

Introduction to Elements/Discover Research

Webinar 1 Q&A Summary

March 10, 2026

The following questions and answers were collected during the first Elements webinar, held on March 10, 2026. Questions have been edited for clarity and organized by topic. This session was open to all Temerty Faculty administrators and delegates.

Profile & Privacy Settings

Q What is Bluebook?

Bluebook is a directory of University of Toronto researchers who are available for opportunities. It is hosted by UofT Communications. There is currently no integration between Elements (DiscoverResearch) and Bluebook.

Q Is there an "Other" option in the profile section, or can users create their own labels?

There is no option to create an "Other" label within the Canadian Research and Development Classification (CRDC). The CRDC labels are a standardized list populated by Statistics Canada and cannot be customized.

Q Who decides whether each entry should be Internal/Private or Public/External?

The faculty member should decide the appropriate privacy setting for their account. Privacy levels are defined as follows:

- **Public**
Data may be shared publicly by the University of Toronto.
- **Internal**

Data is visible to other users of DiscoverResearch (Symplectic Elements) but is not displayed publicly.

- **Private**

Data is hidden from most users of DiscoverResearch, but remains accessible to certain privileged users, which may include co-authors, collaborators, delegates, and various types of research administrators.

You can control the privacy setting for an entire profile by selecting the desired profile in the "Manage My Profile" section.

Q Can we set an entire profile to Private so that only the physician can view their page?

No, the privacy options for the entire profile are either Internal or Public. Unless permission is granted to a delegate only the faculty member and authorized administrators of the Elements system have access to a profile. For more information about privacy settings, please refer to [Privacy](#) statement within your Elements account.

Q Should I only include current and most recent appointments, or is it recommended to add previous appointments and employment as well?

It is preferred to have the most fulsome profile possible. However, the faculty member should determine which activities to include and for what time frame.

Q Is there a list explaining what Internal, External, Private, and Public mean?

Yes. From within Elements, click on the menu, then select "Privacy Information" under Guidance, or you may directly refer to [Privacy](#).

Q Does the profile image need to meet certain specifications?

There are no restrictions on the type of photo used in the profile section.

Appointments & Professional Activities

Q How do you indicate a gap in an academic appointment, such as parental leave?

In the Professional Activities module, select "Office Held," then under Type choose "Work Interruptions." Enter the reason in the Description field.

Q Would "Hospital Chief" be classified as non-academic employment?

That is correct. However, if a role has a teaching component, it may also be considered academic.

Q Where do you enter information if you are on the editorial board of a journal?

Select "Editorial" under Professional Activities.

Q For the activities listed under Professional Activities and Teaching & Supervision, should dates be entered as exact dates or as an academic year?

You can use any of the available date formats noted next to the date field.

Teaching & Supervision

Q Is there an "Other" category for Teaching and Supervision?

Yes. There is an info type called "Other Teaching Responsibility" available in Elements. But please check the dropdown list from the "Teaching Activity Type" field in Course Taught, as one of them might be used to capture your activity.

Q What about teaching post-docs or multilevel education — there doesn't seem to be an "Other" option like in WebCV?

There is. For every teaching activity, you can identify the educational level (for whom the teaching is given to), by choosing the Primary Audience and Year/Stage.

Q If teaching in a rounds series like CICU Core Rounds, do you have to enter each lecture separately?

No. You can enter these types of records in Teaching & Supervision under Course Taught without repeating the same course or round individually.

Q For doctors working toward promotion in Teaching, do they need to list activities (such as clinic supervision, ward supervision, academic half days, etc.) by academic year?

Yes. These activities should be entered by academic year, or by academic year and month.

Q Regarding consent to use student names in the Teaching section — does this apply to the Public profile or the Internal profile?

If you have not received consent to use a student's name, that name should not be entered into Elements, regardless of the privacy setting.

Q There is a checkbox asking if we have permission to use student names. Even if we don't check it, can we still include the name?

No. If consent has not been received, the student's name must not be entered into Elements.

Publications & Scholarly Works

Q If a publication on my CV is not automatically populated, should I enter it manually?

Yes, that is expected. Please add it manually.

Q Can you import information about journal publications, or does it all need to be entered manually?

Providing the appropriate IDs in your Elements profile (e.g., ORCID, PubMed) will import all available publication records from linked bibliographic databases.

Q Will manually added journal articles be flagged as duplicates if they were already added previously?

No, they will not be automatically flagged. Please check the system before adding new records to avoid creating duplicates.

Q Once a publication is entered manually, will it be duplicated by the automated feeds?

Yes, if bibliographic IDs are being utilized and auto-claiming is enabled, a manual entry may be duplicated by the system. Always check for existing records before adding manually.

Q In WebCV, entering a DOI auto-populated the title, journal, authors, and dates. Does Elements work the same way?

The DOI auto-populate feature was not functional in WebCV – instead the PubMed field was operational. In Elements, if PubMed, ORCID, or other bibliographic sources are linked, all available data from those sources will be pushed to the faculty record.

Q When I look at the field name to enter the name of a journal under Editorial activities, I can't find a "Journal" field.

The field for entering the journal name is called "Publication."

Q How does a physician's name get bolded in publications?

The system uses logic to identify the profile owner and bold their name in relevant sections automatically.

Q When the report is printed, some names are bolded and some are not. How can this be fixed?

You can edit the bolding of names in the exported MS Word format. Elements retains the source formatting from the system the data is being pulled from.

Q When will the additional fields for scholarly and creative works (e.g., role, journal impact factor) be available?

These fields are currently available. Click on the record title, scroll down to the "Journal Article Contribution" section, and click the plus (+) button to add the details.

Q Where do presentations and published abstracts go?

Presented Abstract and Presented & Published Abstract should be entered under Conference, in Scholarly and Creative Works.

Q When presenting the same abstract or poster at multiple conferences, do they need to be entered individually?

Yes. Each conference requires its own entry, including the host information and date.

Q For invited speaker engagements at a conference, where should this be entered?

Conference Presentation role should be entered under "Conference" in Scholarly and Creative Works. Enter the record details, save, then click on the title from the list view and add additional details in the "Conference Contribution" section.

Q Where do I enter information about invited lectures and talks, specifically the "Geographical Scope" field?

This should be entered under Scholarly and Creative Works - Presentation/Lecture. After completing and saving the initial data entry, click on the title from the list view, then scroll down to "Presentation/Lecture Contribution" to complete additional fields including Geographic Scope.

Q For lectures and talks not linked to funding (e.g., Fellow Teaching Sessions or Invited Guest Lectures), should these still go under Presentation/Lecture?

Yes.

Q Where should Grey Literature publications (e.g., website posts, blog posts) be entered?

These should be entered in Scholarly and Creative Works under "Other Publications."

Q All publications are appearing under "Journal Articles," including abstracts. Does this mean we need to review all records to correct their type?

The claimed publication data comes from bibliographic databases. If the type appears to be Journal Article, it was validated as such. Please contact the Elements support team at elements.med@utoronto.ca for guidance on how to address this in bulk.

Q Every time a publication is claimed, it defaults to "Author" without specifying first, senior, or co-author. Can this be changed?

The bibliographic source indicates the researcher's role. If a change is needed, the "Additional Information" section can be used to specify the particular role.

Q Is there a field for description or notes in Journal or Grant review activities to record exact review dates?

There is no description field in Journal or Grant reviews, as exact dates are not required in any reports. You can enter the number of reviews under "Works Reviewed/Refereed During Time Frame," which is the key data point.

Managing Claims & Duplicates

Q What if publications have been automatically claimed to a faculty page that don't belong to them? Is there a way to remove them?

From the record list (e.g., List of Journals), check off the titles of the incorrect records and click the Reject button.

Q If a faculty member has the same initials as another and their works were auto-claimed in error, will auto-rejecting items from that research ID remove them?

No. Once records are claimed, they remain in the profile until you manually reject them. If you unlink the incorrect ID, you will also need to manually delete any records that were previously added from it.

Tip: Avoid using "Auto Claim Associated Items" as a safety net. Use "Auto Suggest Associated Items" instead so you can review entries before accepting them.

Q If a publication was manually created incorrectly, is there an easy way to delete it entirely? What does "removing the relationship" do?

Yes. You can remove the relationship between the record and the faculty member's profile, which will remove the record from their profile.

Q Can data be moved automatically from one module or info type to another?

No. Data cannot be moved automatically from one module to another, or from one info type to another within a module.

Grants & Contracts

Q At what time of year are grants updated?

The Research Information System (RIS) institutional grant feed is refreshed on the third Wednesday of every month. Grants held by affiliated institutions (such as hospitals) are updated annually in March and are one year behind the current reporting year.

Q When grants are updated, will they appear as new entries? Should I check for duplicates?

Yes. You should check for duplicates if you have manually entered a grant prior to the feed being refreshed.

Q Can a grant category be added manually if it cannot be found in the dropdown menu?

Yes. If your grant is older than two years and does not appear in the system, you should add it manually. If entering a grant from the previous year, remember to check for duplicates when the feed is refreshed.

Q Who validates the accuracy of grant information before it enters the Institutional Grant System?

Peer review status is captured in the Research Information System (RIS) at the program level when a program is first established. Grant data is sourced directly from affiliated institutions and hospitals, as well as from My Research for U of T administered grants. Note that affiliated institutions are not required to submit peer review status for their grants.

Q How do I fix incorrect information in a claimed grant, and who should report the issue?

If a claimed grant has incorrect or missing information, the issue must be resolved at the source system (RIS). To request a change, contact raise@utoronto.ca, identify the RIS application number to be updated, and attach a copy of the notice of award from the sponsor if possible.

Data Migration & Import from WebCV**Q Can information already in WebCV be imported into Elements?**

Data migration from WebCV to Elements has already been completed with the following cut-off dates:

- Teaching & Supervision data: extracted as of April 25, 2024
- Professional Activities data: extracted as of February 28, 2025

Any changes or updates made in WebCV after these dates will not appear in Elements and must be added manually.

Q Can data be imported into Elements directly from a Word CV?

No. There is no import function into Elements other than the automated feeds for Scholarly and Creative Works and Grants and Contracts.

Tip: If you have an MS Word version, you can copy and paste data directly into Elements data fields.

Q As a new faculty member who never had access to the prior system, do I have to enter everything manually from my Word CV?

No. Automatic data feeds exist for Scholarly and Creative Works and Grants and Contracts. All other information will need to be manually entered.

Q My conference talks were not moved from WebCV to Elements. How can this be addressed?

Any information missing from your Elements profile will need to be manually entered.

Q For the Continuing Professional Activities (CPA) report — was this transferred from WebCV to Elements?

Some records were transferred from WebCV, but you will need to build your report by creating relationships between the record and the report.

Delegates & User Access

Q How many delegates can be assigned to a profile? Are there any limitations?

A faculty member or researcher can add as many delegates as they wish. A delegate can hold the same role as other faculty members or researchers. There is no limit on how many profiles a delegate can be assigned to.

Q How do I appoint a delegate for my Elements profile?

Faculty members can submit a request to add a delegate by providing a UTORid using this form: <https://utoronto.sharepoint.com/sites/med-ITService/SitePages/Elements.aspx>. You can also contact the Elements team at elements.med@utoronto.ca.

Q As a delegate for physicians, I do not have a UTORid. How would I log into Elements?

Faculty members can submit a request to add a delegate which includes providing a UTORid. Please use this form: <https://utoronto.sharepoint.com/sites/med-ITService/SitePages/Elements.aspx>. You can also contact the Elements team at elements.med@utoronto.ca.

ORCID & Bibliographic IDs

Q If the ORCID ID is already showing on the right side of the profile, why is there still a task in the centre saying "Connect your ORCID ID"?

This is a universal system suggestion and is part of the platform design. It appears for all users regardless of whether an ORCID ID is already displayed.

Reports & Exports

Q What is the estimated timeline for the AAR and TER reports to be available in Elements?

AAR will be released on March 16, 2026
TER will be released on March 23, 2026

Q Can you download your CV in CIHR format?

No, CIHR format is not currently available as an export option.

Q Can the Canadian Common CV be linked to Elements?

This may be considered as an enhancement in the future.

Q Are there information types under Teaching and Professional Activities that don't connect to DOM reports? Can they still be viewed through the public profile?

Correct. Not all info types in Elements are mapped to the custom reports. The custom reports are available to all Temerty Medicine Elements users and are not specific to the Department of Medicine. Data not included in a report may still be visible through the public profile.

Support & Resources

Q Who do we contact when we have questions about Elements?

You can reach the Elements support team at: elements.med@utoronto.ca

Q Where is the Elements user manual located?

Support resources are available on the MedIT website: <https://medit.med.utoronto.ca/elements>