Elements Guide

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1 Getting started

1.1 Accessing Elements

The address for Elements is: https://elements.shu.ac.uk/

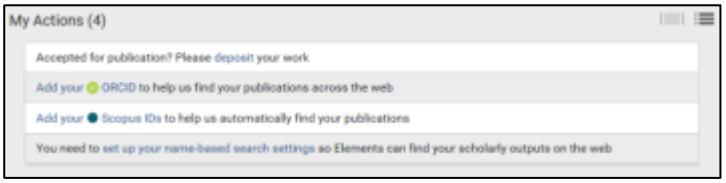
Please login with your usual SHU username and password.

1.2 The Home page

The **Home** page is the first page you see after logging into Elements. It is easy to return to the Home page at any time by clicking on the 'Home' tab.

On the Home page you can see task prompts under 'My Actions' and look at a summary of your publications. There are also links to where you can add your work.

'My Actions' provides quick links to things you may need to do. These highlight actions you currently need to take.



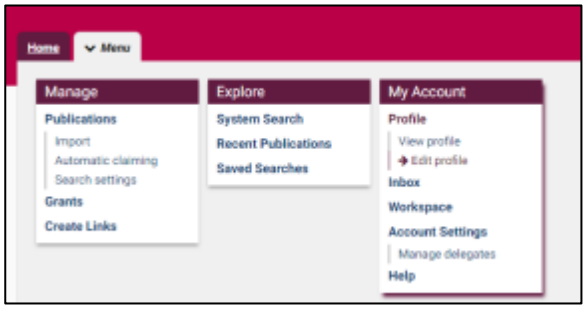
'My Summary' shows a summary of your publications. There are links from within the summary to view your publications and to add a publication.

1.3 The Menu

The menu tab provides links to the pages where you can:

- 'Manage' your publications, grants and links
- 'Explore' data in the system
- manage 'My Account'

The other tabs that are available to you depend on your user permissions in the system. Most Elements users will see the 'Home' and the 'Menu' tabs.



1.4 Your profile

To see your profile, click on your photo on your Home page or go to:
Menu> My Account > Profile > View profile

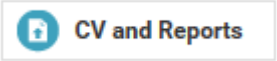
By default, your profile can be viewed by any other user in the system. This means all SHU staff and research students.

Your profile contains your photo, email address, a list of your publications and your grants (imported from Converis). You can add further details, such as your research interests, teaching activities, links to you social media profiles, etc.

You can edit your profile by clicking on the 'Edit profile' button from the profile view page. Alternatively, there are links to edit your profile from your home page and in the Menu.

In 'Edit mode', click on the 'Add' option in a section to add information or click on the yellow pencil icon next to an entry to edit it.

When you are viewing or editing your profile you will see the 'CV and Reports' button in the top right hand corner. This option will enable you to export your Profile information in a variety of formats.



1.5 Searching Elements

You can explore the publications, grants and people on Elements by going to 'Explore' from the Menu.

System Search

- Simple search to look for publications or grants by keyword
- Advanced search to search for publication or grants in more detail

You can save a search by clicking on the 'Save this search' link at the top of the results list

Recent Publications

- Look for recently claimed publications for the whole university or by faculties, departments, research institutes and centres

Saved Searches

- To access your previously saved searches

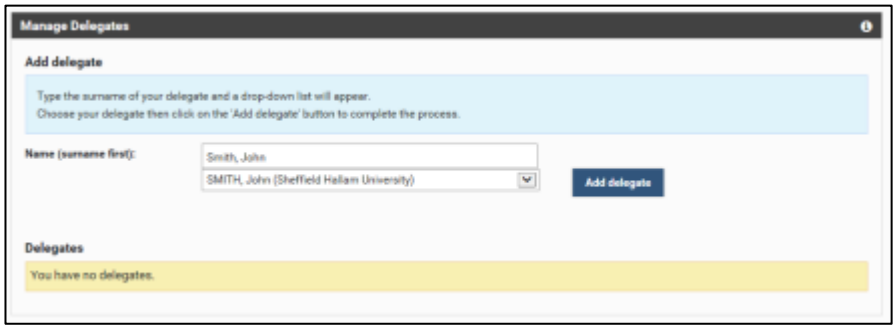
1.6 Delegating

You can give a delegate (or delegates) editing rights to your account. 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 should not share your login details with anyone).

You may find that the research administrators in your faculty already have delegate rights to your account.

To set up a new delegate, go to: Menu > My Account > Account Settings > Manage delegates.

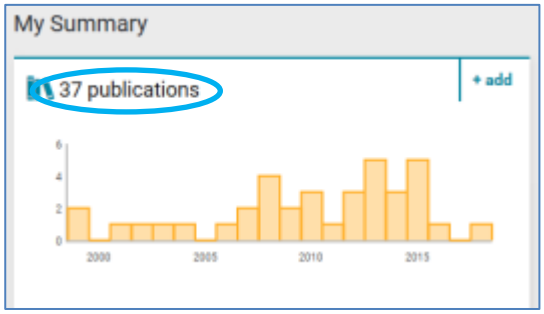
Search for the name of the person you wish to add as a delegate. Once you have found the correct name click on the 'Add delegate' button.



2 Your publications

2.1 Navigating your publications

You can go to the list of your publications by clicking on the link in the 'My Summary' section on your Home page or by going to: Menu > Manage > Publications



You will then see the 'My Publications' page.

There are three tabs on this page

- **Mine** - this is a list of the publications that you have claimed, that have been automatically claimed for you (from SHURA, Academ or database searches) or that you have added manually. These are the ones that are yours.
- **Pending** - publications you will need to claim as yours or reject as not yours (see section 2.2 on claiming and rejecting below)
- **Not mine** - publications you have rejected as not yours

Sorting and filtering a list of publications

You can sort a list of publications using the 'Sort by' menu at the top of the list.

You can also use the filters on the right of the page to choose to see only particular publications.

Tip: If you can't see all the publications that you think should be in a list, check the filters that are set.

Compact and Detailed view

You have the option to view your lists of publications in two ways:

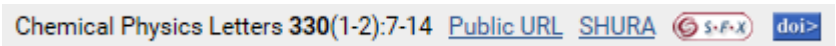
- **Compact view** - slim, basic details, no additional tabs
- **Detailed view** - more information about each publication, such as Altmetrics, citation metrics and journal rankings. You will also see tabs where you can find more detail.

When in 'Detailed view' you will see six tabs underneath the title of each publication.

- Summary - details of the publication
- SHU users - other users at SHU who are associated with the publication (co-authors, editors, translators, contributors)
- History - the history of the item (e.g. when it was claimed)
- Data sources - the data sources where the publication details have been found
- Full text - information about the status of deposit and about any full text manuscripts that have been deposited in SHURA for this publication
- Links - all the links associated with the item (e.g. links to authors, co-authors, contributors and associated grants).

The 'Detailed view' also shows you Altmetrics, citation metrics and journal rankings for a publication.

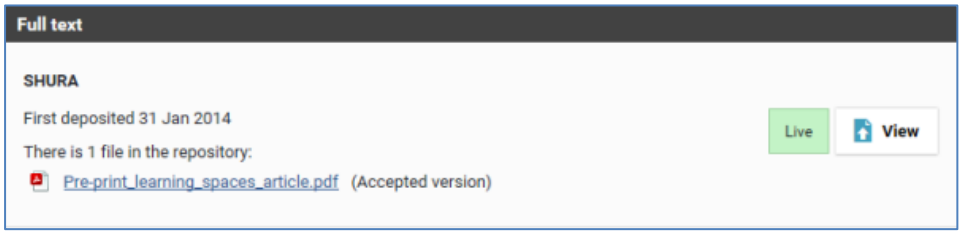
Both the compact and detailed views include links to where the publicatoin may be accessed. For example, there may be a DOI link which will usually show you the publication on the publisher's web pages. If there is a record for your publication on SHURA, there will be a link to the relevant SHURA page.



Viewing full publication details and data sources

You can click on the title of a publication or on the magnifying glass icon to view the full details. The full details are:

- Publication description - i.e. the title, authors, place and date of publication. etc.
- Full text - whether a full text manuscript is available from SHURA and a link to 'view' or 'deposit' a manuscript into SHURA (the image below shows the 'view' link)

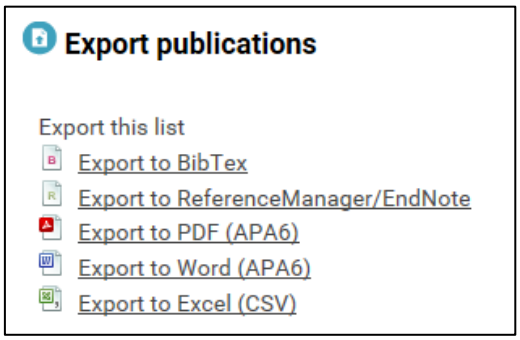


- Data sources - Elements may have found information about your publication from multiple sources. These are usually brought together into one record, but you can see the different data sources if you wish to.

- Links - for example to SHU co-authors, contributors and associated grants etc.
- Affiliations map (if available)
- Keywords (if present)

Exporting publications

From your list of publications, you can select any number of publications using the checkboxes and click on the 'Export' button to export them. Publication details can be exported in a variety of formats.



The 'Export to Reference Manager / EndNote' option will result in the creation of a .ris file, which can be imported into RefWorks and other reference management software.

2.2 Claiming and rejecting publications

Elements searches for your name in external databases like Scopus or Web of Science to find publications that may belong to you. When Elements finds publications that match your profile, they are placed in the 'Pending' list of your publications, ready for you to claim or reject.

The first time you log in to Elements there could already be some publications waiting for you to claim or reject. If there are many publications which are not yours, have a look at section 3 below on setting up automatic claiming and modifying search settings to improve the searches.

You will receive an email to let you know when newly found publications are added to your 'Pending' list. You can follow the link mentioned in the email to a page in Elements, where you can login and then choose to claim or reject the pending publications.

In your 'My Actions' list, there may be a 'claim or reject' task. Clicking on the link will take you to the pending publications.

Alternatively, go to 'My Publications':
Menu > Manage > Publications.
Then click on the 'Pending' tab.

In your list of pending publications, you can claim or reject individual publications using the buttons below each item.

Click 'Claim as mine' to add the item to your publications list under the 'Mine' tab. If the publication does not belong to you, click 'Reject (Not mine)' to move it to the 'Not mine' tab.

You can claim or reject multiple publications at the same time. Select a number of publications using the checkboxes next to each one. Then claim or reject the checked publications using the Claim and Reject buttons at the top of the list of pending publications.

2.3 Managing your list of publications

You can manage your list of publications to:

- ensure it is complete
- edit records
- select favourites and hide records

2.3.1 Checking your publications list

When you first start using Elements it is recommended that you check your list of publications is correct and nothing is missing. This will help to ensure that the list of publications that will appear on your staff profile is accurate.

Go to 'My Publications' (Menu > Manage > Publications) and click on the 'Mine' tab to see your claimed publications. You may need to choose the 'Detailed view' of the list to see all the options you need.

<u>Rejecting publications</u>

The red cross icon can be used to reject any publications that have been incorrectly identified as yours. These will move from your 'Mine' list to the 'Not mine' list on your 'My Publications' page.

If you make a mistake, publications can be recovered from the 'Not mine' list by choosing 'Claim as mine'.

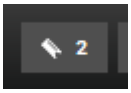
If a large number of the publications in your 'Mine' list are not yours, check the identifiers that are set up for you in Automatic claiming (see section 3 below).

<u>Joining (merging) records</u>

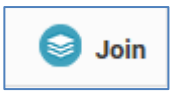
If you have multiple records for the same publication you can merge them. This can be done by using your Elements workspace.

Click on the 'Add to workspace' button next to each of the duplicate publications to add them to your workspace.

Click on the 'Workspace' icon at the very top of the Elements screen to view your workspace.



In your workspace, select the records you wish to join by ticking the check boxes and then click on the 'Join' button.



Splitting records

In Elements, a publication record often includes data from different data sources. To see the data sources, click on the 'Data sources' tab in the 'detailed view' of your publications list.

If you have two publications with very similar details they may have been incorrectly identified as being the same publication.

You can split them to form separate publications. Use the 'Split this record' icon (double headed arrow) next to the wrongly identified data source to split it out as a separate publication.

Claiming publications

You should claim any of your publications that are in your 'Pending' list so that they appear in your 'Mine' list. See claiming and rejecting (section 2.2) above.

Adding publications

Deposit any missing publications as described in section 4 below.

2.3.2 Editing records

Go to 'My Publications' (Menu > Manage > Publications) and click on the 'Mine' tab to see your claimed publications.

Changing the publication type

Below the summary of each publication will be its content type, for example, Journal article, Chapter, Conference paper, Book, etc.

If this is incorrect for any of your publications, click on the yellow pencil icon next to the content type to choose a different type from the drop down list. If you change your mind, you can change the publication type back, without any loss of data.

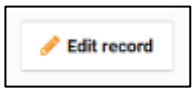
Editing publication details

If you have manually added a publication to Elements, you can edit the manual data source, for example to edit the title or amend the page numbers. Please note that there is no edit option for other data sources (for example if your work has been found in Scopus or Web of Science). However, you can add a manual data source to the record if you wish to amend the publication details that are displayed on your staff profile.

To add or edit a manual data source, view the full details of the publication by clicking on the magnifying glass icon below the publication or by clicking on it's title.

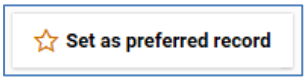
In the full details view, look at the 'Data sources' section.

If there is an existing manual record, click on the 'Edit record' button and make the required changes.



If there is no manual record and you would like to add one, click on the 'Add manual record' button.

- The manual data source may not be the version of the record used in your staff profile on the external web pages and therefore changes you make will not be reflected in your profile. If you wish the data in the manual record to be the data which appears in you external profile, set the manual data source to be your preferred record for that publication.



- Changes to publication details in manual data sources will not be reflected in SHURA. If edits need to be made to SHURA records, please email the details of the record to be amended and the changes required to: elements@shu.ac.uk

Changing your relationship to a publication

You may find that your relationship to a publication is incorrect. For example, a thesis you have supervised could be in your list of publications, with you credited as an author.

To change your relationship with a publication, view the full details of the publication. In the 'Links' section you will see your current relationship.

Use the 'Edit' option to change your relationship. The options are: 'Authored by', 'Edited by', 'Translated by' and 'Contributed to by'. If you have supervised a thesis, 'Contributed to by' would be the correct option.

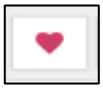
2.3.3 Favourites and hiding

You can organise your publications to improve how they display on your staff profile. This can be done from 'My Publications' at:
Menu > Manage > Publications

Click on the 'Mine' tab to see your claimed publications.

Setting favourite publications

Use the heart icon to select / deselect a publication as a favourite. Selected publications will appear in the Favourites tab on your Elements profile and at the top of your list of publications on your staff profile on the external website.



Hiding publications from your profile

Use the eye icon to hide or unhide publications. Hidden publications will not appear on your Elements profile and they will also not appear on your staff profile on the external website.

3 Setting up automatic claiming and modifying search settings

3.1 What is automatic claiming?

Elements searches external databases like Scopus or Web of Science to find publications that may belong to you. Elements can *automatically* claim publications from these searches for you, based on identifiers which uniquely identify you. These will then automatically appear in your 'Mine' publications list.

The identifiers you are mostly likely to set up are your ORCiD, Scopus ID and ResearcherID (Web of Science).

- An ORCiD provides a persistent digital identifier that distinguishes you from other researchers. If you do not already have an ORCiD, you can create one easily on the ORCID website.
- If you have publications indexed in Scopus or Web of Science you will have a unique identifier in each of these databases.

Automatic claiming can also happen based on your email address(es).

3.2 Setting up automatic claiming

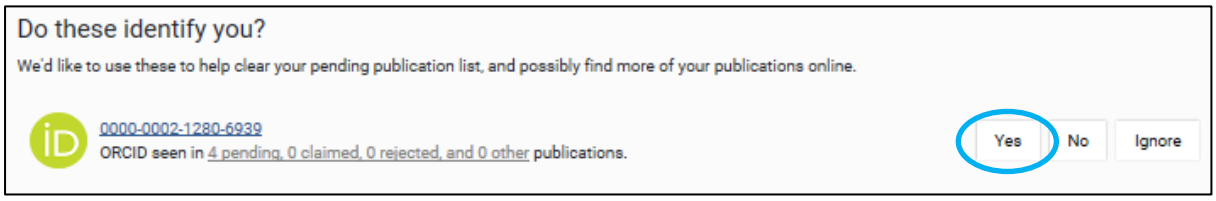
The page for setting up automatic claiming is at: Menu > Manage > Publications > Automatic claiming

PLEASE NOTE: Check carefully that any identifiers set up in automatic claiming are definitely yours. Publications linked to the identifiers will be automatically added to your Elements profile and to your profile on the SHU external web pages.

Do these identify you?

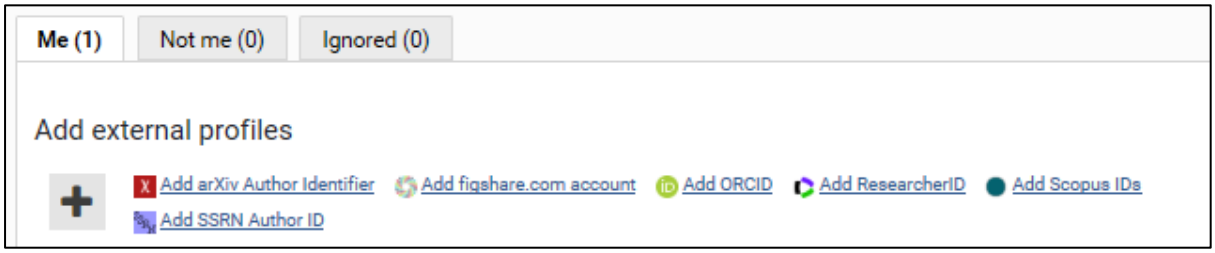
On the 'Automatic claiming' page, Elements will suggest identifiers which may be yours. You can choose to accept them by clicking on the 'Yes' button next to them.

If the identifiers are not yours, choose 'No' (to reject publications linked to this identifier) or 'Ignore' (the identifier will not be suggested as potentially yours again, but will also not be used to reject publications).



Adding identifiers

On the automatic claiming page, you can add identifiers by clicking on the link for the identifier you wish to add under 'Add external profiles'. You will need to know the ID number that you wish to add. Find this first on the ORCiD, Scopus or other source web site.



Connecting your ORCiD

Adding your ORCiD will enable Elements to automatically claim any publications it finds in external databases where the ORCiD is in the metadata.

The additional step of *Connecting your ORCiD* (which means you log in to ORCiD and give Elements the permission to use ORCiD data), enables Elements to use the information on your ORCiD profile to claim publications as yours in Elements.

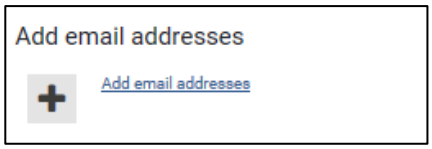
If your ORCiD has been added to your profile but not yet connected you will be prompted to Connect your ORCiD to Elements under 'My Actions' on your Home page. We strongly advise you to do this.

If your 'My Actions' does not have an action to 'Connect your ORCiD', you can check if it is added and connected on the 'Automatic claiming' page at:
Menu > Manage > Publications > Automatic claiming

Automatic claiming with email addresses

Elements will automatically claim publications based on your current SHU email address.

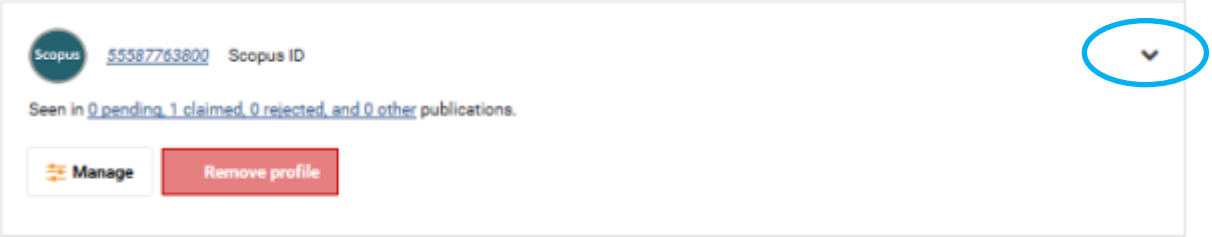
You can add additional email addresses, for example from your previous employers, which you may have used when publishing work in the past.



Modifying identifier settings

You can modify your automatic claiming settings on the 'Automatic claiming' page at:
Menu > Manage > Publications > Automatic claiming.

To modify the setting for a particular identifier, click on the arrow next to the identifier.



You can remove the profile if it is not correctly identifying you, by clicking on the 'Remove profile' button.

Alternatively, if you click on the 'Manage' button you can choose from a number of options of how publications linked to the identifier will be handled by Elements:

- Autoclaim - publications will be automatically claimed
- Auto suggest - publications will automatically go into your pending list
- Auto reject - publications will be automatically rejected
- Ignore - no action will be taken

3.4 Amending your name based search settings

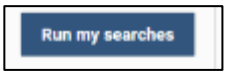
Elements searches for your name in external databases like Scopus or Web of Science to find publications that may belong to you and adds them to your 'Pending' list, ready for you to claim or reject.

You are encouraged to amend your name-based searches to ensure searches in external databases are accurate. There are three things we recommend checking in your settings:

- the variations of your name
- your addresses (affiliations)
- the databases which are used to find your publications

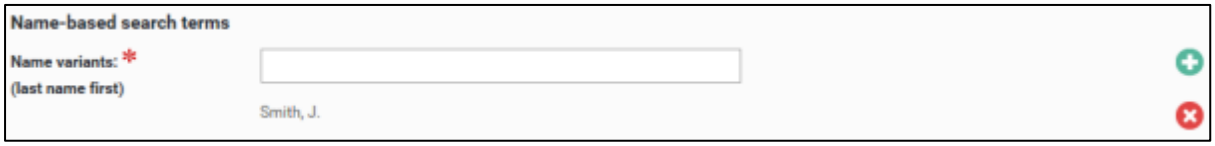
To view and amend your publication search settings, go to:
Menu > Manage > Publications > Search settings

At the top of the 'Search settings' page is the 'Status', showing the latest searches. The searches are scheduled to run regularly but you can run them by clicking on the 'Run my searches' button.



<u>Adding name variants</u>

In 'Search settings' - under the banner 'Name-based searches' - there is a section called 'Name-based search terms' with a field called 'Name variants'.



Your name will already be there in the format: Smith, J.

This may not be the version of your name you use in publications or there may be other variants of your name under which you have published. You can add additional variants of your name by using the 'plus' icon. It is not necessary to add variants which include your full given names. Initials only are required.

If you have completed the changes you want to make to your settings, click on the 'Save' button.

Adding affiliations

If you are finding that there are lots of publications in your 'Pending' list that are not yours, the accuracy of the search for your publications can be improved by adding affiliation names under 'Addresses'. Searches in external databases will look for results matching your name(s) **and** your addresses (affiliation). This helps to distinguish you in the searches from other researchers with similar names and initials but employed at other universities.

Adding 'Sheffield Hallam' (affiliations always work better without the word 'University') and any previous places of employment is helpful.

If you have completed the changes you want to make to your settings, click on the 'Save' button.

Choosing sources (databases) to be searched

Elements is configured to search for your publications in databases relevant to your subject area.

You can change the databases which are being searched, for example if the preselected databases do not accurately reflect your particular research interests.

You will find the list of databases that can be search at the bottom of the 'Search settings' page.

Databases which are being searched for your publications have a tick in the 'Search by name' column. These can be added or removed by simply ticking/unticking the checkboxes.

- arXiv - physics, maths, engineering, computing
- CiNii EN / CiNii JP - Japanese literature
- DBLP - computer science
- MLA - modern languages
- PubMed - biomedical sciences, health
- RePEc - economics
- Scopus - multidisciplinary
- SSRN - social sciences
- Web of Science - multidisciplinary

If you have completed the changes you want to make to your settings, click on the 'Save' button.

Other search settings

There are other settings you can amend if the searches are not finding your publications or if they are finding too many publications which are not yours.

However, additional search terms are restrictive and we do not recommend you use this. For example, if you add Keywords or Journals, then Elements will only retrieve articles that include those keywords or are published in those journals and may miss your other publications.

For help please see the guide to research settings on the Library Research Support team pages about Elements: http://bit.ly/elementsSHU

Alternatively, please contact the Library Research Support Team

- Email: elements@shu.ac.uk
- Call: (0114) 225 3852

4 Depositing the manuscript of your publications

You can deposit the manuscript of your publications on SHURA via Elements. This is your main route to making your work Open Access. It is also important to enable you to meet funder requirements and for your work to be eligible for the next REF. Research England require journal articles and conference papers (published with an ISSN) to **be deposited within 3 months of the date of acceptance**.

It is possible to add a publication's details to Elements without depositing a manuscript and there may be circumstances where you wish to do this. However, if you do not deposit a manuscript, a record on SHURA will not be created.

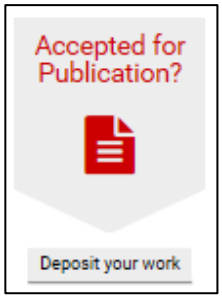
4.1 Depositing journal articles and conference papers on acceptance

Please deposit your new journal articles and conference papers as soon as they are accepted for publication.

You will need to know details of the publication you wish to deposit and have a file of the final peer reviewed manuscript saved. This is the version of the manuscript with all changes made in response to peer review but before publisher typesetting and copyediting. Knowing the acceptance date is also helpful.

In addition to making your deposit, you will need to forward the email from your journal editor notifying you that your work was accepted for publication to: elements@shu.ac.uk

To deposit your journal article or conference paper:



- On your Elements Home page, click on the **'Accepted for publication?'** button

- In the box that opens, choose whether to add a 'Conference paper' or a 'Journal article' by clicking on the appropriate button

- Elements can help you find the details of publications which you wish to add. However, when you are entering publications that have only just been accepted, it is unlikely to be able to find the details from elsewhere.

  You can try searching for the title or DOI of your publication if you wish to do so.

  If the search finds your article or paper you can claim it, but make sure you are certain that it is your article. Claiming it instantly adds it to your list of publications.

- If the search does not find your publication, you will need to enter the details manually. You can do this as follows:
  - click on the 'Skip' link below the Title or DOI search box
  - on the next screen, enter the details of the journal article or conference paper - the fields with a red star are mandatory
  - you can fill in 'Additional information' if you wish to do so
  - click on the 'Save' button

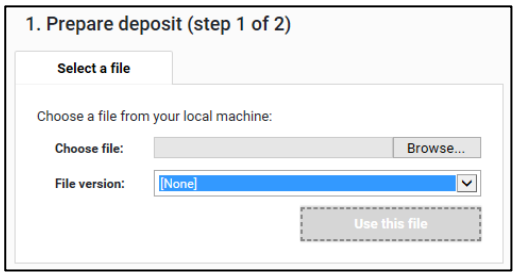
- Respond to the prompt to link the publication to a grant as appropriate.

- The next step is to deposit your full text manuscript. **You must do this for your publication to appear on SHURA and for your deposit to be eligible for the REF.**

  To select a file to deposit, click on the 'Browse' button and find your saved file.

  Choose the file version 'Accepted', 'Published', 'Submitted' or 'Supporting information'.

  Click on the 'Use this file' button.



- You can 'Upload another file' if required, for example if you have a separate file of tables/figures.

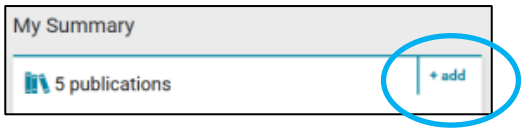
- Complete the deposit by clicking on the 'Deposit' button.

  You will see a page confirming the deposit status of your publication (on the 'Thank you' screen).

4.2 Depositing a new publication of any other type

The 'Add a new publication' option allows you to add the details of new publications and research outputs of any type. It also enables you to deposit a manuscript and create a SHURA record (this is strongly recommended).

- From your Home page, click on the **'+ add'** link in the 'My Summary' box. Alternatively, there is an 'Add a new publication' button on the 'My Publications' page.



- Choose the type of publication or output that you would like to deposit.

- Elements will prompt you to search (usually by title) for your publication or other research output.

  Enter the title of your publication or output and click on the 'Search' button.

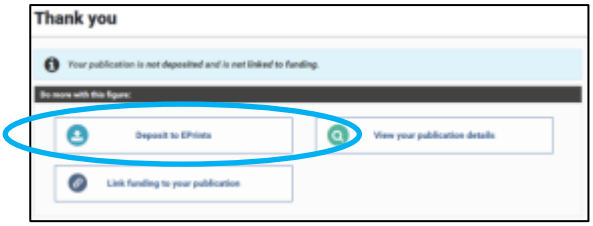
  If Elements finds a matching output, click on the 'Claim' button next to it.

  If Elements does not find a match, click on the 'Skip' link below the search box to go to the page where you can enter the details.
  - Enter the details of the publication or output - fields with a red star are required.
  - You can fill in 'Additional information' if you wish to do so.
  - Click on the 'Save' button.

- Respond to the prompt to link the publication or output to a grant as appropriate.

  The record is now saved in Elements (you will see a Thank you screen confirming this).

  If you want your publication or output to appear on SHURA, you will now need to deposit a file of the full text manuscript or other appropriate file (PDF of a poster, image of artefact, a film, etc.).



- Click on the 'Deposit to SHURA' button on the 'Thank you' screen.

- To select a file to deposit, click on the 'Browse' button and find the file where it is saved on your drives. Then click on the 'Use this file' button. You can Upload another file if appropriate.

- Complete the deposit by clicking on the 'Deposit' button.

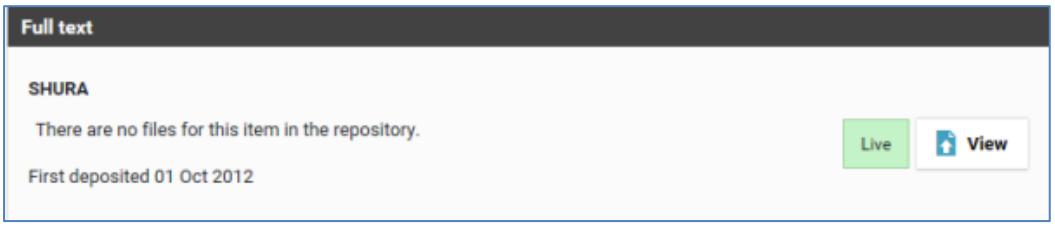
4.3 Depositing a manuscript for an existing Elements record

You may have publications in your publications list in Elements that do not have the manuscript deposited in SHURA. You can deposit the manuscript as follows:

- View the full details of the publication
- Scroll to the section called 'Full text'

  For publications with no SHURA record, you will see a 'Deposit' button.

  For publications where there is a record on SHURA you will see a 'View' button.



  Click on whichever of these buttons is available and you will see the page where you can deposit the manuscript for that publication.

- To select a file to deposit, click on the 'Browse' button and find the file where it is saved on your drives. Then click on the 'Use this file' button
- You can Upload another file if required (for example if you have a separate file of tables/figures)

- Complete the deposit by clicking on the 'Deposit' button.

If you have any questions about Elements or if you need help, please contact the Library Research Support Team

- Email: elements@shu.ac.uk
- Call: (0114) 225 3852
- Elements help pages http://bit.ly/elementsSHU