Elements

Quick start guide

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Home page

The Home page is where you land after logging into Elements.

Click on EDIT MY PROFILE to go to your Profile page. Scroll through the MY ACTIONS prompts. Every item has a link that takes you to the section in Elements where tasks can be completed, including:

- Set up your search settings
- Add author identifiers
- Claim scholarly and creative works
- Deposit publications
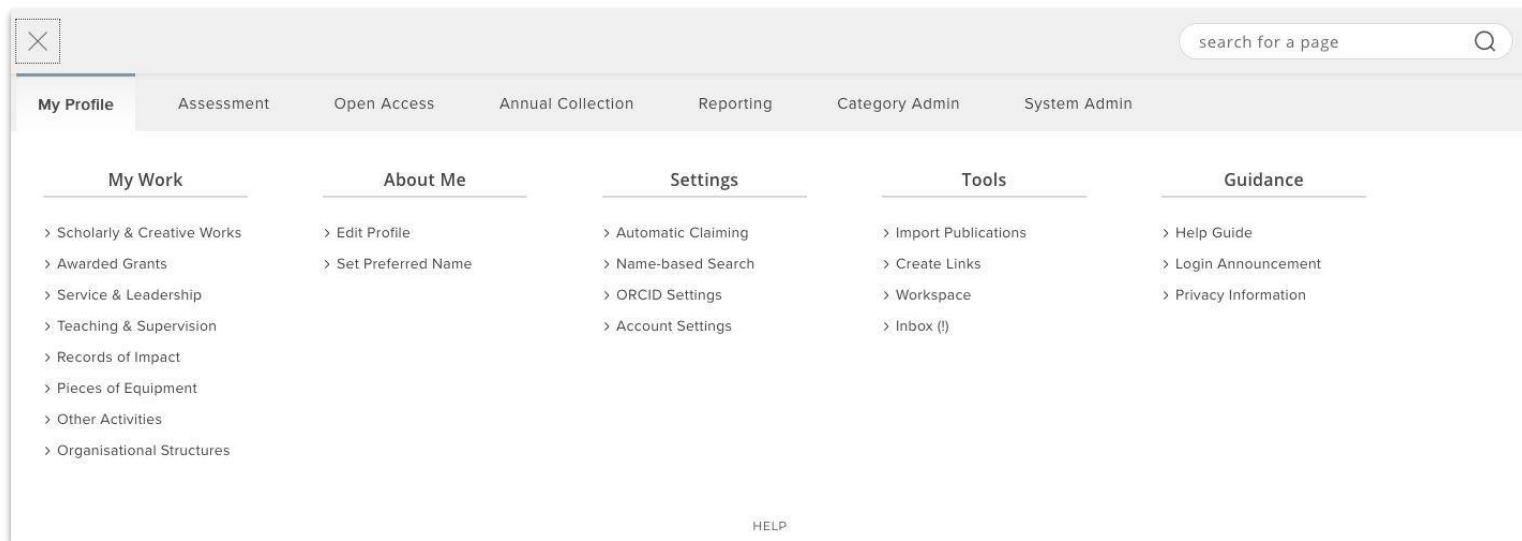- Add records of impact

Data types in each activity section are active links. Click on any one to go to that activity type or add manual records by selecting + ADD NEW.

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Getting to know the Menu

Click on the Menu icon in the top left-hand corner to navigate around Elements.

The My Profile section contains various areas specific to you. You can either browse through the tabs or use the Search box in the upper right-hand corner to find pages. *Please note: The menu items available will depend on the configuration and licence at your organisation and your roles within the system.*

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Managing your Profile

Your Profile can be viewed by any other user in the system.

Using Edit Profile, you can add additional items, such as your photo, an overview statement, your social media sites, and other categories included in the profile.

When you make your profile Public, information from it will be shared with Virginia Tech Experts, the university's public profile system. You can edit your profile and add new information as you prefer, then share it publicly by switching from Internal to Public. Once you have switched it to public access, you can hide any part of it that you do not wish to appear in the public profile system.

For more guidance on Virginia Tech Experts, see
https://guides.lib.vt.edu/VirginiaTechExperts

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Claiming author identifiers

Elements will suggest author identifiers based on your name-based search settings, including identifiers from ORCID, Dimensions, Scopus, ResearcherID, arXiv, figshare and SSRN.

Approve or reject the identifiers using the Yes and No buttons. Elements will automatically retrieve publications in databases using these identifiers and place them in the 'Mine' or 'Not Mine' folders.

If the system does does not find all of your identifiers, you can enter them by clicking on the "Add…" link.

The system will automatically import the address associated with your organization but you can add additional email addresses you may have published with previously.

Automatic claiming

ℹ️ Please tell us about the identifiers that are used to identify you in external data sources.
The more you can tell us, the less often you will be asked to verify which items are yours.

Do these identify you?
We'd like to use these to help clear your pending list, and possibly find more of your items online.

ur.01123321343.51 Dimensions Researcher ID
Seen in 2 pending, 26 claimed, 0 rejected, and 0 other publications.   YES NO IGNORE

8973030600 Scopus ID
Seen in 0 pending, 27 claimed, 0 rejected, and 0 other publications.   YES NO IGNORE

| Mine (5) | Not Mine (0) | Ignored (1) |

Add external profiles
➕   🌐 Dimensions Researcher ID   ⬤ Scopus ID

External profiles
Items associated with the following profiles will be automatically claimed for you:

X   http://arxiv.org/a/hook_d_1 arXiv Author Identifier   ⚙ Manage
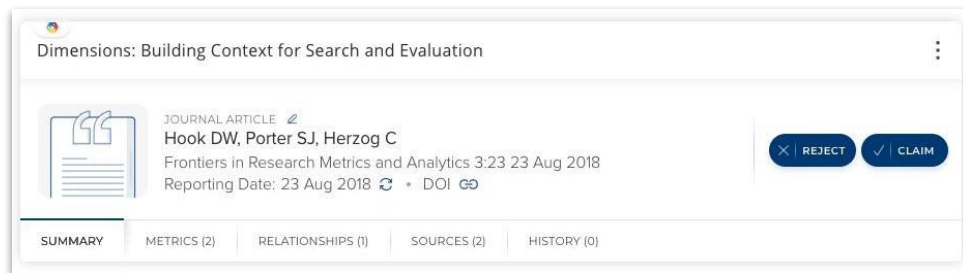
dwh figshare for Institutions account
Your figshare for Institutions account is controlled by system-wide settings and cannot be removed.   ⚙ Manage

Claiming or rejecting publications

Elements will indicate when it finds new publications in the online databases that match your profile. These will be placed in the Pending list of your records to await your approval. One of the actions in your My Actions list will take you to the pending publications.

Claim or reject individual publications using the check or "x" buttons. Or you can select a number of publications using the checkboxes, then claim or reject the marked publications with the large buttons at the top of the list.

Claimed publications will move to the Claimed list and rejected to the Rejected list.

If you have lots of items that do not belong to you, work with your System Administrator to clear the Pending list, modify your search settings to improve the accuracy of the searches, and re-run your search.
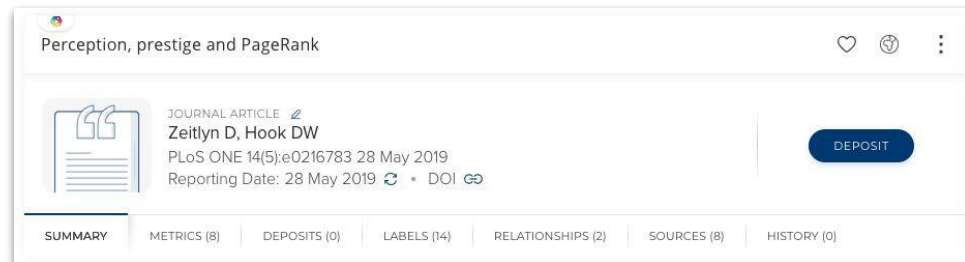
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My Publications

Your My Publications page, you can view various forms of data about your articles by clicking on the tabs at the bottom of the record.

To change the publication type select the pen icon, once selected you have a drop down menu of available types, save the new type.

This change will be recorded in history notes. If you change your mind you can always change it back without any loss of data.

Summary shows the basic bibliographic data, while Metrics displays the Times Cited and Altmetric data. Labels presents all of the ontologies available to be associated with the publication, while Relationships lists all of the other Elements users who are linked to the record.

Finally, Sources shows a list of the data sources that comprise the publication object and History is the log of all activities performed against the record.

Depositing publications to VTechWorks

After claiming or adding a publication, you can choose to upload it into VTechWorks, Virginia Tech's open access repository housed in the University Library. If you need to set an exception for your article (embargo or other access restrictions), choose an item from the pre-configured exception list and add a comment.

If your article is already available somewhere in Open Access form, you can simply enter the OA location URL.

Adjusting your Search Settings

Your search settings are preloaded with your name (usually in the form of LASTNAME, IN and LASTNAME, FIRSTNAME), but you can improve these settings by adding Name variants or Address terms.

Tip: Use the smallest meaningful word or term in an address. For example, enter "Oxford" and not "Oxford University."

Tip: Additional search terms are restrictive. If you add Keywords or Journals, then Elements will only retrieve articles that include those keywords or published in those journals.

Don't forget to click Save when you're finished editing your search settings!

Name-based searches

These settings let you influence how the system performs 'name-based searches' for you, both at online databases and within existing data in the system. This kind of search will result in items being placed in your Pending list(s), for you to claim or reject.

Separate identifier-based searches can be managed on the Automatic Claiming page.

Daniel Hook's settings were last modified on **13 May 2019** at **12:06** by Mr Andrew Sowerby.

Name-based search terms

Name variants: *
(last name first)

Hook, D. W.

When adding name variants, please use the format "Lastname, Firstname/initials" — for example "Smith, A. G." or "Smith, Alex".

Add all combinations of your last name and initials under which you publish. The system will then convert the supplied name to the exact formats best required when searching each data source. Please do **not** use the format "Andrew Smith" or "AG Smith". Always write your last name first, followed by a comma.

If a name variant is only used by one online database, you can customise this setting in the relevant section of this page.

Addresses:

imperial

washington

↻ Switch to advanced view

Add keywords associated with previous institutions, or those with which you collaborate.

Additional search terms

This section allows you to exactly specify additional supplementary information to narrow the results returned by name-based searches. Providing information in this section will cause you to only receive results published after the provided start date, which have the supplied keywords and which were published in one of the provided journals.

Start date:

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Manage delegates and Preferred Name

You can grant a delegate (or delegates) editing rights to your account under Set Preferred Name.

Your delegate(s) will receive copies of your email alerts and will be able to log in (using their own credentials) and 'impersonate' you to manage and edit your records.

You can also add a preferred first and/or surname here. These settings will override the name that was imported into Elements from your HR system and will be displayed throughout Elements. It will not, however, modify your Search settings.

Manage Delegates ⓘ

Add delegate

Type the surname of your delegate and a drop-down list will appear.
Choose your delegate then click on the 'Add delegate' button to complete the process.

Name (surname first):   [   ]

Delegates

Daniel Hook has no delegates.

Preferred Name ⓘ

Changes will not affect name based publication search settings. A review of search settings is recommended after any change.

Adding a preferred first name and/or surname will override the name that was imported into Elements for you (e.g. from your HR systems). If a preferred name is added, this will be displayed throughout Elements.

First name: [Daniel   ]

Surname: [Hook   ]

[Update preferred name]

Manually adding a publication

You can always add publications manually if they are not found in the online databases. New items can be added from within your listing of records for a given section. Just select **+ ADD NEW** on the home page.

New items can also be added directly from the Home Page. Click the ADD NEW text in the bottom left corner of the section in which you would like to add the new activity.

There is automatic checking to confirm you do not create a duplicate. Just **enter** the title and search.

You can **claim or skip** to continue to the next step.

MY WORK
My scholarly & creative works

CLAIMED (5)   PENDING (0)   REJECTED (0)

showing 1 - 5 out of 5

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

Scholarly & creative works

Claimed
- 10 books
- 35 book chapters or sections
- 52 refereed journal articles
- 39 journal articles
- 104 conference papers or presentati...
- 3 presentations (not at a conference)
  and 39 more scholarly & creative wor...

+ADD NEW   VIEW ALL

Manual Entry Form

A new record can be generated for any activity in the system by adding information into the manual entry form. Required fields are marked with an * and essential fields displayed by default. All other fields are optional.

Guidance is provided for types at the top of the page in the blue information box and for fields where you see a large ?

Don't forget to Save and continue, and follow the prompts to view your publication.

Editing A Record

Reporting requirements and processes vary by college. Some colleges utilize custom reports available through the University Data Commons. These reports can be accessed directly at https://udc.vt.edu or via the Help page within Elements (customized by college).

To run your report in the UDC, go to the "Faculty Activity Reports" menu tab in the upper right corner of the screen. When you click on that, you'll have the option to choose an "Individual" or "Group" report. (Most individual users will only see "Individual" as an option). After selecting which report type you'd like to run, you'll see fields requesting the following information:

1. In the **College** field, select your college
2. In the **Report** field, select the report you'd like to generate.
3. In the **Faculty** field, your name should appear, given that you are logged into the system.
(Two-factor authentication is required).
4. Select the **Start Date** (Month/Day/Year) and **End Date** (Month/Day/Year)
5. Click "**Download Report**"

A mapping for each report template can be accessed at the bottom of the UDC interface once a specific report is selected.

Faculty Activity Reports ▾

Individual Activity

College
College of Liberal Arts and Human Sciences

Report*
Faculty Annual Report (FAR)   ?

Faculty*
Barbara Lockee

Start Date (MM/DD/YYYY)   End Date (MM/DD/YYYY)
01/01/2021   12/31/2021

⬇ Download Report

See a problem in your report? Submit issue here.
Download this report's template.

Editing A Record

You may wish to update or change records within the Elements system. Records that are manually created can be edited by going to the record, making any desired changes, and saving the record to update it in the system.

Records that are automatically imported <u>cannot be edited</u>. However, if such a record contains information that needs to be changed, you can create a manual version of that record and make any necessary adjustments, and save the changes. That record will become the preferred record and will be referenced in reports, reflecting a corrected version.