

Quick Reference Guide for CAES

Updated 12/8/2022

2022 Notes & Tips

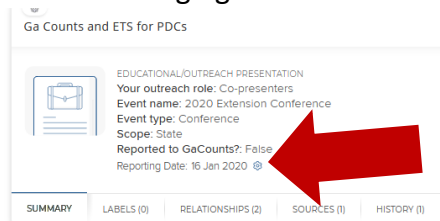
★ Pull your EAS first

A best practice is to pull your Elements Activity Summary (EAS) **BEFORE** you start entering data for this year. You may find information you entered last year or that a collaborator has entered. This will prevent duplicate entries and wasted efforts. You will also see if there are things in your report that need to be cleaned up.

★ Check your Reporting Dates

Almost everything on your EAS is there because of the *Reporting Dates* for that record. Here are two important things to understand about *Reporting Dates*:

1. You can quickly change the *Reporting Dates* on a record by clicking the little gear icon beside this field. But please remember, if you change your *Reporting Dates* to be manually controlled, instead of automatically controlled, they will not automatically update, if there is a change to the record, such as an article changing status from being published online to being published in print.



2. Records for some activities that have a date range, like serving on a committee will continue to be displayed on your EAS indefinitely, if no *End Date* is entered. This is by design. This keeps you from having to re-enter the activity each year.

★ Check graduate student advising records

You may see what appear to be duplicate records on the EAS in the sections **Student/Postdoc supervision** and **Graduate/Professional student advising**. For more detail about this, please see [this help document](#).

★ Record Extension work accurately

Presentation to agents and other employees?

Enter as *Professional Activities* type **Educational Event** with the event type as *In-service*.
**Always record number of hours and number of participants.

Presentation to an audience that includes the public (industry, producers, families, etc)?

Enter as *Professional Activities* type **Educational/Outreach Presentation**.
**Always record number of hours and number of participants.

Advising an individual or small group on a specific issue, either on-site or remotely?

Enter as *Professional Activities* type **Technical Assistance**. We added some fields last year to allow you to capture phone calls, emails, diagnostics, as well as site visits where you are sharing your expertise. For more information see, [this help document](#).

★ Intellectual Property

There is a new type in *Scholarly & Creative* works called **Intellectual Property**. This data is an auto-feed from Innovation Gateway (SOPHIA database) and **CANNOT** be edited.

If you find some records duplicate previous manual entries in **Patents**, you can remove the **Patents** record.

★ Social Media

Some faculty wanted a way to capture information about the content they share on social media, so we created a new *Professional Activities* type for recording that, called **Social media impact/outreach**.

Keep in mind, you should not record posts that are marketing/promotion, only those where educational content is shared. For more information, see [this help document](#).




For questions or assistance, please contact
Sunshine Jordan at suni@uga.edu
or call 706-542-8837



UGA Elements
UNIVERSITY OF GEORGIA

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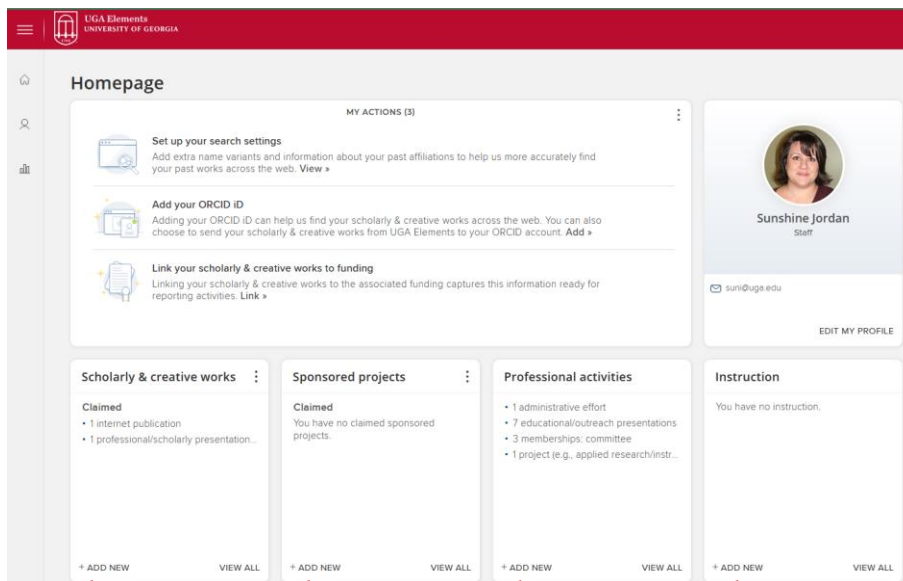
- There are many options for entering information into the UGA Elements system. This guide is meant to be a quick way of identifying how to enter frequently used by CAES types of work.
- Use the search feature in this PDF to find keywords or phrases.
- For more information, log-in to the [Elements help page](#).



For more detailed instructions, see our help documents on the [CAES Elements webpage](#).

Log in to UGA Elements at <https://elements.uga.edu/>

On the *Homepage*, find the desired section, and click the **+ ADD NEW** link.



The screenshot shows the UGA Elements homepage for a user named Sunshine Jordan. The page is divided into several sections:

- MY ACTIONS (3)**: Contains three tasks: "Set up your search settings", "Add your ORCID ID", and "Link your scholarly & creative works to funding".
- Profile**: Shows the user's name, photo, and email address (sun@uga.edu).
- Scholarly & creative works**: Lists 1 internet publication and 1 professional/scholarly presentation. A red arrow points to the "+ ADD NEW" link.
- Sponsored projects**: Lists 0 claimed sponsored projects. A red arrow points to the "+ ADD NEW" link.
- Professional activities**: Lists 1 administrative effort, 7 educational/outreach presentations, 3 memberships/committees, and 1 project. A red arrow points to the "+ ADD NEW" link.
- Instruction**: Shows "You have no instruction." A red arrow points to the "+ ADD NEW" link.

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Activities that Support Professional Development

- **Attended a Seminar/Conference**
Section: Professional Activities
Type: Professional development
- **Attended an Expo**
Section: Professional Activities
Type: Educational Event
- **Member of Professional Association**
Section: Professional Activities
Type: Membership:
Association/Society/Club
- **Awarded Distinguished Title**
Section: Professional Activities
Type: Distinction/Award

Activities that Support the Institution

- **Formal Mentor to a Faculty Member**
Section: Professional Activities
Type: Professional Mentoring
- **Informal Mentor a Faculty Member**
Section: Professional Activities
Type: Extracurricular advising/mentoring
- **Chaired a Committee**
Section: Professional Activities
Type: Membership: Committee
- **Presented in an In-Service Training**
Section: Professional Activities
Type: Educational event

Activities that Support Students and Instruction

- **Guest Lecturer in a Formal Course**
Section: Instruction
Type: Guest teaching
- **Advised Undergrad on Course and Degree**
Section: Instruction
Type: Student Academic Advising
- **Served on an Undergrad Thesis Committee**
Section: Instruction
Type: Student/Postdoc Supervision
- **Provided Tutoring**
Section: Instruction
Type: Tutoring
- **Serve as a Faculty Advisor for a Student Club**
Section: Professional Activities
Type: Extracurricular advising/mentoring
- **Peer Reviewed a Curriculum**
Section: Professional Activities
Type: Reviewing/Refereeing: Curriculum
- **Serve as a Major Professor**
Section: Professional Activities
Type: Graduate/Professional student advising
*NOTE – this data comes from the Grad School in a direct feed to Elements. It cannot be edited. For more info on this topic, see the [help doc](#) on student supervision/advisement.



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Activities that Support Research & Scholarship

- **Attended a Research Conference**
Section: Professional Activities
Type: Event participation
- **Led an Applied Research Project**
Section: Professional Activities
Type: Project
- **Peer Reviewed Conference Presentations**
Section: Professional Activities
Type: Reviewing/Refereeing: Conference
- **Peer Reviewed a Journal Article**
Section: Professional Activities
Type: Reviewing/Refereeing: Journal
- **Journal Articles**
Section: Scholarly & Creative Works
Type: Journal Article
- **Edited an Article**
Section: Professional Activities
Type: Editorship
- **Manuals**
Section: Scholarly & Creative Works
Type: Report
- **Supervise a Research Assistant**
Section: Instruction
Type: Student/Postdoc Supervision
- **Peer Reviewed a Curriculum**
Section: Professional Activities
Type: Reviewing/Refereeing: Curriculum
- **Presented a Poster at a Conference**
Section: Scholarly & Creative Works
Type: Poster
- **Presented at Conference with Published Proceedings**
Section: Scholarly & Creative Works
Type: Proceedings of Conference (published)
- **Presented at Conference without Published Proceedings**
Section: Scholarly & Creative Works
Type: Professional/Scholarly Presentation (unpublished)

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Activities that Support Extension and Public Awareness

- **Event Judging**
Section: Professional Activities
Type: Event Judging
- **Exhibitor at an Expo**
Section: Professional Activities
Type: Event participation
- **TV/Radio Interview**
Section: Professional Activities
Type: Broadcast Interview
- **Extension Presentation**
Section: Professional Activities
Type: Educational/Outreach Presentation
- **Hosted a Public Exhibition**
Section: Professional Activities
Type: Event Administration
- **Ran a 4-H Club Meeting**
Section: Professional Activities
Type: Event Administration
- **Event Judge**
Section: Professional Activities
Type: Event Judging
- **Interviewed for Print Publication**
Section: Professional Activities
Type: Print interview
- **Visited a Farm for Technical Advice**
Section: Professional Activities
Type: Technical assistance
- **Created a PowerPoint**
Section: Scholarly & Creative Works
Type: Instructional Materials
- **YouTube Video**
Section: Scholarly & Creative Works
Type: Internet Publication
- **Posted to a Professional Blog**
Section: Scholarly & Creative Works
Type: Internet Publication
- **Wrote a Magazine Article**
Section: Scholarly & Creative Works
Type: Popular Press
- **Wrote a Newsletter**
Section: Scholarly & Creative Works
Type: Popular Press
- **Developed a Workshop**
Section: Scholarly & Creative Works
Type: Instructional Material
- **Extension Numbered Bulletin**
Section: Scholarly & Creative Works
Type: Report
- **Designed an Instructional Film**
Section: Scholarly & Creative Works
Type: Film/Video/Media