✎ ← **Click on the "Pencil" icon to change activity type**

Reporting Dates: 30 Jun 2024 - ↻

SUMMARY | LABELS (4) | RELATIONSHIPS (1) | SOURCES (1) | HISTORY (9)

Change activity type

Please select activity type

Advising	Clinical Service	Committee membership	Community service
Editorship	Event administration	Event participation	Expert witness
Honor/Award	Interview	Leadership ✓	Litigation
Mentoring	Professional Development	Professional Membership	Review
Other			

Select a different activity type that you'd like the record to be moved under

CANCEL

- **Edit Thumbnail of a record**

  - Users can change a particular record's thumbnail/picture.
  - To do that, click on the "VIEW ALL" link on the tile that you'd like a record activity type changed.
  - Click on the "Pencil" icon next to the image.
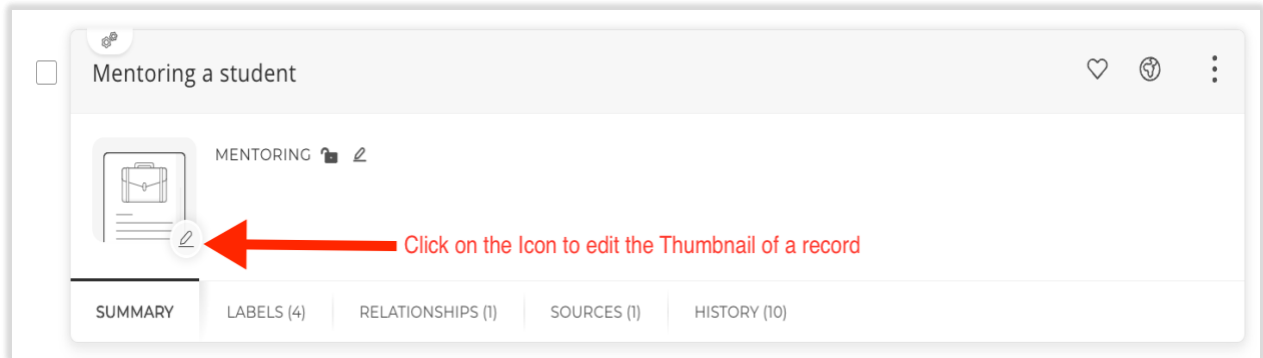
  - Select the image you'd like and click "SAVE" (max file size 6.3 MB)