



Research Intelligence

Pure for Personal Users

Version 5.29

Empowering Knowledge™
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This document is Version 1.0 of the manual *Pure for Personal Users*, produced on Monday, January 29, 2024 at tag f53d9aa .

1. Pure basics for Personal Users

1.1. Manage your profile

Your personal profile consists of general information about you, such as identifying information and information about your job position and research, as well as the sum of records related to you, such as research output you authored or activities you performed.

Your Personal Profile is used:

- to determine the content shown on your profile on your institution's Pure Portal. See [Section 1.2.8. Customize how you appear on the Portal.](#)

Note

This depends on the availability of the Pure Portal at your institution and any institution-specific settings.

- to manage personal information about you as relevant to your research.

If parts of your personal profile are populated from your institution's HR system, you cannot edit these fields in Pure. See [Section 1.1.5. Editable and read-only fields.](#)

To manage your personal profile, you can:

View your Personal overview workspace

1. Click the **Personal** tab in the top navigation bar.
Your **Personal overview** workspace is displayed.
2. To view records associated with your personal profile, click the **My research** tab in the workspace.
3. To view organizations associated with your personal profile and downloadable reports, click the **My profile** tab in the workspace.

Edit your personal information

1. [Open your Personal overview workspace.](#)
2. In the top area of the workspace, click **Edit profile....**
The **Person** editor window is opened with your current information.
3. Make changes as needed and click **Save.**

Note

You may not be able to edit certain fields if they are managed outside Pure or you don't have the correct permissions. See [Section 1.1.5. Editable and read-only fields.](#)

Edit the records related to your personal profile

1. Click the content type of the record you want to see in the left navigation.
The workspace for the content type is opened with the default filter applied: editable records relating to your personal profile.

Note

Depending on your configuration, by default only records that are editable are shown. To see all of your content, click the filter beginning with the word "My" and ending with the name of the content type under the tab you just opened. You can also click through the different content types on the **My research** of the **Personal overview** workspace.

2. Click the name of the record and make edits using the editor window. See [Section Editor window.](#)

You can also:

- Configure which users of Pure have permission to make changes to your personal profile. See [Section 1.2.4. Trusted users.](#)
- Configure automatic processes that find candidate publication from online sources to associate with your personal profile. See [Section 1.3.12. Automated publication search.](#)

1.1.1. Why Pure?

Pure is a research information management system and faculty activity reporting tool that your institution uses to keep up-to-date records about publications authored and other academic activities undertaken by its researchers.

Pure is accessed in a web-browser and requires login credentials from your institution. It may be synchronized with other databases at your institution, such as HR, so that you see recent information from other systems, and can collect publication information from online sources. You can also enter information manually to make sure your full body of academic work is reflected in your Pure profile.

Your role

In Pure, each user has one or more *roles* which determine the parts of Pure you can see and use.

Your role in Pure is a Personal User – that is, you are a *user* that can log into Pure, where you can add and view information. However, as a *Personal User* you yourself are also an entity in Pure. Content can be added that relates to you as a researcher: perhaps as an author of a paper, as an applicant for an award or grant, or as a principal investigator of a research project.

To ensure that your institution can showcase your research at its best, Pure's focus on data quality and ease of import from online sources aims to make this information simple to curate and as accurate as possible.

Understanding affiliations

Pure focuses not just on the quality of one piece of data, but the relations between different pieces of data, particularly between publications, persons and organizations. Maintaining these affiliations helps ensure data quality and makes your research output more discoverable.

Affiliations are added in the forms of links – when you add a record in Pure, make sure you also add a link to relevant related persons, organizations, projects etc.

Additional features

Unless you have other roles, such as an Editor or Administrator role, you probably won't see much of the power behind Pure. Administrative users help assure data quality at your institution.

They analyze the information that you enter to help drive performance at your institution. For example, they can prepare detailed reports about your institution's output, the productivity of its staff and any collaborations taking place. They may also use Pure to manage applications for awards or grants as well as curate information about research projects that these awards hopefully become.

Make your life a little easier

If you are a beginning user, take time to perform the following tasks. These will minimize the amount of manual entry required to keep track of your work, making sure you can maintain one accurate record for each item of research output or research-related activity:

- Enter ID information you use to identify yourself as a researcher on other services, such as [ORCID](#).
- If you use or publish under multiple names, [add these to your personal information](#). This will improve Pure's ability to identify your publications.
- If this functionality is available at your institution, [set up an automated search](#) so that information about your publications is automatically copied into Pure from other databases. Don't worry, you will have a chance to review any imported records to check that they are correct!
- If you have an assistant or colleague who will manage your content in Pure for you, [add them as a trusted user](#) so they can work on your behalf.
- [Customize your email notification settings](#) so that Pure doesn't send you too many or too few reminders.

1.1.2. Manage your profile

Your personal profile consists of general information about you, such as identifying information and information about your job position and research, as well as the sum of records related to you, such as research output you authored or activities you performed.

Your Personal Profile is used:

- to determine the content shown on your profile on your institution's Pure Portal. See [Section 1.2.8. Customize how you appear on the Portal.](#)

Note

This depends on the availability of the Pure Portal at your institution and any institution-specific settings.

- to manage personal information about you as relevant to your research.

If parts of your personal profile are populated from your institution's HR system, you cannot edit these fields in Pure. See [Section 1.1.5. Editable and read-only fields.](#)

To manage your personal profile, you can:

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Edit your personal information

1. [Open your Personal overview workspace.](#)
2. In the top area of the workspace, click **Edit profile....**
The **Person** editor window is opened with your current information.
3. Make changes as needed and click **Save**.

Note

You may not be able to edit certain fields if they are managed outside Pure or you don't have the correct permissions. See [Section 1.1.5. Editable and read-only fields.](#)

Edit the records related to your personal profile

1. Click the content type of the record you want to see in the left navigation.
The workspace for the content type is opened with the default filter applied: editable records relating to your personal profile.

Note

Depending on your configuration, by default only records that are editable are shown. To see all of your content, click the filter beginning with the word "My" and ending with the name of the content type under the tab you just opened. You can also click through the different content types on the **My research** of the **Personal overview** workspace.

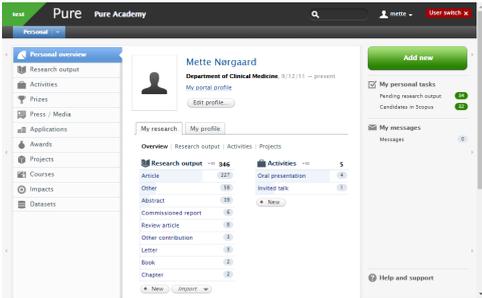
2. Click the name of the record and make edits using the editor window. See [Section Editor window.](#)

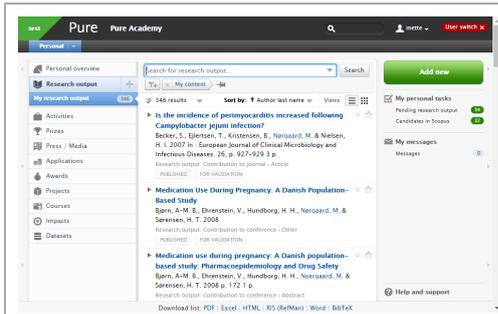
You can also:

- Configure which users of Pure have permission to make changes to your personal profile. See [Section 1.2.4. Trusted users.](#)
- Configure automatic processes that find candidate publication from online sources to associate with your personal profile. See [Section 1.3.12. Automated publication search.](#)

1.1.3. Navigate and search

Important areas of the interface

Picture	Description of areas
	<h3>Pure interface initial view</h3> <p>As a Personal User, the first thing you see in the Pure interface is the Personal overview tab.</p> <p>Many of the features you see on this screen are present throughout Pure.</p> <p>See online help for interactive screenshots.</p> <p>Header and top navigation: Navigate between different modules in Pure, login and control settings relevant to your user.</p> <p>Task pane: Access tasks, messages, favorites, recently-viewed content and support materials.</p> <p>Navigation tabs: Switch between different tabs.</p> <p>Workspace: View and edit records. The content depends on the current tab.</p>



Workspace with content list view

When looking for records in Pure, you will see records that match your filters and search query in a list view.

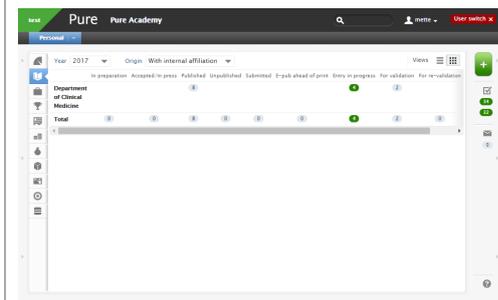
See online help for interactive screenshots.

Search and filter area: Enter a search query, add or save filters.

Results display controls: Control how the search results are displayed (list or matrix view), the number of results per page, the sort order etc.

Preset and saved filters: Access filters that can be applied to searches on this content type.

Matching records: Expand to see details, add to favorites and see confidentiality status.



Workspace with content matrix view

Some content types appear automatically in a matrix view. You can also choose to see this view by toggling



the view in the Views area

See online help for interactive screenshots.

Content filters: Select pre-defined filters from the drop-downs.

Left navigation (collapsed): View records with a different content type.

Task pane (collapsed): Access tasks, messages, favorites, recently-viewed content and support materials.

Content totals: The number of records in each column.

Tip

In the matrix view, the toolbars are also collapsed so you have more room to view the content. To expand collapsed toolbars, click  or  at the edges of the screen.

Editor window

Use the editor window to maintain information records, whether you are adding, editing or deleting them.

An editor window opens automatically when you click on a record.

See online help for interactive screenshots.

Title bar: See the title of the record in the title bar, or the type of the record if you haven't entered a title yet.

Help pane: View messages about how to use the section, either from Pure or from your institution.

Navigation tabs: Switch between different tabs

Workflow and notification area: See who is responsible for the workflow state of the record and comment changes.

Footer: Save, copy or delete the record.

Note

You can't *always* edit content in the editor window despite the name – after you have made all the appropriate entries a research manager at your institution may lock the record from further changes. See [Section 1.3.10. Workflows](#).

Searching and filtering

Global search: search across all records in Pure

Note

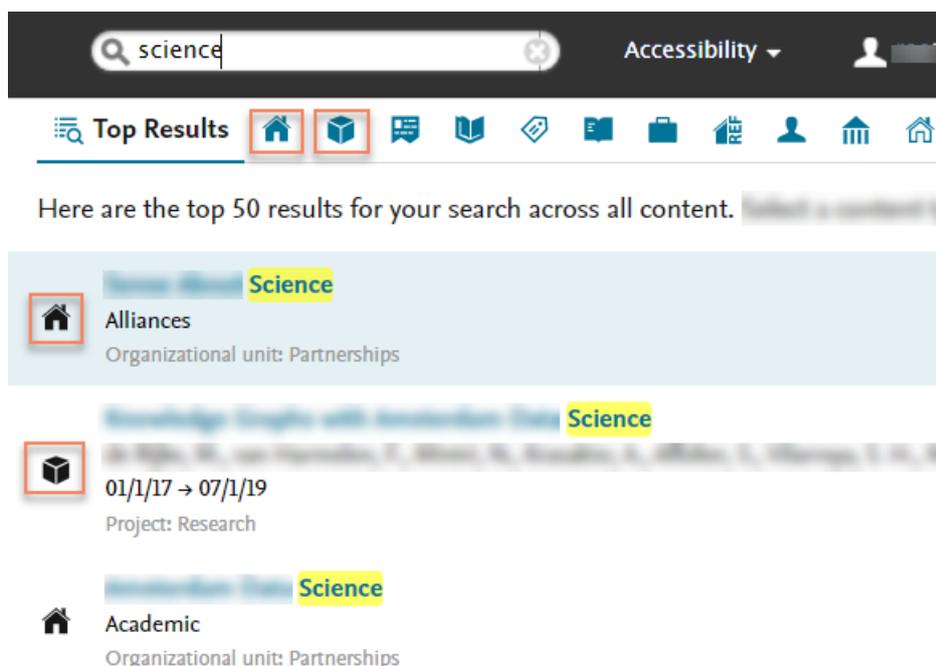
In versions of Pure older than 5.20.0, *My content > Content I can edit* filter option was applied by default to the results of global search. This meant that the user would only see results they could edit. The filter could then be manually removed. Starting with 5.20.0, the *My content > Content I can edit* filter option is only applied by default to search results within one content type (see below).

Tip

When viewing all global search results for a selected content type, you can apply filters to further refine your search. The filters are reset each time you start a new search.

You can search in all of the records in Pure from the header of the Pure interface. This text search ranges across the metadata of all records and content types available in Pure.

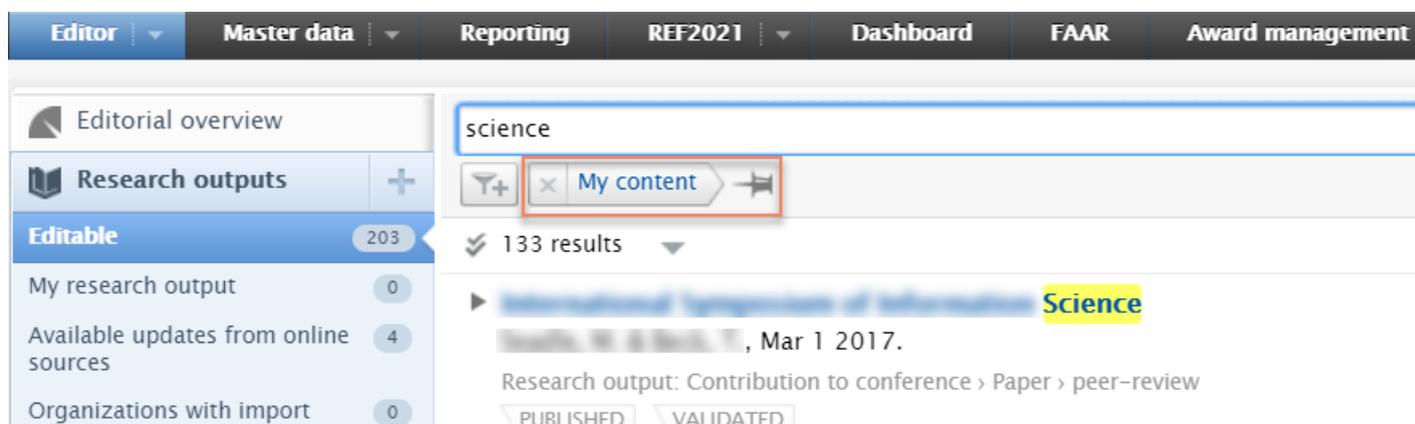
To refine the search to one content type, click the icon for that content type along the top of the search results list. You will be taken to the content type search results overview screen where you can add further filters to narrow down results.



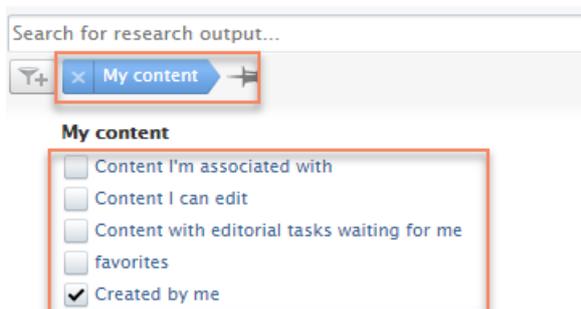
Search within one content type (content list view)

Click one of the content type tabs in the left navigation to open the [content list view](#) with search functionality. With this method, your searches are restricted to the content type that is currently open. Note that the *My content > Content I can edit* filter option is applied (pinned) to the search results by default. You can easily modify your search results:

- select a different option within *My content* filter (see below)
- remove the *My content* filter (✕) to view all search results for that content type
- apply other filters (⌵+)



My content filter: select from a number of options that specify your relationship to the content.



1.1.4. Export data

One way to make use of a list of data outside Pure is to export records. You can control what records you want to export, and choose the format to export them to.

To export records:

Select the records you want to export

1. Navigate to the content type of the records you want to export by clicking the name of the content type in the navigation.

See [Section 1.1.3. Navigate and search](#).

Note

If you want to export data across multiple content types, perform this process once for each content type.

2. Use the search and filter options on the content type page to refine the list of records to export.

See [Section 1.1.3. Navigate and search](#).

Tip

Click  in the filter area to save the current combination of filters. You can access preset and saved filters from the left navigation under the name of the selected content type.

Note

All records that are shown in the content list are exported, regardless of whether you select or deselect the checkbox () next to individual records.

Select the output format

1. At the bottom of the workspace, select the format you want to export records in from the **Download list** menu, either:

- PDF
- HTML
- RIS (RefMan)
- Word
- BibTeX

2. If prompted, select the citation style from the **Select render style** list.

Note

The export formats PDF, HTML and Word allow you to choose a citation style.

Your browser prompts you to download the list of records in your selected format.

Tips and tricks

- To quickly export a list of your own research output, click the "My research output" filter under the Research output tab in the left navigation, then select your preferred export format in the footer.
- If you cannot see the **Download list** menu, you may be looking at your own content on the **My research** tab of your personal profile. See [Section 1.1.2. Manage your profile](#). Make sure you select the records by selecting the content type in the left navigation so you can access the search and filter functionality.

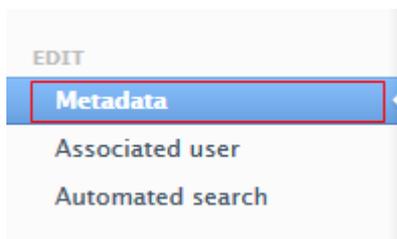
1.1.5. Editable and read-only fields

Sometimes you will encounter information in Pure that you cannot edit:

- in the editor window where you can add and delete information in some fields but not others.



- in the editor window where you cannot open the **Metadata** tab to edit any of its information.



There are four main reasons why you might not be able to edit content in Pure:

The content is populated from a different IT system at your institution

Although you may see other information relating to yourself or your institution (such as personal or employment details, organizational structure and affiliations) in Pure, unless it is directly related to academic activities it is probably maintained outside Pure.

If you see inaccurate information you want to change, you can:

- Wait to see if the content is updated automatically.
Pure is regularly synchronized with other institutional systems, but it may take some time before updates are reflected in Pure depending how often these updates are scheduled.
- Contact the owner of the system the information originates from to have the changes made there.
Often this is the HR system or system with grant/award information at your institution. Your Pure administrator should be able to help you identify the correct system.

The content is synchronized from a different external system

Datasets can be imported from and synchronized with Mendeley Data so that their metadata is available in Pure but the data is under version control within Mendeley Data. Certain fields on these datasets cannot be edited in Pure.

Other content types may also be synchronized from an external system, such as Press/Media clippings.

The content belongs to another user

Unless you also have editor permissions, you can only edit records that have been linked to you as a Personal User.

For example, if you are a co-author of an article and another user has already entered some details into Pure, you can still not edit the record unless you are also added as an author.

If you find a record in Pure where you feel the content should be associated with you, open the record and click **Claim this content** in the footer of the editor window. See [Section 1.3.13. Claim and disclaim publications](#).

The content is in workflow state where it can no longer be edited

This means it has been approved by an editor or the library and blocked from further changes.

You can see the workflow state for a record in the content list view of search results, or search for records based on their workflow. See [Section 1.3.10. Workflows](#).

1.1.6. View your FAAR report

Introducing FAAR reports

FAAR stands for "Faculty and Academic Activity Reporting". A FAAR report collates records about a researcher's professional activities from Pure into one document so that you and your institution can easily

download and use this information outside of Pure.

Note

A FAAR report does not contain personal information about you (such as contact information or previous employment information) beyond name and email address information. Its focus is on records entered into Pure such as research output, activities or other content.

Download your FAAR report (.docx or .pdf)

1. Section [View your Personal overview workspace](#).
2. Click the **My profile** tab in the workspace.
The Faculty and Academic Activity report area is shown on the tab.

Note

This area is only visible if your institution has enabled FAAR reporting.

3. If you want to download the report as a Word document, click **Download docx**.
4. If you want to download the report as a PDF, click **Download PDF**.

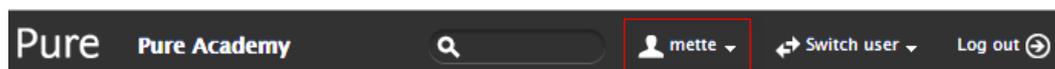
1.2. Language settings

Depending on the setup of Pure at your institution, you may be able to change the language settings. You can change the *interface language* and the default *submission language*.

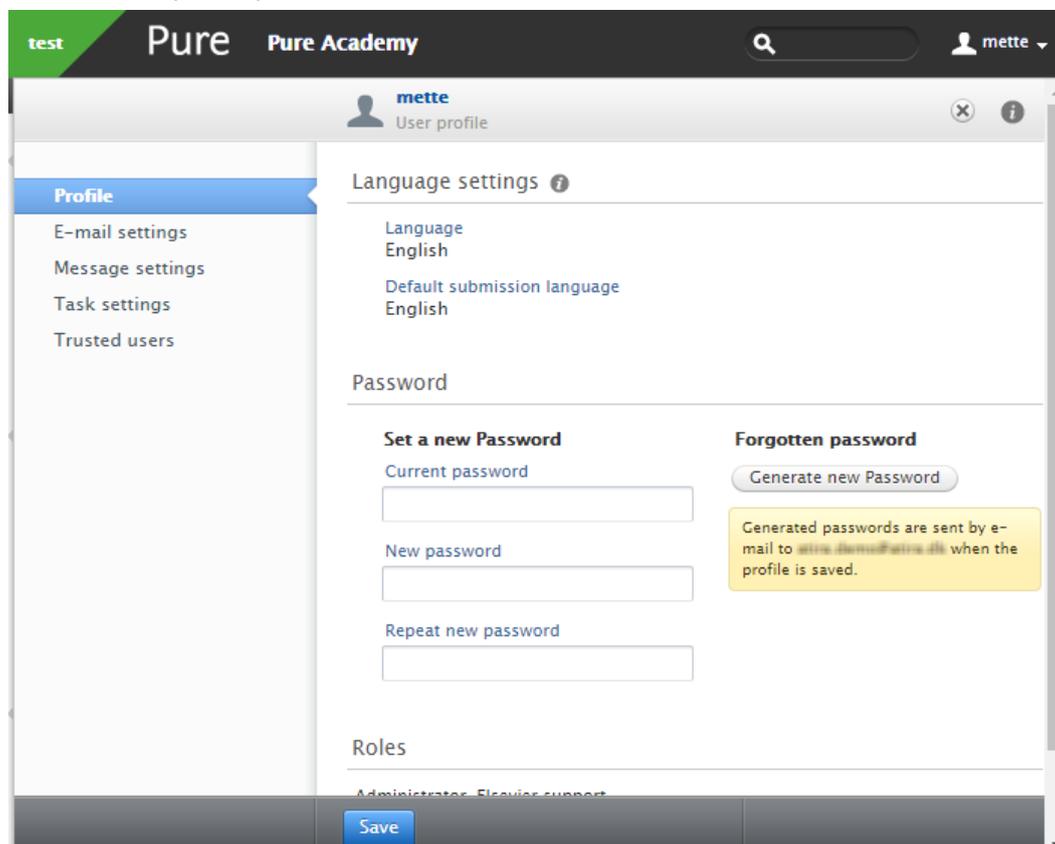
Change your interface language

The interface language controls the language of the text that you see on the screen when you work in Pure. To change the interface language:

1. Click your username in the header.



The User settings dialog is expanded.



- In the **Profile** tab > **Language settings**, select the interface language in the **Language** field.

Note

You can only change the interface language if additional languages are made available by your institution.

Change your default submission language

The submission language determines the language tag that is given to the content that you enter into Pure.



Figure 1. You can see the language tag given to the content you enter by the small flag next to the field.

For example, if you often enter content in English and in Swedish, you can choose whether your initial setting is that content should be labeled as Swedish or as English. Of course, you can still switch easily between the input languages!

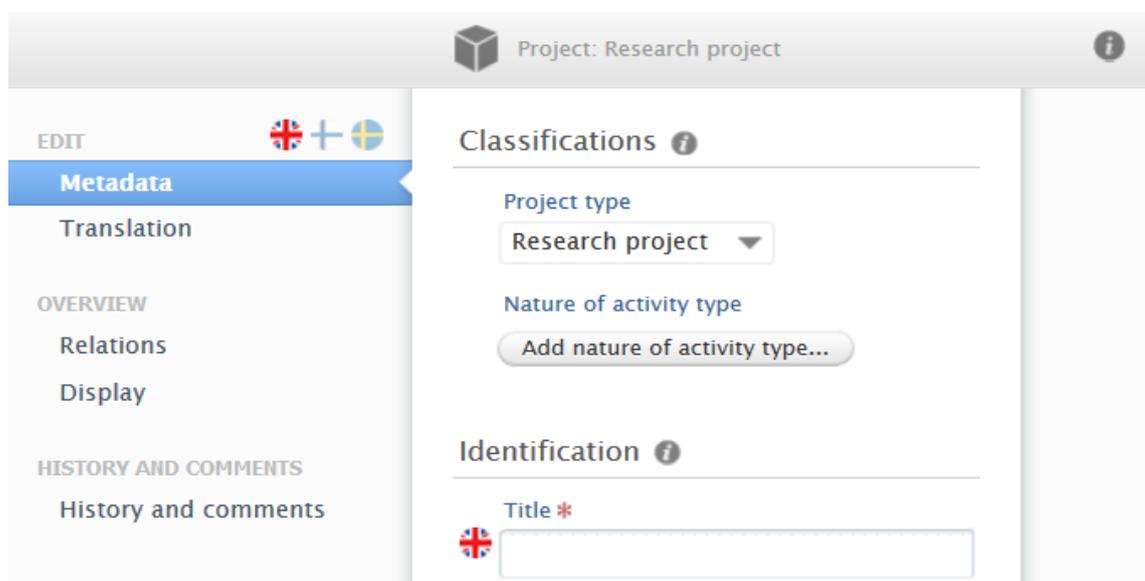
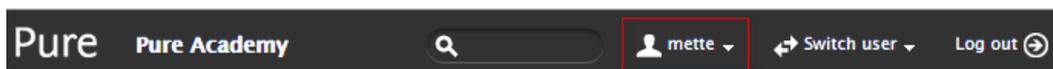


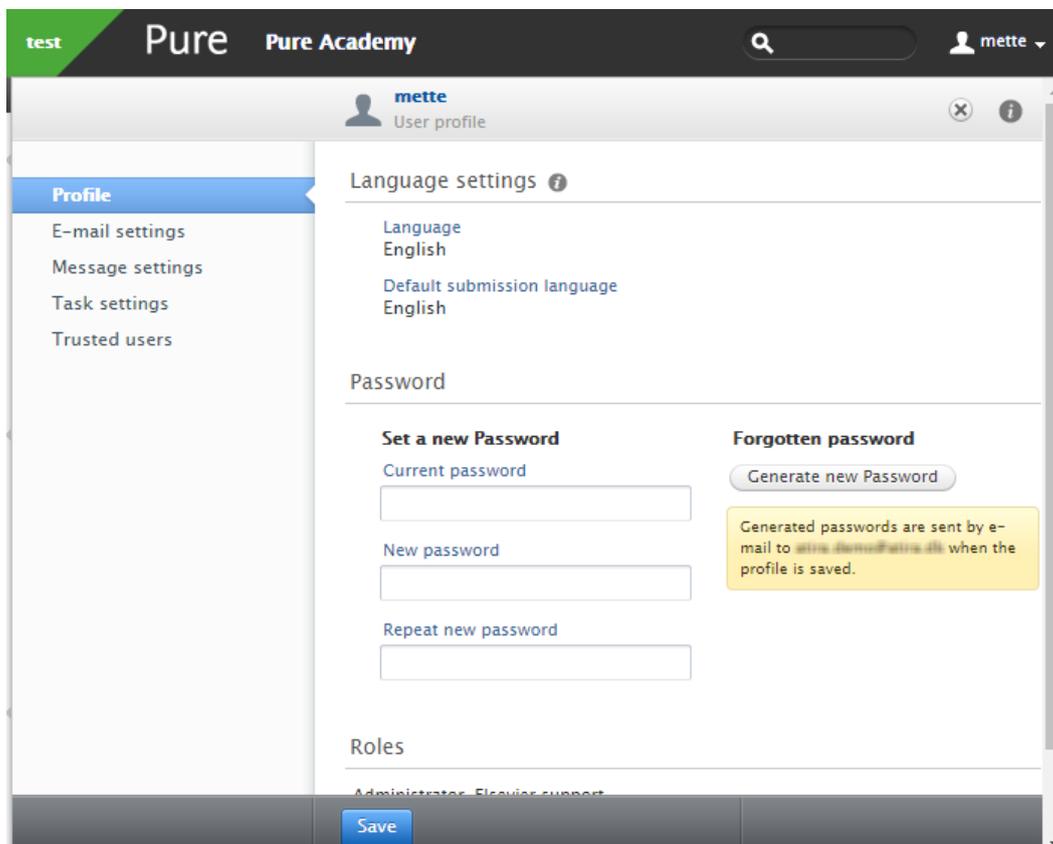
Figure 2. Click the flag in the left navigation of the editor window to change the current submission language.

To change the default submission language:

1. Click your username in the header.



The User settings dialog is expanded.



2. In the **Profile** tab > **Language settings** section, select the submission language in the **Default submission language** field.

Note

You can only change the submission language if additional languages are made available by your institution.

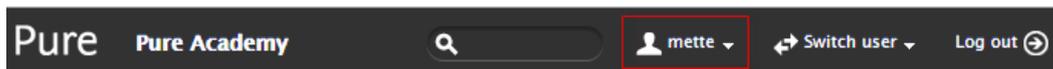
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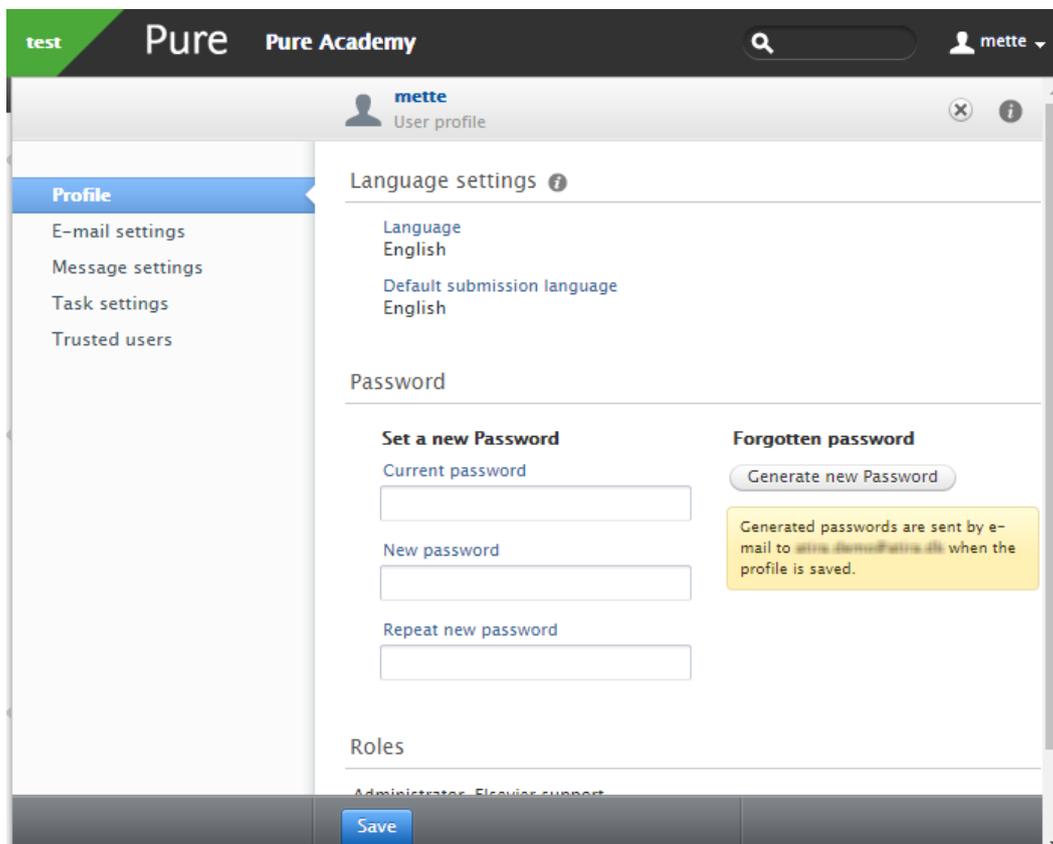
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You can only change the interface language if additional languages are made available by your institution.

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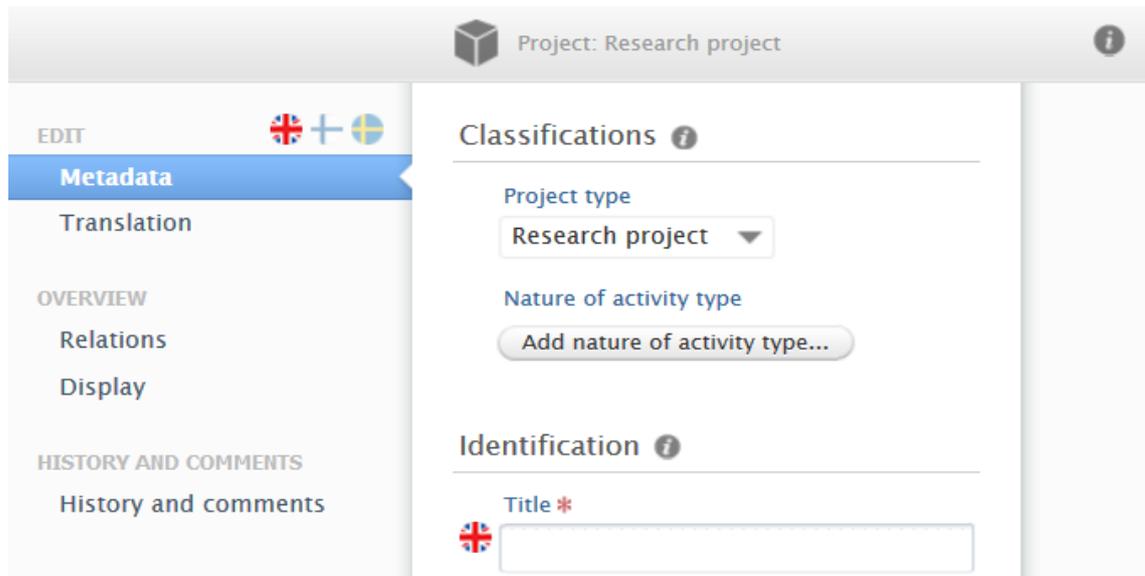
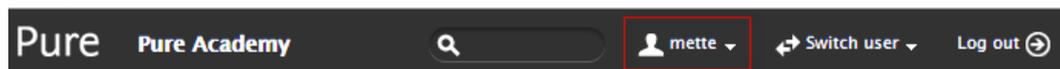


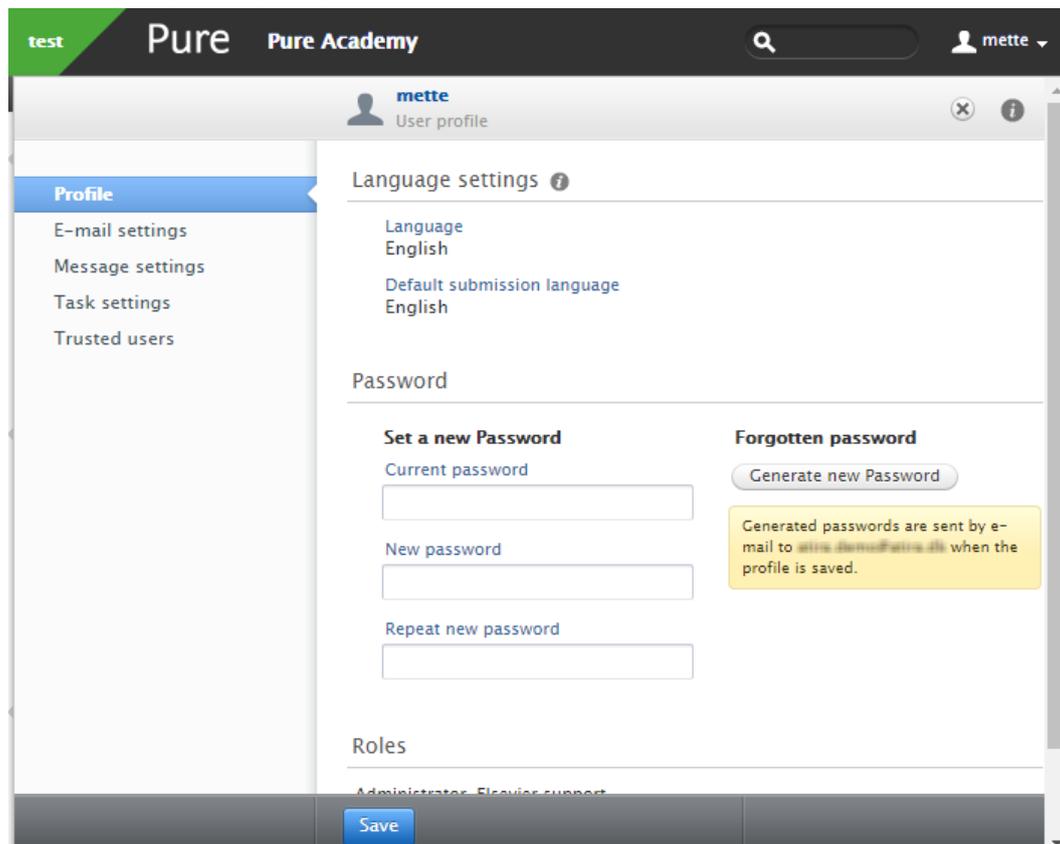
Figure 4. Click the flag in the left navigation of the editor window to change the current submission language.

To change the default submission language:

1. Click your username in the header.



The User settings dialog is expanded.



- In the **Profile** tab > **Language settings** section, select the submission language in the **Default submission language** field.

Note

You can only change the submission language if additional languages are made available by your institution.

1.2.2. Email preferences

You can control whether you receive email notifications when certain events occur in Pure. You can also control how often these notifications are sent to you.

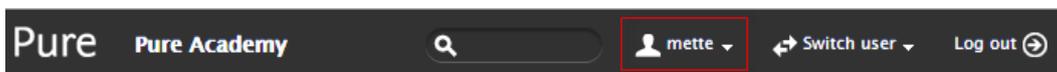
Change your email address

The email address that Pure sends emails to is defined when your user credentials are created. If you need to change the email address, contact your Pure administrator.

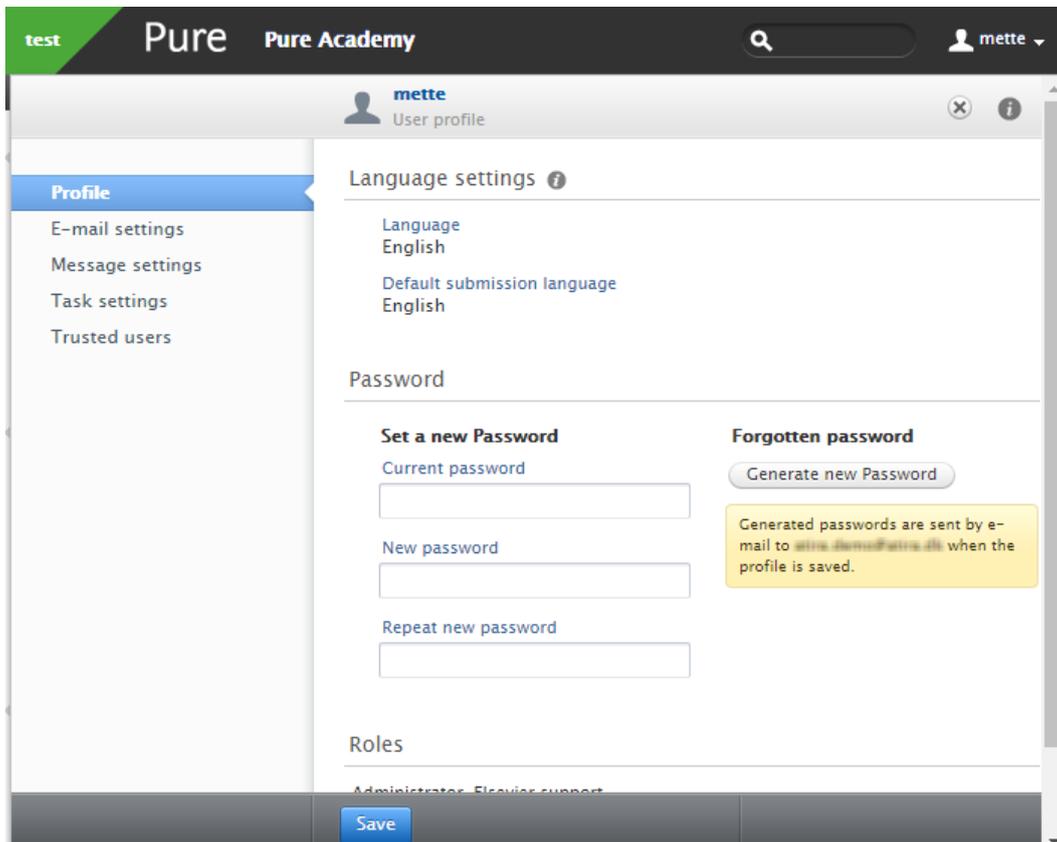
Change email behavior for an event

To change your email notification preferences:

- Click your username in the header.



The User settings dialog is expanded.



- Click the **E-mail settings** tab in the left navigation pane.

A table listing events that can trigger a message and the frequency of emails about these events is displayed.

- Navigate to the event that you want to change your email notifications for in the **E-mail message** column.

Tip

If there are multiple events related to one content type, click ► to expand the list of events. Events for each content type are sorted under the sub-headings **Notification** (something related to you is changed in Pure), or **Personal task** (you are asked to make some changes on a record related to you in Pure).

- In the **Mail frequency** column next to the event, select whether the event should trigger an email notification. For events under the sub-heading **Personal tasks**, you can also choose the frequency with which emails are sent, such as daily, weekly, monthly or quarterly.

Note

If a list of events is collapsed, this field shows a text summarizing whether emails are sent for events in the list.

Summary text	Description
All e-mails	Every event in the list triggers an email notification.
Some e-mails	One or more events in the list triggers an email notification.
No e-mails	No events in the list trigger email notifications.

Additional email settings

Some email notification settings are controlled in other parts of Pure. Use the table below to locate where to find these controls:

Email setting	Location
New publication candidate found in online source	The Automated search tab of the Person editor window.

1.2.3. Manage multiple names

Name information is generally synchronized into Pure from your institution's HR system, so it is likely that your name cannot be edited in Pure.

However, you can maintain various name variants to reflect any different names you are known by or have used when publishing. For example, nicknames, a name change due to marriage, or middle names.

Personal identification ⓘ

First name(s) **Last name ***

Nationality
 ▼

Name variant

Beth Known as name	Edit ↓ -
Smith Former name	Edit ↓ ↑ -
伊丽莎白白 Translated name	Edit ↓ ↑ -
Liz White Default publishing name	Edit ↑ -

Add name variant...

Figure 5. Different name variants on the **Metadata** tab of the **Person** editor window.

Tip

If you are entering a name variant where only either the first name(s) or last name differs from your standard name, you do not have to re-enter the parts of your name that stay the same. For example, if you have a nickname that replaces your first name, you do not need to enter your last name in the name variant.

To manage name variants:

1. [Open your Personal overview workspace.](#)
2. In the top area of the workspace, click **Edit profile...**
The **Person** editor window is opened with your current information.
3. Click the **Metadata** tab.
4. In the Personal identification section, click:
 - **Add name variant...** to expand the **Name variant** area. Choose the type of name, enter the name, then click **Create** to add the name variant.
 - **Edit** next to a name to expand the **Name variant** area. Click **Update** to change the name variant.
 -  to delete the name variant.
 -  or  to re-order the name variant within the list.

Different name variants available

Name variant	Description	Usage in Pure
Standard name	Your name as used in the HR system at your institution. This is the name displayed in the Personal Identification section on the Metadata tab of your personal profile.	Used in citations unless overruled by a <i>Default publishing name</i> , and in Pure unless replaced or augmented by a <i>Known as</i> name.
Default publishing name	Your name as it appears on new publication records added to Pure.	Replaces the standard name when related to publications. For example, as an author. This name is used in citations; whether it is the full name or initials depends on the citation format. Tip Authors' names as related to research output (such as citations) are fixed at the time that the record is created. Changing your Default publishing name does not affect your name on items of research output from the past. Note If you create content by importing it from an online source, then the name provided from this source is used regardless of your preferences in Pure.
Former name	Your previous name, which you may have also published under.	
Known as	Your name as displayed in Pure for other users to see. For example, when searching for people, or in conjunction with a username.	Shown instead of the standard name on screens in the Pure interface and on content. 
Portal sort name	Your name as it should be sorted alphabetically when displayed on the Pure Portal. Generally this is used to exclude prefixes. For example, enter "Jong" for the name "De Jong" if you want to be sorted among other surnames with the letter "j" instead of the letter "d".	Not shown in any interface, only used to sort lists of names. Tip Make sure that this name is the same (differing only in prefixes that may affect sorting) as the name for you that is shown on the Pure Portal.

Changing names

If you change your standard name in Pure, only future content is affected. Records created while you had your former name continue to show the former name.

You can also add this former name as a name variant, especially if you changed your name before beginning to use Pure.

Using name variants for automated search and online import

When [configuring an automated search](#), Pure automatically suggests various search strings based on your standard name and your default publishing name. You can manually add other variants with the Add name...

button.

When matching persons in Pure to authors of records imported from online sources, Pure matches based on all name variants and the Scopus ID.

1.2.4. Trusted users

Allow someone to act on your behalf

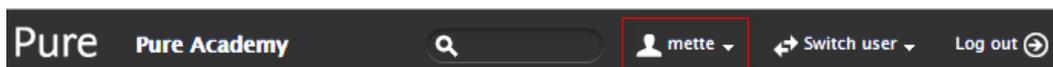
You can allow another Pure user to manage information in Pure on your behalf by adding them as *trusted user*.

A trusted user can take control of your user account, and can perform all of the tasks that you can in Pure, except for taking control of other user accounts where you are a trusted user.

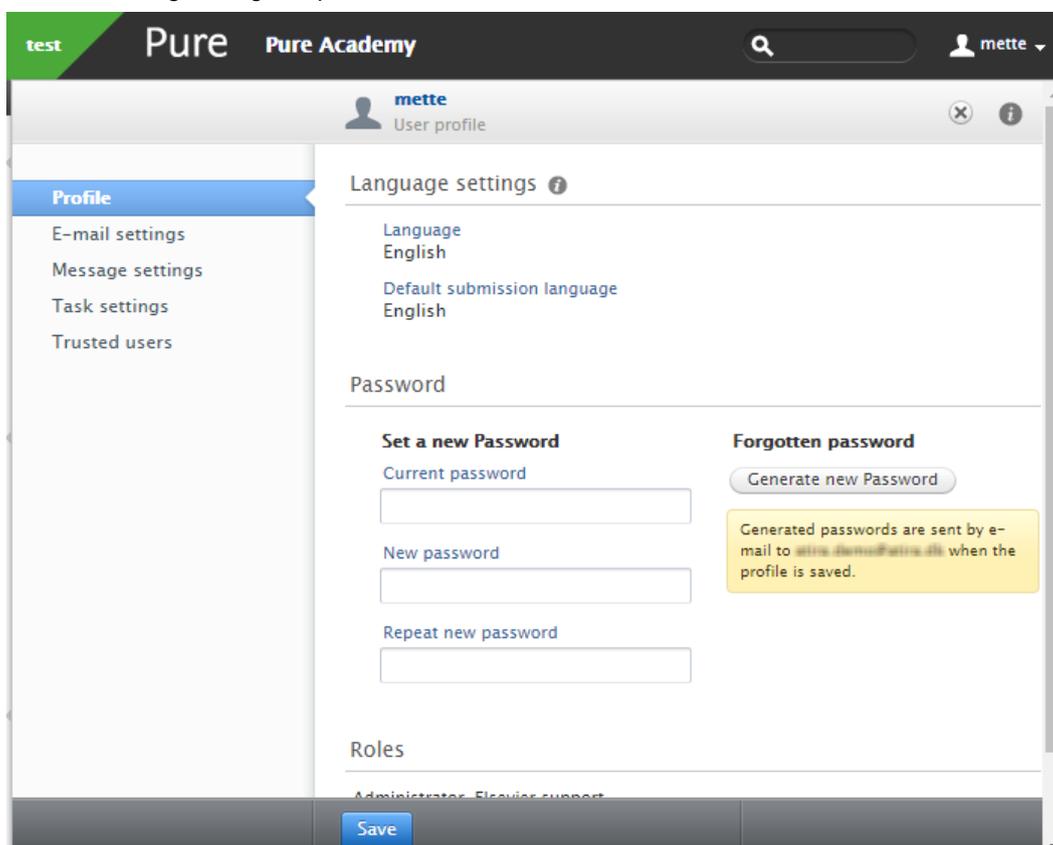
Add a trusted user

To allow another user to control your account:

1. Click your username in the header.



The User settings dialog is expanded.

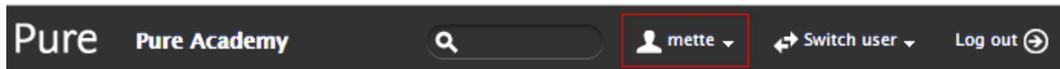


2. In the **Trusted users** tab, click  and enter part or all of the name of the user you want to allow to act on your behalf.
3. Select the user from the results list. They are added to the list in the **Trusted users** section.

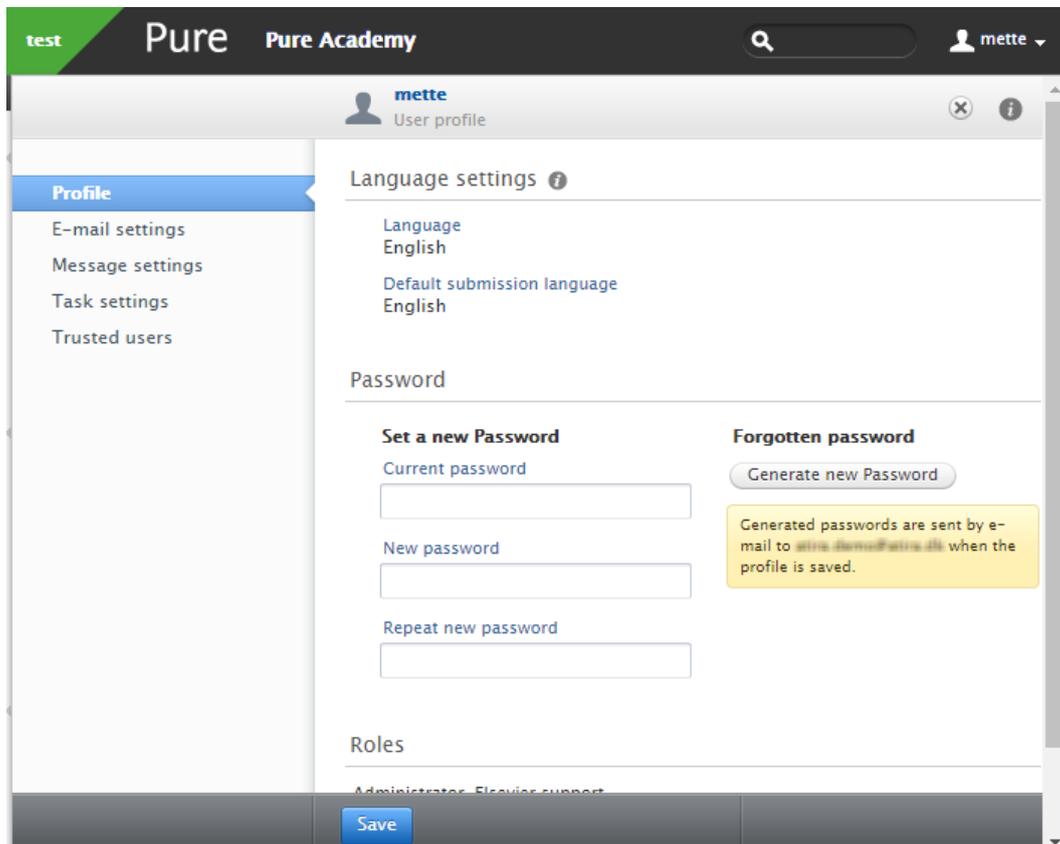
Remove a trusted user

To remove control over your account from a trusted user:

1. Click your username in the header.



The User settings dialog is expanded.



2. Next to the user you want to remove, click . The user is removed from the list and can no longer access your account.

Note

Even though trusted users have all the permissions of your account and activity is attached to your username, any changes they make are recorded in the audit log as being made *by their user acting as your user*.

Comments

Ian Smith has added a comment 13:04

I am making an initial save

Write a comment about the content

History

root as Ian Smith 13:06:28

Modified Pages (from-to), Number of pages

root as Ian Smith 13:04:46

Created

*Figure 6. Though the "root" user was acting on behalf of the user "Ian Smith" for all of these actions, the user switch is only labeled in the **History** section.*

1.2.5. Message about a record

If you want to contact someone about a record in Pure, you can send them a message from that record. For example, if you want to confirm a detail with other authors, or alert an editor or Pure administrator that there is an error you do not have permissions to fix.

Depending on how workflows have been configured at your institution, it may not be possible to make comments or send messages about records that have been fully approved by editors/library staff. See [Section 1.3.10. Workflows](#).

To send a message:

1. Find and open the record you want to send a message about. See [Section 1.1.3. Navigate and search](#).
2. In the editor window, open the **History and comments** tab.

EDIT

Metadata

OVERVIEW

Relations

Fingerprints

Display

HISTORY AND COMMENTS

History and comments

Comments

There are no comments for this content

Write a comment about the content

History

There is no history for this content

Long-term preservation

Content has not been stored in long-term preservation

3. Click Write a comment about the content.

- Write a comment in the text box and select the names/roles of the Pure users you want to see the comment.

Comments

There are no comments for this content

Write a comment about the content

Send this comment as a message to:

- All contributors to this content
- Ian Smith

Warning

Make sure you select the checkboxes next to the names of the people you want to see the comment on the record, otherwise no message is sent.

- The users are alerted to your comment in the task pane and see the comments alongside a link to the content.

The screenshot shows the 'My messages' section with a notification for 'Messages' (1). Below it, a detailed message view is shown. The message is titled 'Enabling High-performance Statistical Computing' by Robertson, C. It includes an 'Award date' of 11/2006/100 and an 'Award' of Research Councils. A yellow notification bar at the bottom of the message pane states: 'Adam Anderson has added a comment' on 22/05/17 9:50, with a sub-message 'Please review spelling'.

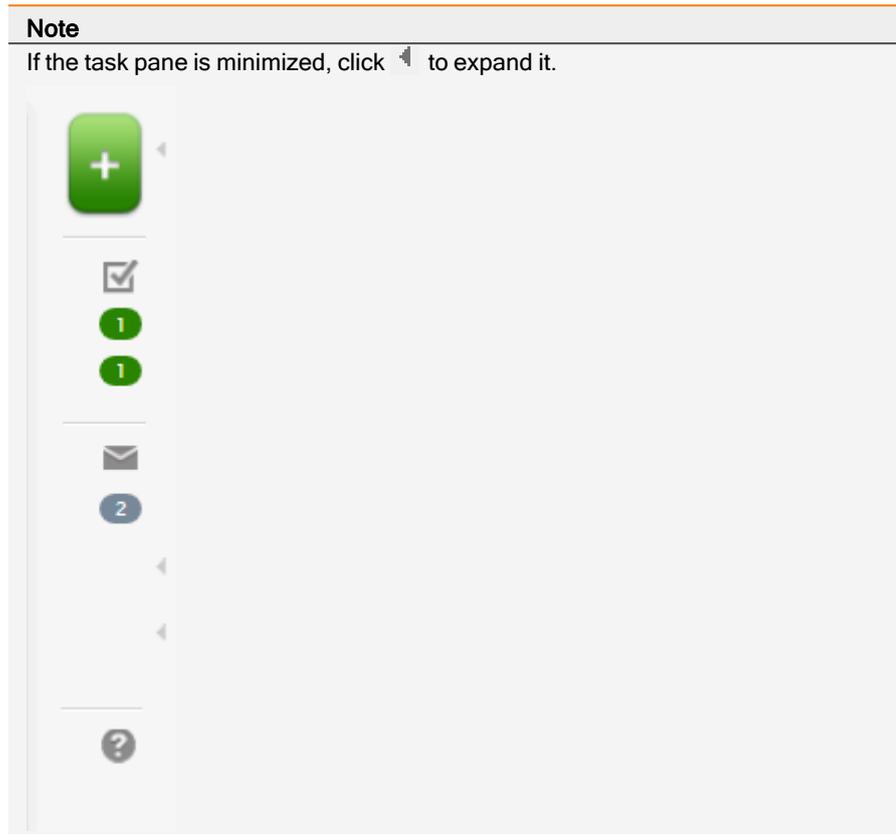
1.2.6. Assigned tasks

Depending on your role within Pure, you may be assigned tasks.

As a Personal User, generally you will be asked by an Editor (such as a librarian or a research manager) to update or improve some information you entered, or to accept some information that was entered about you by another user.

View your tasks

1. Navigate to the task pane on the right side of the Pure interface.



2. Navigate to the **My personal tasks** section of the task pane.
Your tasks are listed in this area by workflow status and content type. See [Section 1.3.10. Workflows](#) and [Section 1.3.3. Content types](#).

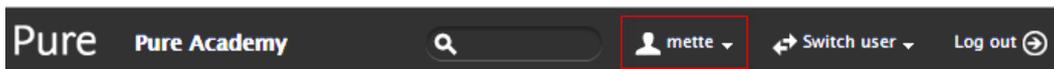
Complete your tasks

1. [Navigate to a task](#) and click it.
2. Work on the record and change the workflow status.
3. Save the record and close it.
The task is completed and disappears from your task list.

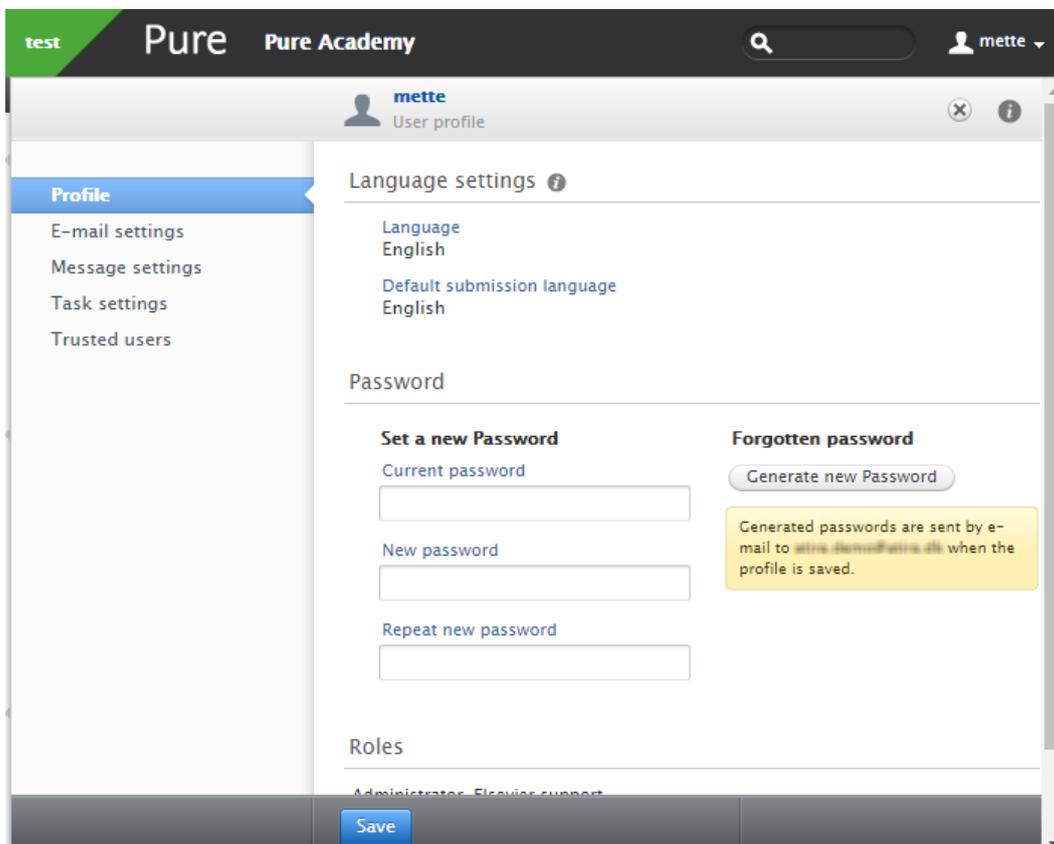
Change notification behavior for tasks

To change your task notification preferences and configure whether a task is shown in the task pane:

1. Click your username in the header.



The User settings dialog is expanded.



2. Click the **Task settings** tab in the left navigation pane.
3. Navigate to the task that you want to change your notifications for in the **Task** column.

Tip

If there are multiple tasks related to one content type, click ► to expand the list of tasks. Events for each content type are sorted under the sub-headings **Personal task** (you are asked to make some changes on a record related to you in Pure).

4. In the **Show** column next to the task, check the box if this task should trigger a notification.

List of tasks and their meanings

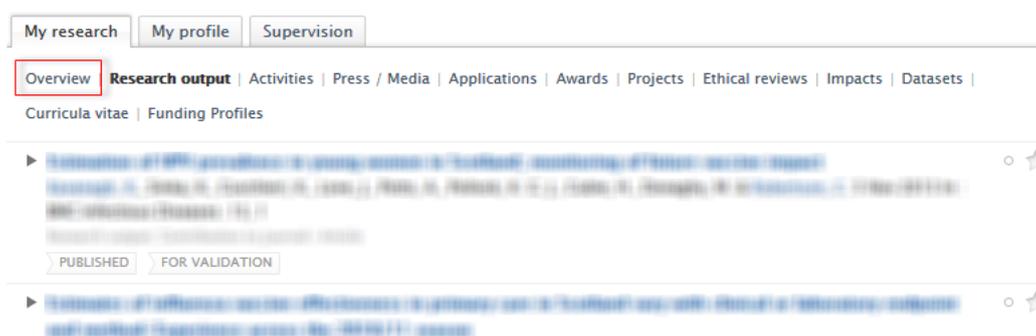
Task	Role	Description
Pending (content type)	<i>Personal User</i> Only for content types with a workflow. If the user has this role for multiple content types, the tasks are grouped by content type.	The user's input is needed to view the record and change its workflow step.
Open Access electronic file upload reminder	<i>Personal user</i> Optional: This requires the <i>Sherpa Romeo Journal Synchronization</i> job to be	A reminder is sent to upload electronic files to <i>Research outputs</i> that, when the electronic version is provided, could potentially become Open Access based on publisher policies provided by Sherpa Romeo. The records shown depend on publishers' copyright

	synchronizing data from Sherpa Romeo.	policy and are synchronized from Sherpa Romeo.
Candidates in (online source)	<i>Personal User</i> <i>Editor of Research output</i> when combined with <i>Editor of persons</i> .	An Automated search has found new search results that match the author's name and any variations (as configured for your institution).
Claimed/disclaimed Research output	<i>Administrator of claims</i>	The user's input is needed to add or remove an association between a Personal User and an item of research output. Personal Users do not have the ability to edit these associations themselves.
Changes in manually maintained online CV	<i>Personal User</i>	The user has a public, static CV that has been published and new content has been added to Pure that should likely appear on this CV.

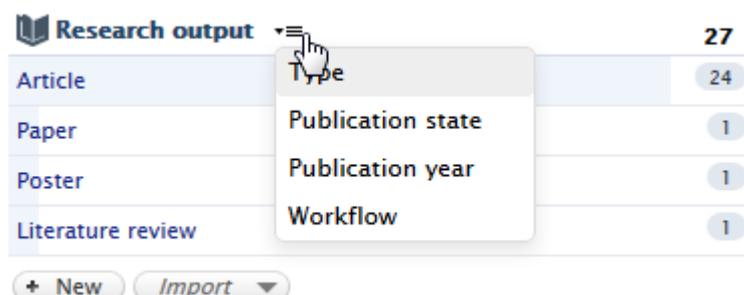
1.2.7. Customize overview

You can customize how statistics about your records in Pure are shown on your overview page.

1. [Open your Personal overview workspace.](#)
2. Click the **My research** tab in the workspace.
3. If you see a content list in the workspace, click **Overview** at the top of the **My research** tab.



4. Next to each content type that you want to customize the display of, click the  icon.



5. Select the dimension to show on the graphical representation for each content type.

Tip

You can also choose to view a visualization of all of your relations in Pure from your



overview page. Click to open the dynamic visualization, and select the content types you want to see in the graph.

Robertson, Chris
 cr.demo@atira.dk
 Department of Statistics & Mode
 Science
 Person: Academic (Staff)

Focus Open

Relations Collabo

- Activities
- Awards
- Courses
- Datasets
- Events
- External organisations
- External persons
- Journals
- Organisational units
- Persons
- Press / Media
- Prizes
- Projects
- Publisher
- Research output
- Student theses

1.2.8. Customize how you appear on the Portal

Information on the Pure Portal reflects the information about you in Pure. You can customize aspects of your profile on the Pure Portal.

Note

Depending on how the Pure Portal is configured at your institution it may appear slightly different from the images here.

Picture	Description of areas
---------	----------------------

The screenshot shows a personal profile page on the Pure Portal. At the top, there is a navigation bar with 'Home', 'Profile', 'Research Units', 'Research Output', 'Equipment', 'Datasets', 'Projects', and 'Activities'. The profile header includes a photo, the name 'PhD', the department 'Department of Statistics & Modelling Science', and contact details like phone, email, and website. Metrics for '112 Citations' and '6 Items' are shown. Below the header are several sections: 'Personal profile' with sub-sections for Research interests, Education / Academic qualification, Teaching, Previous employer, Personal profile, and Other work; 'Fingerprint' showing a grid of research topics; 'Network' with a world map; 'Projects' listing two projects; 'Research Output' listing two publications; 'Datasets' listing one dataset; and 'Press / Media' listing one news item.

See online help for interactive screenshots.

Personal overview: Includes basic information such as contact information. You can add free text by adding an item to the Curriculum and research description area of your personal profile in Pure.

Citations: See metrics calculated about your work. Metrics per individual publication are shown next to the publication.

Fingerprint overview: The top fingerprinted concepts.

Collaboration map: A visualization of other institutions you have worked with or have co-authors at.

Highlighted content: By default, your newest content. You can also choose which items you want to show here.

View your profile page on the Pure Portal

1. [Open your Personal overview workspace.](#)
2. In the top area of the workspace, click the link **My portal profile**.

Your profile as publicly-visible on the Pure Portal is opened in a new browser tab.

Change contact and affiliation information

Change	Location in Pure	Notes
Change contact information	Personal overview workspace > Edit profile... > Metadata tab > Personal identification section	This information may be read-only in Pure. See Section 1.1.2. Manage your profile .
Change photo	Personal overview workspace > Edit profile... > Metadata tab > Personal identification section	This information may be read-only in Pure. See Section 1.1.2. Manage your profile .
Change affiliation information	Personal overview workspace > Edit profile... > Metadata tab > Organisational affiliations section	This information may be read-only in Pure. See Section 1.1.2. Manage your profile .
Hide affiliation information	Personal overview workspace > Edit profile... > Portal profile tab > Show affiliations section	Your affiliation may still be shown on other pages, such as the page for the organization you are affiliated with.

Customize fingerprint

Change	Location in Pure	Notes
Remove concepts from your Fingerprint	Personal overview workspace > Edit profile... > Fingerprints tab	
Add concepts to your Fingerprint	Personal overview workspace > Edit profile... > Metadata tab > Curriculum and research description section > Add profile information... > Add a research interest statement, mentioning concepts you want to include in your Fingerprint	Fingerprints are constructed by mining concepts from scientific documents and listing how closely the analyzed documents/texts are related to concepts. New concepts may not appear in your Fingerprint if they have not yet been added to Elsevier Fingerprint Engine during a regular update. See About fingerprints and weighted concepts .

Customize collaboration map (network map)

The collaboration map indicates the location of collaborations that took place within the past five years by showing the countries/regions (and where possible, states) where you had an affiliation or where co-authors of your research outputs were affiliated (excluding co-authors from large author collaborations).

Change	Location in Pure	Notes
Hide the collaboration map from your Portal Profile	Personal overview workspace > Edit profile... > Portal Profile tab > set Show collaboration map on profile to Off .	The map is shown or hidden once the Pure Portal has been synchronized.

Customize metrics and content

Note

Changes you make to your profile on the Pure Portal are made in firstly Pure then queued for update on the Pure Portal. Depending on other updates that are being performed at the time your changes may appear almost immediately in the Pure Portal (for example, a single change at a small institution may take 30 seconds) or may appear several hours later (for example, if your administrators are re-publishing all other researchers' profiles or have paused updates for technical reasons).

Change	Location in Pure	Notes
Curate list records listed on the Overview tab of your profile	<p>Personal overview workspace > Edit profile... > Portal profile tab > Highlighted content section > Select and order some of your content up to the maximum number of items allowed.</p> <hr/> <p>Tip You can also click the Edit my highlighted content directly from the Overview tab of your profile if you are already logged into Pure in another tab of your browser. The Portal profile tab from Pure is opened automatically and any changes you make will be queued for update on the Pure Portal.</p>	Highlighted content is also shown on other tabs of your profile and is shown first in other lists where it appears.
Hide metrics	Personal overview workspace > Edit profile... > Portal profile tab > Show metrics section > Select metrics to show on our personal profile.	If the content is available elsewhere on the Pure Portal, the metrics may still be show there.
Hide a record (e.g. research output) listed on other tabs	Open the record itself (e.g. the item of research output, project etc.) from your Personal overview workspace > Metadata tab > Visibility section > Set visibility to Private , Backend or Campus .	
Show a record (e.g. research output) missing from the Pure Portal	<p>Open the record itself (e.g. the item of research output, project etc.) from your Personal overview workspace > Metadata tab.</p> <p>In the Visibility section, check that the setting is Public or Campus, depending where you want the record to be visible.</p> <p>Check that the Status of the record in the footer of the editor window and advance the workflow state if needed. Only Validated records are shown on the Pure Portal.</p>	See Section 1.3.10. Workflows .

1.3. Content types

1.3.1. Introducing content types

In Pure, records are organized based on their *content type*, that is, the kind of real-world entity they represent. The content type determines how the record is processed, reported and displayed in Pure.

For example, commonly-used content types include:

- Research output
- Activities
- Datasets.

1.3.2. View records by content type

View records grouped by their content type on the **Personal** tab:

Either:

- Navigate to the **My research** area of the Personal tab.
Summary statistics are displayed for each content type. The summary statistics describe the sub-types of the records per content type by default.

Tip

You can click  next to the name of the content type to show summary statistics along a different dimension, such as workflow state or year.

- Click the name of the content type in the left banner.
The search and filter window is displayed for the content type, displaying records that are visible based on your user permissions.

Note

The filter "My content" is applied by default.

1.3.3. Content types

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Note

The filter "My content" is applied by default.

1.3.4. Add sub-types to a record

Specify a sub-type for a record

Depending on the options configured by your institution, you can further specify the sub-type of a record. Selecting a sub-type defines which fields you see and are required to complete when creating or editing a record.

For example, when adding *Research output* into Pure, you are prompted to drill-down until you have chosen the most specific description of the research output in question, such as "Journal article" or "Conference poster".

To specify a sub-type, follow these steps:

1. To open the **Choose submission** wizard, click  in the task pane.
The **Choose submission** wizard is opened.

- To choose a content type and sub-type, do one of the following:
 - Select a recommended content type and sub-type from the main area.

Note

You can click  or  to scroll through multiple screens with recommendations.

- Select a content type and drill down to the appropriate sub-type from the menu on the left.

Warning

If your institution has not configured any sub-types for the content type you are not prompted to make any further choices.

- Continue entering information about the record in the **Editor** window.

Change the sub-type of a record

- Open the **Editor** window for the record
- Click **Change template** and select from the available sub-types.

Note

You can only change the sub-type of a record if it is in an appropriate workflow state. See [Section 1.3.10. Workflows](#)

1.3.5. Research output

Overview

In Pure, the term "research output" is used to describe a very wide range of academic publications and other types of productions including:

- peer-reviewed journal articles, editorials, letters
- books, chapters in books
- conference papers and posters
- software, performances, artifacts, exhibitions or compositions
- patents
- theses.

To ensure the information you enter about your research output is complete and correct, your institution uses [workflows](#) to keep track of whether this data has been approved/validated or requires more input from its authors.

Add an item of research output

Add research output using a wizard

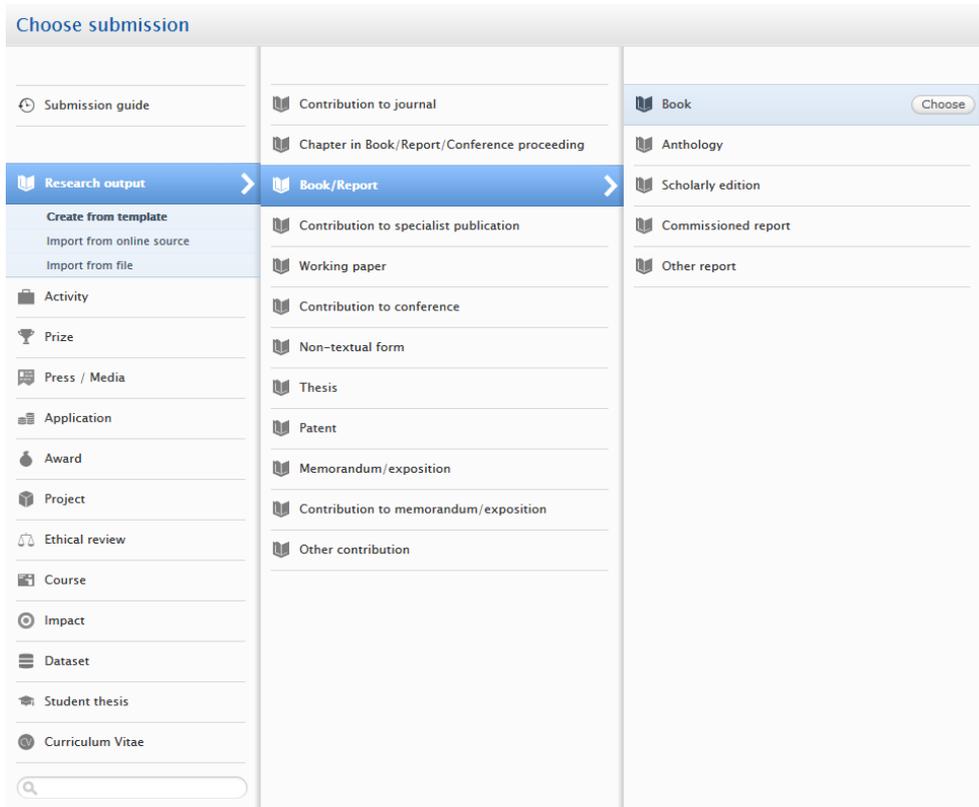
Recommendation

If you are entering an item that has co-authors at your institution, [search for the item](#) first to check that it is not already in Pure. If so, you can [claim authorship](#) on the item.

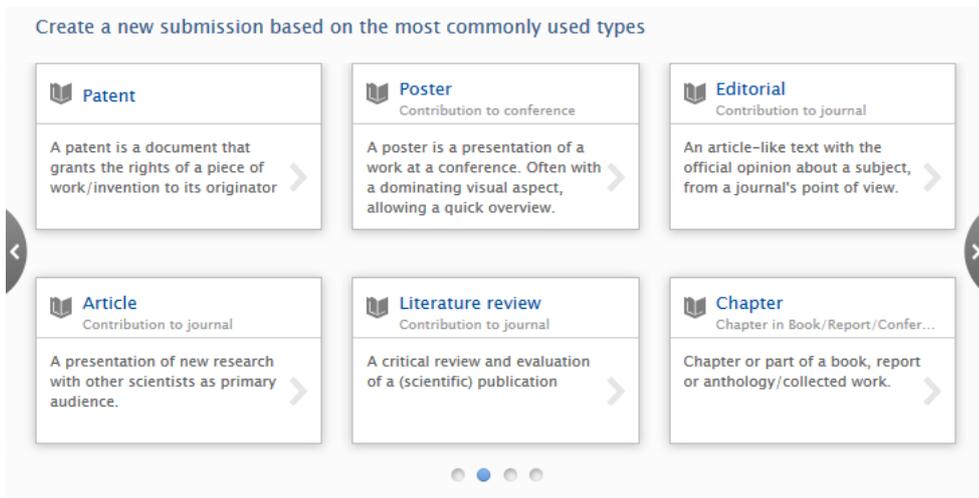
Tip

If you have already entered details into another online system, you can save time by [importing the record from this source](#).

1. Click  in the task pane.
2. In the **Choose submission** wizard, either:
 - Click **Research output** in the left pane and drill down until you locate the precise type of the item you want to add.



- Scroll through and select one of your commonly-used record types from the main area of the window.



3. Enter all available information about the item in the editor window.

- In the **Relations** section, add links to any other records that have a real-work connection to the current item you are adding. Click the icon under each listed content type and begin typing the name of the related record to link to see matches.

Recommendation

To maintain quality data it is very important to link related records. For example, link a *Project* record to an item of *Research output* it produced, *Press/Media clippings* about it, *datasets* collected for it, *student theses* produced etc.

- Click **Save**.

Add research output from BibTeX, RIS and CERIF files

- Click  in the task pane.
- Click **Research output** in the left pane and then click **Import from file** from the list that opens below.
- Click the file type you want to import from.
- If you want to add records from the clipboard, paste these records into the Paste text field and click **Import**.
- If you want to add records from a file, drag the file to the **Upload file** area or click **browse** to open a file browser to select the file. Click **Import**.
- For each record that is displayed that you do not want to import, click **Remove**.
- For each record that is displayed that you want to import:

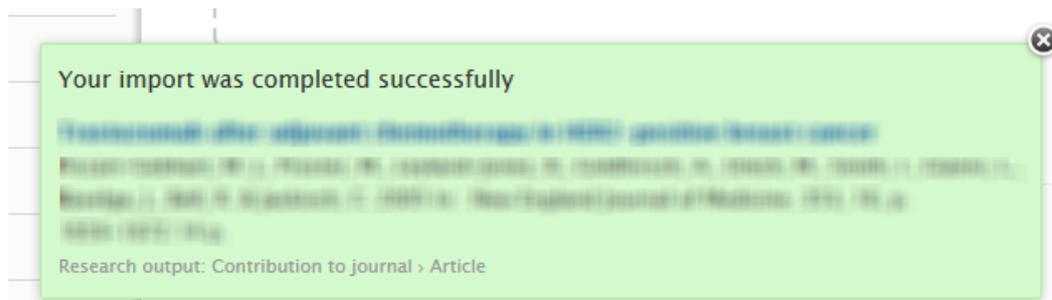
- Click  or the title of the publication.
- In the **Import from** window that is opened, make the required selections to link the entities mentioned to records in Pure.

Note

If the authors are affiliated with your institution, take care to match them to people in Pure.

- When this information is complete, click **Import & review**.
- In the Research output editor window that is opened, complete the information about the item.
- If you want to enter more details about this publication at a later date before sending it to the library for validation, select the workflow state *Entry in progress* in the footer of the window.
- Click **Save**.

If your publication is imported successfully you are shown a success message.



If you try to import this same item again with the same format, you are also given a notification.

This publication has already been imported from BibTeX. [View the publication](#)

Add research output from an online source

To minimize the effort of adding your research output to Pure, you can import your publications from online databases. Whether you are getting started with Pure and want to populate all of your past publications or looking for a recent item of research output, this can save you time and reduce data-entry errors.

Tip

You can search in and import from all databases that your institution subscribes to and has activated in Pure.

For each online source that you want to import your publications from:

1. Click  in the task pane.
2. Click **Research output** in the left pane and then click **Import from online source** from the list that opens below.
3. Select the online source you want to search in.
4. Enter information you want to search on and click Search.
5. For each record that is displayed that you do not want to import, click **Remove**.

Note

These records are remembered by Pure as ones you have rejected and are not shown to you in the future if you search again in this online source.

6. For each record that this displayed that you do want to import:

1. Click  or the title of the publication.

Note

If you are using Scopus as an import source, you can also click  and select either **Import & match** to follow the standard process or **Import & save** to automatically match entities and attempt to save the record without review.

2. In the **Import from** window that is opened, make the required selections to link the entities mentioned to records in Pure.

Note

If the authors are affiliated with your institution, take care to match them to people in Pure.

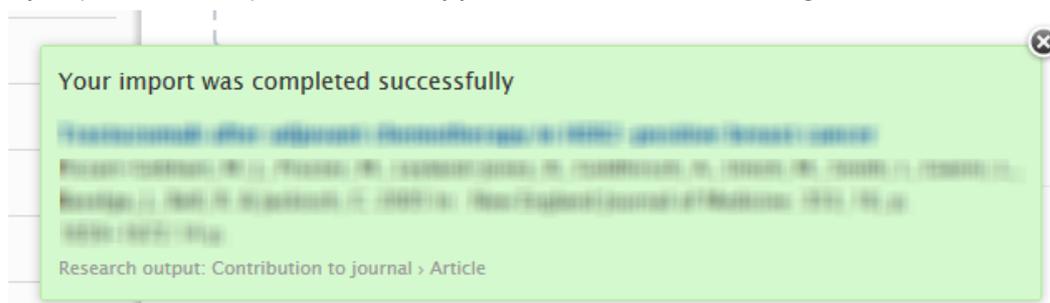
3. When this information is complete, click **Import & review**.

Note

Depending on the online source you can also click **Import & save** to skip the review process, however if there are required fields that are not filled you will still be directed to the editor window.

4. In the Research output editor window that is opened, complete the information about the item.
5. If you want to enter more details about this publication at a later date before sending it to the library for validation, select the workflow state *Entry in progress* in the footer of the window.
6. Click **Save**.

If your publication is imported successfully you are shown a success message.



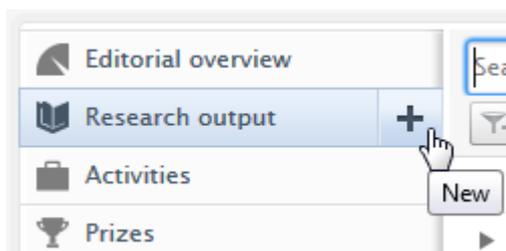
The next time you run a search from the same online source, this record is no longer shown.

Tip

You can set up a regular search across various online sources for your publications. See [Section 1.3.12. Automated publication search](#).

Use the Add Research output shortcut

1. In the main window of Pure, hover over the **Research output** tab for the content type you want to add in the left navigation.



2. Click the **+** icon that appears.
3. Drill down until you locate the precise type of the item you want to add and click Choose.
4. Enter all available information about the item in the Research output editor window.

Tip

If you have chosen the wrong content type for the item you want to enter, click Change template to go back to the **Choose submission** wizard.

5. In the **Relations** section, add links to any other records that have a real-work connection to the current item you are adding. Click the icon under each listed content type and begin typing the name of the related record to link to see matches.

Recommendation

To maintain quality data it is very important to link related records. For example, link a Project record to an item of Research output it produced, Press / Media clippings about it, datasets collected for it, student theses produced as part of the group etc.

6. Click **Save**.

Find an item of research output

Search for a publication

1. Click either the **Personal** tab in the top navigation.
2. Click **Research output** in the left navigation.
3. Either:
 - Type a search query in the search bar and click **Search**.
 - Add or remove search filters.

Tip

You can access saved filters below the open tab in the left navigation. The **Editable** filter is opened by default.

See [Section Searching and filtering](#).

4. Click the name of the item to open the editor window for more information about the record.

Note

Your ability to edit the record depends on the workflow state of the record. See [Section 1.3.10. Workflows](#).

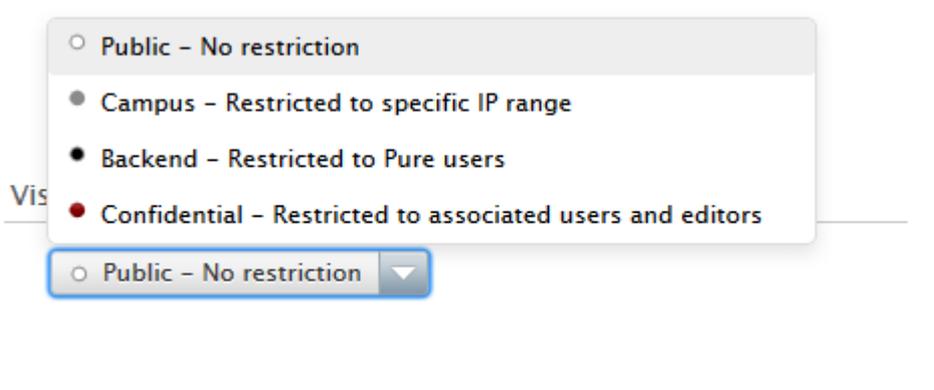
Tip

You can also click  next to a record's name to show more details.

Understanding visibility and confidentiality

You can control the visibility/confidentiality of a record from the editor window.

Set the visibility state from the drop-down menu in the visibility area on the **Metadata** tab.

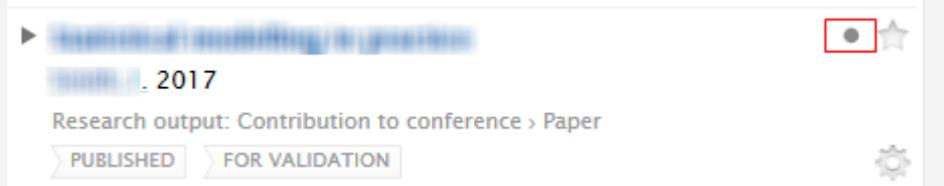


Note

References to visibility in the Pure Portal are only relevant if the Pure Portal is available at your institution.

Tip

You can see the confidentiality state of research output in the content list view of search results. A colored circle is shown next to the item of research output indicating its state.



Visibility state	Description
Public	No restriction on visibility. All users of Pure can see this content and it may be displayed on your Pure Portal.
Campus	When viewed on the Pure Portal, visibility is restricted to viewers with a specific IP range set to reflect being on-campus at your institution. All users of Pure at your institution can see this content from within Pure.
Backend	Restricted to Pure users. This content is only visible within Pure.
Confidential	Highly-restricted visibility. Only visible from within Pure to general administrators and (those acting on behalf of) users that have been explicitly added to the record or have a role approving/validating the record.

View citation and other metrics for a publication

1.3.6. View metrics about your research output

Pure can collect and display comprehensive metrics about your publications as well as the particular journals you publish in, including download counts.

Note

The metrics available in Pure are highly-dependent on the subscriptions at your institution and how Pure is configured.

View metrics about your own researcher profile

1. [Open your Personal overview workspace.](#)
2. In the Research output section, click the citation links below the summary of your content to view your publications sorted by citation-count in descending order.

The screenshot shows the 'My research' tab selected. Under 'Research output', there are 4 items: 3 Articles and 1 Book. Under 'Press / Media', there is 1 Expert Comment. A tooltip is open over a research output item, displaying a list of publications:

Rank	Publication Title	Citation Count
1.	Research information systems through the research information system: a review of the state of the art	8
2.	Research information systems through the research information system: a review of the state of the art	3

The record highlighted with a blue bar represents your [h-index](#) as calculated across publications from the chosen source that have been added to Pure.

View download counts about an item of research output

1. [Open the Research output editor window](#) for an item.
2. Click the **Metrics** tab.

If downloads information is available, it is shown here.

View metrics about an item of research output

1. [Open the Research output editor window](#) for an item.
2. Click the **Metrics** tab.

View metrics about a journal or publisher

Note

Whether publisher information is available depends on the configurations of Pure at your institution.

1. [Open the Research output editor window](#) for an item published by the publisher/journal.
2. Click the **Metrics** tab.
3. View the metrics on the **Metrics on the related publisher** section if the publication is a book, or **Metrics on the related journal** if the publication is in a journal.

Edit an existing item of research output

Editing research output and workflow states

Workflows allow you to keep track of the approval and verification process of meta data added to Pure. Workflow states indicate whether a record is incomplete, complete, or verified.

For more information, see [Section 1.3.10. Workflows](#).

Edit your association with an item of research output (Claiming and disclaiming authorship)

If a co-author of an item of your research output has already entered the item into Pure and has forgotten to associate you with the item, you can *claim* that you should also be associated with (added to) this content. If you are added to a record, you can also make changes to the record depending on its [workflow state](#).

Similarly, if someone associates you with an item of research output and this is incorrect, you can *disclaim* the record.

For more information, see [Section 1.3.13. Claim and disclaim publications](#).

1.3.7. Datasets

You can manage metadata about datasets in Pure.

In Pure you can keep track of information about datasets, including:

- the time range the dataset covers
- the people associated with the dataset (collectors)
- the availability of and access to the dataset.

If this functionality is enabled at your institution, you can also configure an integration with dataset from Mendeley Data. [Mendeley Data](#) is a cloud-based research data repository with specific research data management capabilities such as version management and automatic archiving.

Manage datasets linked from Mendeley Data

Datasets in Pure that are synchronized with Mendeley Data are automatically kept up-to-date with the gold standard copy located in Mendeley Data. Only the metadata is available in Pure.

Note

The integration of datasets with Mendeley Data is only available if it has been enabled by your institution.

Link a dataset in Mendeley Data to yourself in Pure

Once your institution has enabled linked datasets, Pure tries to match your personal profile to a profile in Mendeley and suggests datasets linked to that profile.

This is performed automatically, based on processes set up by the Pure administrators at your institution.

If you have datasets in Mendeley that are not shown in Pure and you know that an integration with Mendeley Data is available for you:

1. Add one or more of the following IDs [on the Metadata tab of your personal profile](#):
 - Mendeley Profile ID
 - Scopus author ID
 - ORCID ID
 - Mendeley Profile URL.
2. Wait some time until your institution's regular (e.g. weekly) processes that scan Mendeley looking for datasets are completed. The amount of time depends on your institution's settings, though is usually less than a week.
3. If Mendeley datasets related to your personal profile are found, an editor at your institution will be asked to approve this link and the dataset will be automatically added to your content in Pure.
4. In the Dataset editor window, enter any additional content about the dataset.

Note

The content from Mendeley Data is pre-populated and is read-only in Pure. Changes to the metadata in Mendeley are periodically imported into and reflected in Pure.

Warning

If the dataset is flagged as "Embargoed" in Mendeley Data, only a small set of fields are pre-populated in Pure. Once the embargo period has passed, the full metadata is made available in Pure.

Click **Save**.

Find a dataset from Mendeley Data in Pure

1. Click either the **Personal** tab in the top navigation.
2. Click **Datasets** in the left navigation.
3. Either:
 - Type a search query in the search bar and click **Search**.
 - Add or remove search filters.

Tip

You can access saved filters below the open tab in the left navigation. The **Editable** filter is opened by default.

See [Section Searching and filtering](#).

- Click the name of the item to open the editor window for more information about the record.

Note

Your ability to edit the record depends on the workflow state of the record. See [Section 1.3.10. Workflows](#).

Tip

You can also click  next to a record's name to show more details.

Manage datasets without links

If you do not have links to Mendeley data, you can manage datasets exactly the same as any other content type. See [Section 1.3.8. Other content](#).

1.3.8. Other content

Pure can be used to maintain accurate information about various other academic activities or data points besides research output, including:

- Activities, such as attending a conference or giving a talk
- Prizes conferred
- Academic courses taught
- Press clippings or media coverage about academic work
- Ethical reviews, grant applications and grants
- Student theses
- [Datasets](#).

These different types of records are called *content types*. See [Section 1.3.3. Content types](#).

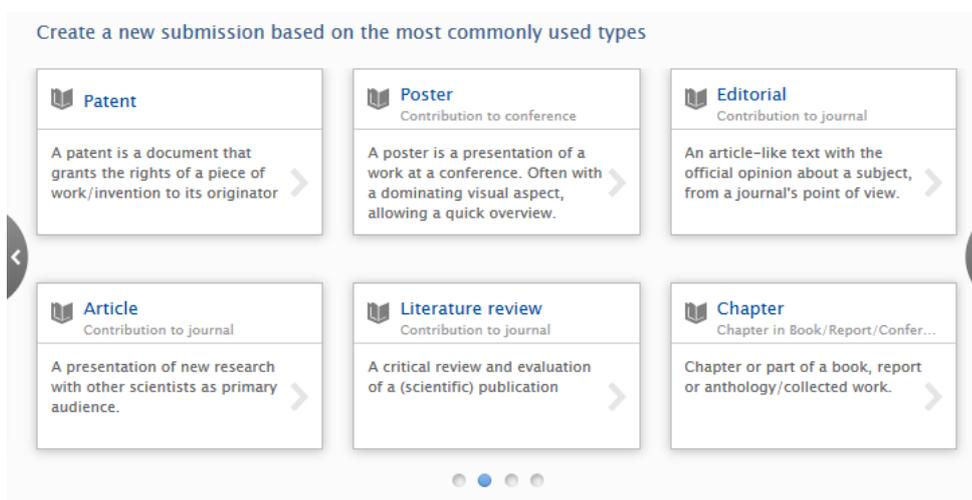
Depending on how your institution has decided to use Pure, you may be able to see and record many or few content types.

The process of adding, finding, and editing a record is the same for all content types.

Add a record

Add a record using a wizard

- Click  in the task pane.
- In the **Choose submission** wizard, either:
 - Click the content type you want to add in the left pane and drill down until you locate the precise type of the item you want to add.
 - Scroll through and select one of your commonly-used record types from the main area of the window.



- Enter all available information about the item in the editor window.

- In the **Relations** section, add links to any other records that have a real-work connection to the current item you are adding. Click the icon under each listed content type and begin typing the name of the related record to link to see matches.

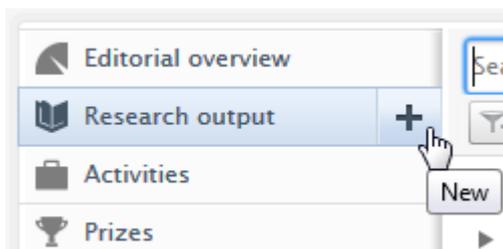
Recommendation

To maintain quality data it is very important to link related records. For example, link a *Project* record to an item of *Research output* it produced, *Press/Media clippings* about it, *datasets* collected for it, *student theses* produced etc.

- Click **Save**.

Use the Add Record shortcut

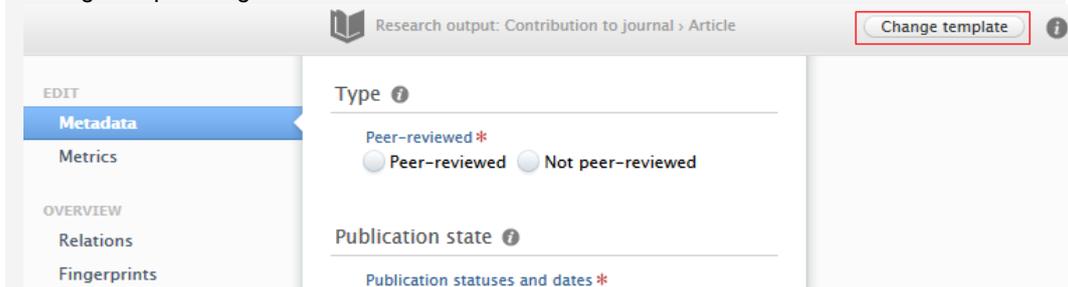
- In the main window of Pure, hover over the **Research output** tab for the content type you want to add in the left navigation.



- Click the **+** icon that appears.
- Drill down until you locate the precise type of the item you want to add and click Choose.
- Enter all available information about the item in the Research output editor window.

Tip

If you have chosen the wrong content type for the item you want to enter, click Change template to go back to the **Choose submission** wizard.



- In the **Relations** section, add links to any other records that have a real-work connection to the current item you are adding. Click the icon under each listed content type and begin typing the name of the related record to link to see matches.

Recommendation

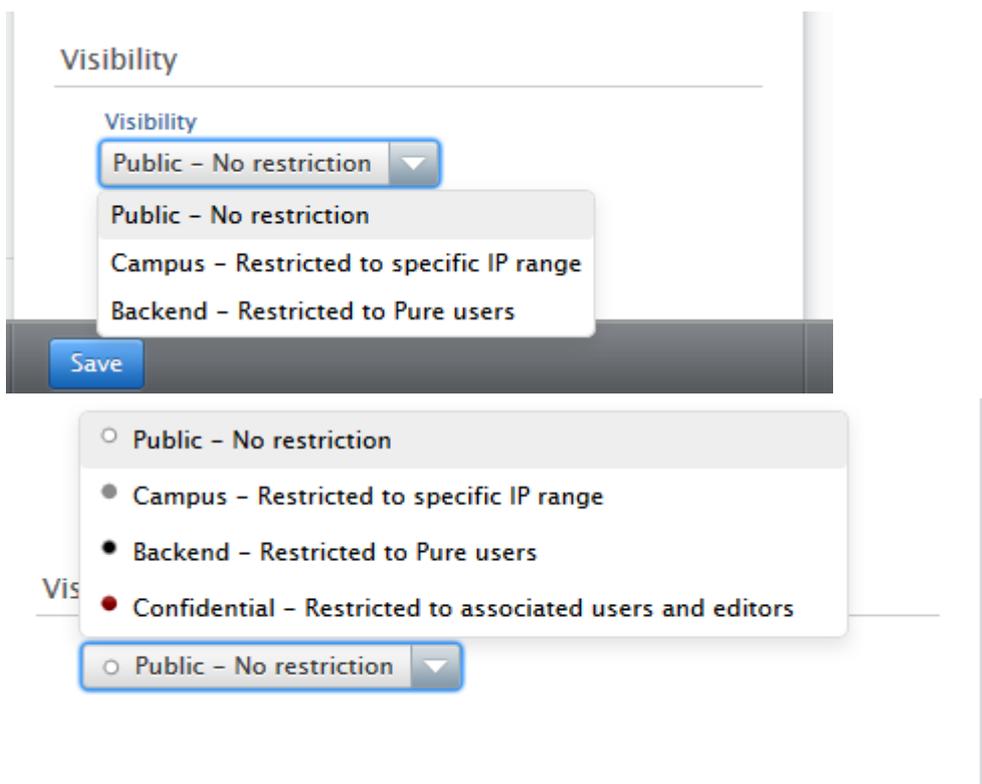
To maintain quality data it is very important to link related records. For example, link a *Project* record to an item of *Research output* it produced, *Press / Media clippings* about it, *datasets* collected for it, *student theses* produced as part of the group etc.

- Click **Save**.

Understanding visibility and confidentiality

You can control the visibility/confidentiality of a record from the editor window.

Set the visibility state from the drop-down menu in the visibility area on the **Metadata** tab.

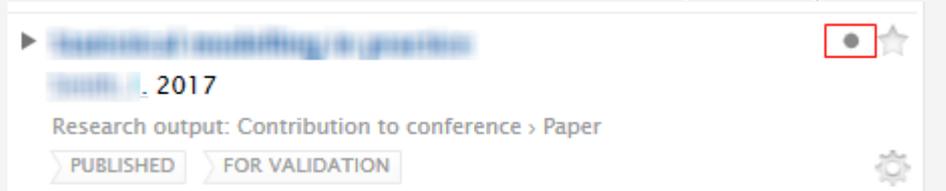


Note

References to visibility in the Pure Portal are only relevant if the Pure Portal is available at your institution.

Tip

You can see the confidentiality state of research output in the content list view of search results. A colored circle is shown next to the item of research output indicating its state.



Visibility state	Description
Public	No restriction on visibility. All users of Pure can see this content and it may be displayed on your Pure Portal.
Campus	When viewed on the Pure Portal, visibility is restricted to viewers with a specific IP range set to reflect being on-campus at your institution. All users of Pure at your institution can see this content from within Pure.
Backend	Restricted to Pure users. This content is only visible within Pure.
Confidential	Highly-restricted visibility. Only visible from within Pure to general administrators and (those acting on behalf of) users that have been explicitly added to the record or have a role approving/validating the record.

Visibility status	Description
Public	No restriction on visibility. All users of Pure can see this content and it may be displayed on your Pure Portal.
Campus	When viewed on the Pure Portal, visibility is restricted to viewers with a specific IP range set to reflect being on-campus at your institution. All users of Pure at your institution can see this content from within Pure.
Backend	Restricted to Pure users. This content is only visible within Pure.

Find a record

Edit an existing record

1. Click either the **Personal** tab in the top navigation.
2. Click the name of the content type of the record in the left navigation.
3. Either:
 - Type a search query in the search bar and click **Search**.
 - Add or remove search filters.

Tip

You can access saved filters below the open tab in the left navigation. The **Editable** filter is opened by default.

See [Section Searching and filtering](#).

4. Click the name of the item to open the editor window for more information about the record.

Note

Your ability to edit the record depends on the workflow state of the record. See [Section 1.3.10. Workflows](#).

Tip

You can also click  next to a record's name to show more details.

Editing records and workflow states

Workflows allow you to keep track of the approval and verification process of meta data added to Pure. Workflow states indicate whether a record is incomplete, complete, or verified.

For more information, see [Section 1.3.10. Workflows](#).

1.3.9. Add previous achievements to your profile

To enhance your profile, you can add records to it even if those records relate to an organization outside of your current institution. For example, if you won a prize or participated in an activity while you were affiliated with another institution.

This functionality is available for the following content types:

- Research output
- Activity
- Prize

To link a record to an External organisation, follow these steps:

1. Access the **Editor** window.
2. Scroll to the **Persons/Organizations** section and select Add organizational unit.
3. Optional: Perform a search to check whether the External organisation is already available.
4. If the desired External organisation is not available, select Create external organization.
5. Fill in the form and select **Create**.

1.3.10. Workflows

Workflows allow you to keep track of the approval and verification process of meta data added to Pure. Workflow states indicate whether a record is incomplete, complete, or verified.

Records have the following workflow states:

- **Entry in progress:** Incomplete record that is still being edited.
- **For approval:** Record that is marked as complete and is awaiting approval.
- **For validation:** Record that is marked as complete and is awaiting validation.
- **For revalidation:** Record that is awaiting a second round of approval.
- **Approved:** Record that has been approved by the organization in charge.
- **Validated:** Record that has been validated by the organization in charge.

When you view a Research output record, you see its workflow state as a tag.

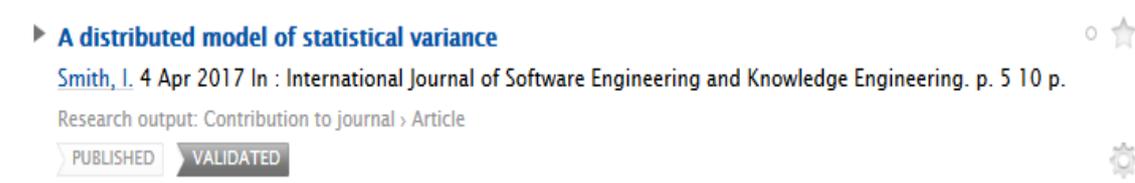
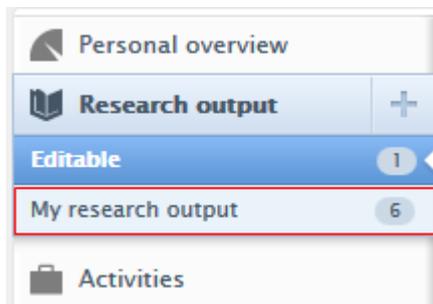


Figure 7. A record with the workflow state Validated.

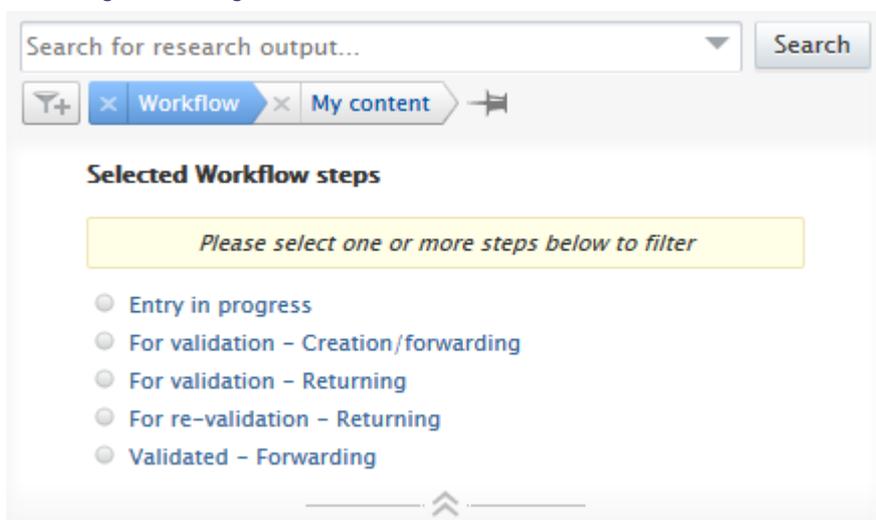
Filter records by workflow state

The **Editable** filter displays records that you can currently edit. Depending on your institution's Pure configuration, this may exclude records that have the **Approved** or the **Validated** state.

To view all Research output records that you are associated with regardless of their workflow state, select **My research output**.



To filter on content that is in a specific workflow state, add the **Workflow** filter to a content list. See Section Searching and filtering.



When using the **Workflow** filter, you can specify the direction that the item entered its current state:

- **Returning:** The item is sent back to the previous workflow state. For example, because it requires correction or clarification.
- **Forwarding:** The item is progressing to the next workflow state. For example, because it has just been created.

The **Workflow duration** filter allows you filter on the time range that records have spent in their current workflow state.

Change a record's workflow state

To change the workflow state of a record, follow these steps:

Note

Your ability to change workflow states depends on your institution's Pure configuration.

1. In the footer of the record's editor window, select the state that you want to move the record into.
2. Optional: Leave a comment for the responsible editor in the **Comment to status change** field. Alternatively, send a message in the **History and comments** tab of the editor window
3. Click **Save**.

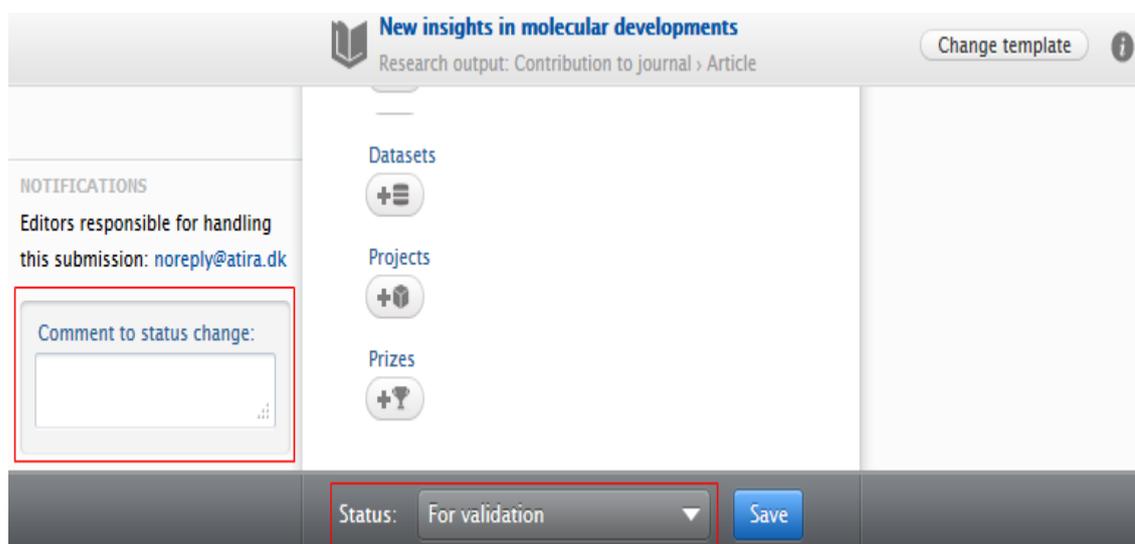


Figure 8. A new Contribution to journal record in the editor window.

Default workflow for Research output and Persons

Depending on your institution's Pure configuration, new Research output and Persons records undergo one or two rounds of validation and/or approval.

If you are creating a Research output or Persons record, the workflow state is automatically set to **For validation** or **For approval** once you saved the record. If you want to continue editing the record after saving it, manually set the state to **Entry in progress**.

Default workflow for other content types

Depending on your institution's Pure configuration, content types other than Research output and Persons may have no workflow or have a simple standard workflow.

If you want to continue editing the record after saving it, manually set the state to **Entry in progress**.

1.3.11. ORCID integration

An ORCID ID is a persistent digital identifier to uniquely identify a researcher across diverse systems. This supports automatic linking between you and your publications and professional activities. See [ORCID](#).

Pure allows you to link an ORCID ID to your personal profile, and to export information from your personal profile within Pure to your ORCID ID.

If you choose to export from Pure to ORCID, the following information is sent:

- Other identifiers on your profile (Scopus Author ID, Researcher ID, Digital Author ID).

Note

If you delete an ID from another system, for example a Scopus author ID, in ORCID then it will reappear the next time content is exported from Pure to ORCID.

- Limited organizational affiliation information:
 - Institutional affiliation (along with the City and Country of the organization).
 - End date of affiliation (if a former member of staff or student).
- Pure Portal URLs (if configured to be exported by your local Pure administrator).
- Metadata about your research outputs, where all of the following apply:
 - the publication status is *ePub ahead of print* or *Published*.
 - the workflow state matches that configured by your local Pure administrator.
 - the visibility is *Public*.

Note

The ability to create an ORCID ID and to export content to ORCID are only available if they have been enabled by the Pure administrators at your institution.

Link an ORCID ID to Pure

1. [Open your Personal overview workspace](#).
2. In the top area of the workspace, click **Edit profile...**
The **Person** editor window is opened with your current information.
3. In another browser window, navigate to <https://orcid.org/>.
 - If you do not yet have an ORCID ID, register with ORCID and note your ORCID ID number.
 - If you do have an ORCID ID, sign into ORCID to verify your ORCID ID number.
4. On the **Metadata** tab in the **Personal Identification** section, select **Add existing ORCID ID**.

ID

Add ID...

ORCID

Add existing ORCID

5. In the **Add existing ORCID** dialog, type your ORCID ID and click Check.
6. You are redirected to the ORCID website, where you may be asked to log in again.

- Using the ORCID website, follow the prompts to allow Pure to access your ORCID record, and click **Authorize**.



PURE 

has asked for the following access to your ORCID Record



Get your ORCID iD

Allow this permission until I revoke it.
You may revoke permissions on your account settings page. Unchecking this box will grant permission this time only.

This application will not be able to see your ORCID password, or other private info in your ORCID Record. [Privacy Policy](#).

Don't have an ORCID iD? [Register](#).

Email or iD 

Password 

[Forgotten password?](#)

Deny

- You are redirected to Pure's Person editor window, where you initially started the process to add an ORCID ID. You can see whether the process was successful in the ORCID section.

Note

You can click  next to the ORCID ID to remove it from Pure if needed.



Josephine Bloggs

Person

Personal identification 

First name(s)

Last name *

Nationality

Name variant

Title

ID

Scopus author ID

Edit 

ORCID



-

 ORCID for 'Josephine Bloggs' applied.

Profile photos

Links

- Click **Save**. The Person editor window is closed.
- Check the email address that is associated with your ORCID ID. If necessary, respond to the verification email from ORCID.

Perform a one-off export to a linked ORCID ID

Tip

If you have ORCID exports enabled at your institution, it is likely that an automatic export has been set up for the available information in your profile at some scheduled interval. This process copies information from your profile in Pure to ORCID. However, you can also export your content to ORCID 'on-demand'.

- [Open your **Personal overview** workspace.](#)
- In the top area of the workspace, click **Edit profile...**
The **Person** editor window is opened with your current information.
- On the **Metadata** tab in the **Personal Identification** section, you can see any ORCID IDs affiliated with your personal profile. If there is no ORCID ID listed, add one as described above.

- Next to the ORCID ID you want to export to, select Export.

 **Josephine Bloggs**
Person

Personal identification ?

First name(s) **Last name ***

Nationality

Name variant

Title

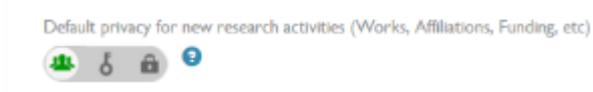
ID
55975120000 Edit -

ORCID
 0000-0001-7870-7370
(Last exported: 29/01/16 21:52)

All of the content approved when setting up the ORCID ID is re-exported, regardless of when it was last updated.

Manage visibility and privacy of content in ORCID

When you create your ORCID ID you are prompted to select a default privacy level for new research activities, which is applied to content exported from Pure to ORCID.



In addition to this, various actions in Pure and ORCID can have consequences for the visibility of items in ORCID.

Location	Action	Consequence
ORCID	Edit the privacy settings of individual items	Settings are respected with subsequent exports from Pure.
ORCID + Pure	New content in Pure duplicates content already in ORCID	ORCID groups these items so you do not see two items in ORCID.
ORCID + Pure	Change visibility in ORCID to <i>restricted</i> and then change visibility in Pure to not <i>Public</i> .	The item cannot be removed from ORCID as Pure cannot access items with restricted visibility.
ORCID	Delete content	<p>If you delete the item in ORCID but not in Pure, the item reappears in ORCID the next time an export from Pure is performed.</p> <p>The only way to prevent certain items from Pure appearing in ORCID is to change the visibility of the items to restricted from within ORCID.</p> <p>If you want to truly delete the content from ORCID, delete the content in ORCID then change the visibility in Pure to not <i>Public</i>.</p>
ORCID	Delete an ID from another system	If you delete an ID from another system, for example a Scopus author ID, in ORCID then it will reappear the next time content is exported from Pure to ORCID.

Revoke permissions for Pure to export to ORCID

Note

If you revoke permissions, the next time that Pure tries to export content to your ORCID ID it will fail. After this failure, Pure will never export to your ORCID ID again until you re-authorize this process.

1. [Log into your ORCID account.](#)
2. Navigate to the **Account settings** page.

3. In the **Trusted organizations** section, click the trashcan icon (Revoke access) in the table row for Pure.

ORCID
Connecting Research and Researchers

FOR RESEARCHERS FOR ORGANIZATIONS ABOUT HELP SIGN OUT

MY ORCID RECORD INBOX (6) ACCOUNT SETTINGS DEVELOPER TOOLS LEARN MORE

41,276 ORCID iDs and counting. See more...

Josephine Bloggs

ORCID ID
ID sandbox.orcid.org/0000-0001-7870-7370
View public version

Account settings

Email and contact preferences	Edit
ORCID inbox notifications	Edit
Password	Edit
Privacy preferences	Edit
Security question	Edit
Close account	Close this ORCID record...

Trusted organizations

You can allow permission for your ORCID Record to be updated by a trusted organisation.
[Find out more](#)

ORCID record	Approval date	Access type
PURE https://www.elsevier.com/solutions/pure	2016-01-29	Update your affiliations Get your ORCID iD Update your biographical information Update your works Revoke Access

The next time an export is attempted (either 'on-demand' or automatically via a system Job), Pure will attempt the export but will be informed by ORCID that the authorization has been revoked. Pure will not attempt again unless the User re-authorizes the export of content from Pure to ORCID.

1.3.12. Automated publication search

You can configure an automated search to scan various linked databases for information about research output that may belong to you. Any items found are presented to you as candidates so that you can accept and import the relevant publications.

This functionality is only visible if it is available at your institution.

An automated search is run once every seven days. You can also run an automated search in a one-off manner.

Set up an ongoing automated search for publications in online sources

1. [Open your Personal overview workspace.](#)
2. In the top area of the workspace, click **Edit profile...**
The **Person** editor window is opened with your current information.
3. Click the **Automated search** tab in the left navigation.

4. For each online source in the Enable automated search area, toggle the switch to **On** if you want to enable the automated search.

Enable automated search

Scopus On

Name variant
Add name...

In this setup you can add your name in different variations.
Pure has initially suggested that you use these variants: J Smith, Jan Smith.
You can edit these or add additional name variants if needed.

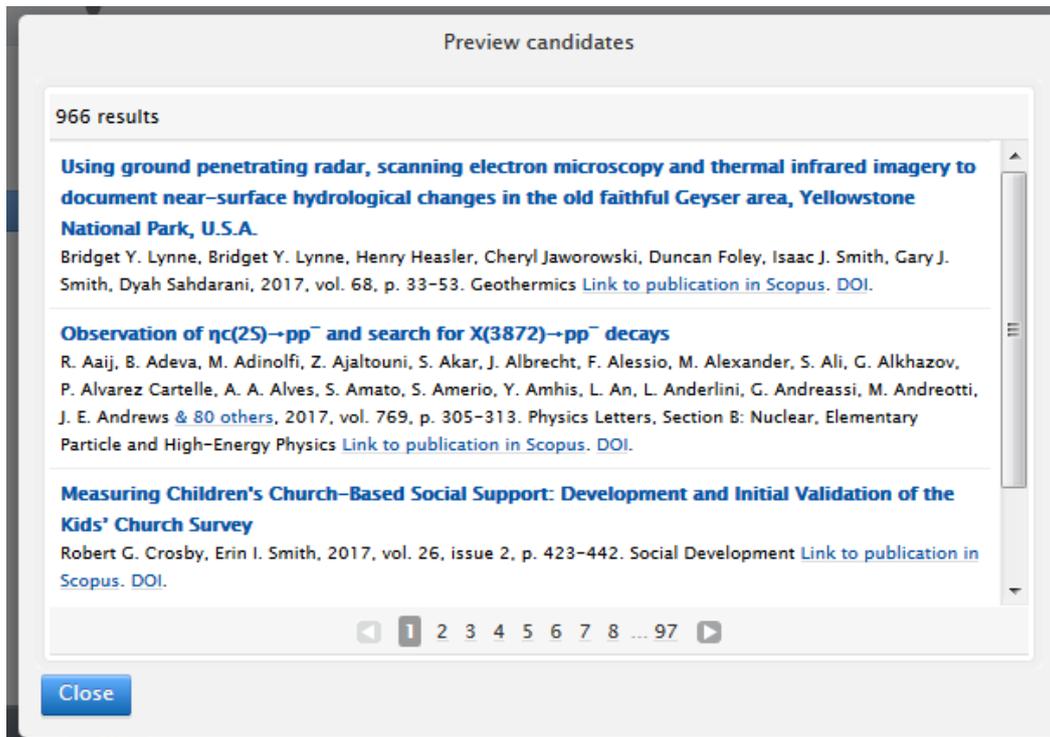
Add suggested names

5. Automated search is based on the authors' names on publications, or ORCID/Scopus IDs. If you want to manually add an additional name variant to search for, click Add name... and enter the additional name variant.
6. Standard name suggestions are also provided by Pure so that common representations of author names are not missed. To add standard name suggestions, click Add suggested names.

Tip

After adding name variants, you can edit the variant by clicking Edit name or remove it with the  button.

- Once you have at least one name variant, you can click Preview candidates to check that the search criteria are able to appropriately locate some results. The number of previewed candidates is not indicative of the actual number of publications related to you, but rather how well your search criteria will work.

**Note**

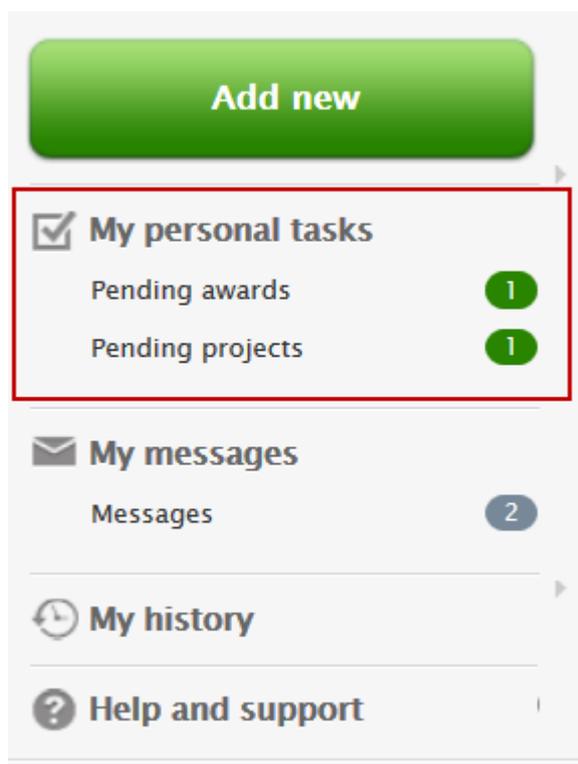
You cannot import publications from the **Preview candidates** dialog. If you want to import publications from online sources with immediate effect, use the **Import from online source** tab of the **Choose submission** window. See [Section Add research output from an online source](#).

- Click **Save** to exit the Person editor window. When the automated search is run you will be informed about any publication candidates.

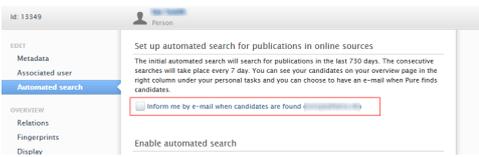
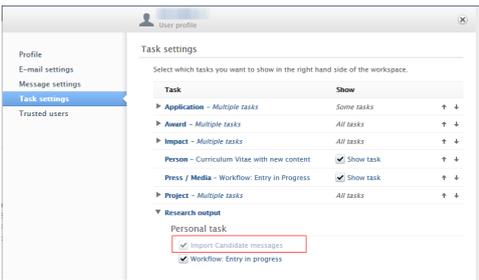
View candidate publications

You can access notifications about found publications in the task pane.

Click the task to open it.



Control how you are notified about publication candidates

Type of notification	Where to control it
Email	<p>The Automated search tab of the Person editor window.</p>  <p>The screenshot shows the 'Automated search' tab in the 'Person editor window'. It includes a section titled 'Set up automated search for publications in online sources' with a text area and a checkbox labeled 'Inform me by e-mail when candidates are found' which is checked. Below this is an 'Enable automated search' button.</p>
Personal tasks	<p>The Task settings tab of the User settings window.</p>  <p>The screenshot shows the 'Task settings' tab in the 'User settings' window. It features a table of tasks with columns for 'Task' and 'Show'. The 'Personal task' section is expanded, showing 'Import Candidate messages' and 'Workflow: Entry in progress', both of which have checkboxes that are checked.</p>

1.3.13. Claim and disclaim publications

If a co-author of an item of your research output has already entered the item into Pure and has forgotten to associate you with the item, you can *claim* that you should also be associated with (added to) this content. If you are added to a record, you can also make changes to the record depending on its [workflow state](#).

Similarly, if someone associates you with an item of research output and this is incorrect, you can *disclaim* the record.

Tip

Pure makes a distinction between internal and external person records: an *internal* person (👤) works at your institution and has a detailed personal profile that links to their research output, whereas an *external* person (👤) is a researcher who doesn't work at your institution and does not have much information in Pure, often only a name. For example, an external person could be a collaborator at a different university.

If you cannot see a publication that you are an author of (but *can* still find the publication in Pure) then it could be that you have been added to the publication as an external person. Make a claim on the publication to ask it to be linked to your record as an *internal* person.

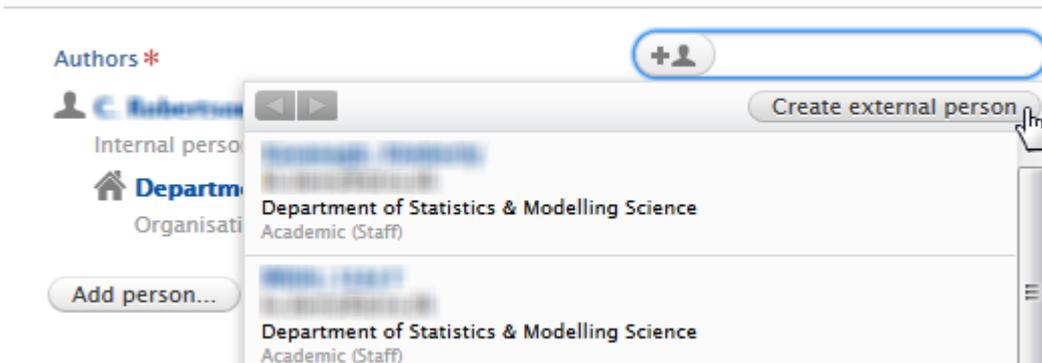
Authors and affiliations ⓘ

Figure 9. When adding a co-author to a publication, you can search quickly over persons already in Pure (which automatically includes all faculty members at your institution) or add a new external person.

Claim a publication

1. Search for the publication you want to claim.

Tip

Remove the **My content** filter to search and filter over content that is not (yet) associated with you.

2. Click the name of the publication to open the Research output editor window.
3. In the footer of the editor window, click **Claim this content**.
4. In the **Do you want to be added to this content?** dialog, add an optional message to inform the editor about your association to the record.

Do you want to be added to this content?

If so – send this message to the responsible editor.

Message (optional)

You will receive a message when the content is updated

5. Click **Claim this content**.
6. Wait until the editor of this content at your institution responds to the notification and adds you to the publication. You will be informed by email, according to your notification settings. See [Section 1.2.2. Email preferences](#).

Disclaim a publication

In Pure, other users can link you to publications when they create or edit the item of research output.

If you have been added to an item of research output by another user of Pure, a notification is displayed below each item when shown in the [content list view](#).

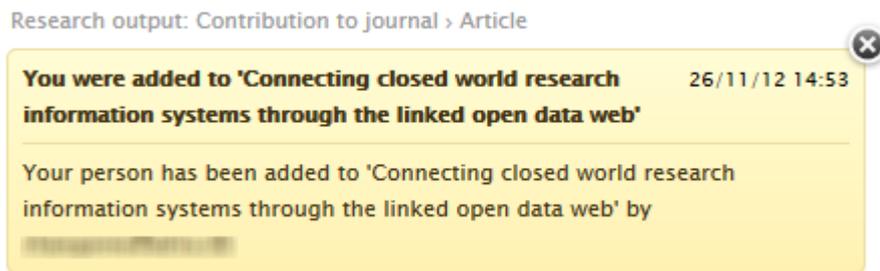
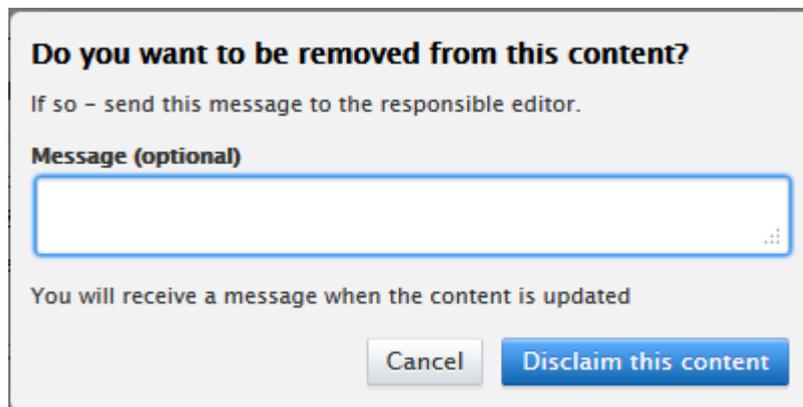


Figure 10. An example badge shown below a publication added to the current user by another user. Click  to dismiss this badge.

If you feel this is incorrect, you can disclaim the publication:

1. Search for the publication you want to disclaim.
2. Click the name of the publication to open the Research output editor window.
3. In the footer of the editor window click **Disclaim this content**.
4. In the **Do you want to be removed from this content?** dialog, add an optional message to inform the editor about your association to the record.



Do you want to be removed from this content?

If so – send this message to the responsible editor.

Message (optional)

You will receive a message when the content is updated

5. Click **Disclaim this content**.

2. Glossary

A

author collaboration

Within Pure, an author collaboration is a master data content type that represents a group of researchers that share authorship of research output(s) under a collective name. The list of authors under this collective name can be retrieved, but author collaboration relations are not reported or shown on a collaboration map. An author collaboration was previously called a 'group author'.

Automated Search

A regularly-executed search query over an online source that retrieves content that matches a Personal User's name or ID. Users are then prompted to verify that this is content related to them so it can be imported into Pure.

C

Community module

The Community Module helps groups of institutions (based on geographic area, academic consortium, or a focused research area) to manage and promote their research from one shared location. It is a shared installation of Pure that aggregates (and deduplicates) the data from each individual institution's Pure. This allows the institutions, for example, to demonstrate their combined impact to funding agencies and government bodies, to share resources internally, and to attract investment and talent.

Community Portal

The Community Portal is a Pure Portal that runs off the shared installation of Pure running the Community Module. It is a website that provides a complete picture of the combined research assets across member institutions, and a single point of access for interested parties including potential collaborators.

D

Data story

A data story (in the new reporting module) comprises a series of text and graphics that communicate insights about information in a data table.

deduplicate

Clean a group of records so that there is no more than one record in Pure for each real-world entity. This is performed by identifying multiple records with matching strings across several attributes, and is performed by either merging them together, or marking them as distinct.

E

editor window

The window that opens in Pure to show detailed information about a record, and where (depending on your permissions and its workflow step) you can make edits.

H

Hierarchy (organizational unit)

The organization hierarchy (also, organizational structure) represents how the organizational units at your institution relate to each other.

M

major release

Major releases of Pure take place in February, June and October, and typically include a significant number of new features or technical changes. Minor releases occur more frequently (between major releases) and generally add urgent changes, less complex changes and bug-fixes.

minor release

Major releases of Pure take place in February, June and October, and typically include a significant number of new features or technical changes. Minor releases occur more frequently (between major releases) and generally add urgent changes, less complex changes and bug-fixes.

P*Personal User (role)*

Someone who is both a user of Pure (i.e. can log into Pure via SSO or username and password) and whose personal profile is captured in Pure (either by synchronization or manual entry). Researchers (or students) who log in to Pure to manage their own profile or capture metadata about research they themselves have been conducting should be given the Personal User role. Note: Other administrative staff with additional roles may also have the Personal User role.

production environment

The Pure installation that you are actively using at your institution runs on a production environment. You should be using the production environment when your researchers or administrative users log in and create data. A staging environment, in contrast, is used to test new settings, features or upgrades. It uses data copied from the production environment and usually no new data is produced in the staging environment.

Pure version

Major releases of Pure take place in February, June and October, and typically include a significant number of new features or technical changes. Minor releases occur more frequently (between major releases) and generally add urgent changes, less complex changes and bug-fixes.

S*staging environment*

The Pure installation that you are actively using at your institution runs on a production environment. You should be using the production environment when your researchers or administrative users log in and create data. A staging environment, in contrast, is used to test new settings, features or upgrades. It uses data copied from the production environment and usually no new data is produced in the staging environment.

T*task*

A piece of work that should be performed by the user that receives the task. The tasks users receive depend on the roles they have. Tasks are shown in the Task pane on the right of the screen (and depending on preferences may also trigger an email alert) and generally involve reviewing metadata or relations on a piece of content so that the content can progress to the next workflow step.

test environment

The Pure installation that you are actively using at your institution runs on a production environment. You should be using the production environment when your researchers or administrative users log in and create data. A staging environment, in contrast, is used to test new settings, features or upgrades. It uses data copied from the production environment and usually no new data is produced in the staging environment.

W*Workflow, workflow step*

A series of steps that a piece of content progresses through that track the state of that content (generally used for internal quality assurance). In Pure this can be turned off, or consist of three steps (Entry in progress, For validation, Validated) or four steps (Entry in progress, For approval, Approved, Validated), the latter which is generally used when content should be reviewed by two units within your institution, such as first the faculty and then the library. The content is progressed by users with the relevant role relating to that content type and current workflow step, and users who are responsible for reviewing the content are notified via their task list. If enabled, then content that was 'Validated' but has since been edited is sent for 'Re-validation', that is, it requires another round of review after these changes.