



TEMERTY FACULTY OF MEDICINE
UNIVERSITY OF TORONTO

Elements TFoM Refereed Publications Data Summary - A Reporting Guide

Screenshot Instructions - Guidance for Academic Leaders and Staff

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The following slides describe:

1. What data from Elements is used to populate the report
2. How users can generate the Refereed Publications Data Summary Report from their Elements account.
3. Troubleshooting tips



1. What data from Elements is used to populate the report?

Data used to populate the refereed Publications Data Summary Report is only taken from the **Scholarly & creative works module**, under the following activity types:

- ❖ Books
- ❖ Chapter
- ❖ Conference
- ❖ Journal Article
- ❖ Monograph
- ❖ Poster
- ❖ Report/Policy Document
- ❖ Other Publication



Homepage

MY ACTIONS (1 of 2)



Add your ORCID iD

Adding your ORCID iD can help us find your scholarly & creative works across the web. You can also choose to send your scholarly & creative works from DiscoverResearch to your ORCID account.

ADD



Arnold Alfonso-Test
Temerty Faculty of Medicine

arnold.alfonso@utoronto.ca

EDIT MY PROFILE

Scholarly & creative works

Claimed

- 5 books
- 3 chapters
- 5 commercializations
- 2 conferences
- 7 journal articles
- 5 other publications
- 11 presentations / lectures
- and 15 more scholarly & creative wor...

+ ADD NEW VIEW ALL

Grants & contracts

Claimed

- 26 sponsored research agreements
- 7 financial conflicts
- 8 salary support and other fundings

+ ADD NEW VIEW ALL

Professional activities

- 2 activity or event organizing
- 4 activity or event participations
- 7 committee memberships
- 2 conference reviews / referees
- 26 honours / awards / distinctions
- 3 grant application assessments
- 4 journal review / referee
- 2 media relations
- and 21 more professional activities >

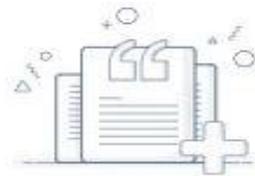
+ ADD NEW VIEW ALL

Teaching & supervision

- 4 courses developed
- 1 course taught
- 1 guest lecture

+ ADD NEW VIEW ALL

Add a new scholarly & creative work



Select scholarly & creative work type

Artifact	Book Review	Book	Chapter
Commercialization	Community Research Project	Conference	Dataset
Design	Exhibition	Figure	Fileset
Journal article	Media / Composition	Monograph	Other Publication
Performance	Preprint	Presentation / Lecture	Poster
Report / Policy Document	Research Workshop	Scholarly Edition	Software / Code
Team Research Project	Thesis / Dissertation	Working Paper	

CANCEL

The following fields in a publication record are used in the Refereed Publications Data Summary Report:

➤ Peer Reviewed

The Refereed Publications Data Summary Report contains data from peer-reviewed publications only. For publications to be included on the Report, the “Peer Reviewed” checkbox must be checked, Or, the “Non-refereed item” left unchecked for individual publication records.



The image shows two checkboxes side-by-side. The first checkbox is labeled 'Peer-Reviewed' and has a blue checkmark inside it. The second checkbox is labeled 'Non-refereed item' and is empty.

➤ Role

Found under **Contribution section**, only four standard publication roles in Elements are counted in the Refereed Publications Data Summary Report:

- Principal Author
- Co-Principal Author
- Senior Responsible Author
- Co-Author or Collaborator

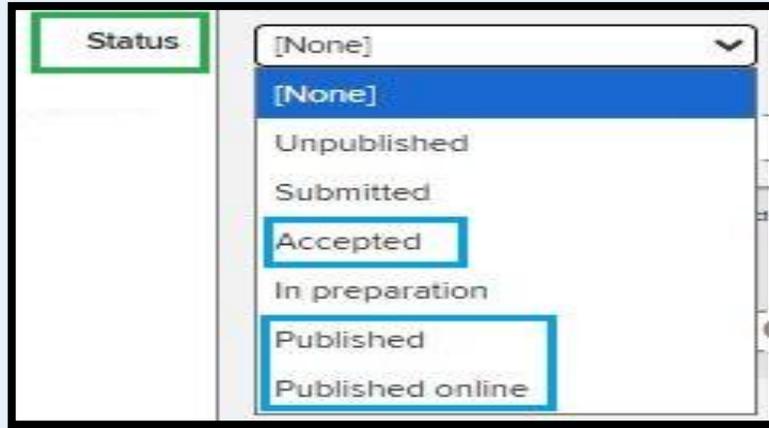


The image shows a screenshot of a 'Publication Role' dropdown menu. The menu is open, showing a list of roles. The roles listed are: [None], Acknowledge in Publication (Not Author), Coauthor or Collaborator, Co-Principal Author, Editor, Principal Author, Senior Responsible Author, and Other. The roles 'Coauthor or Collaborator', 'Co-Principal Author', and 'Principal Author' are highlighted with blue boxes.

Other roles, such as Acknowledged in Publication (not author), Editor, or Other are not counted in the Report.

➤ Publication Status

Only “Published”, “Published Online” and “Accepted” publications are counted on the Refereed Publications Data Summary Report. Statuses, such as: “Unpublished”, “Submitted”, “In preparation” or that have a blank Publication Status, are not included in the Report.



A screenshot of a web form showing a dropdown menu for 'Status'. The menu is open, displaying the following options: [None], Unpublished, Submitted, Accepted, In preparation, Published, and Published online. The 'Accepted' and 'Published' options are highlighted with blue boxes, and the 'Published online' option is also highlighted with a blue box. The 'Status' label is highlighted with a green box.

➤ Date

The first column in the Refereed Publications Data Summary Report is for the year of the publication(s). If the publication year has not been entered in the “Date” field of an individual publication record, then that publication will not be counted on the Report.



A screenshot of a web form showing a date input field. The field is labeled 'Publication date' and contains the text '25 Aug 2025'. To the right of the text is a green checkmark icon, a calendar icon, and a red 'x' icon.



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2. How to generate the Refereed Publications Data Summary Report in Elements

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How to Generate your TFoM Refereed Publications Data Summary Report

1. Log in to Elements. The Elements Profile Homepage opens.
2. Within the homepage, click **"Edit My Profile"** to export the CPA report.

The screenshot shows the SYMPLECTIC Elements profile homepage for Arnold Alfonso-Test. The page is divided into several sections:

- Header:** SYMPLECTIC Elements logo, user profile (Arnold Alfonso-Test), and navigation icons.
- Homepage:** A large card titled "MY ACTIONS (1 of 2)" with the heading "Add your ORCID iD". It includes an illustration of a laptop and a smartphone with an ORCID ID icon, and an "ADD" button. Below the heading, it states: "Adding your ORCID ID can help us find your scholarly & creative works across the web. You can also choose to send your scholarly & creative works from DiscoverResearch to your ORCID account."
- Profile Card:** A circular profile picture of Arnold Alfonso-Test, his name, affiliation (Temerty Faculty of Medicine), and email address (arnold.alfonso@utoronto.ca). A red box highlights the "EDIT MY PROFILE" button.
- Summary Cards:** Four cards displaying claimed activities:
 - Scholarly & creative works:** 5 books, 3 chapters, 5 commercializations, 2 conferences, 7 journal articles, 5 other publications, 11 presentations / lectures, and 15 more scholarly & creative works.
 - Grants & contracts:** 26 sponsored research agreements, 7 financial conflicts, and 8 salary support and other fundings.
 - Professional activities:** 2 activity or event organizing, 4 activity or event participations, 7 committee memberships, 2 conference reviews / referees, 26 honours / awards / distinctions, 3 grant application assessments, 4 journal review / referee, 2 media relations, and 21 more professional activities.
 - Teaching & supervision:** 4 courses developed, 1 course taught, and 1 guest lecture.

How to Generate your TFoM Refereed Publications Data Summary Report in Elements

1. In the top-right corner, click **“CV and Report”** (A dialog box will open, which will prompt you to select a report type)
2. Choose TFoM Refereed Publication Data Summary Report, then click **“NEXT.”**

The screenshot shows the SYMPLECTIC Elements user interface. At the top, the user is identified as Arnold Alfonso-Test. The profile page is in 'Edit mode', with buttons for 'VIEW MODE', 'EDIT MODE', and 'CV AND REPORTS'. The 'CV AND REPORTS' button is highlighted with a blue border. A dialog box titled 'CV and Reports' is open, displaying a 'Select report' screen. The dialog lists several report options, with the 'TFoM Refereed Publications Data Summary Report' option selected and highlighted by a blue box. Below the list, there are 'CLOSE' and 'NEXT' buttons, with the 'NEXT' button also highlighted by a blue box.

CV and Reports

Select report

- NIH biographical sketch (2015)
Required for due dates on or after May 25 2015 and encouraged for applications due on or after January 25 2015, using data available on your profile.
- NIH biographical sketch (pre-2015)
Required for due dates before January 25 2015, using data available on your profile.
- TFoM Refereed Publications Data Summary Report**
Custom Peer-Reviewed Publications Data Summary for TFoM
- TFoM Creative Professional Activity (CPA) Report
Custom CPA Report for Temerty Faculty of Medicine Members
- TFoM CV
Custom CV for Temerty Faculty of Medicine Members
- TFoM Teaching & Education Report (TER)
Custom TER for Temerty Faculty of Medicine Members

CLOSE NEXT

How to Generate your TFoM Refereed Publications Data Summary Report in Elements

Run report

TFoM Refereed Publications Data Summary Report

User

 Arnold Alfonso-Test
Temerty Faculty of Medicine

Dates

If supplied, the export will only contain data relevant to the specified date range.

Start date
Valid formats: dd/mm/yyyy, 28 Sept 2023

End date
Valid formats: dd/mm/yyyy, 28 Sept 2023

Format

1. If you want to **export data from a specific time (Optional)**, enter the **Start Date** and **End Date** under the Dates section. **If you leave all data fields blank, the system will include all records up to the present in the report.**
2. Choose the output format under the Format Section **(We recommend selecting PDF for best results.)**
3. Click **"RUN"** to proceed. The report will be downloaded in your computer.

Sample of Refereed Publications Data Summary Report

DIVISION OF [University Division]
DEPARTMENT OF MEDICINE, UNIVERSITY OF TORONTO

Refereed Publications Data Summary

Dr. Dlonra Osnofla

Year	Total # As Principal Author	Total # As Co-Principal Author	Total # As Senior Responsible Author	Total # As Collaborator or Co-Author	Total #
2024	1		1		2
2023	1		1	3	5
2022	1	1	2	4	8
2021			4	1	5
2020				2	2
2019	1		4	2	7
2018			2		2
2017	2				2
2016				3	3
2015	2			1	3
2014	1				1
2010				1	1
2008				1	1
2006	1			3	4
2005	1			1	2
2004	1			2	3
2003				1	1
2001				1	1



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3. Troubleshooting Tips

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If you believe that a publication is being mistakenly excluded from the counts on your Refereed Publications Data Summary Report, then go to the applicable record in the Publications section of your Elements account, and check the following:

Field Name	Possible Issue
Publication Type	Is the Publication Type field set to one of the types that are included in the Report? If not, and it is set to either “Newspaper Articles” or “Online Resources”, etc., then this record is being properly excluded from the Report.
Peer Reviewed	Is the Peer Reviewed checkbox checked or unchecked? If Peer Reviewed is unchecked, Or, if Non-refereed item is checked, then this record is being properly excluded from the Report.
Role	Is your Role set to one of the four roles that are counted on the Report? (i.e., Principal Author, Co-Principal Author, Senior Responsible Author, or Coauthor or Collaborator) If not, then this record is being properly excluded from the Report.
Publication Status	Is the Publication Status field set to either “Published”, Published online” or “Accepted”? If not, then this record is being properly excluded from the Report.
Date	Has a year been entered in the Date field? If not, then this record is being properly excluded from the Report.



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Questions?

Please email elements.med@utoronto.ca

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