



SYMPLECTIC

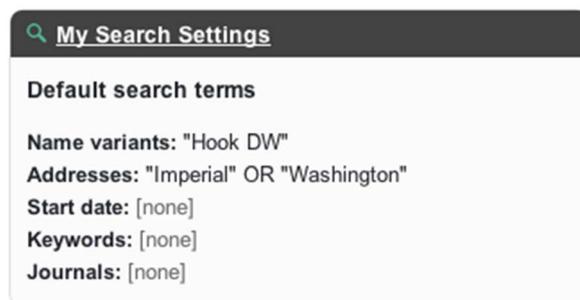
**Trouble-shooting guide for search
settings**

Contents

Why are some of my papers not found?	3
How does the system choose my initial settings?	4
Making changes to initial settings	6
Make changes for individual databases	10
Find individual publications using ID numbers	14
Trouble-shooting FAQs	19

Why are some of my papers not found?

Initial search settings are created automatically when your details are added to the *Elements* system, and are completely flexible to being amended by you or your delegates.

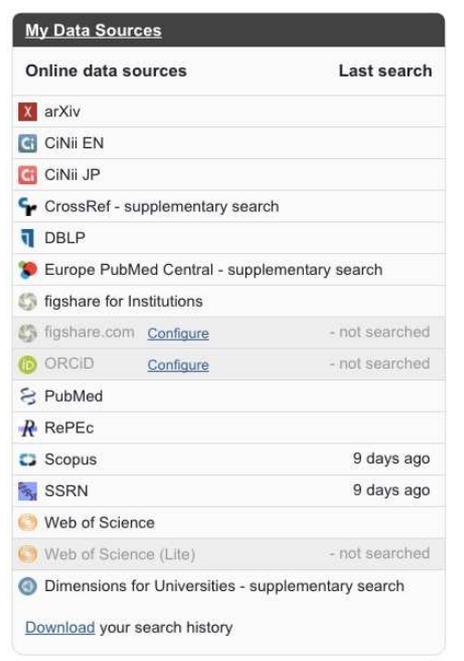


These initial settings will bring back a good result for more than 90% of researchers in STEM subjects - identifying all the correct publications in the databases without finding a large number of incorrect publications that would need to be declined.

For some users, a proportion of publications may be missed for a range of reasons, such as publishing with collaborators outside your institution, or using different combinations of your name and initials for different publications.

In these cases, your search settings will need to be amended to better fit the way you publish.

This guide aims to show you how to do that. It will also provide advice on a range of other search options, and answer some common questions.



If you are still experiencing problems after consulting this guide, or if your question isn't answered here, please contact your institution's support staff, via the link on the 'help' page.

How does the system choose my initial settings?

When your details are first added to the *Elements* system, search settings will be created based on the data received about you from your institution's Human Resources system.

All users

For all users, their name will form part of the search settings.

It is stored in *Elements* in this format:

- Lastname, INI

It will be submitted to each online database in an appropriate format for their requirements. Please note that while some bibliographic databases can search with first names, the majority employ the "Lastname, INI" format. Even the databases that include first names do not do so for every year.

Users with common names

When importing your details, *Elements* will compare your name against data from the US Census, in order to work out how relatively 'common' your name is.

For users whose names occur frequently in the Census, further search settings must be added; otherwise, the system is likely to find too many results in the online databases.

The precise search terms used in these cases will be determined by your institution, but they are likely to be a range of keywords associated with your institution, added to the 'address' search setting.

An example:

- institution name
- a range of individual school or faculty names
- the address or postcode of your institution.

This will create a Boolean search string that will limit the initial results to publications that match your name to an author field AND one of these terms to an item in the address field.

Start date

Your institution may also have set up a default start date for new users.

Troubleshooting tip: A start date instituted by your institution will limit the initial search range, and may exclude a number of your early publications.

You are free to change this date, which may be included simply to indicate to new users the minimum range of publications your institution wishes to see entered into *Elements*.

What is submitted?

Symplectic Elements v4.17 - Trouble-shooting guide for search settings

The resulting search string will be submitted to each active database (with appropriate syntax) in this basic form:

```
(name OR name) AND (start date) AND (address OR address)
```

After retrieving relevant publications from each database, the system will match together identical publications from different databases into single records, and then email you concerning the results.

If the results do not include all your recent publications, you can consult the following sections of this guide to work out how to improve your search settings and get a more accurate result.

Making changes to initial settings

You are free to change your search settings in any way you like, or create separate queries for each database.

Edit the search settings

Click on 'My Search Settings' on the Home page and you will see the screen opposite.

The top of the screen shows your recent search history and, below that, you can make changes to your initial search settings.

The same set of 'common' search settings are submitted to all the online databases unless these are separated from the Common search terms. The next section will describe how to do this.

The most common changes that need to be made are to add Name variants and to add previous institutions or the institutions of regular collaborators to the 'Addresses' area

The screenshot displays the 'Settings for automated publication gathering' interface. At the top, there is a navigation bar with tabs for Home, Profile & CV, Elements, REF2014, HERDC, Reporting, and Explore. Below this is a 'Status' table showing search history for various sources.

Source	Last searched	Next search after
arXiv	15:11 15 Sep 2014	20:39 16 Sep 2014
figshare	15:11 15 Sep 2014	20:39 16 Sep 2014
ORCID	19:36 16 May 2014	20:39 16 Sep 2014
Scopus	15:33 16 Sep 2014	20:39 16 Sep 2014
Web of Science	08:37 18 Aug 2014	20:39 16 Sep 2014
Web of Science (Lite)	08:37 18 Aug 2014	20:39 16 Sep 2014

The 'Settings' section includes:

- My default search terms:** A text input field containing 'Hook DW'.
- Addresses:** A list of institutions including 'imperial' and 'washington'.
- Online database IDs:** A dropdown menu currently set to 'arXiv'.
- Source-specific search terms:** A table with columns for 'Currently searched', 'Simple mode', 'Advanced mode', and 'Use default search terms (simple mode only)'. It lists various databases like arXiv, CNI, DBLP, ORCID, PubMed, and Scopus.

Name variants

To add a new variant of your name and initials, type in the box (using the format 'Hook D') and then click on the blue 'plus' button to add it to the list.

Incorrect variants can be removed by clicking on the red crosses.

The screenshot shows the 'Settings' page for Daniel Hook. At the top, a yellow banner states: 'Daniel Hook's settings were last modified on 16 Sep 2014 at 20:09 by Jeff Lang.' Below this, the 'My default search terms' section is visible. Under 'Name variants:', there is an input field with a blue '+' button to its right. Below the input field, two variants are listed: 'Hook DW' and 'Hook D', each with a red 'x' button to its right. A blue tooltip box provides instructions: 'Add all combinations of your name and initials under which you publish. If a name variant is only used by one online database, you can customise this setting in the relevant section of this page. We recommend the format "Other, AN" for most databases.' Below the name variants, the 'Addresses:' section has an input field with a blue '+' button. Two addresses are listed: 'Imperial' and 'Washington', each with a red 'x' button. A blue tooltip box says: 'Add keywords associated with previous institutions, or those with which you collaborate.' Below the addresses, the 'Start date:' section has an input field and a blue tooltip box with date format examples: '14 Mar 2001 (dd MMM yyyy)', 'Mar 2001 (MMM yyyy)', and '2001 (yyyy)'. Below the start date, the 'Keywords:' section has an input field with a blue '+' button. A message states: 'Daniel Hook has not supplied any keywords.' and there is a 'Switch to advanced view' button. At the bottom, the 'Journals:' section has an input field with a blue '+' button.

Names cannot be edited. To change a variant, simply remove the incorrect version and add the new, correct version separately.

Add addresses

To add details of an institution name that frequently appears on your publications, type each new keyword (e.g. the name of the institution or research centre) into the box, then click on the blue 'plus' button to add each one.

You will only need to do this if the system has automatically included your current institution's address terms in this area.

Troubleshooting tip: Many bibliographic databases use abbreviated versions of institution names, so entering the full name in the address field will result in missed publications. Focus on the key word or words in the institution name.

Examples:

- Enter "Emory" rather than "Emory University."
- Enter "Cambridge" rather than "University of Cambridge."
- Enter "Cincinnati Children" rather than "Cincinnati Children's Hospital."

Please note: Adding address terms where previously there were none will, in fact, restrict your search by causing the new keywords to be added to the search string with the 'AND' logic operator. In other words, searches with address terms will retrieve *only* results that include those addresses.

Other search terms

Start date

If you wish to change the search to run from a different date (or add a start date if one isn't included by your institution) enter this here.

As previously stated, including a Start date will restrict the results retrieved.

Please note: Some bibliographic databases do not contain comprehensive records for papers published before 1990.

Keywords

No keywords are used by default but, if you find you have a namesake in another field of work, adding keywords may help to exclude their publications from your search results.

You can add new keywords one by one, and the system will search for each one in turn.

Please note: Use of keywords will restrict results retrieved to those items that include the keywords.

If you want to use additional logic terms to control the keyword search (AND, NOT etc.), switch to advanced view.

Journals

If you know that your publications are restricted to just a few journals and wish to exclude any others, enter the journal names using the official abbreviations for the online databases (these may differ slightly - enter all the different versions if so). The system will search for each journal in turn (using the OR logic term).

Please note: If you use the Journals field, results retrieved will be restricted to items from *only* those journals.

Save your search settings

When you have finished editing your search terms, be sure to click the "Save" button before leaving the page.

What happens next?

You do not have to wait until the next regular search (usually once a fortnight) to see the results of searching the databases with your new settings.

When you click on 'Save', a message will be posted at the top of the screen, showing that your details have been placed in a queue to be submitted to the online databases.

The actual search will happen during the next system-wide 'scheduled search' after the posted time. At most institutions, all user records waiting in this queue will be submitted once per hour, or at a similar frequency.

You will notice that the earliest time the search will happen is at least 30 minutes after you saved the new search settings.

This built-in delay allows you to finish editing before a search takes place. This means that there may be a delay of up to a few hours (depending on the frequency of your institution's scheduled search) before results are delivered to your "Pending" file.

The system will email you as normal if it finds new publications.

View your search history

At any point, you can download a history of all the online database searches carried out on your records.

This can be a useful way of keeping track of how the changes made to your search terms have increased the accuracy of your search and brought back more results.

Click on the link at the top of the search settings screen to download the latest version of your history.

The information is provided in CSV format, which can be opened in spreadsheet programs, such as Excel.

The table shows:

- Dates and times of searches for each database
- Results of each search
- The number of new records found
- The number of results matched by the system to existing records in:
 - approved
 - declined
 - pending

An example of a search history is shown below.

After the searches on 19/04 and 28/04, this user approved three of the publications found and left some in the 'pending' area. These were then matched against the results of the most recent search on 03/05, as shown in the final three columns.

	A	B	C	D	E	F	G
	Search time and date	Database searched	Total publications found	New papers in total	Already approved	Already declined	Already pending
1							
2	03/05/2011 15:03	PubMed	14	0	3	0	11
3	03/05/2011 15:03	Web of Science	23	0	0	0	0
4	03/05/2011 15:03	arXiv	0	0	0	0	0
5	03/05/2011 15:03	Scopus	18	0	0	0	0
6	03/05/2011 15:03	CINII EN	0	0	0	0	0
7	28/04/2011 07:54	PubMed	14	0	1	0	13
8	28/04/2011 07:54	arXiv	0	0	0	0	0
9	28/04/2011 07:54	CINII EN	1	0	0	0	0
10	28/04/2011 07:54	CINII JP	1	0	0	0	0
11	19/04/2011 20:07	PubMed	14	0	0	0	0
12	19/04/2011 20:07	arXiv	0	0	0	0	0
13	19/04/2011 20:07	CINII EN	0	0	0	0	0
14							

Make changes for individual databases

Initially, all the databases will use the common search terms. However, each database can be separated from the common terms so that different search terms can be entered.

This can be useful, for example, if you have a stored 'advanced' search query for one of these databases, which you know accurately brings up all your publications.

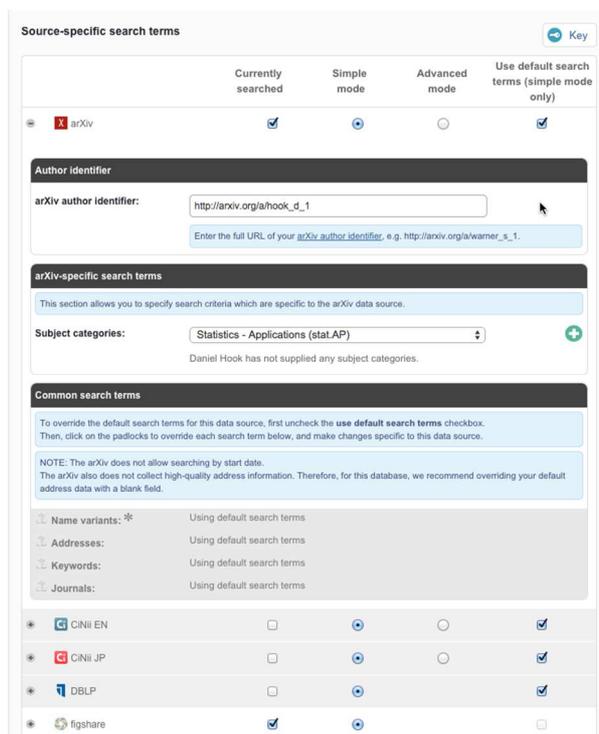
You can also switch each database on or off, depending on its relevance to your research. This is done via the checkboxes in the table at the bottom of the screen.

Usually, your institution will activate all the relevant databases for new users by default, but it may not have a subscription to all the services, so you may find one or more of the databases switched off when you first use the system.

Viewing search terms for a database

To view the search terms for an individual source database, click on the plus sign on the left of its name to expand the view.

You will see a new section of the screen with any source-specific search terms at the top (the example shown is ArXiv) and a set of search terms, including name, address, keywords and journals, below.



Adding source-specific search criteria

Some bibliographic databases have search criteria that can be added without unlocking the common search terms.

In the example above (ArXiv), you can add your personal Author Identifier and any categories under which you publish to the search criteria, and these will be submitted to the relevant database at the next search.

Unlock and change the common search terms for a database

Most bibliographic databases have fields that can only be altered after first being unlocked.

Begin by unchecking the box labelled “Use default search terms (simple mode only).”

Then, click the “plus” symbol next to the database name.

A locked padlock icon next to each individual search term will then become active, meaning these terms can be unlocked and edited as needed.

Common reasons for doing this include when an additional name variant is used only by this database, or when you want to define a more limited range of journals.

Once you have finished editing the terms for a database, click on Save. These alternative search terms will be used during the next search.

A note on Web of Science and Unicode characters

If your name contains accented letters that are found only in the full Unicode set of characters, Web of Science may stall, returning no results from that database.

If this happens, it will be shown on your main summary screen in an alert with a message something like ‘the query was rejected as illegal’ or ‘unexpected token’.

To solve this problem, unlock WoS from the common search terms and change any accented characters to the plain ‘ascii’ versions with no accents. This change should mean your name is found successfully in this database from then on.

Using an advanced search string

For some databases, such as PubMed or Web of Science, you may already have stored a suitable search string that brings back an accurate set of your publications.

This can be entered into the search settings for the database by checking the column in the table of sources labelled 'Advanced'.

Selecting this option will automatically separate the database from the Common search terms and display an empty text box, into which you can paste your search string.

Click on 'save' and this string will be used for this database next time a search takes place.

Test your advanced queries online

Several of the databases will allow you to compile and instantly test an advanced search string using a 'search builder' or a similar tool.

Rather than compiling an advanced query within *Elements* (where an incorrect search might bring back many mismatched publications that would need to be declined), taking advantage of these online services to test and copy our advanced queries is a good idea.

Web of Science

The WoS online service allows you to test a new advanced search string for syntax errors and to check the number of results.

Visit <http://apps.isiknowledge.com> and click on the 'Advanced Search' tab for Web of Science. (Institutional access required to see this webpage)

PubMed

PubMed's advanced search builder can be found here:

<http://www.ncbi.nlm.nih.gov/pubmed/advanced>

ArXiv

For ArXiv, build a search query that works for your publications via this page:

<http://arxiv.org/find>

The search string to copy into the 'advanced search' box in *Symplectic Elements* will be shown in brackets on the screen that shows the results.

Find individual publications using ID numbers

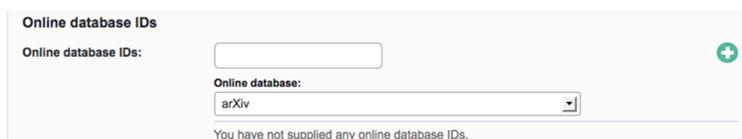
If a small number of individual publications do not fit your usual search terms for any reason, it is not necessary to change your search settings in order to ensure they are found in the online databases.

All the following databases have a system of identification codes for their online records, and these can be found via their web interfaces and then entered into your search settings screen for download.

- arXiv
- CiNii
- DBLP
- Europe PubMed Central
- PubMed
- RePEc
- Scopus
- Web of Science

Entering IDs

The area for entering database IDs is found within the 'Common search terms' section of the search settings screen.



Enter an ID into the text box, select the appropriate database from the drop-down menu and click on the 'plus' button to add it to the list.

Save the search settings when you have finished entering IDs.

What happens next?

All the IDs you have added will be submitted in the next online search of the appropriate database(s), sometime 'after 30 minutes' from the time when you save the search settings screen (see above for more about this intentional delay).

The new publications pulled from the database will be put in the 'pending' area of your records, along with any other publications found, and you will receive an email alert.

You will need to approve all the publications found using this method for them to appear in your publications list.

The IDs that have successfully brought in publications will disappear from your search settings screen once the publication details have been downloaded.

Finding IDs for each database

Each online database will store an ID against each publication it holds. However, this is easier to find for some databases than others.

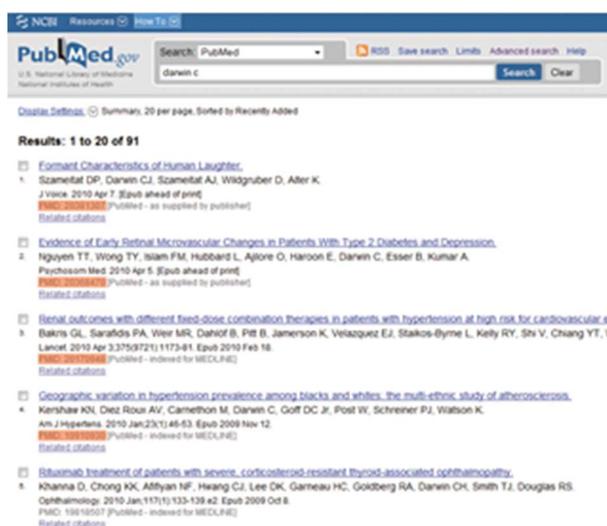
The advice below aims to help you find the correct number for a missing publication using the relevant web interfaces.

Please note: accessing these services may require an institutional subscription.

PubMed

PubMed shows ID numbers next to each record in the search results listing, as well as prominently on each individual publication screen.

The 'PMID' number is usually 8 digits long (do not include the phrase "PMID" in the ID field within Symplectic Elements). PubMed IDs are found in search result lists:



Web of Science

WoS displays an 'IDS' number on the HTML page for each record (e.g. 758YZ), but this is not their unique ID number. The number you want is known as the 'ISI number' or 'Accession Number.'

The Web of Science Accession Number displays in the citation record. The Accession Number for the record shown is "000335672600003" (do not include quotes or the word "WOS" in the ID field within Elements).

Document Information
Document Type: Article
Language: English
Accession Number: WOS:000335672600003
ISSN: 1672-5182
eISSN: 1993-5021

Scopus

The Scopus database does not supply a formal system of IDs. However, the URL for a publication page does contain an identifier that *Elements* is currently using to identify and collect publications.

This is labelled 'eid' within the URL and is usually of this form:

- 2-s2.0-76249086347

You can copy and paste this from a relevant Scopus publication page into the ID field and the system will download the details.

These may not be permanent IDs, however, so please make sure to check the publication is correct before approving it for your list. The Scopus reference in the URL can be used as an ID:



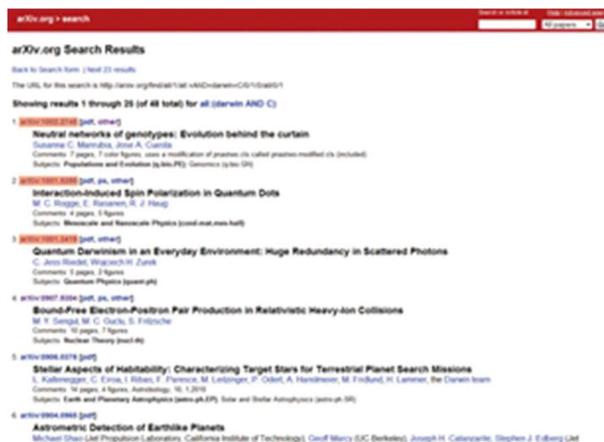
ArXiv

The ArXiv web interface shows IDs next to each record in the search results, as well as prominently on each individual publication screen.

The ArXiv ID is in this form:

- 1002.2745

(Do not include the phrase "arXiv" in the ID field within *Elements*). ArXiv IDs are shown in the search results:



DBLP

Symplectic Elements v4.17 - Trouble-shooting guide for search settings

The DBLP database stores a reference 'string' instead of a number, and this can be entered into the ID field within *Elements* as normal.

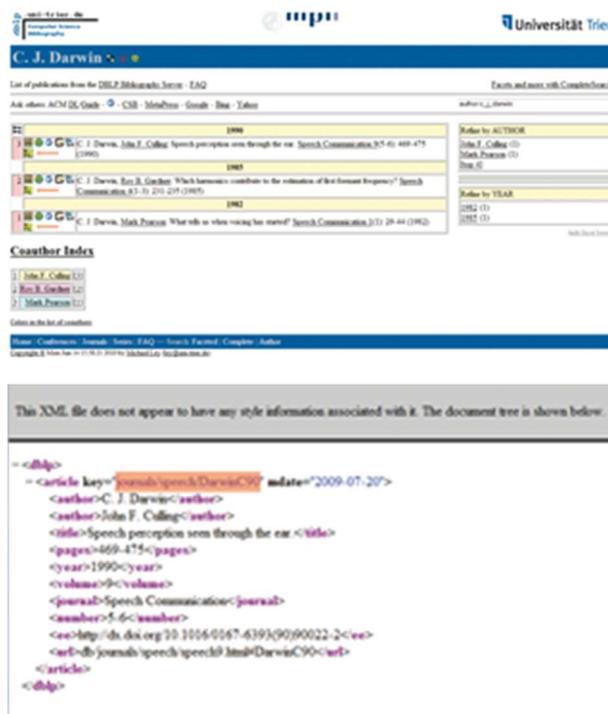
Within the search results, click to view the bibliographic data as XML and the page that opens up in your browser will show this string (labelled 'article key' at the top of the record).

The string will generally be in this form:

- journals/speech/DarwinC90

(Do not include quotes in the ID field within *Elements*).

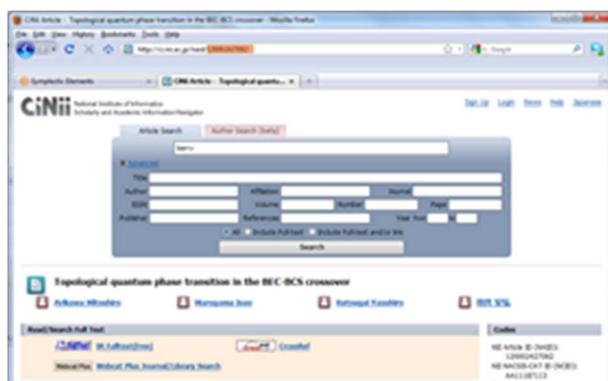
For DBLP, click to view the XML record:



```
<?xml version="1.0" encoding="UTF-8" standalone="no" ?>
<dblp>
  <article key="journals/speech/DarwinC90" mddate="2009-07-20">
    <author>C. J. Darwin</author>
    <author>John F. Collins</author>
    <title>Speech perception seen through the ear</title>
    <pages>469-479</pages>
    <year>1990</year>
    <volume>9</volume>
    <journal>Speech Communication</journal>
    <number>5-6</number>
    <url>http://dx.doi.org/10.1016/0167-6393(90)90022-2</url>
    <url>db-journals/speech/speech9.html#DarwinC90</url>
  </article>
</dblp>
```

CiNii

The CiNii databases show their ID numbers in the URL of each 'full details' screen. It will usually be a simple number. In CiNii, use the reference in the URL:



What happens for incorrect IDs?

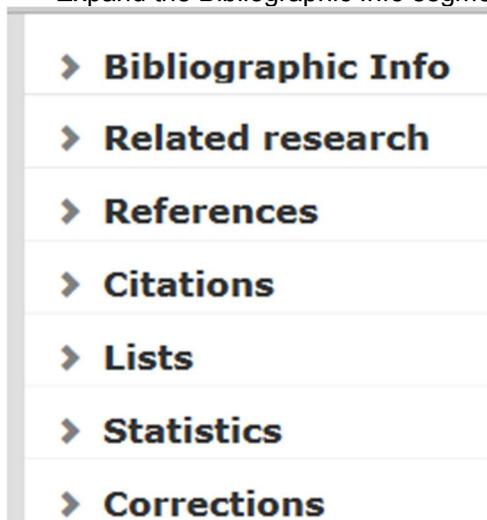
If an ID is submitted to a database, but does not match any publications in that database, it will remain in the list on your search settings screen.

You can then identify and delete incorrect IDs and add any new correct versions.

A database must be active for your records before an ID number search can be carried out. Activate a database by checking the box in the header bar for the database on the search settings screen (see chapter 4).

RePEc

- In RePEc locate the record for the item. Search <https://ideas.repec.org>
- Click the title to pull up the record.
- Expand the Bibliographic Info segment



- The Handle is the label for the RePEc identifier
- Copy and paste the full string – starting with RePEc: and ending with a number

Trouble-shooting FAQs

This section provides a brief troubleshooting guide to some of the most common problems experienced by users in searching the online databases.

If your query is not covered here or elsewhere in this guide, please contact your institution's support staff, via the link on the 'help' page within *Elements*.

One publication is not found

Possible problems:

- The publication is not (or not yet) listed in the online databases that are activated for your searches.
- The publication has already been downloaded, and accidentally put in your 'declined' area.
- The publication has not been found because its details differ from the others that have been found.

This may be because the details have been submitted differently for publication, or because of an error in the data held in the online database (e.g. a spelling mistake in your name, or an initial left out).

Or the publication's 'address' data may be for a collaborator's institution (a common issue for users who have address search terms added because they have a common last name - see chapter 2).

Solutions in brief:

- Check your 'declined' publications list.
- Check that the publication is available and that the databases in which it appears are switched on for your records.
- Check the details of the publication, as they appear on the database web interface.
- Compare carefully between these details and your search settings.
- Add any new details to your search settings (e.g. add a new name variant, to match how you are listed on the publication).

A small number of publications is not found

Possible problems:

- The publications are not (or not yet) listed on the online databases.
- The publications have already been downloaded, and accidentally put in your 'declined' area.
- The publications have not been found because they differ from the others.

This is most likely because of a different name variant you sometimes use, or because a

group of your papers are listed against a collaborator's institution (a common issue for users who have address search terms added because they have a common last name - see chapter 2)

Solutions in brief:

- Check your 'declined' publications list.
- Check the details of a sample of the missing publications, as they appear on the database web services.
- Compare carefully between these details and your search settings to identify any common differences between this group of publications and your search settings.
- Add any new details to your search settings (e.g. add a new name variant, to match how you are listed on the publications).

Publications are not found at all for one or more databases

Possible problems:

- Searching for the database has been switched off.
- The 'advanced search' option has been accidentally activated, and an empty search string is being submitted.
- The 'advanced search' option has been activated and an incorrect search string has been added.
- Your search settings contain 'special' characters that the database cannot process (this is only possible for the Web of Science database)

Solutions in brief:

- Go to your search settings page, and make sure the box 'Search this source' is checked in the header bar for the database.
- Check the 'advanced search' option has not been selected (this radio button is found in the table row for the database).
- If the advanced search is intended to be used, check the syntax of the search string, using the web service for the database to make sure it brings back appropriate results (see chapter 4).
- Check your 'common search terms' for special characters (letters with accents, for example) that Web of Science cannot process. If these are present, you will need to separate Web of Science from the common search terms and replace these search terms with ones that use plain letters only.

No publications are found for any database

Possible problems:

- Searching is switched off. This may have occurred when your record was first created. Your institution will usually switch on the databases for users defined as 'academic staff' and therefore likely to publish. If you have a dual role within your institution, which is not easily classified, you may need to activate the databases in your records by hand.
- Publications have been found in the past, but have all been placed in the 'declined' area by mistake.
- Your search terms are being submitted but are so narrow that they do not bring back any publications.
- Your search terms are so wide; they bring back too many publications, triggering a fail-safe within the system.
- Other errors may have occurred for your search terms.

Solutions in brief:

- Go to your search settings page, and make sure the box 'Search this source' is checked in the header bar for each database.
- Check your 'declined' publications list.
- Check your common search terms and make sure you have suitable name variants entered.
- If there is an 'address' term, check this is relevant to your publication history and add/remove institution name and address terms as appropriate (for example, you may be new to your current institution and need to add the name of your previous workplace instead).
- If there are keywords, consider removing these completely. These can make the search very narrow, since each category of search term is added using the 'AND' logic operator (see page 7).
- If there are only name variants, check the top of your 'search settings' page to see if an error is being reported due to too many results being obtained.
- If a database reports finding more than 2,000 results for a search, the system will operate a fail-safe and not download all these details. You should therefore add 'address' terms or keywords to narrow your search to find a smaller number of publications.
- If an error has occurred for any other reason, this will also be reported at the top of your search settings screen. If you cannot resolve the issue listed in the error, you should contact your institution's support staff, via the link on the 'help' page within *Elements*, quoting the error message in your email.

Note: at the top of your search settings screen, database errors are reported in this form:
"The last automated searches took place on 15 Jun 2010 at 12:51. The following issues occurred:
Web of Science: Too many search results (6026)."

In general

Enter every variant of your name. While the “LastName, INI” format is the most widely used, more databases are including the “LastName, FirstName” variants. Check how your name is listed in databases over a span of several years as indexing rules change over time.

Commas are not required between Last Names and initials.

Use the most important words in Addresses and avoid the use of terms like “College” or “University.” Many bibliographic databases use abbreviations for common address words, so fully spelled-out versions will not retrieve results.

Do not enter email addresses in the address field.

Fewer search terms are better than more. Unless you publish in a very narrow range of journals or always attach the same keywords to your publications, avoid use of the “Journals” and “Keywords” fields. Also, some databases set an upward limit of the number of terms that can be submitted.

Online database IDs are the identifiers for publications, not the authors. If you have a PubMed or ResearcherID or ArXiv identifier, enter those in the “Source-specific search terms” section for each database.