

KUOZ : Academic v Scientific category

The 5.11.2 Pure release included the delivery of KUOZ Table D : Research activities. Upon delivering this table, it was highlighted that we have a discrepancy between KUOZ Table D and KUOZ Table C : Research outputs (delivered in 5.9.0).

Namely, Table C uses the following categories:

- **Scientific**
- Professional
- Popular
- *Other*

KUOZ output type	2015			
	Scientific	Professional	Popular	Other
A: 'Refereed' journal article	5374	-	-	-
B: 'Non-refereed' article	162	341	79	228
C: Book (authored)	100	41	7	0

Whereas Table D uses the following categories:

- **Academic**
- Professional
- Popular
- *Other*

KUOZ output type	2016			
	Academic	Professional	Popular	Other
A: Edit / reviewing	-	-	-	1122
C: Presenting	-	-	-	790
D: Exchange	-	-	-	2

At the Dutch User Group meeting on 29 May, it was agreed that the categories to be employed for both tables should be:

- **Academic**
- Professional
- Popular
- *Other*

We plan to make the necessary updates to KUOZ Table C : Research Outputs in the 5.12.1 (July) release. **Prior to upgrading to 5.12.1**, it is recommended that you create and export a report for all Research Outputs, including the following fields. This will give you a 'before' picture that you can compare against post-upgrade to confirm all values have migrated as expected.

- Pure ID / UUID
- Output type
- Publication category
- SEP Output type
- KUOZ Output type

Upon upgrade to 5.12.1, where the publication category 'Scientific' is employed for Research Outputs, the classification will automatically be updated to 'Academic'. Additionally, if any of your SEP or KUOZ Output mapping

files previously made employed mappings that included the 'Scientific' publication category, these will be automatically updated to use the new 'Academic' classification.

For many of you, this is all that will need to happen upon upgrade to 5.12.1 in order for your KUOZ Output and Activity categories to be appropriately captured and reported. However, **if you have existing Activity, Prizes, and/or Press / Media content where you need to edit the category from 'Scientific' to 'Academic', you will need to undertake the following steps.**

Before you begin

It is recommended you make a report of all of your Activities, Prizes, and Press / Media content, their type, their category, and their current SEP and KUOZ Output types. This will just ensure you have a record of each item's properties prior to undertaking the bulk actions described below, and will help you to keep track of which actions need to be undertaken, as per the steps outlined below.

The actions required make use of functionality delivered in 5.7.0, described in the following sections of the 5.7.0 release notes:

[https://doc.pure.elsevier.com/pages/viewpage.action?pageId=32923683#Releasenotes-Pure5.7.0\(4.26.0\)-Activities:Newunifiedmodelactivities](https://doc.pure.elsevier.com/pages/viewpage.action?pageId=32923683#Releasenotes-Pure5.7.0(4.26.0)-Activities:Newunifiedmodelactivities)

Create 'Academic' category¹

The first step you need to undertake is to create the 'Academic' category for Activities, and enable it on all relevant Activity templates and types.

Go to Administrator > Activities > Types. Select the first template / type to modify. Select 'Modify available categories'.

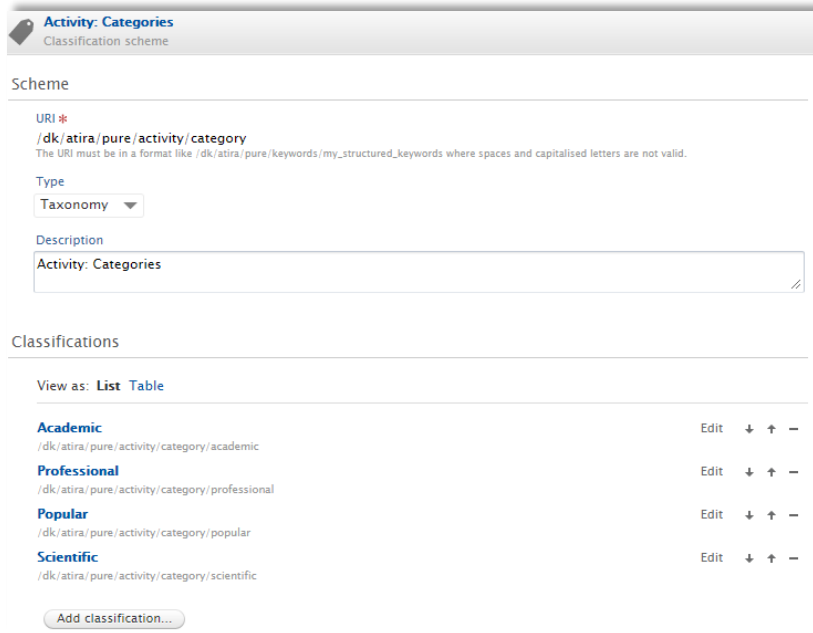
The screenshot shows a modal window titled "Edit subtype". It has a close button in the top right corner. The content is organized into sections:

- Type enabled:** A toggle switch is currently set to "On". Below it, a note states: "When disabling a type, new content cannot be added to this type, but existing content will keep the type and it will be reportable etc."
- Name:** A text input field contains "Participation in conference".
- Description:** A text area contains "Types of Conference participation".
- Indicator relations:** Two buttons are present: "Add indicator relation" and "Modify available indicators". A note below says: "Indicators will be available as a drop down in the template editor. Multiple indicators can be added."
- Category relations:** A list of categories is shown: "Scientific (5)", "Professional", and "Popular". Each category has an "Edit" link to its right. Below the list is a button labeled "Modify available categories". A note at the bottom says: "Categories will be accessible in the template editor".

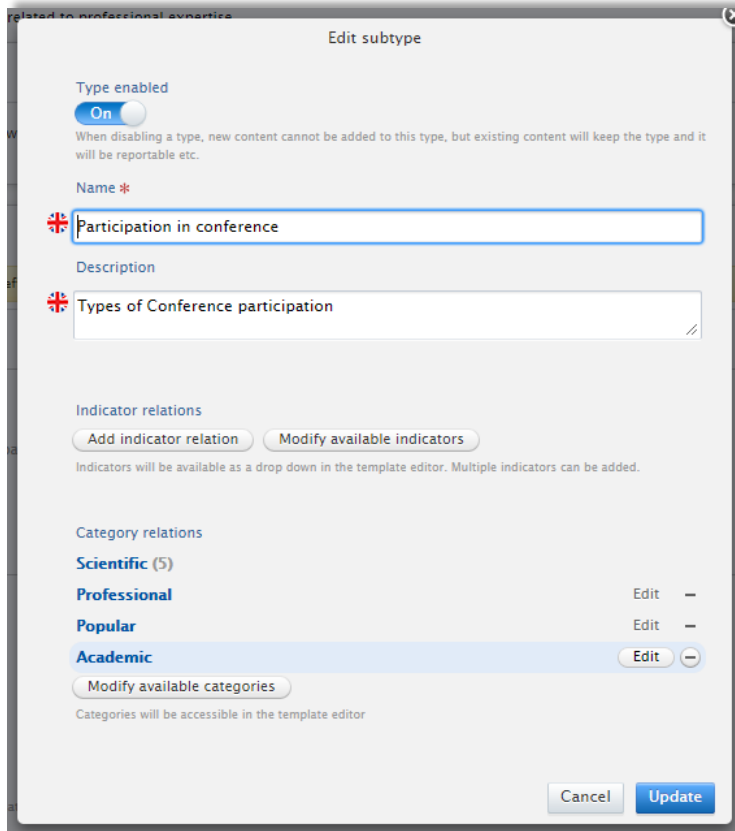
At the bottom of the dialog are "Cancel" and "Update" buttons.

¹ These steps all describe bulk editing categories for Activities. The same steps can be followed for the Prizes and Press / Media content types.

If you don't already have 'Academic' as an available category on Activities, then select 'Modify available categories' and add 'Academic' to the classification scheme, and use the arrows to move the items into the desired order (e.g. Academic first, then Professional, then Popular).

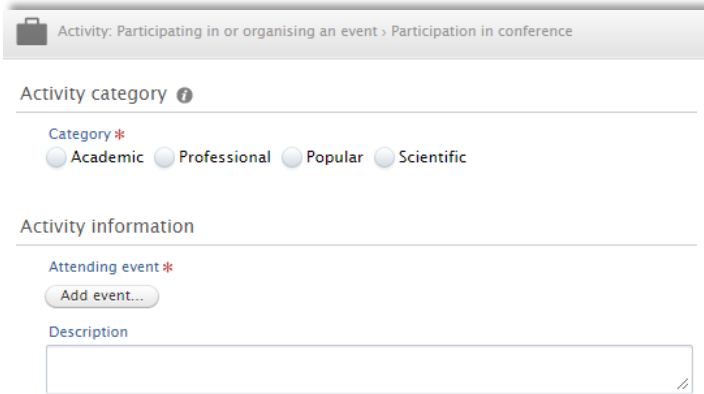


Otherwise (or once created), select 'Add category relation' to add the 'Academic' category to the Activity Type.



Repeat these steps for all relevant Activity templates and types (you won't need to create the 'Academic' category after the first one – you will just need to add it to each template / type).

Once complete, you will have 'Academic' available as a category on all relevant Activity templates and types.



Activity: Participating in or organising an event > Participation in conference

Activity category ⓘ

Category *

Academic Professional Popular Scientific

Activity information

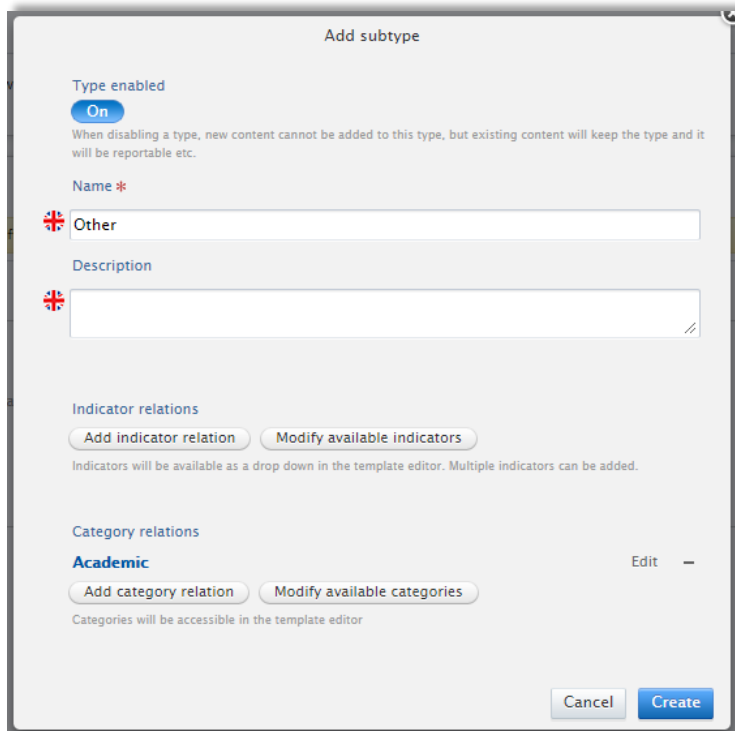
Attending event *

Description

Create 'Other' type for each template

The only way to bulk edit the category on Activities is to also change the Activity type at the same time. As such, as part of this process, you need to create a 'dummy' type for each Activity template.

Select the first affected template, then select 'Add subtype', giving it a unique name (e.g. Other (if not already used), or 'TO BE CHANGED'). Then 'Add category relation' and add 'Academic' (you don't need to add any other categories as this is just a temporary measure).



Add subtype

Type enabled

On

When disabling a type, new content cannot be added to this type, but existing content will keep the type and it will be reportable etc.

Name *

Description

Indicator relations

Indicators will be available as a drop down in the template editor. Multiple indicators can be added.

Category relations

Academic Edit -

Categories will be accessible in the template editor

Bulk edit the category for existing Activities from 'Scientific' to 'Academic'

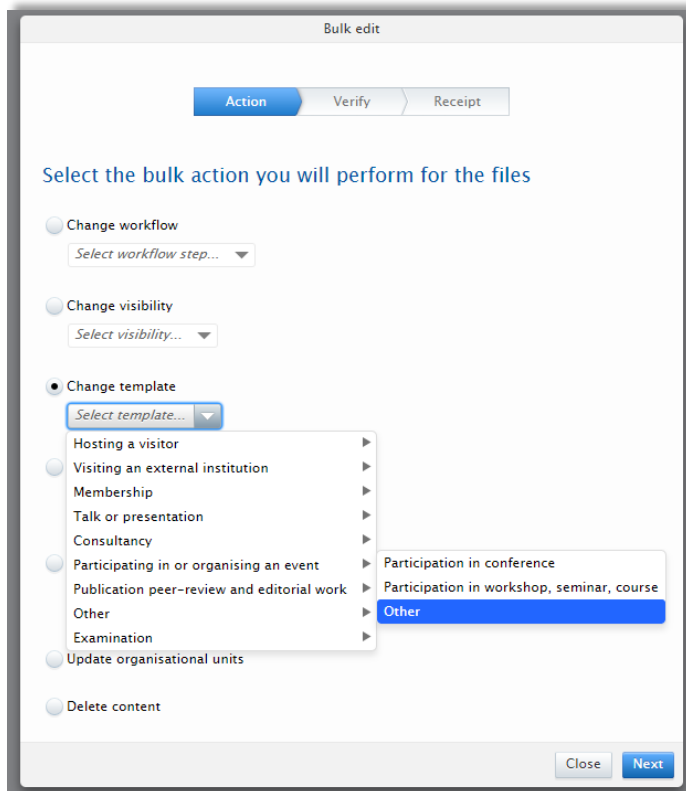
Go to your editable list of Activities, and filter for:

- Activity type
- Category = Scientific

IT IS VERY IMPORTANT TO ENSURE THAT YOU UNDERTAKE THESE BULK ACTIONS INDIVIDUALLY, TYPE BY TYPE – Otherwise you will inadvertently modify the type of most of your Activities, and will lose metadata.

Then select 'bulk actions' using the double-tick icon next to the number of results, then 'Select all'. Next, select 'Bulk edit'.

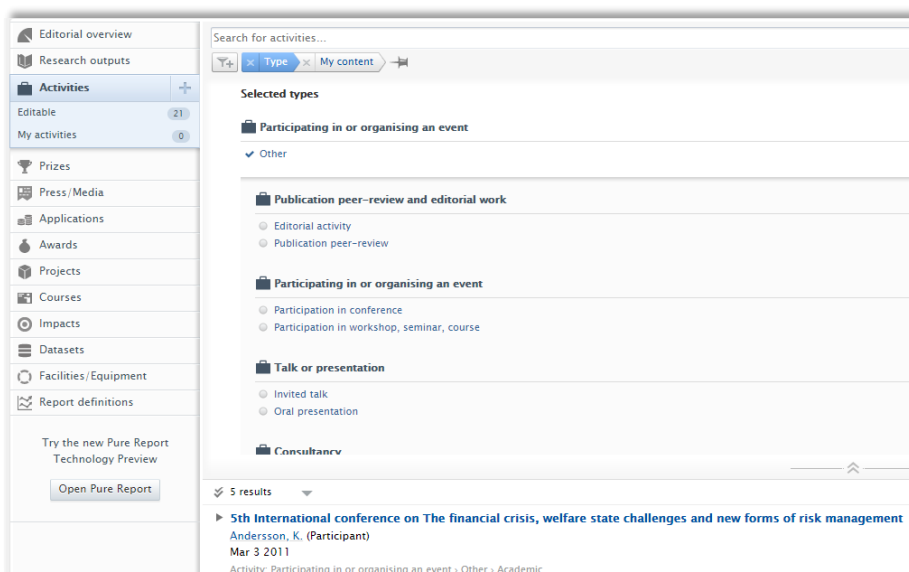
This will open a new window, with all bulk actions available. Select 'Change template'. Then select the Activity template and the 'dummy' type, and click 'Next'.



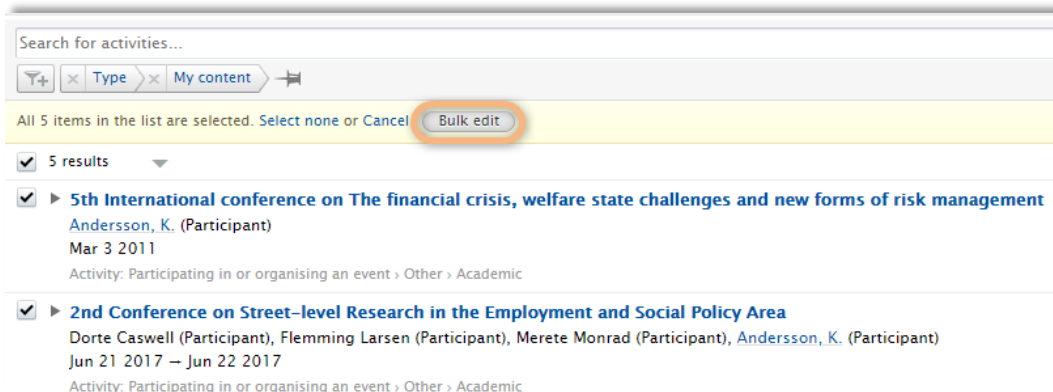
On the next screen you will be asked to 'Apply the changes' (as the 'dummy' type only has 'Academic' available as a category, all content will be assigned that category). You can ignore the highlighted message about lost data – as you are not changing the Activity template, simply the type, no data will be lost.

So, now all of your selected Activities are assigned the 'dummy' type, and you need to move them back to the correct type and assign the 'Academic' category.

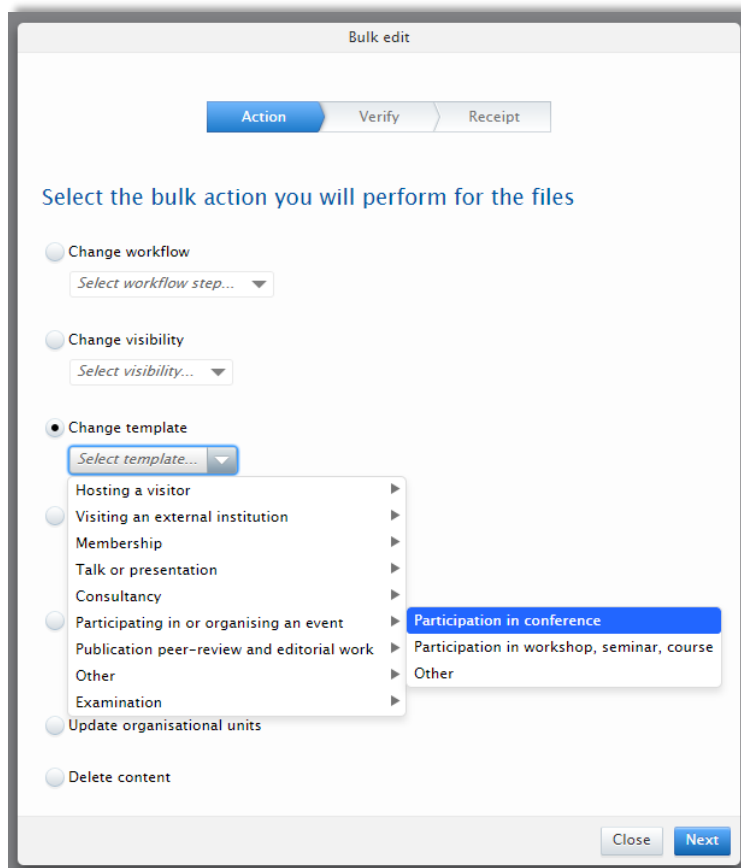
Go to your editable list of Activities, and filter for the 'dummy' type.



Then select 'bulk actions' using the double-tick icon next to the number of results, then 'Select all'. Next, select 'Bulk edit'.



This will open a new window, with all bulk actions available. Select 'Change template'. Then select the correct Activity template type, and click 'Next'.



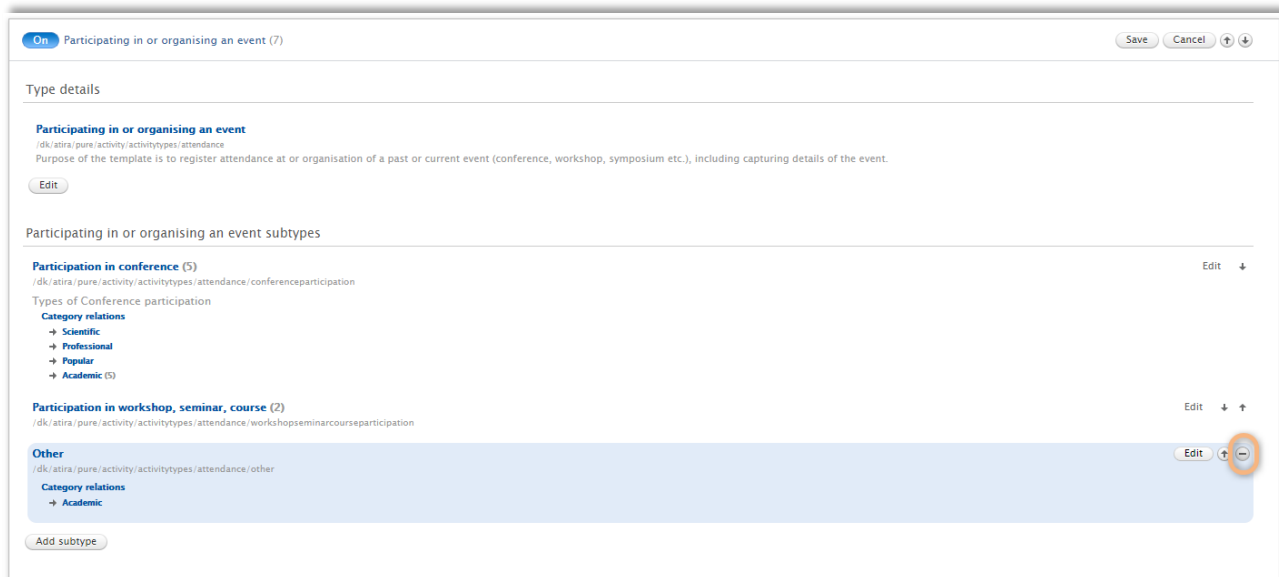
On the next screen you will be asked to 'Apply the changes'. You can ignore the highlighted message about lost data – as you are not changing the Activity template, simply the type, no data will be lost.

Perform these bulk changes for all relevant Activity templates and types.

Remove 'dummy' Activity type

Once all affected Activities have been re-assigned the 'Academic' category and reverted back to the correct type, you will have zero records remaining in the 'dummy' Activity type and you can therefore remove it from the available types.

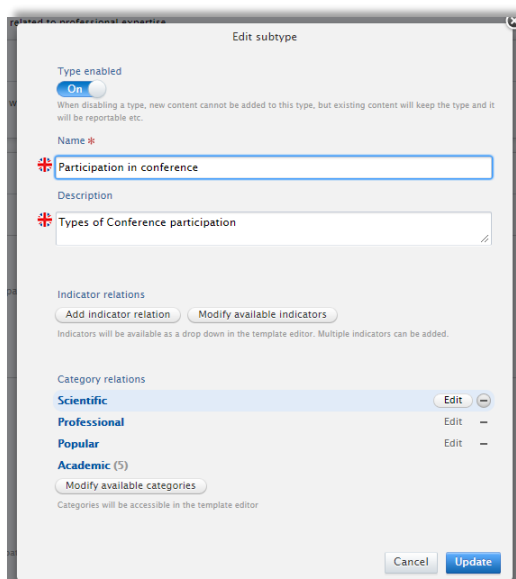
Go back to Administrator > Activities > Types. Then, within each template, simply select the '–' icon next to the 'dummy' type.



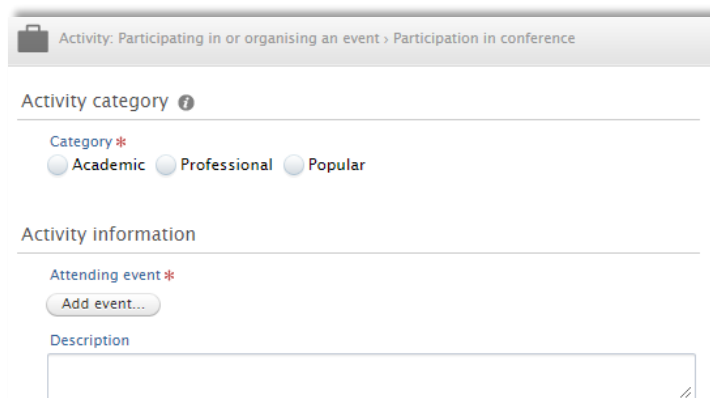
Remove 'Scientific' category from Activity editor

Once all affected Activities have been re-assigned the 'Academic' category, you will have zero records remaining in the 'Scientific' category and you can therefore remove it from the available categories in the Activity editor, and (if desired) disable it in the classification scheme.

Go back to Administrator > Activities > Types. Select the first template / type to modify. Then simply select the '–' icon next to the 'Scientific' category:



This will remove it from the list of available categories in the Activity editor. Repeat this for all relevant Activity templates and types.



Activity: Participating in or organising an event > Participation in conference

Activity category ⓘ

Category *

Academic Professional Popular

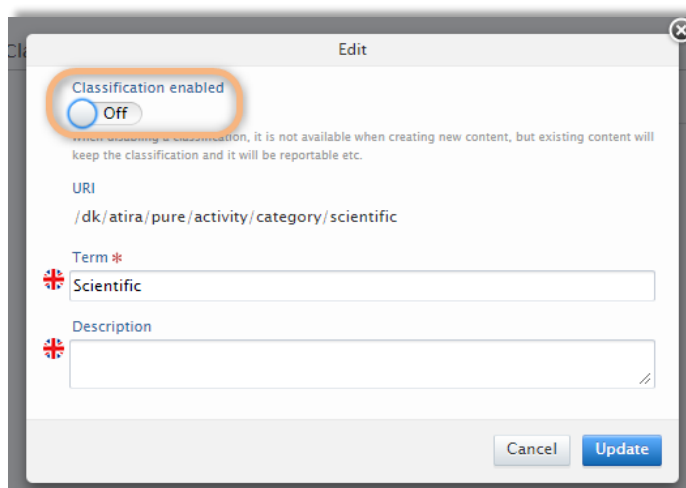
Activity information

Attending event *

Add event...

Description

If you wish, you can then also disable the 'Scientific' category in the Publication categories classification scheme:



Edit

Classification enabled

Off

When disabling a classification, it is not available when creating new content, but existing content will keep the classification and it will be reportable etc.

URI

/dk/atira/pure/activity/category/scientific

Term *

Scientific

Description

Cancel Update

Undertaking these actions, along with the updates we will make to KUOZ Table C : Research Outputs in 5.12.1 will ensure that all content will be appropriately classified in the various SEP and KUOZ tables, according to intended audience.

Update KUOZ Activity mappings

If you have employed mappings in your KUOZ mapping files that include Activity, Prize, or Press / Media categories, you will need to update these as well to ensure that your KUOZ Table D : Research Activities continues to report expected values.

Details on how to do so are available at:

<https://doc.pure.elsevier.com/display/DUTCHPURE/KUOZ+-+Update+Activity+type+mapping>