

Taken over by

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Feature purpose

The **Taken over by** functionality allows to indicate that an organisation has been "taken over" by another organisation, while at the same time keeping the correct organisational information on *Research Output*, *Activities* etc. This way, when one former organisational unit (A) is "taken over by" another organisational unit (B), the content associated with organisational unit A should be shown as related to organisational unit B on the Pure Portal and in reporting. The organisation indicated as "taken over by" is treated as a parent of the organisation it has taken over.

Understand the scenarios in the documentation

In order to describe the different scenarios around the **Taken over by** functionality, the following example is used throughout the document:

- 2 Organisations:
 - *Old organisation (A)*– is being closed down
 - *New organisation (B)*– is the new active organization that has taken over the old organisation
- 1 Research Output:
 - *Research Output (X)* – affiliated to *Old organisation (A)*

How to use the feature

There are several ways to add the **Taken over by** relation on your *Organisation* in Pure.

Manually

This option is available only to users with permissions to update both *Organisations* and *Persons*. These are either Administrators or combinations of Editor/Administrator of Organisation + Editor/Administrator of Persons.

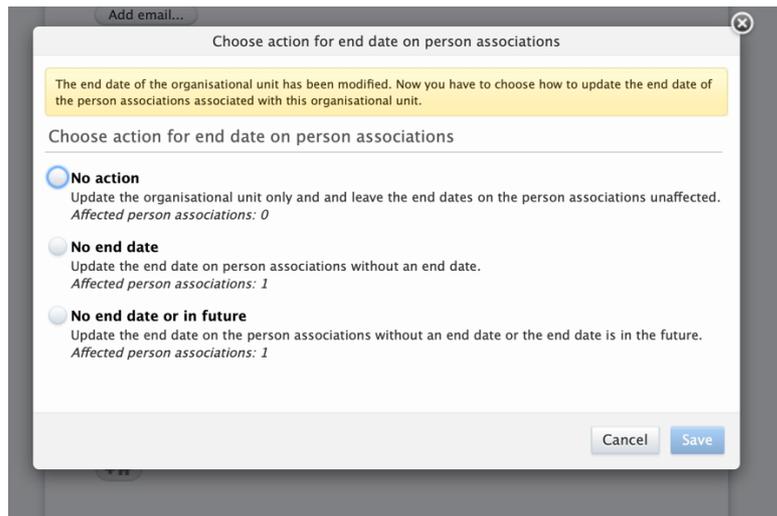
Steps:

1. *Old organisation (A)* already exist in Pure.
2. Create *New organisation (B)* and place it correctly in your organisational hierarchy (by adding the correct *Parent organization*).



(Organisational hierarchy prior to applying **Taken over by**)

3. Open *Old organisation (A)*
 - a. Add *End date* of when this *Organisation* closed down.
 - b. Select how you would like to handle the association between the *Old organisation (A)* and the related *Persons*.



(Update association between *Old organization A* and the related *Persons*)

- c. Add *New organization (B)*– in the field *Organisational unit taken over by*



(Adding "Taken over by" on Old organization A)

- d. Save your settings.

Your organisational hierarchy should now look like this (see also section on "Organisational hierarchy):

- ▼ **University**
Organisational unit: Institution
- ▼ **New organization (B)**
Organisational unit: Institute
 - **Old organization (A)** Taken over by New organization (B)
Organisational unit: Institute
 - **Old organization (A)** Taken over by New organization (B)
Organisational unit: Institute

(Organisation hierarchy after *Taken over by* has been applied)

Synchronisation (or XML Import wizard)

This option can be done either via the **Configurable Organisation Synchronisation** job, or the XML import wizard. If you are using other Organisation synchronization jobs to synchronize Organisations into Pure, please contact the Pure support if help is needed.

Information on how to configure the job correctly (including how to populate the **Taken over by** field) can be found in a PDF file called “Populating Organisations” provided in as part of the job description in Administrator > Jobs > Configurable Organisation Synchronisation.

Note: It is important to have the new organisation structure in place prior to changing the synchronization of Persons to the new organisation. The Organisation synchronization will only update the Organisation information and will not update related persons. They will have a current affiliation to a former organisation, if not update otherwise (eg. through Person synchronization)

TAKEN_OVER_BY	String	1024	No	If this organisation is a historical organisation and another organisation has replaced it, the ID of this organisation can be specified here. Pure will then make a relation between the two organisation
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Synchronisation view/field configuration

The screenshot shows the configuration interface for 'ORGANISATION_DATA'. It is divided into two sections: 'Mandatory synchronisation fields' and 'Synchronisation fields'.
 - **Mandatory synchronisation fields:** Includes 'TYPE' (set to 'Sync') and 'NAME' (set to 'Sync'). A note states: 'A field with "Sync" will result in data being overridden from the transferred data source, while "Sync once" will not override any existing data.'
 - **Synchronisation fields:** Includes 'START_DATE', 'END_DATE', 'OWNER', 'VISIBILITY', and 'TAKEN_OVER_BY'. Each has a dropdown menu. The 'TAKEN_OVER_BY' dropdown is highlighted with a red box and shows options: 'Do not sync', 'Sync', 'Sync once', 'Do not sync', and 'Lock field'.
 - A note for 'Synchronisation fields' states: 'Be aware that changing a field from "Do not sync" or "Lock field" to either "Sync" or "Sync once", will result in data being transferred from the data source to the field, overriding any existing data.'

(information on how to change the configuration on the **Taken over by** part of the synchronization)

Masterlist

The **Taken over by** functionality is currently not supported in Masterlist and needs to be handled manually after the new organisation has been added.

Organisation Display

After the **Taken over by** functionality has been applied, a few changes will be visible in Pure:

Organisational hierarchy

After the **Taken over by** has been applied to *Old organization (A)* – a few adjustments are made to your organizational hierarchy.

Old organization (A) will still be visible under the existing *Parent*, but the *New organisation (B)* will be visible as an additional *Parent* (sometimes referred to as a *pseudo-parent* because the *New organisation (B)* will not be listed in the *Parent* section of the editor, but only in the *Taken over by* section).

Note: In Pure, you can choose whether to include pseudo parents in the organizational hierarchy under Administrator > System settings > Content hierarchy > Organisation hierarchy resolution strategy.

If you select *Only use regular parents*, your organisational hierarchy will not display the overtaken organizational units under their pseudo-parents (new parents).

Applying this setting to our example organisations A and B will result in the following hierarchy:

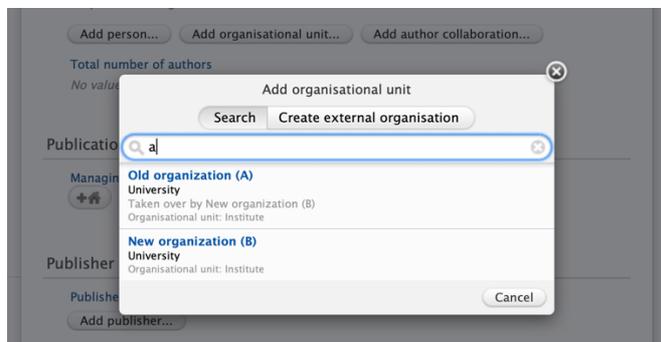
- ▼ **University (root)**
 - Organisational unit: Institution
 - **New organization (B)**
 - Organisational unit: Institute
 - **Old organization (A)** – Former organisational unit. 22/12/2020. Taken over by New organization (B)
 - Organisational unit: Institute

(Organisational hierarchy with setting “Only user regular parents” enabled)

Enabling this setting will not have effect on how content is displayed on the Portal or in reporting.

Short format of an organisation

Every place in Pure where we display information regarding an organisation, will now include information on the *New organization (B)* that has taken over the *Old organization (A)*. This could eg be seen when listing organisations or adding an organisation to a piece of content.



(render of organisation that has been “taken over”)

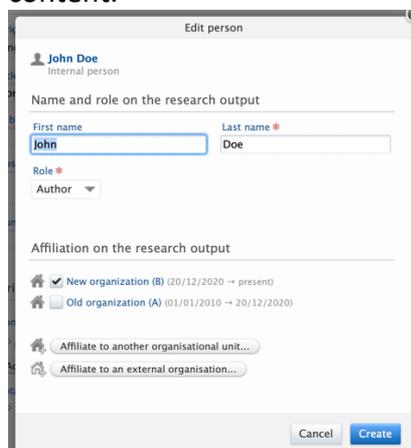
Expected behavior on related content

Content already in Pure that is related to the *Old organisation (A)*

Existing content related to the *Old organisation (A)* prior to it being taken over by the *New organisation (B)*, will not be affected by the change. The affiliations on the content will stay the same and the correct history of the content will be preserved. For example, when looking at a piece of content on the Portal, you will be able to see that it was produced under *Old organisation (A)*, but will also see it currently listed as content that belongs to the *New organisation (B)*.

Content added after *Taken over by* has been applied

When the *Old organisation (A)* has been closed down – and *the New organisation (B)* has overtaken it, we recommend that the Persons associated with *Old organisation (A)* to also be updated at the same time (either manually in Pure, through your synchronization, Master list or through the API). Persons will therefore have a former association to *Old organisation (A)* and likely a new association to the *New organisation (B)*. When creating new content in Pure, *New organisation (B)* will be set as default as associated to the content.



(adding Person to content after **Taken over by** has been applied)

What to expect in reporting

It is possible to create a report on an organisation that includes the content created in organization(s) your organisation has taken over.

In the example report below, you want to know how many Research outputs the *New organisation (B)* has produced and you would like to include the Research outputs that were created by *the Old organisation (A)*.

This is done differently in the classic and new Reporting modules.

New Report module

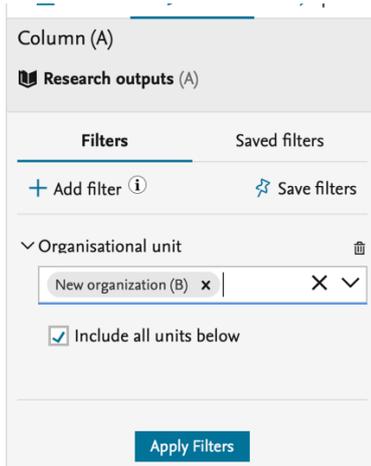
In the new Reporting module, the *Old organisation (A)* that is taken over by the *New organization (B)* is seen as a child of the *New organization (B)*.

You can get to the results in various ways.

Below, we present 2 ways of generating the report but there are more ways of getting the same result.

Scenario 1:

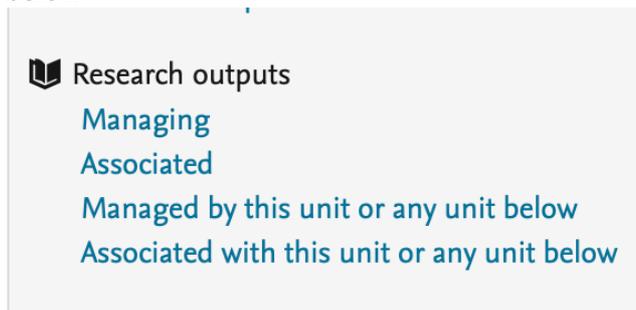
- Start your report on Research Output
- Include a filter on *Organisational unit*.
 - Select *New organisation (B)*
 - Tick *Include all units below*



(Filter on *Organisational unit*, including underlying organisations (also “taken over”))

Scenario 2:

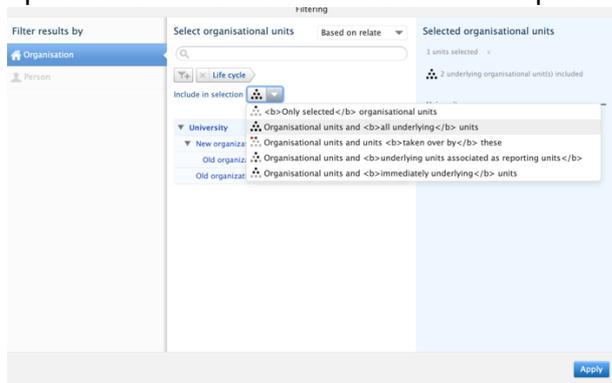
- Start your report on Organisations (can be filtered by Organisational unit = *New organisation (B)*)
- In column B – select related Research Output > *Managed by this unit or any unit below*



(Related Research Output, managed by this unit or any unit below (also organisations **Taken over by**)

Classic Reporting module

In the classic Reporting module, you can specify the content’s relationship to organisations via the Organisational unit filter (default filter), and further narrow it down by selecting options from the *Include in selection* dropdown menu.



(Selection of organisation including organisations “taken over by”)

Steps:

- Select Research output as content type to report on

- Select the Table (analysis) format
- Click on the *Organisational unit* filter to open it
- Deselect the organisation already chosen
- Select *New organisation (B)*
- In *Include in selection* – select *Organisational units and organizational units taken over by these*
- Save filter

What to expect in Pure Portal

On the Pure Portal content related to “taken over by” organisation will be shown on the lists of content for the new Organisation (content related to “Old organisation (A)” can be shown on the list of content for “New organisation (B).

What to expect on Organisation on the Portal

Looking content lists on an organisation that has taken over other organisations (New organisation (B)) you will now see a listing of content related to both new and “taken over by” organisations

The screenshot shows the Pure Portal interface for a 'New organization (B)'. The page has a dark header with the organization name and a navigation bar with tabs for Overview, Profiles (1), Research Output (2), Prizes (1), Activities (1), Press / Media (1), and Impacts (1). The 'Research Output' section is active, showing a bar chart for 'Research Output per year' with bars for 2018 and 2020. Below the chart, there are two results listed: 'Content created after Taken over by is added' (Dec, 2020) and 'book created on Old organisation (A)' (Dec, 1 Dec 2018).

(Listing of content related to new organisation and “taken over by” organisation)

What to expect on an individual piece of content on the Portal

The content that was added to Pure prior to the organizational change (applying *Taken over by*), will not be affected by the change. It will still show the same (old) organization:

Book title

[John Doe](#)

[Old organization \(A\)](#)

Research output > peer-review

(The display of content after “taken over by” has been enabled – when showing former organisations on the Portal)

Note: If you have chosen to display former organisations on your Portal, we will show a link to the former organization on the individual piece of content. If you have chosen not to display former organisations on your Portal, we will not show former organisation affiliation on the individual piece of content. You can set your preference under Administrator > Pure Portal > Portal > Configuration > Content types > Organisational Units > Only show active organisations in the Portal.