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Search

[Home](#) > [Symplectic Elements](#) > [Elements Release Notes](#) >

Symplectic Elements - v7.4 Release Notes

Edited 6 days ago

Welcome to Symplectic Elements v7.4!

This release continues our commitment to reducing administrative burden and making everyday research workflows faster and more reliable.

Building on the AI-assisted data entry capabilities introduced in v7.2, v7.4 introduces a beta release of **CV import**, extending the power of AI from single-item entry to a full document-to-profile workflow. Users can upload a CV or paste unstructured text and have publications, grants, teaching activities, professional activities extracted automatically, all subject to explicit review and confirmation before anything is saved.

This release also brings a fundamental change to how **preferred records** work in Elements. The preferred record is now a single, object-level property that applies consistently across Discovery, Assessment, Item evaluation, OA Monitor, and Reporting, replacing the previous user-by-user approach and ensuring that the same

metadata is used everywhere. Existing preferences will be migrated automatically during the upgrade.

Elsewhere, the **Item Evaluation** module now includes bulk import support for nominations, reviews, and outcomes, as well as the ability to capture input from external reviewers who do not have an Elements login. The **Discovery** module has been redesigned with a cleaner search experience and significant accessibility improvements, and **Awards Management** now integrates classification schemes fully with Elements label schemes.

As always, the new version of Symplectic Elements and associated upgrade instructions can be found in the [upgrade forum](#).

CV import: beta release

In Elements 7.4, we are excited to introduce the beta release of **CV import**. This new feature moves beyond single-item entry into a true "document-to-profile" workflow, designed to significantly accelerate faculty onboarding and profile completion projects.

The beta program is open to all Digital Science-hosted Elements customers. To take part, simply enable the feature via the **AI settings** admin page and control who has access to it via the **Feature access** page. For full instructions on enabling CV import, see the [support site](#).

The screenshot displays the 'Review extracted items' interface in Elements. On the left, a list of extracted items is shown, including 'Pedagogical methods: critique design, reflective revision protocols, open-page testing, community workshop facilitation, curriculum mapping, and portfolio assessment.' and 'Languages: English; French; Kinyarwanda.' A red arrow points from this list to the 'Review extracted items' panel on the right. The right panel shows a summary of 400 total items, with 306 ready to import, 51 incomplete, 10 imported, 33 already in profile, and 0 excluded. Below this is a table of items with columns for Item, Category/Type, Import status, Import method, and Actions. The table lists items like 'Shoreline Margins: An Illustrated Atlas of Small...' and 'Sail Ledger'. A detailed view of an item is shown below the table, including fields for Type, My relationship, Privacy, Title, Authors, Publisher, Publication date, and Status.

Image: Extracting and organising metadata into structured records

Intelligent data extraction

CV Import allows users to simply drop a PDF (up to 5MB) or paste bulk unstructured text (up to 100,000 characters) into Elements.

The system then automatically extracts and organises metadata into structured records, mapping them directly to your existing Elements schema.

CV import Beta

AI-assisted import
This feature is in Beta. Please [give feedback](#) to help improve the experience and flag any issues you encounter.
This tool uses AI to scan your document to extract items for import. Like any AI, it can make mistakes, so please review the suggestions before you confirm the import.

Select import method

Upload CV
Upload a CV or document with your academic and professional history. AI will extract your activities and publications and categorise them for you.

Drag file here or **browse** to choose
Supported format: PDF (max 5 MB)

Paste Text
Paste your publications, grants, teaching and professional records. You can enter raw text, citations or DOIs. Max. 100,000 characters.

Start

Image: The CV import start page

Beyond traditional harvesting

While automated harvesting remains essential for publications, CV Import is purpose-built to capture the richer, often underrepresented activities that exist primarily in unstructured documents. This includes:

- **Professional activities** and institutional service
- **Teaching activities**
- **Non-traditional research outputs (NTROs)** and publications not indexed in data sources
- **Grants** not listed in institutional sources or Dimensions

Deduplication, user control and traceability

As with single-item AI-assisted data entry, CV import leverages advanced matching algorithms to identify existing records and prevent duplication, details of which are on the [support site](#).

Furthermore, we adhere to a strict **human-in-the-loop** principle: no AI-extracted data is ever saved to a profile without explicit user review and confirmation.

When an item is created or claimed using CV import, this will be noted in the corresponding history entry on the item and logged in the Reporting Database's item history tables.

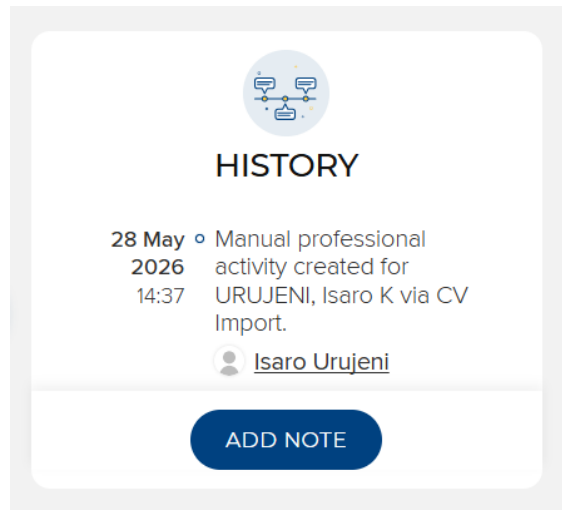


Image: History entry for an item created via CV import

Review at your own pace

Even with the convenience of bulk processing, a user may wish to review the results across multiple sessions. From the moment they upload their document, through to completing the review of extracted items, users can leave the process at any point and return later to pick up where they left off. Full details of the import process are on the [support site](#).

Review extracted items Beta

AI-assisted import
This feature is in Beta. Please [give feedback](#) to help improve the experience and flag any issues you encounter.

400 Total items | 306 Ready to import | 51 Incomplete | 10 Imported | 33 Already in profile | 0 Excluded

Import 306 ready items
This includes creating new items, claiming pending or external items, and linking to existing system items. [Import 306 items](#)

Filter by category: All categories

141 - 150 of 306 items Results per page: 10 [Previous](#) 1 ... 14 15 16 ... 31 [Next](#)

Item	Category/Type	Import status	Import method	Actions
Graduate Studio in Visual Narrative No match found	Instruction Course taught	Ready to import	Create new	<input checked="" type="checkbox"/> <input type="checkbox"/>
Artist Book Lab No match found	Instruction Course taught	Ready to import	Create new	<input checked="" type="checkbox"/> <input type="checkbox"/>
Documentary Illustration No match found	Instruction Course taught	Ready to import	Create new	<input checked="" type="checkbox"/> <input type="checkbox"/>
Drawing for Story No match found	Instruction Course taught	Ready to import	Create new	<input checked="" type="checkbox"/> <input type="checkbox"/>
Graduate Studio in Visual Narrative No match found	Instruction Course taught	Ready to import	Create new	<input checked="" type="checkbox"/> <input type="checkbox"/>
Senior Thesis Studio No match found	Instruction Course taught	Ready to import	Create new	<input checked="" type="checkbox"/> <input type="checkbox"/>
Editorial Illustration No match found	Instruction Course taught	Ready to import	Create new	<input checked="" type="checkbox"/> <input type="checkbox"/>
Foundations of Image Practice No match found	Instruction Course taught	Ready to import	Create new	<input checked="" type="checkbox"/> <input type="checkbox"/>
Artist Book Lab No match found	Instruction Course taught	Ready to import	Create new	<input checked="" type="checkbox"/> <input type="checkbox"/>
Sequential Image No match found	Instruction Course taught	Ready to import	Create new	<input checked="" type="checkbox"/> <input type="checkbox"/>

141 - 150 of 306 items [Previous](#) 1 ... 14 15 16 ... 31 [Next](#)

[Finish](#)

Image: The review page showing a CV import in progress

Institutional control

Users' access to CV import is configured by a dedicated "CV Import User" feature access role, which can be assigned at the organization, group, or individual level, giving you fine-grained control over who can use the feature. For example, this allows you to:

- Account for differing AI policies between groups within your institution
- Pilot the feature with specific groups
- Grant access to administrative delegates curating on behalf of others

Feature access for CV import and single-item AI-assisted data entry are independent of each other, so you can manage access to the two features separately.

AI credits

With the release of Elements 7.4, we are introducing the **AI credits** model for managing AI usage. AI credits can be purchased as desired, in a similar way to support hours. As AI features are used, AI usage will be charged against your credit balance.

AI credits will cover the use of both AI features currently available within Elements:

- CV import
- AI-assisted data entry (for single items)

Note: use of AI Summarisations in the Discovery module does *not* consume AI credits.

As a guide, one credit should typically allow the full import of a 20-page academic CV containing 300 new items. Exact credit usage will depend on document size, complexity, and the number of items produced. Where items have been previously imported using AI features or can be matched using DOIs or other identifiers, credit usage will be reduced.

Your institution's AI credit balance is shared across all of your Elements instances, production and non-production. Administrators can easily track balance through a new, dedicated interface.

For more information about AI credits, see the [support site](#).

Flexible purchasing and AI credit "pots"

Like support hours, AI credits can be purchased at any time; they are not tied to your annual renewal cycle. When you purchase credits, they will be applied to your balance as a batch or "pot". A pot can become active immediately after purchase, or you can request a future activation date. Each pot expires 12 months after its activation date. Admins can track active, upcoming, used and expired pots on the AI Settings page.

AI settings

AI Credits
Credits are topped up via support ticket. View pricing and instructions on the [support site](#).

Remaining credits
85.79 [Download daily balance CSV](#)

AI credit pots
AI Credits are organised into pots, each with its own start date, expiry date, initial balance and remaining balance. A pot becomes active on its start date and becomes inactive either (a) when its remaining balance reaches zero, or (b) on its expiry date.

Each time an AI feature is used, credits are deducted from the active pot(s). If multiple pots are active, credits are deducted from the pot that is due to expire soonest. The amount deducted reflects the amount of AI processing used.

Active
If multiple pots are active, AI credits will be deducted from the pot that is due to expire the soonest.

Pot ID	Start date	Expiry date	Initial credits	Remaining credits
01KSJ3HFYJR8JYXBMNEGA 7W5RF	26 May 2026	27 May 2027	100	85.79
				Total: 85.79

Upcoming
Pots that have been purchased but not yet activated. Each pot will become active on its start date.

Pot ID	Start date	Expiry date	Initial credits	Remaining credits
01KSQKE8HNZ9KF3RYZB1 NNAB1	01 Oct 2026	02 Oct 2027	50	50.00

Recently used or expired
Pots that have been used up or expired within the last 12 months. Any credits remaining in expired pots are no longer available for use.

Pot ID	Start date	Expiry date	Initial credits	Remaining credits
01KR4DQAVN2DYC31QK9R FT4ZJB	26 May 2026	27 Aug 2026	10	0.00

Image: Admin-facing AI credits info, showing active, upcoming and used pots.

Initial allowance

To allow you to trial CV import and/or AI-assisted data entry, every customer will be allocated an allowance of 10 AI credits upon enabling *either* CV import or AI-assisted data entry for the first time. This initial allowance will expire 3 months after activation.

If you have already enabled AI-assisted data entry, this initial allowance began on 26th May 2026 (expiring 27th August). Any usage of AI-assisted data entry that occurred before 26th May 2026 will not be charged for.

Streamlining the path to profile completeness

CV import gives your institution a streamlined, intelligent way to capture the full breadth of a researcher's contributions. This is a beta release, and we're excited to hear about your experience - what's working well, where it could be sharper, and how this new capability is fitting into your institution's workflows. Your feedback will directly shape where we take CV import next. You'll find a link to our feedback form in the product.

Preferred record

In this release, we have completely overhauled the 'Preferred record' functionality in Elements, moving away from a user-by-user preference. The preferred record is now a single, **object-level property that propagates globally throughout Elements** (including Discovery, Assessment, Item evaluation, OA Monitor, and Reporting).

Crucially, this feature acts as an item-level override of your instance's default source precedence rules. Once a preferred record is selected, Elements will bypass the default data source precedence list, and the metadata from that specific record will be used everywhere in Elements (whenever record-level information is hoisted to the object level).

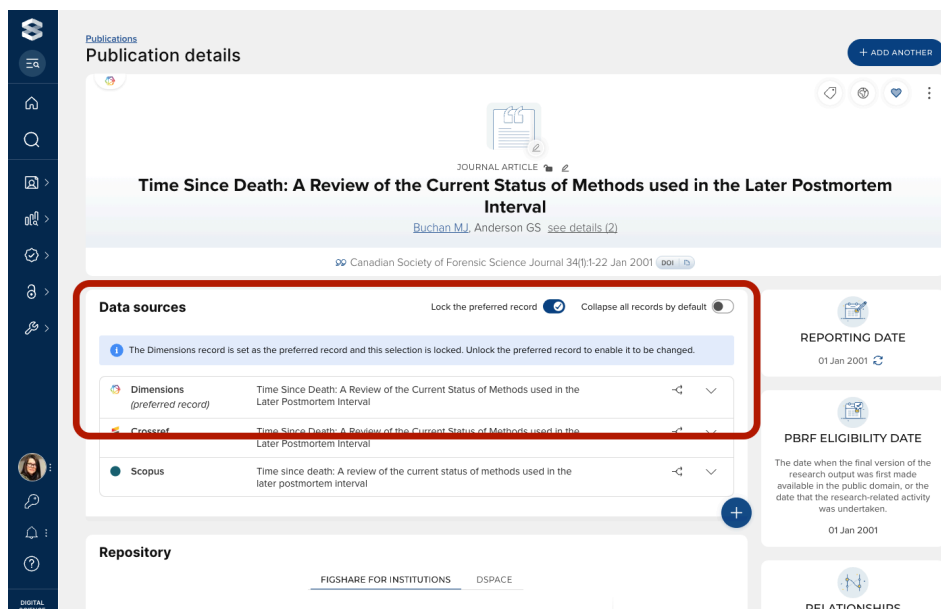


Image: The preferred record now acts as an object-level property that propagates throughout Elements, and includes an admin locking feature.

Key benefits

- **Complete data consistency:** By adopting a 'global approach', the selected preferred record is consistently returned across all precedence schemes, preventing data inconsistencies where different modules might fetch different representations of an object.
- **Enhanced data governance and admin controls:** To protect institutional data integrity, we have introduced an 'Admin lock' for the preferred record. This ensures that an

object remains accurate and stable, and prevents 'preference wars' among multiple authors on a single publication.

- **Simplicity and transparency:** It is now much easier to communicate and understand which record's data is representing an object, as the preferred choice is respected system-wide (see details of exceptions below).
- **Expanded functionality:** Preferred records can be captured on most content types in Elements:
 - Publications
 - Grants
 - Professional activities
 - Teaching activities
 - Records of impact
 - Projects
 - Pieces of equipment (new)
 - Journals (new)
 - External organisations (new)
 - Organisational structures (new)

Migration of existing data

To accommodate this shift, your existing data will be automatically migrated to the new object-level property during the 7.4 upgrade. We have designed the migration logic to protect your curated data and handle any existing user conflicts:

- Manually verified records
 - If an object has a manually verified record, it will automatically be flagged as the new object-level preferred record. Furthermore, if that manually verified record was locked, the preferred record selection will also be locked to safeguard your previous administrative intent.
- Single user preferences
 - If there is no manually verified record, but there is a single existing user-level preferred record, it will be migrated to the object level.
- Matching user preferences:

- If multiple users had previously selected the same preferred record, that preference will be migrated to the object level.
- Conflicting user preferences:
 - Where multiple users had selected different preferred records for the same object, Elements will resolve the conflict by migrating the most recently applied preference.

Please note the following upgrade implications:

- Due to structural database changes required for this feature, the **upgrade to 7.4 may take longer than usual** (potentially up to 2 hours longer, depending on database size).
- Because the preferred record now modifies the default output **repository relevance schemes**, it changes the aggregated metadata that is sent downstream. When the preferred record changes the 'output' of a relevance scheme, the overall object 'hashes' will change; this hash change can cause items to be automatically repushed to connected repositories. For repositories like Figshare, these repushes may trigger automated repository review workflows - you should anticipate this behavior upon upgrade and going forward for when users update preferred records.
- The preferred record now serves as the primary source of metadata in the **OA Monitor** - including critical dates, ISSNs, and subtypes which are used to determine if an item is 'in scope' or compliant with configured OA schemes. Consequently, some items may see a change in their status following upgrade to v7.4. For non-compliant items, the system prioritises reporting non-compliance reasons based on the most 'active' record (most recent non-withdrawn) from the most preferred RT2 source.
- There are changes to the **API** that integrations will need to account for. The API now returns the preferred record first by default and includes a new is-preferred-record property. There is also a new configuration setting (use-legacy-record-precedence-ordering) available if you need to group records from a single source together.

- The preferred record ID column will be removed from the user preference tables in the **reporting database** (i.e. [User {Category} preferences] tables) upon upgrade. A new 'Is Preferred' column has been added to applicable [%CategoryName%] and [%CategoryName% Record] tables in the reporting db.
- Changes to **basic reports** include:
 - Objects basic report: A new 'preferred source' column has been added to this report.
 - Objects records basic report (All Records Report): A new true/false indicator column has been added to clearly denote whether a specific record is the preferred record.
 - User object pairs basic report: This report includes a new column indicating if the record is the preferred one.
 - ObjectLinksToUsers basic report (Links with users): The legacy 'preferred source' column has been removed from this report

Similar to the basic reports, the **list object CSV export** has been updated to include a new column indicating if the record is preferred.

Exceptions

While the preferred record acts as a system-wide 'trump card', we have preserved a few specific administrative configurations that will continue to supersede the preferred record:

- If your institutional **ORCID** push is explicitly configured to include only verified manual records, Elements will continue to respect that strict configuration, even if the user's preferred record is from another source or is an unverified manual record.
- If your custom **repository relevance scheme** explicitly defines a hard-coded source order in the XML (e.g., strictly ordered as Scopus, then Web of Science), the system will continue to respect that explicit ordering over the object-level preferred record.

Further details on this new preferred record functionality are available in the 'How does preferred record functionality work?' FAQ [support article](#).

Item Evaluation module expansion

Elements v7.4 continues the development of the Item Evaluation module with a set of enhancements focused on flexibility and data management. This release introduces support for external reviewers, giving institutions the ability to capture input from individuals who do not have access to Elements, alongside new bulk import functions that make it easier to load nominations, reviews, and outcomes at scale. Additional workflow improvements further reduce the administrative overhead of running an evaluation exercise.

Bulk data import

This release introduces the ability to import nominations, individual reviews, and overall outcomes into an Item Evaluation exercise using CSV files. This is particularly useful for clients who have existing review data captured in the Assessment module and want to migrate it into an Item Evaluation exercise without re-keying it manually. It also supports other common scenarios, such as recording reviews that have been collected outside of Elements, capturing scores that have been moderated off-system, or submitting data on behalf of researchers who do not engage directly with the platform.

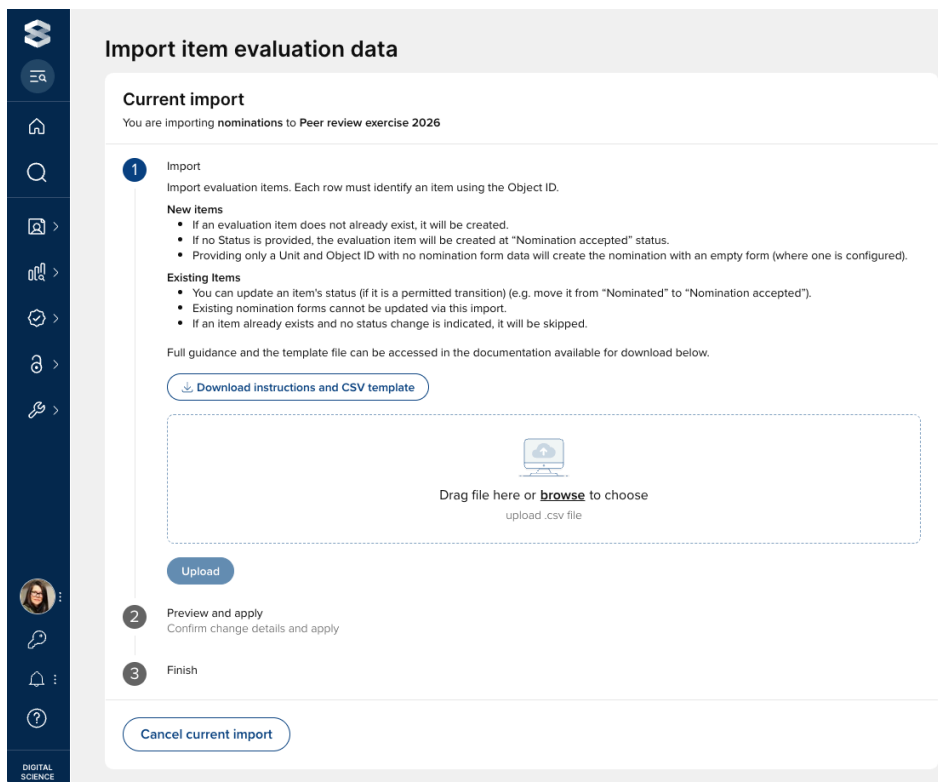


Image: Import nominations, individual reviews, and overall outcomes in bulk

Import functions for Item evaluation are available to Administrators and Unit managers only.

Further information on importing item evaluation content in bulk is available in the "Import item valuation content" [support article](#).

External reviews

In this release, we have introduced support for capturing external reviews, enabling you to capture input from reviewers who do not have a login to Elements.

When assigning reviews, Administrators and Unit managers can now add external reviewers alongside internal users. Rather than selecting from the pool or searching for an Elements user, an external reviewer is identified by entering a name and other identifying text - for example an institution and/or email address. The same identifier cannot be used twice for the same item within a unit, ensuring clarity across the review list.

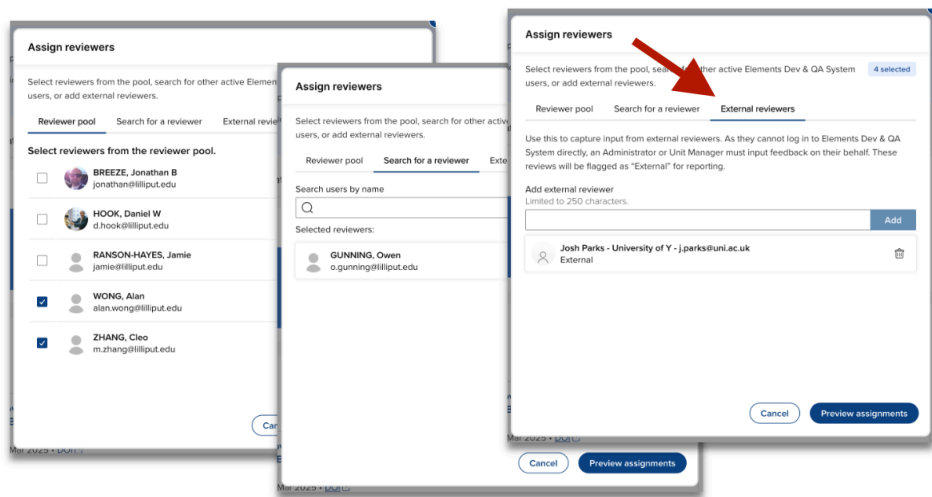


Image: Assigning external reviewers

External reviews follow the same workflow as internal reviews. They pass through the same statuses and are subject to the same management actions, including submitting, declining, and deleting. Because external reviewers do not have access to Elements, Administrators and/or Unit managers are responsible for submitting and declining reviews on their behalf.

External reviews are also included in the new external reviewer filter on the Unit management page, making it straightforward to find items that have assigned external reviews. A dedicated flag on each individual review also identifies it as external, which is reflected in reporting.

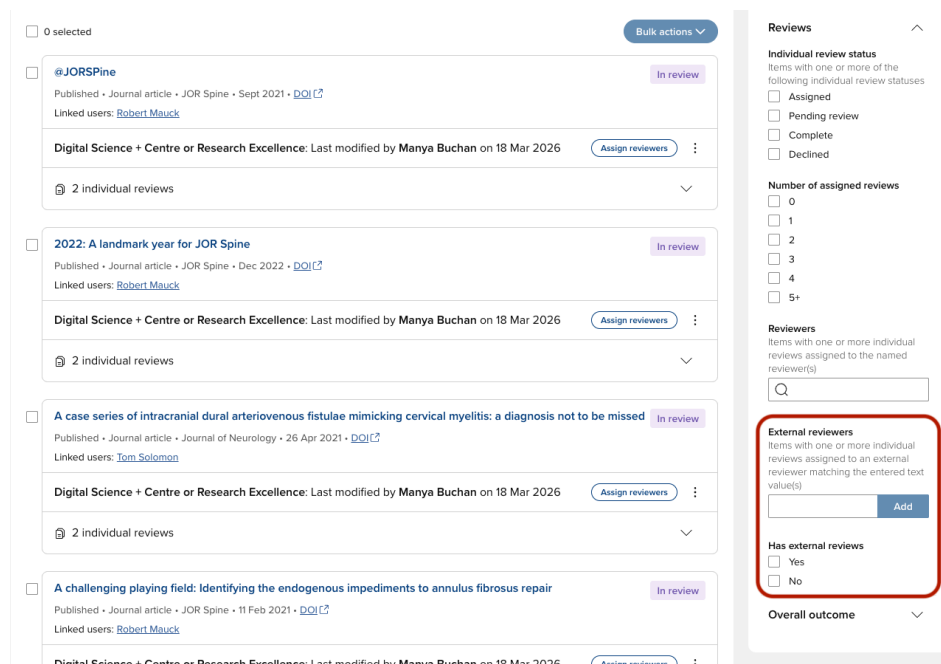


Image: External reviewers filters

Further information on assigning external reviews is available in the 'Assign, dispatch, and manage reviews' [support article](#).

Additional management actions

In this release, it is now possible to capture an overall outcome for a candidate directly from the Nomination accepted stage, bypassing the individual review workflow entirely. This may be useful where a decision has been reached outside of the review process, where historical evaluations are being entered into the system retrospectively, or where individual reviews are not required for the type of evaluation exercise being undertaken.

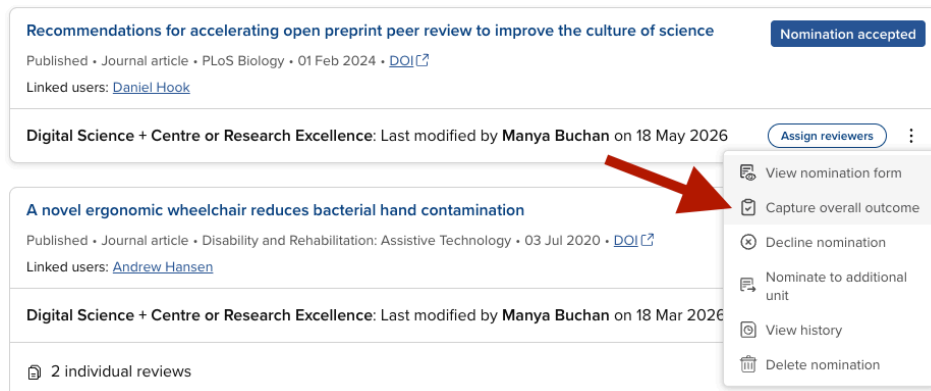


Image: Capture the overall outcome directly from 'Nomination accepted' status.

Further information on this action is available in the 'Capture the overall outcome' [support article](#).

Support site

The [Item Evaluation](#) section of our support site, where all Item Evaluation support articles can be accessed, has been expanded to include further information on the functionality included in this release.

Discovery Module Enhancements

The v7.4 release of the Elements Discovery module comes with a redesigned search feature that makes finding the correct profiles even easier - as well as a significant number of accessibility improvements for users of assistive technologies.

Redesigned Search

The search bar has been redesigned with the addition of an explicit Search button and the removal of the separate tag-based search option leaving a simpler and cleaner UI. The search algorithm

continues to match against both tag data and public profile data, preserving full search coverage.

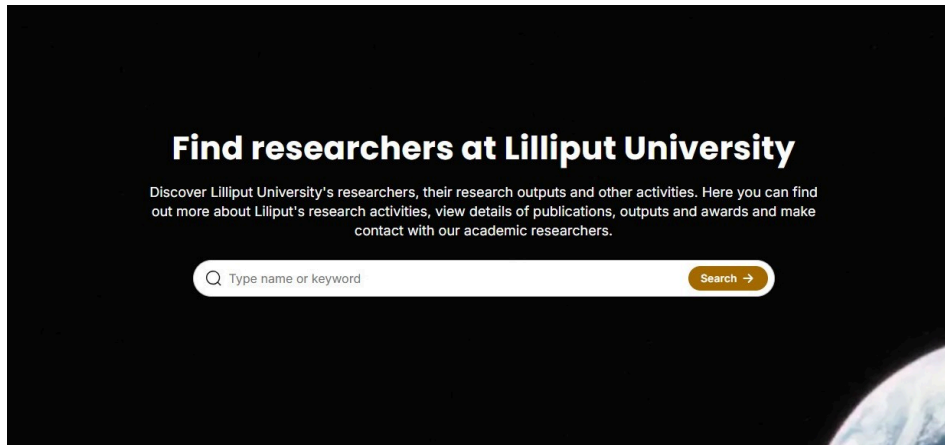


Image: Redesigned Discovery search bar

The search page UI adopts your existing branding scheme and the display varies depending on which profiles your Discovery module has enabled. The above image demonstrates how it appears when just the Expert profiles are enabled, whilst the image below shows the appearance when Expert, Equipment & Group profiles are all enabled.

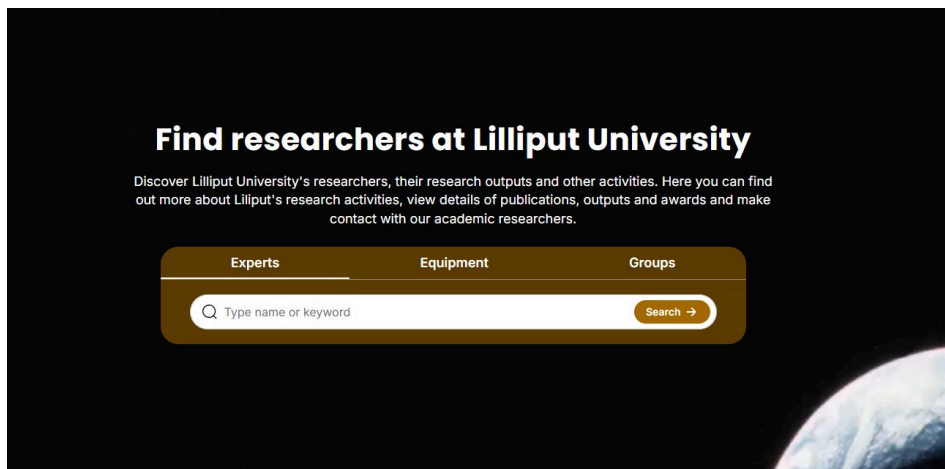


Image: New search bar configured for Expert, Equipment & Group profiles

Tag Behaviour

In v7.4, we have amended the behaviour of the clickable tags in the Discovery search results. Prior to this release clicking on a tag would result in a completely new search being run against that tag. In this release, clicking a tag in the search results applies it as a filter to the current search, refining the result set rather than replacing the search entirely.

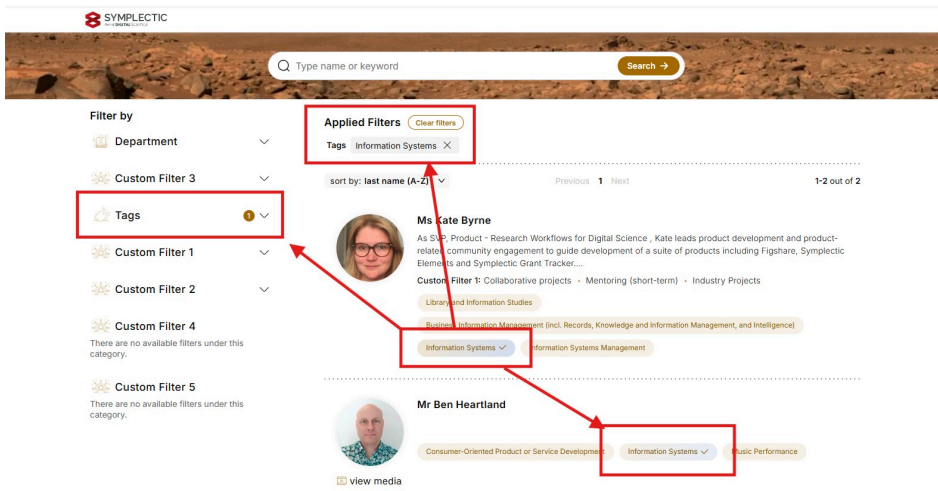


Image: Clicking on tags in the search results applies a filter rather than a new search

Filters

The filter selection modal has been redesigned. A new type-ahead search has been added to allow filters to be easily located and applied. The previous sort options have been removed as part of this redesign.

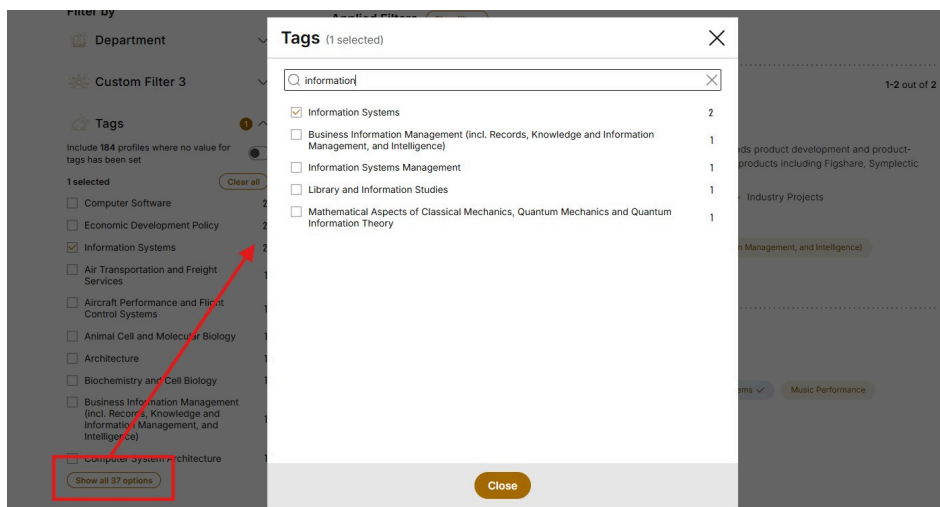


Image: The redesigned filter selection modal with a type-ahead search function

Accessibility

All of these changes have been made with accessibility at the forefront of our design and the new search experience is fully WCAG 2.2 compliant to AA standard. We have made significant improvements to accessibility throughout the Discovery module in this release, and we will continue that work as we move towards the whole of Discovery reaching full WCAG 2.2 AA compliance.

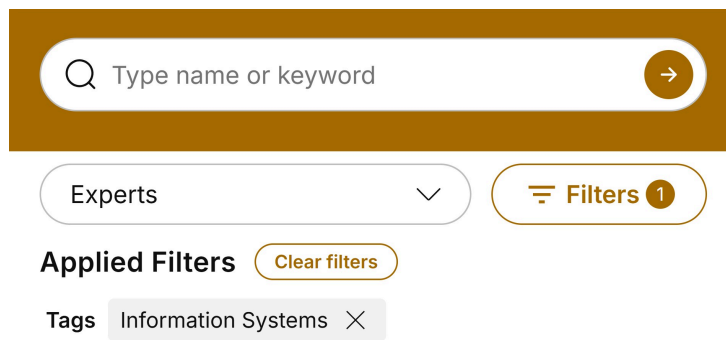


Image: Updated search UI reflowed in mobile view

Awards Management

In this release we are pleased to have enhanced the existing Awards Management classification schemes so that they are integrated fully with the Elements label schemes, and to introduce the ability to record percentage values against selected schemes.

In addition, we have made additional change request and deliverable data available to query via the API and through the Elements reporting database.

As with previous releases, full details of the Awards Management functionality released in v7.4 are available in the Awards Management release notes on our [support site](#).

Sherpa Romeo (JISC Open Policy Finder) journal data

We have updated the Sherpa Romeo data source for journals to use the new JISC Open policy finder API, following JISC's [announcement](#) that the Sherpa Services API will be retired at the end of July 2026. This change ensures that the source's journal data will continue to synchronise after this date.

Note: This change was also patched back to v7.1, v7.2, and v7.3. After the legacy Sherpa Services API is switched off, the Sherpa Romeo journal data source will stop updating for any clients on v7.0 or earlier, or unpatched versions of v7.1, v7.2, and v7.3.

Other improvements and fixes

- We fixed an issue with the **external organisation** autocomplete where an incorrect record could be returned, making it difficult to locate the intended institution. The

lookup now considers a broader set of matching records to ensure more accurate and reliable results.

- In the **Annual Collection** module, we have expanded the range of evidence types available for DHET collections to include six additional values: Proof of public profile (CO), Proof of press review (CO), Proof of award(s) (CO), Formal declaration letter (CO), Upload PhD/Masters (CO), and Proof of ethical clearance (CO).
- The **REST API** now includes endpoints for **managing impact evidence** attached to impact case studies, supporting all three evidence types: document uploads, URL references, and contact or testimonial references. This allows integrations to create, retrieve, and delete evidence items programmatically, removing the need for manual entry through the user interface.
- We have fixed an incorrect value in the **Types of Activity label scheme** (toa-2020), where 'Experimental Research' has been corrected to 'Experimental Development'. Any existing record metadata using the incorrect value has been updated to reflect this change.
- We have fixed an issue in the **PDF viewer** where annotations and text were not being positioned correctly. This change ensures content displays accurately within the viewer.

2026 release dates

We would like to remind you of the upcoming [release dates](#) for 2026:

- 9 July 2026
- 24 September 2026
- 26 November 2026

End of support

As always, we recommend you regularly review our [End of Support Announcements](#) for information about upcoming end of support in Symplectic Elements for various technologies.

New end-of-support announcement: SSAS analytics database

We are announcing the upcoming end of support for the SQL Server Analysis Services (SSAS) analytics database that ships alongside Elements, along with the four stock analytics dashboards in the Reporting Hub that depend on it: Grants with Linked Publications, Publication Collaboration by Department, Publication Group Comparison, and Publication Volume. These will be removed in our v7.7 release.

If your institution uses these dashboards, has built custom dashboards against the analytics database, or has any external integrations connected to it, please take a moment to review this announcement.

Full details are in our [End of Support Announcements](#) article. Please contact Support if you believe you will be negatively impacted.

End of version support

We would also like to draw your attention to the upcoming end-of-support dates for versions of Symplectic Elements:

Version	Release date	End of support date
7.4	28 May 2026	28 May 2028
7.3	26 February 2026	26 February 2028
7.2	1 December 2025	1 December 2027
7.1	18 September 2025	18 September 2027
7.0	26 June 2025	26 June 2027
6.23	24 April 2025	24 April 2027
6.22	28 February 2025	28 February 2027
6.21	28 November 2024	28 November 2026
6.20	19 September 2024	19 September 2026
6.19	27 June 2024	27 June 2026

If you need assistance planning to upgrade, please contact our team via the Support Site.

We're here to help!

We hope you enjoy getting to know the latest version of Symplectic Elements. Should you have any questions, we're here to help! Just contact us at support@symplectic.co.uk for assistance.

Best wishes,

The Symplectic Team

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