

Welcome to Elements/Discover Research

Drop-In Session 1 — Q&A Summary

March 20, 2026

The following questions and answers were drawn from the first Elements Drop-In Session, held on March 20, 2026. Questions have been edited for clarity and organized by topic. This session was open to all Temerty Faculty of Medicine administrators and delegates.

Access & Delegate Setup

Q Do I need a UTORid to access Elements?

Yes, a UTORid is required to log in to Elements. There is a delegate access process available for administrative assistants and staff who do not have a UTORid to be provisioned with one. The request must be initiated by the faculty member. For assistance, please visit the MedIT Elements page or contact elements.med@utoronto.ca.

Q My PI tried to give me delegate access but was unable to. How do I resolve this?

If you are having trouble accessing the Service Catalogue, please contact the Elements team by email at elements.med@utoronto.ca.

Reports & Exporting

Q When will the Teaching and Education Report (TER) and Teaching Data Summary Report be available in Elements?

The Annual Activity Report (AAR) has already been released.

- The Teaching and Education Report (TER) is planned for release on March 23rd.
- The four data summary reports - including the Teaching Data Summary Report, are scheduled for March 30th.

By March 31th, all TFoM formatted reports used for promotions and activity reporting will be available in Elements.

Q The Annual Activity Report does not show staff details such as the physician's name, title, position, or department. Why?

If information such as the faculty member's name or department is not appearing in the report, it is likely missing from the profile's mapped fields. Please contact the Elements support team at elements.med@utoronto.ca and provide a list of the missing items so they can investigate the issue.

Q How do I print or export reports from Elements?

Click on "Edit My Profile" and then select "CV and Reports" to view and generate available reports. Alternatively, use the Reporting Hub in the main navigation and select "TFOM" to access your reports.

Q For this year's activity report submission, should we generate the report from WebCV or Elements?

If you have reports to submit prior to March 31, 2026 and have access to WebCV, generate your reports from WebCV. If you don't have a WebCV account, you can use Elements to produce your reports provided you have populated your profile with the applicable data.

Q The AAR generates a date range for abstract presentations. Physicians want a single date, not a range. Is there a workaround?

This is a known limitation. Because the system requires both a start and an end date, the recommended workaround for a single-day event is to enter the same date in both the start and end date fields. This feedback has been noted and will be passed along to the Symplectic team for consideration.

Data Migration from WebCV

Q Will WebCV data be transferred automatically to Elements?

A partial data migration has already been completed. Teaching and Supervision data was extracted as of April 25, 2024, and Professional Activities data was extracted as of February 28, 2025. Any data entered in WebCV after these cut-off dates will not appear in Elements and must be added manually. It is recommended that you extract all reports from WebCV prior to March 31, 2026 so you have a record to reference when curating your Elements profile.

Q Was the migration done for all faculty members or only some?

The migration was performed for all faculty members who had data in their WebCV account.

Q It sounds like I may have up to a year and a half of data to manually enter. Is that correct?

Yes, any data entered in WebCV after the migration cut-off dates will need to be manually added to Elements. Faculty with long CVs may choose to prioritize more recent data. For example, entering only records from a certain year onward.

Q Do I need to download the CV from WebCV and upload it to Elements to migrate the data?

No. There is no upload function in Elements. The initial data migration was done automatically, and you can log in to review what was transferred.

Any data missing must be entered manually. You can copy and paste from a Word CV as a practical workaround. Scholarly and Creative Works and Grants and Contracts are populated through automated feeds and do not require manual migration.

Scholarly & Creative Works

Q How does the automatic population of publications work in Elements?

Elements automatically harvests publication records from bibliographic databases. Records are pulled based on the faculty member's name, affiliated institution, and any IDs they have linked to their profile, such as ORCID, Scopus, or Dimensions IDs.

The record types automatically pulled in include books, conference records, journal articles, and presentation/lecture entries. Once linked, records will appear as pending for the faculty member or delegate to review and claim.

Q Why are some abstracts automatically populated while others need to be entered manually?

The automatic feed relies on the accuracy of the data in external bibliographic sources. If a publication is not being pulled in, it may be because the faculty member's bibliographic IDs (ORCID, Scopus, Dimensions) have not been set up in Elements, or because the author's name is not consistently spelled across sources (e.g., 'A. Alfonso' versus 'Alfonso, Arnold'). In these cases, the record will need to be entered manually.

Q Where do I enter conference presentations, including the presenter's or moderator's role?

Conference entries should be added under Scholarly and Creative Works - Conferences. For presentations and published or presented abstracts, use the Conference info type. The presenter's role (e.g., presenter, moderator) is entered in the Contribution section, then open the record, scroll down to the "Conference Contribution" or "Presentation/Lecture Contribution" section, click the edit button, and enter the presentation role there.

Q When a speaking engagement is not attached to an official conference, where should it be entered?

If the engagement is not tied to a formal conference, it should be entered under Scholarly and Creative Works - Presentation/Lecture, rather than under Conference.

Q Where is the Geographical Scope field for talks and lectures? I can't find it.

The Geographical Scope field has been moved out of the main record form. To access it, open the presentation or lecture record, scroll down to the "Presentation/Lecture Contribution" section, and click the edit button. The Geographical Scope field will appear there along with other additional fields.

Q Why is a grant or presentation record I entered not printing in the CV report?

Records will not print in the CV if required fields in the Contribution section are left blank. For grants, you must enter the funding type, your role, and the grant status in the "Grant Contribution" section.

For presentations, the presentation role must be entered in the "Presentation/Lecture Contribution" section. To access these fields, open the record, scroll down to the relevant Contribution section, click "View" then "Edit," complete the fields, and save.

Q What does the "Add to Workspace" button do? It appears when I click the three dots on an entry.

The Elements team is not currently familiar with this feature and will follow up with the central Symplectic team to confirm its function. An explanation will be shared in a future training session or support resource.

Teaching & Supervision

Q Where do I enter aggregate teaching evaluation scores?

Teaching evaluations should be entered under Teaching and Supervision. Click "Add New" and select the appropriate info type from the available options.

Q When entering dates for Teaching and Supervision activities, should I use the academic year format (e.g., July 1 to June 30) or an exact date?

Both are acceptable. You can use the academic year date range (e.g., July 1 to June 30) or enter a specific date for individual activities. The system will include all data entered within Elements in your reports regardless of the date format used.

Q How do I enter research-based degree supervision records if the system requires a thesis title and I do not have one?

The thesis title is a required field that cannot be bypassed. As a temporary workaround, you may enter a placeholder such as "Not Applicable" or a general research topic to allow the record to be saved. The Elements team will investigate the downstream impact on reporting and follow up with further guidance.

Q Where should I enter observership records for doctors who shadow a principal physician as part of an observership program?

Observerships should be entered under Teaching and Supervision - Mentorship. In the Additional Information section of the Mentorship record, you can enter the primary audience and select the preceptorship/observership type. The mentee's name can also be recorded there.

Grants & Contracts

Q Can you add a grant that was applied for but not received?

Yes. You can add grants that were applied for but not awarded. Note that the record information may be incomplete since it was not funded, but the system allows you to enter it.

Claiming & Managing Records

Q If publications were automatically claimed for a faculty member with the same initials as another researcher, can incorrect records be mass-deleted?

Unfortunately, claimed records must be reviewed and rejected one at a time to ensure accuracy. Once rejected, they will be moved to the rejected list and removed from the active profile, but they will remain in the database. If needed, they can be reclaimed from the rejected list at any time.

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 I reject a researcher ID linked to a profile, does that automatically remove the publications that were previously claimed from that ID?

No. Unlinking or rejecting a researcher ID does not automatically remove records that have already been claimed. Those records must be manually rejected from the profile one at a time.

Q How do I delete a manually created record?

Click on the title of the record to open it. From within the record, you can remove the relationship to the faculty member's profile, which will remove it from their active profile. Records can also be rejected from the list view by checking the title and clicking the Reject button.

Q Who is responsible for claiming or rejecting pending publication records?

The faculty member or their delegate should review pending records and claim those that belong to the faculty member's profile. Records can be claimed or rejected from the pending list in the Scholarly and Creative Works section. If a record is rejected in error, it can still be found in the rejected list and reclaimed.

Upcoming Sessions & Resources

Q What upcoming training sessions are available?

The Elements training series includes the following sessions:

- A deeper dive into Elements (March 24th)
- Two reporting-specific sessions (April 7th & April 21st).
- Additional Drop-In Sessions are scheduled for April 2nd, April 17th, and May 1st.

If you have registered for the webinar series, you will be added to all upcoming session invites. Support will continue beyond these sessions as Elements becomes the permanent platform following WebCV decommissioning on April 1st.