

Using Elements for Narrative CVs, R&I Plans and informing PDR - Guidance

Purpose

The purpose of this initiative is to reduce work for researchers by moving career-related narrative texts and data, which are needed for various reasons, into one place. These can then be reused accordingly, to reduce duplication and inefficiency. It will also enable R&I Plans and PDRs to be connected directly to the provision of researcher and innovator support and development programmes.

Elements

The Elements system has been chosen for this because two of the main traditional indicators of research activity – outputs/publications and grants – are already in the system and automatically pull into templates. It is also a flexible, user-friendly system, with existing integration to the University's HR (Core) and grants (Converis) systems.

Scope

The initiative is intended to bring together all the following:

- The paper Research and Innovation Plan, currently completed each winter, to inform the award of Significant Responsibility for Research (SRR) and other research-related allocations (Significant Research Potential and Academic Development); and to allow clarification of how Research & Scholarly Activity time is to be used in relation to R&I activity
- The scattered hosting of statements and evidence that could be pulled together into a Narrative CV – required for UKRI and SHRIF bids, among an expanding number of purposes. Narrative CVs are also interchangeably referred to by some funders as Résumés for Research and Innovation (R4RIs). Within the Elements system, an 'Academic CV' is a Narrative CV appended with a list of outputs and grants.
- Some documentation to inform PDRs – the information generated from here will be able to replace the information used in the R&I components of academic PDRs; objectives set within the R&I Plan on Elements are portable and can be copied across into PDR documentation
- Some documentation for promotion applications – the information generated from here may be able to inform the R&I components of academic promotion documentation. For example, applications for progression to Associate Professor are based on Narrative CVs, so the information generated here can be used by staff to form the basis of those documents.
- REF 'contributions to the discipline' data, previously collected at UoA level through ad-hoc surveys

Privacy and Data Use

The settings in the system have all been set as private (and this will explicitly be displayed at the top of each page). This means other users in the university, including line managers, will not be able to access your content. The usual way to share information will be to generate PDFs or Word documents containing the relevant portions.

Some research managers e.g. Heads of Research Centre, Departmental Research Leads, ADRIs and UoA Co-ordinators will be able to extract aggregate data for the staff in their organisation unit. This will be used as a data source for external returns and accreditation e.g. for compiling and composing REF environment statements. Select RIS staff will also have similar access where a component relates to their specific remit – e.g. identifying support needs around bid writing or external engagement etc.

All data will be managed in accordance with the University's Staff Privacy Notice: <https://www.shu.ac.uk/about-this-website/privacy-policy/privacy-notices/privacy-notice-for-staff>. It cannot and will not in any way be used for performance management.

Fundamentally sensitive personal data should not be entered into the system. Rather it is expected that much of the information entered will already be in the public domain, and the purpose here is principally to collate, curate and present that in one place.

How is it Structured?

There are two main components to this:

- A Narrative CV, which summarises and presents an individual's key career achievements to-date
- A forward-looking R&I Plan, which sets out ambitions and proposals for the coming 3 years

These can stand alone, or be combined, depending on the specific purpose.

How Do I Complete a Narrative CV?

Narrative CVs are an initiative which encourages researchers to present a holistic view of their R&I activities and outcomes, moving beyond lists of outputs/publications and grants. They are structured into four sections. Each section should be a narrative summary of your most relevant (to the specific context you are producing the Narrative CV for) achievements, totalling approximately 250 words per section (1000 words/2 sides in total). They should be evidenced narratives, containing both qualitative and quantitative evidence. For more information about Narrative CVs, please see: <https://sheffieldhallam.sharepoint.com/sites/3012/SitePages/Narrative-CVs.aspx>

The four Narrative CV sections are sometimes known as the 'me, we, us and them' components. Specifically they cover:

- Section 1 – How have you contributed to the generation of knowledge?
- Section 2 – How have you contributed to the development of individuals?
- Section 3 – How have you contributed to the wider research community (contributions to the discipline)?
- Section 4 – How have you contributed to broader society, beyond academia (impact and knowledge exchange)?

In Elements, you can create each section (technical details below). Within each section the top box is for the c.250-word narrative summary. Only this will pull into the Narrative CV export. The other boxes are for supporting evidence. This evidence though is important, both to enable future redrafting of the summary sections, and to underpin REF 'contributions to the discipline' requests.

Tip: although provided with a free text box for each prompt, the supporting evidence (everything below the first box in each section) is best recorded as lists with dates. Think of these lists as a repository of all potential evidence you'd use to assemble the different applications of your Narrative CV, as well as what you would potentially like your UoA to take into consideration as your contributions to the discipline for REF purposes.

Tip: each section should only be created once and then edited in future. It can serve as a permanently living document, which can then be exported at different times for different purposes. Do not 'add new' sections once you have created your initial four – this will confuse exports. Please create each section once, then subsequently edit them (guidance on how to do this below).

Tip: no version history of your Narrative CV will be saved, only the current one is; so for future reference you may want to download specific versions you have generated/submitted.

Tip: the first time you create a section you will only be able to save it once all mandatory fields have been completed. Only one or two open questions in each section will be mandatory. However if you prefer not to begin completing these on your first visit, please just enter 'TBC' or 'ongoing' as holding text in those boxes to enable you to save.

How Do I Complete an R&I Plan?

These work similar to Narrative CVs, although they are structured to contain more closed and tick box questions. These responses do not feed into the Narrative CV, rather they can be exported separately.

R&I Plans are intended to be submitted once every 3 years for staff who are confirmed as having significant responsibility for research (this includes R&I professors and associate professor/readers), and discussed annually via the PDR. However, there will be an annual invitation to submit a plan for review in cases where significant changes to existing plans are required and where it is appropriate to review SRP/SRR status. Newly appointed academic staff will have the opportunity to submit a plan as part of their induction.

When you submit your R&I Plan to your line manager and/or local research lead for review, it should be presented in combination with your Narrative CV export; it cannot be reviewed without the latter.

Tip: only create your R&I Plan once and then edit when you return to it (guidance on how to do this below). Do not 'add new' again once you have created your R&I Plan – this will confuse exports.

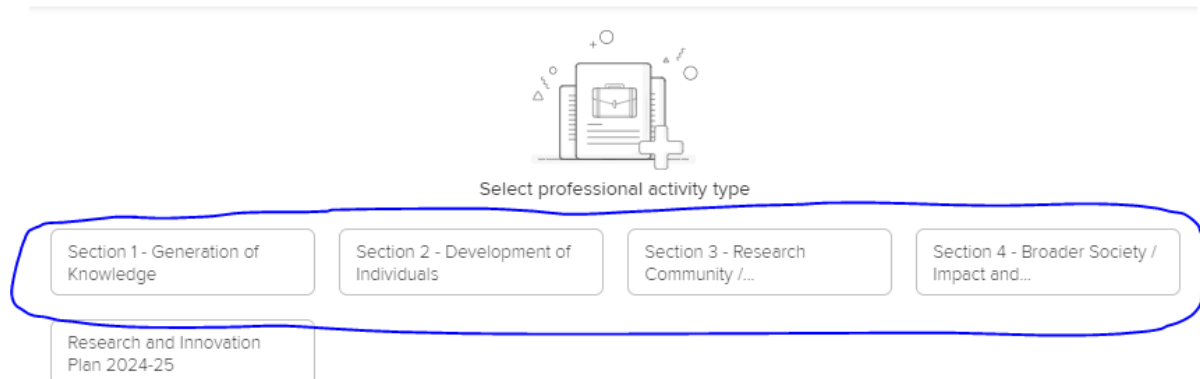
Tip: the first time you create an R&I Plan you will only be able to save it once all mandatory fields have been completed. Only a small number of open questions will be mandatory. However if you prefer not to begin completing these on your first visit, please just enter 'TBC' or 'ongoing' as holding text in those boxes to enable you to save.

Technical Step-By-Step Guidance

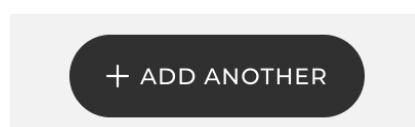
1.1 Creating a Narrative CV

- 1) Log in to <https://elements.shu.ac.uk/>
- 2) In the 'Professional activities' box towards the bottom right, click 'add new'
- 3) Select the relevant section from the options presented:

Add a new professional activity

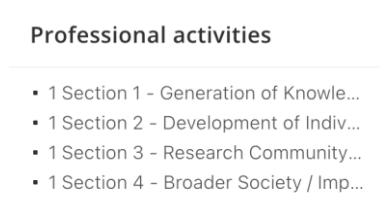


- 4) Complete the relevant boxes, but especially the top one for each section (even if simply to put holding text in mandatory fields in the first instance).
- 5) Save (bottom of screen). You will need to do this for each of the four sections in turn.
- 6) Once one section is created, there is the option, upper right, to add another

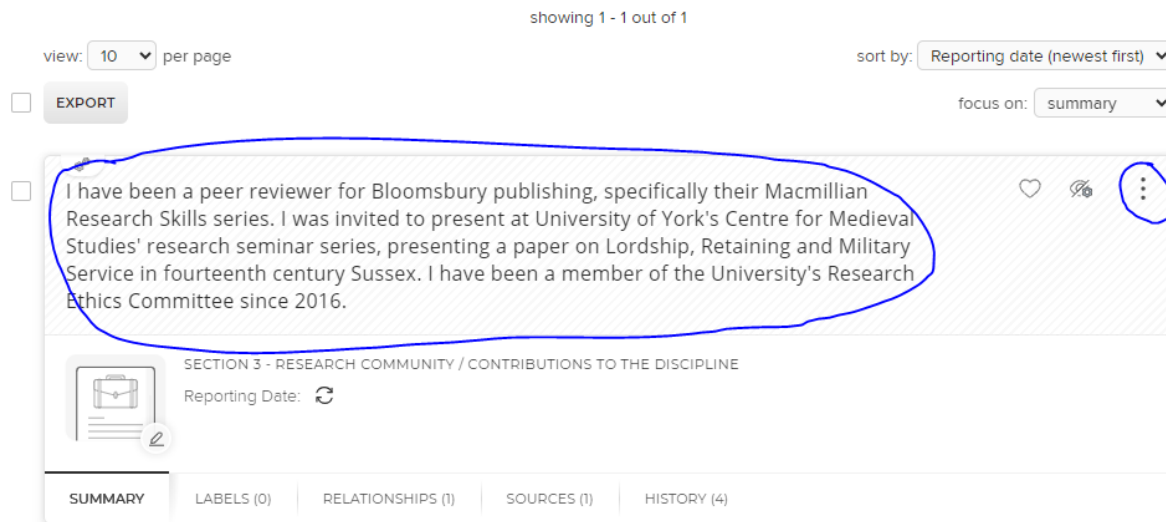


1.2 Editing a Narrative CV

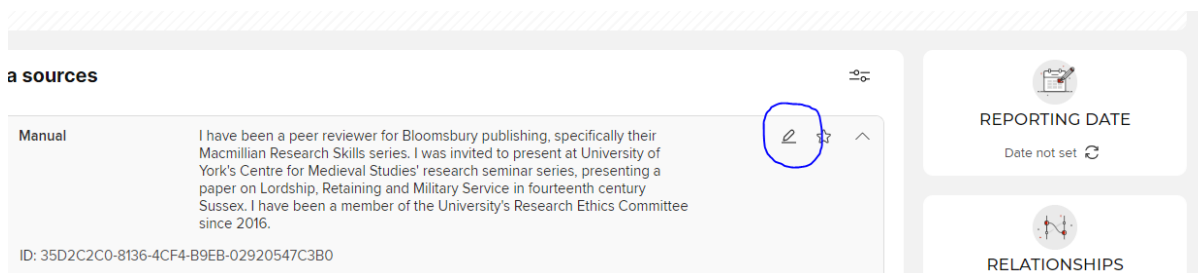
- 1) Log in to <https://elements.shu.ac.uk/>
- 2) In the 'Professional activities' box towards the bottom right, click on the relevant section



- 3) Click on your summary text, in the slightly greyer/hatched area. Or alternatively click the three stacked dots on the top and then 'view details'.



4) Click on the pen image to 'edit record'



5) Save (bottom of screen)

1.3 Exporting a Narrative CV

- 1) Log in to <https://elements.shu.ac.uk/>
- 2) Click on the three lines logo in the very top left of the screen
- 3) Go to Reporting and then 'CVs and Individual Reports'
- 4) On the top/Academic CV tile at the top, click on the 'Run' button
- 5) Search for your name
- 6) Enter dates. The start date determines how far back your output/publication and grant lists will go. In disciplines with higher volumes of these, you may wish to consider an appropriate amount to include, e.g. just the last 5 years. The end date should be today.
- 7) Select PDF or Word (Word enables reformatting or easier pasting into external systems)
- 8) Press 'Run' and it will download

2.1 Creating an R&I Plan

- 1) Log in to <https://elements.shu.ac.uk/>
- 2) In the 'Professional activities' box towards the bottom right, click 'add new'
- 3) Select the 5th/bottom left section from the options presented:

Add a new professional activity

Select professional activity type

Section 1 - Generation of Knowledge

Section 2 - Development of Individuals

Section 3 - Research Community /...

Section 4 - Broader Society / Impact and...

Research and Innovation Plan 2024-25

- 4) Complete the relevant boxes. To create objectives, add free text in the box, then click 'add'. These will also serve as R&I objectives on one's PDR.

* R&I objectives for PDR (next 1 year)

Submit Parliamentary History article by May [edit](#)

Submit AHRC bid in June [edit](#)

Follow up with engagement

[+ Add](#)

- 5) Save (bottom of screen). To save without having completed the plan, insert holding text (e.g. 'TBC') in mandatory fields.

2.2 Editing an R&I Plan

- 1) Log in to <https://elements.shu.ac.uk/>
- 2) In the 'Professional activities' box towards the bottom right, click on the R&I Plan bullet

Professional activities

- 1 Section 1 - Generation of Knowledge
- 1 Section 2 - Development of Individ...
- 1 Section 3 - Research Community / ...
- 1 Section 4 - Broader Society / Impac...
- 1 Research and Innovation Plan 202...

- 3) Click on the title field text, in the slightly greyer/hatched area. Or alternatively click the three stacked dots on the top and then 'view details'.

The screenshot shows a data table with a hatched row. The row contains the text "[title field missing]". To the right of the text are three icons: a heart, a share icon, and a three-dot menu icon. The menu icon is circled in blue. Above the table, there are controls for "view: 10 per page", "sort by: Reporting date (newest first)", and "focus on: summary". Below the table, there are tabs for "SUMMARY", "LABELS (0)", "RELATIONSHIPS (1)", "SOURCES (1)", and "HISTORY (1)".

- 4) Click on the pen image to 'edit record'

The screenshot shows a data source record. The record is titled "Manual" and has a hatched background. The title field contains "[title field missing]". To the right of the title field is a pen icon, a star icon, and an up arrow icon. The pen icon is circled in blue. Below the title field, there is a long ID string: "ID: D9E46ADB-4E45-4DD4-9613-BCE348D513E8". Below the ID, there are two fields: "Stage of research career: Early-Career Researcher" and "Doctorate?: Yes - longer than 2 years ago". To the right of the record is a "RELATIONSHIPS" panel with a "Users" section showing "1" and a "CREATE NEW" button.

- 5) Save (bottom of screen)

2.3 Exporting an R&I Plan

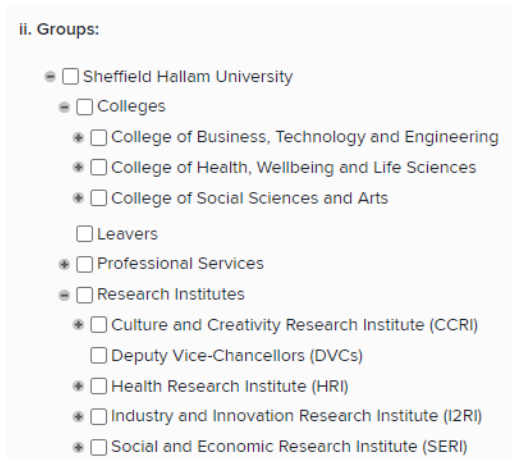
- 1) Log in to <https://elements.shu.ac.uk/>
- 2) In the 'Professional activities' box towards the bottom right, click on 'view all'
- 3) Scroll to the bottom and tick the R&I Plan box

The screenshot displays a document viewer interface. At the top, there is a navigation bar with tabs: SUMMARY, LABELS (0), RELATIONSHIPS (1), SOURCES (1), and HISTORY (4). Below this, the document header shows a checkmark icon circled in blue, followed by the text "[title field missing]". To the right of the header are icons for a heart, a refresh symbol, and a vertical ellipsis. The main content area features a document icon with a pencil and the text "RESEARCH AND INNOVATION PLAN 2024-25". At the bottom, another navigation bar is visible with tabs: SUMMARY, LABELS (0), RELATIONSHIPS (1), SOURCES (1), and HISTORY (1).

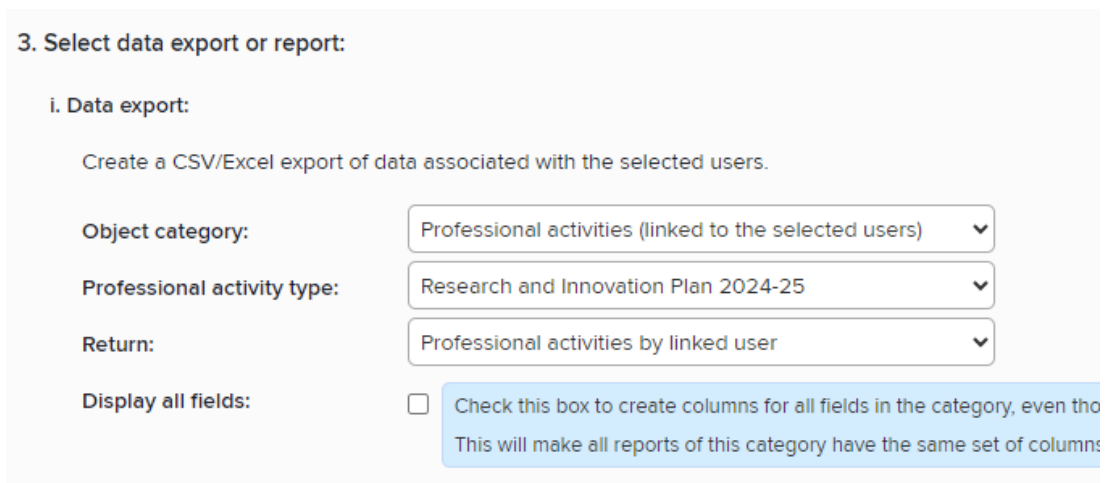
4) Scroll to the top and click the Export button on the top left

3.1 For Research Managers (Heads of Research Centre, Departmental Research Leads, ADRIs, UoA Co-ordinators) – Exporting Bulk Data

- 1) Log in to <https://elements.shu.ac.uk/>
- 2) Click on the 3 lines logo in the very top left of the screen
- 3) Go to Reporting and then ‘Basic Reports’
- 4) In Groups, expand the trees and select your organisational unit(s)



- 5) Add dates (irrelevant for this, but would suggest: start - 1/1/00, end - today)
- 6) Set the 3 fields as below; also leave ‘display all fields’ unchecked



- 7) Click ‘Get Data Export’
- 8) If this doesn’t work as expected, please contact REFsupport@shu.ac.uk to ensure your permission rights map your areas of responsibility correctly.