# Table of Contents

1. Pure basics .................................................................................................................. 5
   1.1. Why Pure? .................................................................................................................. 5
      1.1.1. Your role ............................................................................................................ 5
      1.1.2. Additional features .......................................................................................... 5
      1.1.3. Make your life a little easier ............................................................................. 5
   1.2. Manage your profile .............................................................................................. 6
   1.3. Navigate and search ............................................................................................... 8
      1.3.1. Important areas of the interface ...................................................................... 9
      1.3.2. Searching and filtering ................................................................................... 12
   1.4. Export data ............................................................................................................ 13
      1.4.1. Tips and tricks .................................................................................................. 14
   1.5. Editable and read-only fields ................................................................................. 14
   1.6. View your FAAR report ........................................................................................ 15
      1.6.1. Introducing FAAR reports .............................................................................. 15
      1.6.2. Download your FAAR report (docx or pdf) ..................................................... 15
2. Set up Pure .................................................................................................................... 17
   2.1. ORCID integration ................................................................................................. 17
   2.2. Customize how you appear on the Portal .............................................................. 22
   2.3. Editable and read-only fields ................................................................................. 25
   2.4. Manage multiple names ....................................................................................... 26
      2.4.1. Different name variants available .................................................................... 28
      2.4.2. Changing names .............................................................................................. 28
   2.5. Automated publication search .............................................................................. 29
3. Add and edit content .................................................................................................... 32
   3.1. Manage research output ....................................................................................... 32
      3.1.1. Overview ........................................................................................................... 32
      3.1.2. Add an item of research output ...................................................................... 32
      3.1.3. Find an item of research output ..................................................................... 37
   3.2. View metrics about your research output ............................................................ 39
      3.2.1. Edit an existing item of research output ......................................................... 40
   3.3. Content types ........................................................................................................ 40
      3.3.1. Introducing content types .............................................................................. 40
      3.3.2. Specify a sub-type for a record ..................................................................... 40
      3.3.3. View records by content type ....................................................................... 41
   3.4. Datasets .................................................................................................................. 41
      3.4.1. Manage datasets linked from Mendeley Data ................................................. 42
      3.4.2. Manage datasets without links ..................................................................... 43
   3.5. Other content ........................................................................................................ 43
      3.5.1. Add a record .................................................................................................... 43
      3.5.2. Find a record ................................................................................................... 47
   3.6. Workflows ............................................................................................................. 47
      3.6.1. Viewing records by workflow state ............................................................... 48
1. Pure basics

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.

1.1.1. 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.

1.1.2. 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.

1.1.3. 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.
1.2. 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 2.2.
  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 2.3. 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 2.3. 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 4.6. Trusted users.
- Configure automatic processes that find candidate publication from online sources to associate with your personal profile. See Section 2.5. Automated publication search.
1.3. Navigate and search
1.3.1. Important areas of the interface
As a Personal User, the first thing you see in the Pure interface is the Personal overview tab. Many of the features you see on this screen are present throughout Pure.

See online help for interactive screenshots.

**Header and top navigation:** Navigate between different modules in Pure, login and control settings relevant to your user.

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

**Navigation tabs:** Switch between different tabs.

**Workspace:** View and edit records. The content depends on the current tab.
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.
1.3.2. Searching and filtering

Search across all records in Pure

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.
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.

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 1.3. 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 1.3. Navigate and search.

<table>
<thead>
<tr>
<th>Tip</th>
</tr>
</thead>
<tbody>
<tr>
<td>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.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>All records that are shown in the content list are exported, regardless of whether you select or deselect the checkbox (✓) next to individual records.</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>The export formats PDF, HTML and Word allow you to choose a citation style.</td>
</tr>
</tbody>
</table>

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

1.4.1. 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 1.2. 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.

1.5. 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 3.7. 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 3.6. Workflows.

### 1.6. View your FAAR report

#### 1.6.1. 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.

<table>
<thead>
<tr>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>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.</td>
</tr>
</tbody>
</table>

#### 1.6.2. 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.

<table>
<thead>
<tr>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>This area is only visible if your institution has enabled FAAR reporting.</td>
</tr>
</tbody>
</table>
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.
2. Set up Pure

2.1. 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.

   ![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.
7. Using the ORCID website, follow the prompts to allow Pure to access your ORCID record, and click Authorize.
8. 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)**: Josephine
- **Last name**: Bloggs
- **Nationality**: Select nationality...
- **Name variant**: Add name variant...
- **Title**: Add title...
- **ID**: 55975120000 (Scopus author ID)
- **Edit**
- **ORCID**: 0000-0001-5398-032X
- **Tip**: ORCID for ‘Josephine Bloggs’ applied.

9. **Click Save.** The Person editor window is closed.
10. **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’.
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. 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.
4. Next to the ORCID ID you want to export to, select **Export**.

   ![Personal Identification](image)

   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.

![Default privacy for new research activities](image)

In addition to this, various actions in Pure and ORCID can have consequences for the visibility of items in ORCID.
<table>
<thead>
<tr>
<th>Location</th>
<th>Action</th>
<th>Consequence</th>
</tr>
</thead>
<tbody>
<tr>
<td>ORCID</td>
<td>Edit the privacy settings of individual items</td>
<td>Settings are respected with subsequent exports from Pure.</td>
</tr>
<tr>
<td>ORCID + Pure</td>
<td>New content in Pure duplicates content already in ORCID</td>
<td>ORCID groups these items so you do not see two items in ORCID.</td>
</tr>
<tr>
<td>ORCID + Pure</td>
<td>Change visibility in ORCID to restricted and then change visibility in Pure to not Public</td>
<td>The item cannot be removed from ORCID as Pure cannot access items with restricted visibility.</td>
</tr>
<tr>
<td>ORCID</td>
<td>Delete content</td>
<td>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. 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. If you want to truly delete the content from ORCID, delete the content in ORCID then change the visibility in Pure to not Public.</td>
</tr>
<tr>
<td>ORCID</td>
<td>Delete an ID from another system</td>
<td>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.</td>
</tr>
</tbody>
</table>

**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.

![Account settings](image)

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.

### 2.2. 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.

<table>
<thead>
<tr>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>Depending on how the Pure Portal is configured at your institution it may appear slightly different from the images here.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Picture</th>
<th>Description of areas</th>
</tr>
</thead>
</table>
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
<table>
<thead>
<tr>
<th>Change</th>
<th>Location in Pure</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change contact information</td>
<td>Location in Pure &gt; Edit profile... &gt; Metadata tab &gt; Personal identification section</td>
<td>This information may be read-only in Pure. See Section 1.2. Manage your profile.</td>
</tr>
<tr>
<td>Change photo</td>
<td>Location in Pure &gt; Edit profile... &gt; Metadata tab &gt; Personal identification section</td>
<td>This information may be read-only in Pure. See Section 1.2. Manage your profile.</td>
</tr>
<tr>
<td>Change affiliation information</td>
<td>Location in Pure &gt; Edit profile... &gt; Metadata tab &gt; Organisational affiliations section</td>
<td>This information may be read-only in Pure. See Section 1.2. Manage your profile.</td>
</tr>
<tr>
<td>Hide affiliation information</td>
<td>Location in Pure &gt; Edit profile... &gt; Portal profile tab &gt; Show affiliations section</td>
<td>Your affiliation may still be shown on other pages, such as the page for the organization you are affiliated with.</td>
</tr>
</tbody>
</table>

**Customize fingerprint**

<table>
<thead>
<tr>
<th>Change</th>
<th>Location in Pure</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remove concepts from your Fingerprint</td>
<td>Location in Pure &gt; Edit profile... &gt; Fingerprint tab</td>
<td></td>
</tr>
<tr>
<td>Add concepts to your Fingerprint</td>
<td>Location in Pure &gt; Edit profile... &gt; Metadata tab &gt; Curriculum and research description section &gt; Add profile information... &gt; Add a research interest statement, mentioning concepts you want to include in your Fingerprint</td>
<td>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.</td>
</tr>
</tbody>
</table>

**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).

<table>
<thead>
<tr>
<th>Change</th>
<th>Location in Pure</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hide the collaboration map from your Portal Profile</td>
<td>Location in Pure &gt; Edit profile... &gt; Portal Profile tab &gt; set Show collaboration map on profile to Off.</td>
<td>The map is shown or hidden once the Pure Portal has been synchronized.</td>
</tr>
</tbody>
</table>

**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).
<table>
<thead>
<tr>
<th>Change</th>
<th>Location in Pure</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Curate list records listed on the <strong>Overview</strong> tab of your profile</td>
<td><strong>Personal overview workspace</strong> &gt; <strong>Edit profile</strong>... &gt; <strong>Portal profile</strong> tab &gt; <strong>Highlighted content</strong> section &gt; Select and order some of your content up to the maximum number of items allowed.</td>
<td>Highlighted content is also shown on other tabs of your profile and is shown first in other lists where it appears.</td>
</tr>
<tr>
<td><strong>Tip</strong></td>
<td>You can also click the <strong>Edit my highlighted content</strong> directly from the <strong>Overview</strong> 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.</td>
<td></td>
</tr>
<tr>
<td>Hide metrics</td>
<td><strong>Personal overview workspace</strong> &gt; <strong>Edit profile</strong>... &gt; <strong>Portal profile</strong> tab &gt; <strong>Show metrics</strong> section &gt; Select metrics to show on our personal profile.</td>
<td>If the content is available elsewhere on the Pure Portal, the metrics may still be show there.</td>
</tr>
<tr>
<td>Hide a record (e.g. research output) listed on other tabs</td>
<td>Open the record itself (e.g. the item of research output, project etc.) from your <strong>Personal overview workspace</strong> &gt; <strong>Metadata</strong> tab &gt; <strong>Visibility</strong> section &gt; Set visibility to <strong>Private, Backend</strong> or <strong>Campus</strong>.</td>
<td></td>
</tr>
<tr>
<td>Show a record (e.g. research output) missing from the Pure Portal</td>
<td>Open the record itself (e.g. the item of research output, project etc.) from your <strong>Personal overview workspace</strong> &gt; <strong>Metadata</strong> tab. In the <strong>Visibility</strong> section, check that the setting is <strong>Public</strong> or <strong>Campus</strong>, depending where you want the record to be visible. Check that the <strong>Status</strong> of the record in the footer of the editor window and advance the workflow state if needed. Only <strong>Validated</strong> records are shown on the Pure Portal.</td>
<td>See <strong>Section 3.6. Workflows</strong>.</td>
</tr>
</tbody>
</table>

### 2.3. 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.

![Edit](image1.png)

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

![Metadata](image2.png)

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 3.7. 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 3.6. Workflows.

2.4. 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.
### 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.

---

**Figure 1.** Different name variants on the **Metadata** tab of the **Person** editor window.
2.4.1. Different name variants available

<table>
<thead>
<tr>
<th>Name variant</th>
<th>Description</th>
<th>Usage in Pure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard name</td>
<td>Your name as used in the HR system at your institution.</td>
<td>Used in citations unless overruled by a Default publishing name, and in Pure unless replaced or augmented by a Known as name.</td>
</tr>
<tr>
<td></td>
<td>This is the name displayed in the <strong>Personal Identification</strong> section on the <strong>Metadata</strong> tab of your personal profile.</td>
<td></td>
</tr>
<tr>
<td>Default publishing name</td>
<td>Your name as it appears on new publication records added to Pure.</td>
<td>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.</td>
</tr>
<tr>
<td>Former name</td>
<td>Your previous name, which you may have also published under.</td>
<td></td>
</tr>
<tr>
<td>Known as</td>
<td>Your name as displayed in Pure for other users to see. For example, when searching for people, or in conjunction with a username.</td>
<td>Shown instead of the standard name on screens in the Pure interface and on content.</td>
</tr>
<tr>
<td>Portal sort name</td>
<td>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”.</td>
<td>Not shown in any interface, only used to sort lists of names. 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.</td>
</tr>
</tbody>
</table>

**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.

2.4.2. 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.

### 2.5. 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

![Automated search interface](image)

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.
7. 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.

![Preview candidates](image)

**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.

8. 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

<table>
<thead>
<tr>
<th>Type of notification</th>
<th>Where to control it</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td>The Automated search tab of the Person editor window.</td>
</tr>
<tr>
<td>Personal tasks</td>
<td>The Task settings tab of the User settings window.</td>
</tr>
</tbody>
</table>
3. Add and edit content

3.1. Manage research output

3.1.1. 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.

3.1.2. Add an item of research output

Add research output using a wizard

<table>
<thead>
<tr>
<th>Recommendation</th>
</tr>
</thead>
<tbody>
<tr>
<td>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.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tip</th>
</tr>
</thead>
<tbody>
<tr>
<td>If you have already entered details into another online system such as ORCID, you can save time by importing the record from this source.</td>
</tr>
</tbody>
</table>
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.
4. 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.

5. Click Save.

**Add research output from BibTex, RIS and CERIF files**

1. Click  in the task pane.
2. Click Research output in the left pane and then click Import from file from the list that opens below.
3. Click the file type you want to import from.
4. If you want to add records from the clipboard, paste these records into the Paste text field and click Import.
5. 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.
6. For each record that is displayed that you do not want to import, click Remove.
7. For each record that is displayed that you want to import:
   1. Click  or the title of the publication.
   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.
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.

![Success message](image)

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

![Notification](image)

**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.

<table>
<thead>
<tr>
<th>Tip</th>
</tr>
</thead>
<tbody>
<tr>
<td>You can search in and import from all databases that your institution subscribes to and has activated in Pure.</td>
</tr>
</tbody>
</table>

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

1. Click **Add new** 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**.

<table>
<thead>
<tr>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>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.</td>
</tr>
</tbody>
</table>
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.

   ![Success message](image.png)

   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 2.5. 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.

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.

### 3.1.3. 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 1.3.2. Searching and filtering.
4. Click the name of the item to open the editor window for more information about the record.

<table>
<thead>
<tr>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your ability to edit the record depends on the workflow state of the record. See Section 3.6. Workflows.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tip</th>
</tr>
</thead>
<tbody>
<tr>
<td>You can also click next to a record’s name to show more details.</td>
</tr>
</tbody>
</table>

**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.

![Visibility options](image)

<table>
<thead>
<tr>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>References to visibility in the Pure Portal are only relevant if the Pure Portal is available at your institution.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tip</th>
</tr>
</thead>
<tbody>
<tr>
<td>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.</td>
</tr>
<tr>
<td>Visibility state</td>
</tr>
<tr>
<td>------------------</td>
</tr>
<tr>
<td>Public</td>
</tr>
<tr>
<td>Campus</td>
</tr>
<tr>
<td>Backend</td>
</tr>
<tr>
<td>Confidential</td>
</tr>
</tbody>
</table>

**View citation and other metrics for a publication**

### 3.2. 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 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

<table>
<thead>
<tr>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>Whether publisher information is available depends on the configurations of Pure at your institution.</td>
</tr>
</tbody>
</table>

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.

3.2.1. Edit an existing item of research output

Editing research output and workflow states

Workflows allow your library to keep track of the status of information entered in Pure.

For example, whether a record is an incomplete entry and may not yet be fully accurate, or whether it has been checked and approved by the library as a reliable record.

For more information, see Section 3.6. 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 3.7. Claim and disclaim publications.

3.3. Content types

3.3.1. 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.

3.3.2. 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".

Select a sub-type when creating a record

1. Open the Choose submission wizard.
1. Click in the task pane. The Choose submission wizard is opened.

2. Choose a content type and sub-type. Either:
   - 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.

The Editor window is displayed for the content type and sub-type that you selected.

You can click Change template to change the sub-type of the record you are creating.

3. Continue entering information about the record.

### Change the sub-type of a record

1. Open the Editor window for the record
2. 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 3.6. Workflows.

### 3.3.3. 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.

### 3.4. 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.

### 3.4.1. 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.

<table>
<thead>
<tr>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>The integration of datasets with Mendeley Data is only available if it has been enabled by your institution.</td>
</tr>
</tbody>
</table>

#### 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:
   - Mendeleyn 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.

<table>
<thead>
<tr>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>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.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Warning</th>
</tr>
</thead>
<tbody>
<tr>
<td>If the dataset is flagged as &quot;Embargoed&quot; 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.</td>
</tr>
</tbody>
</table>

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 1.3.2. 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 3.6. Workflows.

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

### 3.4.2. 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 3.5. Other content.

### 3.5. 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 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.

Though the data collected about each content type depends on the real-world entity it represents, the process of adding, finding and editing a record is the same for all content types.

#### 3.5.1. Add a record

**Add a record using a wizard**

1. Click  ![Add new](Add new) in the task pane.
2. 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.

3. Enter all available information about the item in the editor window.
4. 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.

5. Click **Save**.

**Use the Add Record 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.

![Select Research output tab](image)

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.

![Choose submission wizard](image)

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**.

**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.

<table>
<thead>
<tr>
<th>Visibility state</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public</td>
<td>No restriction on visibility. All users of Pure can see this content and it may be displayed on your Pure Portal.</td>
</tr>
<tr>
<td>Campus</td>
<td>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.</td>
</tr>
<tr>
<td>Backend</td>
<td>Restricted to Pure users. This content is only visible within Pure.</td>
</tr>
<tr>
<td>Confidential</td>
<td>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.</td>
</tr>
<tr>
<td>Visibility status</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Public</td>
<td>No restriction on visibility. All users of Pure can see this content and it may be displayed on your Pure Portal.</td>
</tr>
<tr>
<td>Campus</td>
<td>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.</td>
</tr>
<tr>
<td>Backend</td>
<td>Restricted to Pure users. This content is only visible within Pure.</td>
</tr>
</tbody>
</table>

### 3.5.2. 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 1.3.2. 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 3.6. Workflows](#).

**Tip**

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

### Editing records and workflow states

Workflows allow your library to keep track of the status of information entered in Pure. For example, whether a record is an incomplete entry and may not yet be fully accurate, or whether it has been checked and approved by the library as a reliable record.

For more information, see [Section 3.6. Workflows](#).

### 3.6. Workflows

Workflows allow your library to keep track of the status of information entered in Pure. For example, whether a record is an incomplete entry and may not yet be fully accurate, or whether it has been checked and approved by the library as a reliable record.

Your institution will have various workflow states configured to keep track of the status of records.
3.6.1. **Viewing records by workflow state**

When viewing Research output records, you can see the workflow state of each record as a tag.

*Figure 2. A record with the workflow state Validated.*

The default filter, *Editable*, only displays records that you can edit right now. Depending on how Pure is configured at your institution, this may not show records with workflow states indicating the record has already been approved by editors/library staff.

*Tip*

Use the filter *My research output* to see all of the research output records where you are associated regardless of workflow state.

To filter for content within a certain workflow state, add the *Workflow* filter to a content list. See Section 1.3.2. Searching and filtering.

When using the *Workflow* filter, you can also choose the direction that the item entered this state: whether *returning* from a higher state because there was clarification or correction required, or *forwarding* (progressing to a higher state) as it has recently been created or promoted.
3.6.2. Changing a record’s workflow state

When you open a record, you may be able to change its status. For example, to indicate to an editor at your institution that you have finished entering all the relevant information.

Unless your institution has configured its workflow so that you can make changes after an item has been approved by an editor, you can only see records that start with a workflow state of Entry in progress or For validation.

You can view or change a record’s status in the footer of its editor window.

To change the workflow state of a record, choose a new state from the Status dropdown menu in the footer of the editor window. If you want to add a comment to address questions or comments from the responsible editor about the workflow state, add these in the Comment to status change box before pressing Save.

**Tip**

Depending on the workflow state the content will enter, the email address of the relevant editor is shown in the Notifications area above the comment box. You can also send messages about the content in the History and comments tab of the editor window.

**Default workflow state for Research output**

Depending on the configuration of Pure at your institution, research output records may undergo either one or two rounds of validation/approval before they are considered complete and correct.

If you are creating a new record, the workflow state is automatically set to For validation or For approval when you press Save. This means you have entered all necessary information, and the editor responsible for reviewing the entry will receive a notification. If you want to continue to add or change information but save the record anyway, select Entry in progress dropdown menu in the footer of the editor window.

**Default workflow state for other content**

Depending on the settings at your institution, other content types may have either no workflow state, two states or three states.

Either set the workflow state to Entry in progress if you want to enter more details later, or the next state available in the menu.
3.6.3. Meaning of each workflow state

<table>
<thead>
<tr>
<th>State</th>
<th>Typical usage</th>
<th>Editable (as a Personal User)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entry in progress</td>
<td>Initial state. Enter as much information as available at that moment.</td>
<td>Yes</td>
</tr>
<tr>
<td>For approval / For validation</td>
<td>You have marked the record as complete and ready to be approved or validated. The record is waiting for approval from either your department or the library.</td>
<td>Yes</td>
</tr>
<tr>
<td>Approved</td>
<td>Approved by your department.</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td><strong>Tip</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Some institutions skip this state — the library approves and validates records in a single step.</td>
<td></td>
</tr>
<tr>
<td>Validated</td>
<td>Approved by the library.</td>
<td>No</td>
</tr>
</tbody>
</table>

3.7. Claim anddisclaim 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.
Figure 4. 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.

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 4.2. 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**.
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.

5. Click **Disclaim this content**.
4. User settings

4.1. 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.

2. 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 6. 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 7. 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.

<table>
<thead>
<tr>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>You can only change the submission language if additional languages are made available by your institution.</td>
</tr>
</tbody>
</table>

### 4.2. 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:

1. Click your username in the header.

   The User settings dialog is expanded.
2. 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.

3. 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).

4. 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.

<table>
<thead>
<tr>
<th>Summary text</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>All e-mails</td>
<td>Every event in the list triggers an email notification.</td>
</tr>
<tr>
<td>Some e-mails</td>
<td>One or more events in the list triggers an email notification.</td>
</tr>
<tr>
<td>No e-mails</td>
<td>No events in the list trigger email notifications.</td>
</tr>
</tbody>
</table>
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:

<table>
<thead>
<tr>
<th>Email setting</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>New publication candidate found in online source</td>
<td>The Automated search tab of the Person editor window.</td>
</tr>
</tbody>
</table>

4.3. 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 3.6. Workflows.

To send a message:

1. Find and open the record you want to send a message about. See Section 1.3. Navigate and search.
2. In the editor window, open the History and comments tab.
3. Click Write a comment about the content.
4. Write a comment in the text box and select the names/roles of the Pure users you want to see the comment.

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

4.4. **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 your by another user.

**View your tasks**

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

   **Note**

   > If the task pane is minimized, click \[ + \] to expand it.
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 3.6. Workflows and Section 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.

   ![User settings dialog](image)

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.

   ![Task settings tab](image)

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**
<table>
<thead>
<tr>
<th>Task</th>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pending (content type)</td>
<td>Personal User</td>
<td>The user’s input is needed to view the record and change its workflow step.</td>
</tr>
<tr>
<td></td>
<td>Only for content types with a workflow. If the user has this role for multiple content types, the tasks are grouped by content type.</td>
<td></td>
</tr>
<tr>
<td>Open access Research output without documents</td>
<td>Personal user</td>
<td>The user’s input is needed to locate missing full text documents for open access Research output records. The records shown depend on publishers’ copyright policy and are synchronized with SHERPA RoMEO.</td>
</tr>
<tr>
<td>Candidates in (online source)</td>
<td>Personal User Editor of Research output when combined with Editor of persons.</td>
<td>An Automated search has found new search results that match the author’s name and any variations (as configured for your institution).</td>
</tr>
<tr>
<td>Claimed/disclaimed Research output</td>
<td>Administrator of claims</td>
<td>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.</td>
</tr>
<tr>
<td>Changes in manually maintained online CV</td>
<td>Personal User</td>
<td>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.</td>
</tr>
</tbody>
</table>

4.5. 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.

<table>
<thead>
<tr>
<th>Research output</th>
<th>27</th>
</tr>
</thead>
<tbody>
<tr>
<td>Article</td>
<td>24</td>
</tr>
<tr>
<td>Paper</td>
<td>1</td>
</tr>
<tr>
<td>Poster</td>
<td>1</td>
</tr>
<tr>
<td>Literature review</td>
<td>1</td>
</tr>
</tbody>
</table>

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.
4.6. Trusted users

4.6.1. 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.

*Figure 8. 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.*
5. Glossary

A

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.

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.

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.
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.

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.

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.