**Vita/Elements Workflow (DRAFT)**

**Day one (first-time access)**
- **Log into Vita**, then click on the Elements link to create your account. This is an overnight process.
- **Write all narratives** in Word, then copy/save each in Vita. **IMPORTANT: You must save each narrative separately.**
  - Have a submission deadline? Reserve time nearer that date for copying narratives into Vita + as-needed edits.
  - Your area’s P&T experts may provide more guidance about when to write narratives and copy them to Vita.

**When you can log into Elements**
- Update **Elements search settings**, then wait a few days for new settings to start working for you.
- Give delegates access to your Elements account (as appropriate) and update your profile (photo, bio details).

**A few days after updating Elements search settings**
- Get a printed copy of your dossier or CV.
- Log into Elements and update your database/author ID **automatic publication claiming** settings (help article forthcoming).
- Return to Elements homepage and click Pending Publications button to access My publications/Pending tab.
- Adjust display settings (just under Pending tab): Sort by=Title (A to Z), 100 results per page, Compact view, so that most (not all!) publications display in alphabetical order (titles may be missing for some—see notes below).
- Search for, then **claim** each publication on printed dossier or CV by using Title filter (right margin).
  - Whenever feasible, **join duplicate records**, e.g. 1 from RIV and 1 "harvested group" (from databases).
  - Use Publication type filter to "chunk" your work: e.g. first find all books; then all journal articles; etc.
- After you have searched for and claimed all publications on dossier or CV, many remaining pending publications will not be yours. Quickly scroll through remaining results to verify whether you have any left to claim.
  - If none are yours, either click "select all on page" near top, then click Reject button at right, or reject one at a time via Reject button under each publication’s title and citation details.
- Next, verify that a **preferred record** is selected (yellow star is filled in) for each publication.
  - Two places you can do this: a) claimed Publications tab > Detailed view > click Data sources tab (only title and source are displayed) OR b) click on publication title > each source's publication details are displayed.
  - Until a preferred record is selected, this publication will not appear on your dossier (alert appears).
  - Sometimes a publication will not appear in Vita's supporting data area (see below) until after you have first selected its preferred record.
- **Manually add** each remaining publication not yet harvested by Elements during database searches.
  - You can **join** a manually added publication with citation records Elements harvests in a future search.
  - After selecting preferred records for each publication, return to Vita (see "Block O" in upper right); refresh login; and navigate to **Publications Supporting Data** to update other details (e.g. description of effort, citation #s).
- **Co-authored publications** may require additional edits.

**Related notes**
- Elements eye button **hides a publication from view** for people using Vita's (not yet active) public search function.
- Some publications migrated from RIV to Elements have titles that were placed in the wrong field; result is [title field missing]. Verify none are duplicates or require edits (e.g. change publication type; join with other records).
- Joining is important: combines publication metrics with details in manually entered and/or RIV-migrated records.
- Date-related settings for dossier report apply only to the categories listed below the date filter fields.
- When an item does not display in the dossier as expected or required, the workaround is always to edit in Word.
- The impact factor and citation tables in RIV's dossier report were proprietary vendor add-ins. Neither table is explicitly required in OAA's **core dossier outline**. If your area has added either of these as requirements, you will need to contact your P&T expert(s) for guidance about steps to take going forward.
- Known citation metrics added in Vita's **Publications Supporting Data** area will appear in the Vita dossier's Article Citations table, just below the Article Citations heading and just above the heading "5) Research Funding".