How do I access my profile?

Go to https://experts.umich.edu and click on Edit Profile from the Tool Kit in the header to Log In to Elements with your uniqname and level 1 (Kerberos) password. After logging in, you will be in the back of the database (powered by Symplectic Elements).

This is your homepage. Scroll through the My Actions section. You can set the view in this section to carousel or list.

Every item links to the section in Elements where tasks can be completed, including:

- Set up your search settings
- Claim or reject publications
- Add a Scopus or ORCID identifier
- Deposit publications to Deep Blue, the institutional repository
- Add records of impact

Click on the label any section to go to an activity type or click + ADD NEW to manually add records. Note: Grants data is retrieved from U-M’s eResearch Proposal Management system and cannot be manually edited.
How do I edit my user profile?

Click on **Edit My Profile**

Sections of the user profile can be manually edited, and some information that is obtained from authoritative U-M sources, such as name, appointment data and campus email, are locked from editing. If locked information is incorrect, contact [michigan-experts-help@umich.edu](mailto:michigan-experts-help@umich.edu)

You can add a photo and enter a narrative about your research in the Overview. This section will be visible to other U-M faculty when they are logged in and search for a colleague in Elements. This information could be useful in facilitating collaborations across the institution.

Other possible edits include Education (degrees, certifications, postgraduate training), Language Competencies, and Addresses (both mailing and web).

*While most edits will be visible to other U-M users logged into Elements, not all will translate to the public Michigan Research Experts webpage due to current limitations in the public profile frame.*
Editing your user profile

If you have added any author identifiers (e.g., Scopus, ORCID) in the Automatic Claiming Settings, they will be displayed as links under Other Profiles.

Publications and Grants are grouped into Recent, Favorite and All tabs at the bottom of the page.

A map of your U-M co-authorship network is visible.

Your privacy setting is under your control. If at any time you wish to hide your profile from public view, click “Internal.” If your profile is set to Internal (ALL profiles are brought into Elements with a default setting of “Internal”) and you wish to make your profile Public, simply toggle the setting.

While we have not configured the CV to Michigan Medicine or other U-M formats, data from your profile can be downloaded into a basic CV or Biosketch.
The Elements Menu

Clicking on the menu icon in the upper left hand corner to easily navigate Elements. Browse the tabs or use the search box to find pages to carry out tasks. *Note that the Menu options available will be determined by your rights in the system.*

The My Work section will guide you through your works to claim, reject, mark as favorite, link to funding, etc.

In Settings, you can add, claim or reject author identifiers, connect your profile to your ORCID account, or refine your name settings to optimize auto claiming by the Elements system.
Manage Delegates

You can grant a delegate (or delegates) editing rights to your profile under Account Settings.

Your delegate(s) will be able to log in (using their own credentials) and “impersonate” you to manage and edit your records.

If you do not find your delegate(s) in the name search, please contact us at michigan.experts.help@umich.edu to request a user account be created for your prospective delegate(s).

Here you can also set a preferred name to display in Elements. Note this will not change your name in the U-M HR system nor modify your name in the name-based search settings.
Acting as a Delegate

You must have a User Account to be a Delegate. Please contact Michigan.Experts.Help@umich.edu to request an account.

Once you have been assigned a delegate role for a faculty member(s), you will be able to make any edits to the profile, including claiming publications and identifiers, that the faculty member would be able to make.

To “impersonate”:

1. At https://experts.umich.edu, click on Toolkit in the header and choose “Edit Profile”.
2. Log in with your uniqname and level 1 password. You will be taken to your own Elements landing page.
3. Click on the impersonate button in the solid blue header.
4. Enter the “Last Name, First Name” of the person you wish to impersonate.
5. Click “Set Filters”.
6. Click hyperlinked name.
7. You are now impersonating the chosen faculty member.
8. To stop impersonating, click on the “X” in the tab at the top center of the page.
Automatic publication claiming

Based on the data in the system, Elements will attempt to guess which author identifiers (e.g., Scopus ID, ORCID, etc.) are yours. You can manage your author identifiers in Experts to enhance the accuracy with which Elements attributes publications to you. Once author identifiers are added to the system, Elements can automatically claim existing and future publications associated with these identifiers without any further action on your part.

From your profile while logged in, click on the Menu tab and choose Automatic Claiming under the Setting header. Confirm if an identifier is yours by clicking Yes, No or Ignore.

Once you have confirmed, Elements will begin to automatically claim all publications associated with your identifier.

If you have declared that an identifier is not yours, all publications that feature the identifier will be automatically rejected and will not appear as a pending publication.
How to claim or reject publications

Symplectic Elements searches a variety of publication databases multiple times per day. Most publications can be automatically claimed or rejected based on your author identifiers. However, when the system finds publications that cannot be definitely claimed or rejected, it will flag them and add them to your pending publications list. Click on the Pending tab in My Publications to view publications awaiting your approval or rejection.

Claim publications by clicking CLAIM, or reject by clicking REJECT. You can use the checkboxes on the left to select multiple publications, and use the buttons at the top of the list to ‘batch’ CLAIM or REJECT.

Claimed publications will be moved to the list in the Mine tab, and rejected publications will be moved to the list in the Not Mine tab.

Please contact michigan-experts-help@umich.edu for assistance resolving large numbers of items that do not belong to you. We can clear your Pending list or help you modify your Search Setting to improve the accuracy of the searches.
Summary View

You have the option to view your publication records in a Summary of basic bibliographic data or to focus on other aspects of the publications such as Metrics, which include Citations and Almetric Data and Journal Rankings.

The Relationships tab below the article allows you to view other users at U-M who are associated with the article (co-authors, editors, translators). The History tab shows activities with the publication item (when it was claimed, merged, split, or edited). The Sources shows all the data sources that comprise the publication object.

To the right of the publication title, there are options to mark a publication as a Favorite (the heart icon) or to hide a publication from the public profile (the globe icon). The publication will still be in the claimed publication queue and therefore available internally for CV generation or unit reporting. This can be useful if research is done in a sensitive topic or an investigator has changed research directions and wants to hide scholarship they may feel is no longer relevant to their ongoing work.

Clicking on the Deposit tab at the bottom of the record will take you into a workflow that will deposit the item to our Deep Blue institutional repository. You also have the option to set the item as a favorite, hide the item from public view, or add the item to the workspace.
Using ORCID with Elements

There are three ways Elements can utilize ORCID:

1. **Automatic claiming** – You can add an ORCID ID to your list of external identifiers and define how Elements behaves when it finds your ORCID ID in publication metadata, e.g. you can choose to have Elements automatically claim a publication if it is associated with your ORCID ID.

2. **Supplementary search** – As well as using ORCID for automatic claiming, you can CONNECT to your ORCID account, granting Elements permission to collect information from ORCID. Elements will search your ORCID account for a range of publication persistent identifiers. These are then used to search Elements data sources and return publication metadata.

3. **ORCID write integration** – You can send publications from Elements to your ORCID account and control which publications are sent. From your profile, go to the ORCID settings page under My Account in the Menu tab. Only claimed ORCID IDs will display in the setting page; if you have not claimed an ORCID ID, you will be able to connect with ORCID from this page (you can still connect to ORCID from the ‘My Actions’ prompt or the Automatic Claiming page. For security reasons, if you have already connected to ORCID and authenticated read access, you will need to re-authenticate.
Configuring your ORCID setting in Elements

From your profile, go to the ORCID page under SETTINGS. Only claimed ORCID iDs will display; if you have not claimed an ORCID iD, you will be able to connect with ORCID from this page (you can still connect to ORCID from the ‘My Actions’ prompt or the Automatic Claiming page). For security reasons, if you have already connected to ORCID and authenticated read access, you will need to re-authenticate.

Choose from three options:

- **Read from and write publication data to my ORCID account** – You will be able to send publications from Elements to ORCID. Elements will also read data in your ORCID account to improve the accuracy of the search results.

- **Read data from my ORCID account** – Elements will read information in your ORCID account to improve the accuracy of their search results. If you had previously connected to ORCID, this setting will be preselected as this was the permission level granted to Elements.

- **Only use my ORCID to support automatic claiming** – Elements will neither read from not write to your ORCID account. If you have previously claimed an ORCID iD but not connected to it, this setting will be preselected. Elements will still use the ORCID iD for automatic claiming.
Define which publications will be sent to ORCID

If you choose to enable “Read from and write publication data to my ORCID account”, you will have a few options to define which publications are sent from Elements to ORCID:

- **For journal articles, send ‘published’ or published online only** – Preselected by default to prevent journal articles that do not have a status of ‘published’ or ‘published online’ to ORCID. You can deselect this option so all journal articles are sent to your ORCID irrespective of their publication status.

- **Send publications where you have marked your relationship as private** – By default, publications which you have marked as ‘private’ will not be sent to ORCID. You can select this option to send publications marked ‘private’ to ORCID.

- **Only send favorite publications** – You have the option to only send publications marked ‘favorite’ to ORCID. If selected, you need to mark the publication ‘favorite’ before it will be sent.

You will have the option of removing all publications you have sent to ORCID from your ORCID account by selecting the Remove from ORCID link. The ORCID iD will be frozen in Elements, and following deletion, your integration settings will be reset to ‘Only use my ORCID iD to support automatic claiming’.

Updates to ORCID are processed as part of a queue and may take some time to appear.
Search Settings

Your search settings are preloaded with your name (usually in the form of LASTNAME, INITIAL), 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.

To edit your Search Settings, from your profile, click on Settings and choose Name-Based Search.

**Be sure to click SAVE** at the bottom of the page when you’ve finished editing your search settings.
Manual Entry

You can always add publications manually if they are not found in the online databases. Select + ADD NEW under Publications on your homepage, or from within your Publications workspace, click on the + in the upper right corner of your screen.

There is automatic checking to confirm you do not create a duplicate, just enter the title or DOI and search.

For some articles and books you can use “Assisted Entry” to retrieve details from CrossRef or Google Books. Enter a title, DOI or ISBN. This will pre-populate the manual entry form. We hope this saves our researchers time and improves the accuracy of the record.

You can claim, or skip to the next step.
Manual Entry Form

For some types, there is no option but to fill in all the details manually. Required fields are marked with a red asterisk * and essential fields are 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 marked with a large question mark ?

Be sure to save and continue, and follow the prompts to view your publication.
Create a Group Statistics Report

An individual with the role of Statistician for a research unit can create a Group Statistics Report. Statistics Reports are primarily in chart format and reveal publication details for the total membership of the group, such as number of members, total publications per year, publications by citation count, and top cited publications. Group Statistics Reports can be further refined to include only certain members of a group.

Log in through the Toolkit in the header (Edit Profile). Under the Reports & Dashboards tab choose Group Statistics. The group(s) you have access to report on will have been checked. Set your filters:

- Date From and Date To in DD/MM/YYYY format
- If desired, include ‘inactive users’ (those who have left U-M)
- If desired, include non-academic faculty (those with on-line searches turned off)
- Choose the desired citation source

Run the report.
Create a Publications or User Report

An individual with the role of Statistician for a research unit can create a Publication or User Report.

Log in and select the Reports tab from the menu. Under Reporting & Dashboards, choose Basic Reports.

The group(s) you have access to report on will have been checked. To run a publication report, set your filters in step 2:

- Date From and Date To in DD/MM/YYYY format (note: because Elements works on the reporting date, you might prefer NOT to filter on dates now and instead filter on Publication Date in your report)
- If desired, include ‘inactive users’ (those who have left U-M)

In step 3, choose Publications (linked to the selected users), your publication type, and return Publications by linked user. Click Get Data Extract.

To run a User report, go to step 3ii and choose the type of report you want. We run Publication Approval Counts to see who has zero claimed publications. These faculty profiles need identifiers and scholarship claimed to be made public.
Create a Curriculum Vitae (CV) or NIH Biosketch

Michigan Research Experts offers the ability to create raw CVs or NIH Biosketches populated with the research outputs in your user profile.

Click on the Toolkit icon in the header of the Michigan Research Experts homepage and select Edit Profile. Log in with your uniqname and Level 1 (Kerberos) password. From the Menu tab, click on the Reports tab and choose CVs and Individual Reports OR, from within your profile, click on the “CV and Reports” icon in the upper right-hand corner.

You have the option to download your research activity as an Academic CV or an NIH Biosketch, in old or new format. You will also be able to specify a date range, and choose to download as PDF or Word document.

If you have assigned a Delegate to your user account, your Delegate will have the ability to create these reports on your behalf.
Resources & Help

Should you need assistance or wish to provide feedback, you can connect with the team that supports Michigan Research Experts by sending an email to michigan-experts-help@umich.edu.

Click on the Toolkit icon in the header of the Michigan Research Experts homepage at https://experts.umich.edu and select About to be directed to information and a robust library of FAQs.

If you or your unit would like a demonstration of Michigan Research Experts, please contact us at michigan-experts-help@umich.edu.