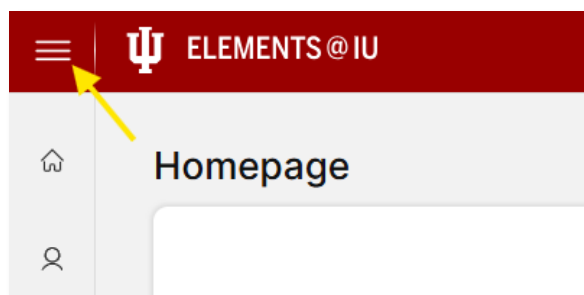




Using Basic Reports as an Administrator

Basic Reports are the core tool to extracting summary data on all activity types in Elements. Access is limited and is only available to those assigned the Statistician (RI) role for their relevant group. If you are unable to access the Basic Reports page, you likely have not been assigned the necessary role. Please contact elements@iu.edu with the KFS org code for the appropriate group (Department/School or Campus) to request access.

Accessing the Basic Reports Page



Use the hamburger menu in the top left corner of the Elements screen to open the Main Menu. Navigate to the “**Reporting**” tab and then select “**Basic Reports**” from the “**Reports & Dashboards**” section.



Generate a Basic Report

The first step of generating a data export is to select the population you want to run a report on. You can search by individual users or on behalf of an entire group.

The group structure and memberships are based on the KFS structure. You can use the arrows to expand the campus level groups to select a specific academic unit such as a school or department.

To review group membership, run the User Group Membership report available in the Report Hub.

Basic Reports

Generate data export

1. Select users and/or groups:

i. Select users
Start typing a name to get a list of suggestions.
Select users from the list.

ii. Groups
Only groups for which you have statistician rights are enabled for selection.

☐ Indiana University

> ☐ Bloomington

☐ Columbus

> ☐ East

☐ Fort Wayne

> ☐ Indianapolis

> ☐ Kokomo

> ☐ Northwest

> ☐ South Bend

> ☐ Southeast

The second step is setting additional filters for your search results. You can limit your search to a specific date range, include former users, or choose to include non-academic Elements users.

2. Select additional filters:

Date from (inclusive)
Valid formats: dd/mm/yyyy, 28 Sept 2023

Date to (inclusive)
Valid formats: dd/mm/yyyy, 28 Sept 2023

Include non-current users
Toggle on to include users who are no longer current at the institution.

☐

Include non-academics
Toggle on to include users who are not defined as 'academics' in the user feed.

☐

The final step is to select the data you want to export. The four main object categories IU is using Elements for are Scholarly & Creative Works, Grants & Contracts, Service & Leadership, and Teaching Activities. You can choose to return all activity types for an object category or select a specific activity type such as only searching for the Article work type from the Scholarly & Creative Work object category.

3. Select data export or report:

i. Data export
Create a CSV/Excel export of data associated with the selected users.

Object category
Scholarly & creative works (linked to the selected users) ▼

Scholarly & creative work type
All ▼

Return
Scholarly & creative works by linked user ▼

Display all fields ☒
Toggle on to create columns for all fields in the category, even though some types do not use them. This will make all reports of this category have the same set of columns.

↓ GET DATA EXPORT

ii. Publication(.ris) and H-index reports:

Report
H-index [CSV/Excel] ▼

↓ GET REPORT

There are a variety of ways you can return the results of your search: works only, works by linked user, works by data source, and more. We recommend selecting “**...works by linked user**” in both the Object Category and Return fields to clearly show each faculty member’s associated work. Complete descriptions of each of the return types is available below.

Once you have selected the complete parameters for your data extract, click “**Get Data Export**” button and your report will download.

Basic Report Return Types

Return Type	Description
Object (e.g. <i>Teaching Activities</i>)	This report returns a deduplicated list of objects (e.g. publications) associated with the selected users. The record returned is based on the default source precedence.

...by linked user	<p>This is a simple report format that contains one row for each user-element pair, using the information from the user's 'preferred' source. It will contain all the same element details as the '[object] by data source' report, but only a minimal amount of user information. This will also include user options such as whether a publication is visible or a favorite.</p> <p>For publications with two co-authors within the group(s), there will be two rows - one for each co-author. If a user has entered multiple relationships between themselves and the object, there will be a row for each relationship. The data shown will be from each user's 'preferred source'.</p>
...by data source	<p>This gives information at the item level and does not contain any information about users of the system, only the list of authors stored in any metadata associated with a publication.</p> <p>The report will include one row for each source from the same item. This is because, without being linked to an author, there is no information about a 'preferred source'. If you require counts of unique items de-duplicate by publication ID.</p>
Links with users	<p>This report will provide all the links between elements reported in the '[Object] by data source' report and your system's users. So, if two users have co-authored a publication, then there will be two rows in the 'Links' report, one to show the link to each author.</p> <p>This report also includes information about the preferred source for each user.</p>
Links with other objects	<p>A report which details records (of all types) to which a selected source record has been linked to.</p>

More information is available at: <https://support.symplectic.co.uk/support/solutions/articles/6000049913-elements-basic-reports-and-group-statistics>
(account creation using your IU email required)

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