# Virginia Tech Carilion School of Medicine

Elements Harvester Guide: Adjusting Search Settings & Utilization

One of the advantages of using the Elements Faculty Activity Reporting System is the *Harvester* feature. This feature gathers publication data from a number of external library databases, including Scopus, PubMed, MLA, Dimensions, and more.

Using name-based search criteria, Elements identifies publications and matches them to your account. Elements will also locate unique identifiers (e.g. Scopus and ORCID ID), which can be used to quickly find all of the content associated with a particular author.

When a new publication is found, the Elements Home Page will notify you to claim or reject the publications (as shown below)
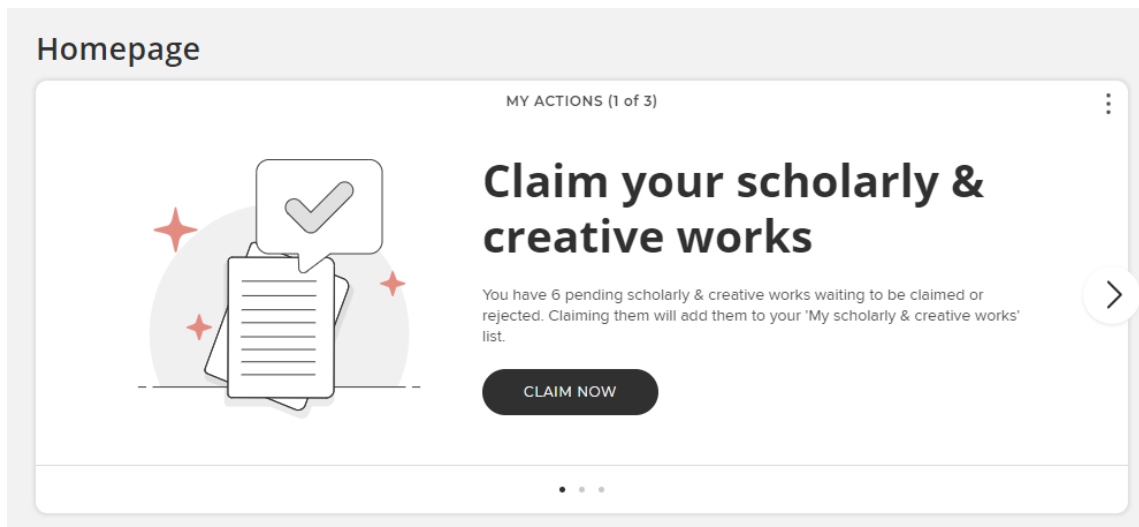
Because of potential similarities between authors' names on publications, it is recommended that you modify your search settings. This will narrow down the results that come back for you. (For example, a researcher named John Smith can have results returned for not only himself, but also other researchers who go by John Smith, J. Smith, etc.) Claiming author identifiers will also improve the search functionality

The following directions outline how to adjust the *Harvester* settings within Elements so that your database searches are as effective as possible:

- ❖ **Step 1** - Automatic Claiming
- ❖ **Step 2** - Adding External Author Identifiers
- ❖ **Step 3** - Modifying Search Settings
- ❖ **Step 4** - Pending Publications
- ❖ **Step 5** - Manually Adding Missing Publications

Step 1 - Automatic Claiming

As Elements gathers publication information from databases, it will group publications together that belong to the same external profiles (ie. Research database identifiers like Scopus ID or ORCID). You can then confirm whether or not each of those profiles belongs to you. Elements will automatically claim publications that belong to the author IDs that you have confirmed and approved for usage.

1. Go to efars.provost.vt.edu/login.html and log in with your **Virginia Tech PID username** (e.g. the first part of your VT email) and **password**.
2. Click the **Menu** icon in the top left corner of the page. Under **Settings,** select **Automatic Claiming**.
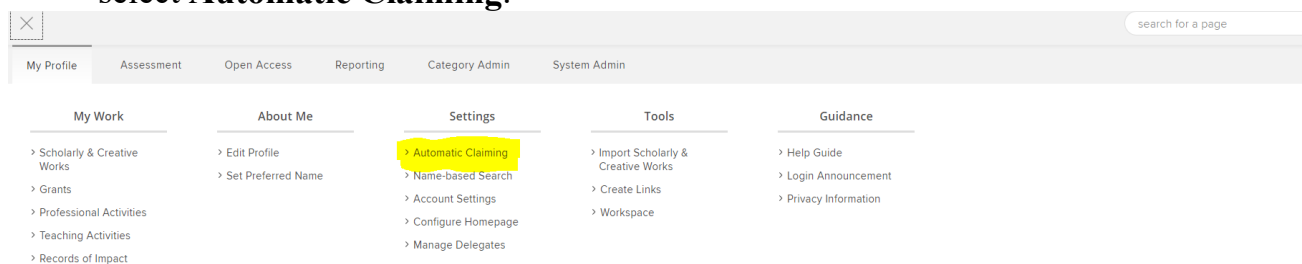
3. If you have published papers, you may see a list of author identifiers that belong to you on this page. On any of the suggested author identifiers, click on the link for the associated publications. Look at the publications that belong to that ID to check that they belong to you.
   - If the author ID belongs to you, click on the **Yes** button.
   - If the author ID doesn't belong to you, click on the **No** button.
   - Click on **Ignore** if you do not want Elements to automatically claim or reject publications belonging to this author ID.
   - If you do not see any IDs listed, you can add external profile IDs as needed (further directions below).
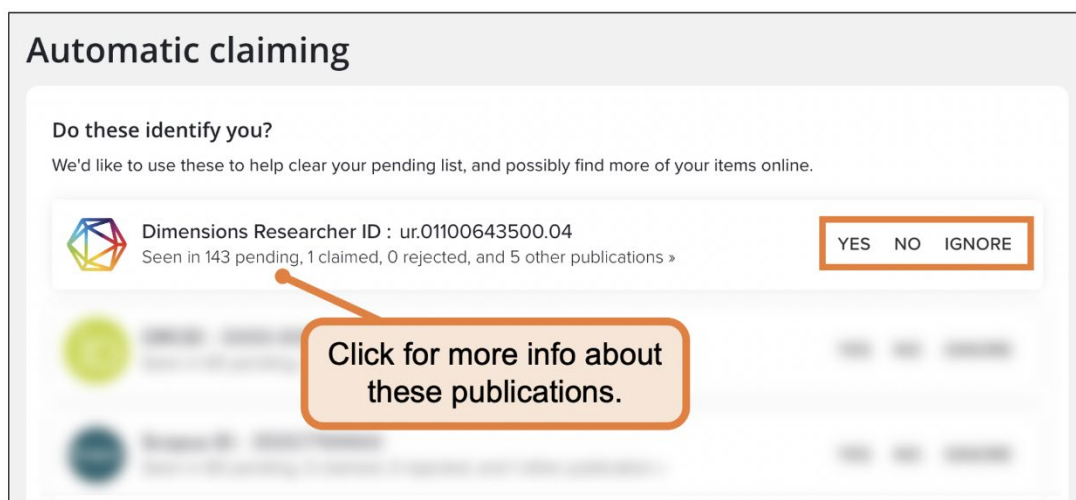
4. Depending on what you selected, a different confirmation window will appear asking you what you would like to do about the publications that are attributed to the author ID.
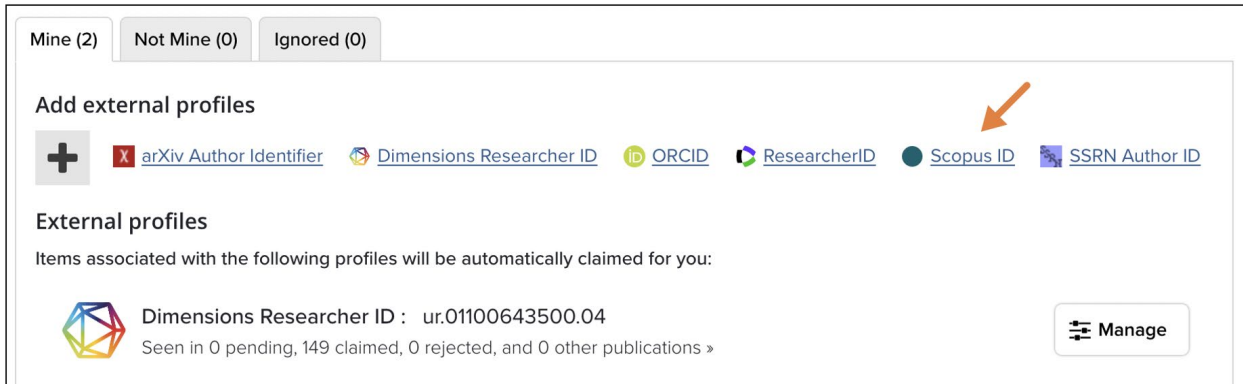

5. Select whether you would like Elements to automatically claim, reject, or suggest publications belonging to this author ID.
6. Click **CONFIRM** to confirm your choice.
7. A confirmation will appear when the action is complete. Click **OK** to continue.

8. Repeat this process for all of the author IDs listed.

Step 2 – Adding External Author Identifiers

If have an author ID that is not showing up in the automatic claiming list, such as your ORCID ID, you can enter it manually on the **Automatic Claiming** page (mentioned in Step 1). To do so, scroll to the top of the page and find the "Add external profiles" section.

1. Click on which type of database author ID you would like to add.
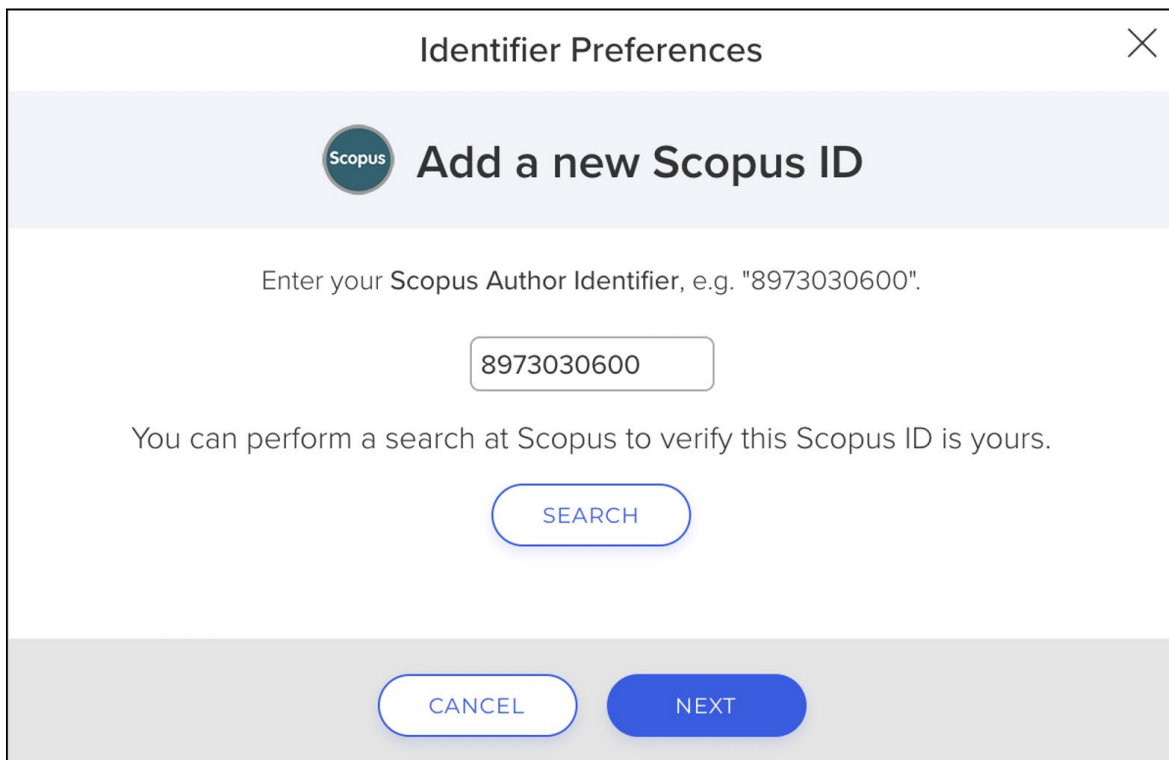
2. In the window that appears, enter the **author ID**. Click **SEARCH** to see publications associated with this ID and double-check that it's the right one.
3. Click **NEXT**.

4. Select the action you want Elements to take with this author ID and click **CONFIRM**.

5. A confirmation message will appear when the action is complete. Click **OK** to continue.


6. Repeat this for other author IDs you wish you manually add.

Step 3 – Modifying Name-Based Search Settings

Next, you will want to give Elements the correct parameters to use for searches. This will improve the process by which the system finds publications and author IDs, increasing the number of results while eliminating as many false positives as possible.

1. Click on the **Menu** button toward the top left of the page.
2. In the "Settings" menu, select **Name-based Search**.
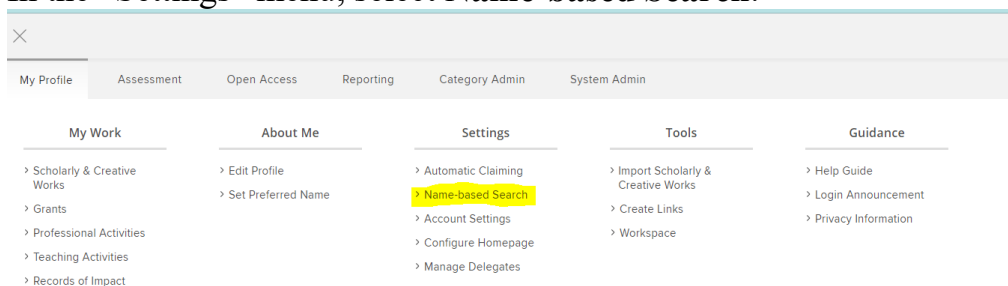
3. Scroll down to the **Name-based Searches** section.
4. **Name variants** – Enter the different variations of your name that have appeared in your publication, with last name first. For example, name variations that might have been used for the name John Jumbo could be: "Jumbo, John" and "Jumbo, J.") After each name variant that you add, you must click on the **Add** (⊕) button. If you need to delete one of the name variants, click on the **Delete** (⊗) button next to that variant.


5. **Addresses** – Ignore unless you know there are several addresses you want to add to your account to associate with your scholarly work.
6. **Start date** – Enter a date that represents when you started publishing work. Be sure to use one of the recommended date formats. This will prevent Elements from harvesting older publications and accidentally attributing them to you.
7. **Keywords** – Ignore.
8. **Journals** – Ignore**.**
9. **Article ID** – Ignore.
10. **Source-specific name-based search terms** – Ignore.
11. Click on the **Save** button at the bottom of the page when you are done!
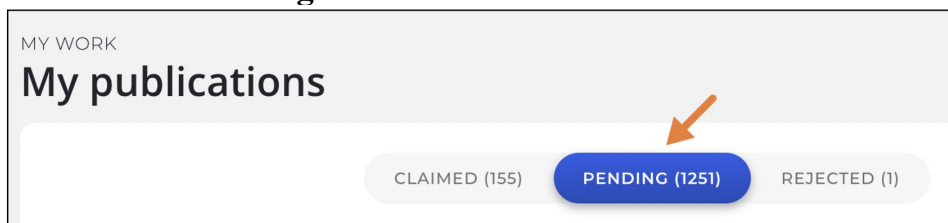
Step 4 - Pending Publications

After modifying your search settings and claiming your external database profiles, you may still have some publications that you will need to either claim or reject on an individual basis. This can be accessed from the **Home Screen** or through the following menus:
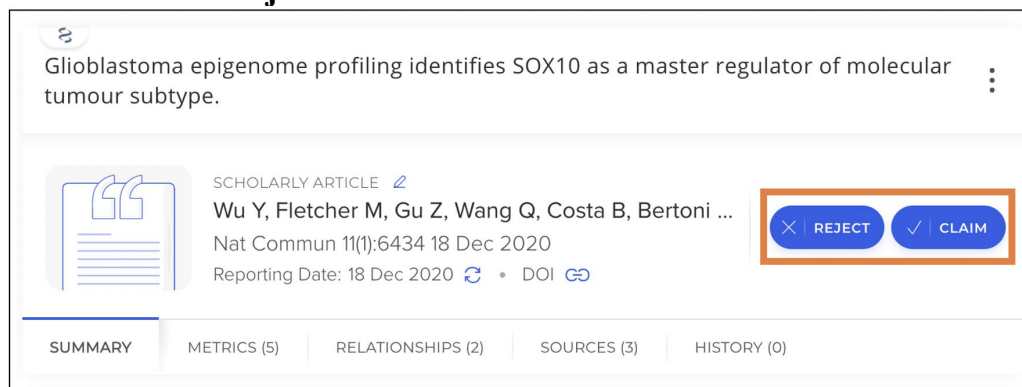
1. Click the **Menu** button toward the top left corner of the page. In the "My Work" section, select **Publications**.
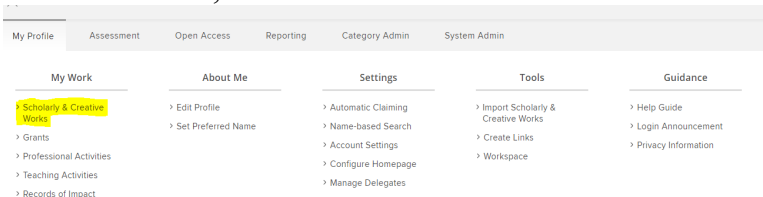
2. Click on the **Pending** tab.

3. Scroll down to the list of pending publications.
4. Determine whether each pending publication is yours and click **Claim** or **Reject** for each.

Step 5 - Manually Adding Missing Publications

After going through the steps above, there may still be items missing from your publications section because they were not found in a database during the search. Other items (book chapters, published conference papers, etc.) are not well-indexed by these databases. For a description of how to manually add items to your publications, visit https://medicine.vtc.vt.edu/faculty-affairs/elements/elements-cv.html