

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 C: Research output				
Year range 2015 - 2017 Apply				
		2015		
KUOZ output type	Scientific	Professional	Popular	Other
A: 'Refereed' journal article	\$374	-	-	-
B: 'Non-refereed' article	162	341	79	228
C: Book (authored)	100	41	z	0

Whereas Table D uses the following categories:

- Academic
- Professional
- Popular
- Other

KUOZ D: Research Ac	tivities			
Year range 2016 → 2018	Apply	Only 3 years of dat	a can be view	ved at any o
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

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'.

Edit subtype	
Type enabled On When diabling a type, new content cannot be added to this type, but exis Wher enable etc. Name *	ting content will keep the type an
Participation in conference	
Description	
Types of Conference participation	
Indicator relation	indicators can be added
Indicator relation (notify trainable indicator)	indicators can be added.
Indicators will be available as a drop down in the template editor. Multiple Category relations Scientific (5)	indicators can be added.
Indicators will be available as a drop down in the template editor. Multiple Category relations Scientific (5) Professional	indicators can be added. Edit •
Indicators will be available as a drop down in the template editor. Multiple Category relations Scientific (5) Professional Popular	indicators can be added. Edit · · Edit · ·
Indicators will be available as a drop down in the template editor. Multiple Category relations Scientific (5) Professional Popular Modify available categories	indicators can be added. Edit Edit
Indicators will be available as a drop down in the template editor. Multiple Category relations Scientific (5) Professional Popular Modify available categories Categories will be accessible in the template editor	indicators can be added. Edit Edit

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).

Classification scheme				
neme				
URI *				
The URI must be in a format like /dk/atira/pure/keywords/my_structured_keywords where spaces and capitalised letters are n	ot valid.			
Type				
Taxonomy				
Taxonomy +				
Description				
Activity: Categories				
Activity: Categories assifications View as: List Table				
Activity: Categories assifications View as: List Table Academic	Edit		•	
Activity: Categories assifications View as: List Table Academic /dk/atira/pure/activity/category/academic	Edit	÷	Ť	
Activity: Categories assifications View as: List Table Academic /dk/atira/pure/activity/category/academic Professional	Edit Edit	+	†	
Activity: Categories assifications View as: List Table Academic /dk/atira/pure/activity/category/academic /dk/atira/pure/activity/category/professional /dk/atira/pure/activity/category/professional	Edit Edit	+	†	
Activity: Categories assifications View as: List Table Academic /dk/atira/pure/activity/category/academic Professional /dk/atira/pure/activity/category/professional Popular	Edit Edit Edit	+ + +	† † †	
Activity: Categories assifications View as: List Table Academic /dk/atira/pure/activity/category/academic Professional /dk/atira/pure/activity/category/professional Popular /dk/atira/pure/activity/category/popular	Edit Edit Edit	+ + +	† † †	
Activity: Categories assifications View as: List Table Academic /dk/atira/pure/activity/category/academic Professional /dk/atira/pure/activity/category/professional Popular /dk/atira/pure/activity/category/popular Scientific	Edit Edit Edit Edit	+ + + +	† † † † † † † † †	

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

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	Edit subtype		
als	Type enabled On When disabling a type, new content cannot be added to this type, but existing content w will be reportable etc. Name #	ill keep the type a	nd it
1	Participation in conference		
	Description		
*	Types of Conference participation		
			11
	Indicator relations		
	Indicators will be available as a drop down in the template editor. Multiple indicators can	be added.	
	Category relations		
	Scientific (5)		
	Professional	Edit	-
	Popular	Edit	-
	Academic	Edit	Θ
	Modify available categories		
	Categories will be accessible in the template editor		
	Ca	ncel Upd	ate

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.

tivity category	0
any category	0
Category *	
Academic	Professional Popular Scientific
tivity information	Professional Popular Scientific
tivity information	Professional Popular Scientific
Academic tivity information Attending event * Add event	Professional Popular Scientific

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
1	Type enabled
(On
V	When disabling a type, new content cannot be added to this type, but existing content will keep the type and
v	vill be reportable etc.
١	Name *
(Other
0	Description
ſ	
1	ndicator relations
	Add indicator relations Add indicator relation Modify available indicators ndicators will be available as a drop down in the template editor. Multiple indicators can be added. Category relations Academic Edit -
	Indicator relations Add indicator relation Modify available indicators Indicators will be available as a drop down in the template editor. Multiple indicators can be added. Category relations Academic Edit - Add category relation Modify available categories
	Indicator relations Add indicator relation Modify available indicators Indicators will be available as a drop down in the template editor. Multiple indicators can be added. Category relations Academic Edit – Add category relation Modify available categories "template will be acreasible in the template aditor
	Indicator relations Add indicator relation Modify available indicators Indicator vill be available as a drop down in the template editor. Multiple indicators can be added. Category relations Academic Edit Add category relation Modify available categories Categories will be accessible in the template editor
	Indicator relations Add indicator relation Modify available indicators ndicators will be available as a drop down in the template editor. Multiple indicators can be added. Category relations Academic Edit Add category relation Modify available categories 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.

Editorial overview	Search for activities
💓 Research outputs	T+ X Category type X My content
Activities	Selected activity categories
Editable 2	Scientific
My activities	
🍸 Prizes	Not set Academic
Press/Media	Professional
and Applications	Popular
lacktriangleright Awards	
Projects	
Courses	Sth International conference on The financial crisis, welfare state challenges and new forms of risk managemen
Impacts	Anderssin, K. (Participant)
Datasets	Mar 3 2011 Activity: Participating in or organising an event > Participation in conference > Scientific
() Facilities/Equipment	2nd Conference on Street-level Research in the Employment and Social Policy Area
\ge Report definitions	Dorte Caswell (Participant), Flemming Larsen (Participant), Merete Monrad (Participant), Andersson, K. (Participant)
Try the new Pure Report	Activity: Participating in or organising an event > Participation in conference > Scientific
Technology Preview	Recwowe Final Conference
Open Pure Report	Andersson, K (Participant) Jun 17 2011
	Activity: Participating in or organising an event > Participation in conference > Scientific

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

Search for activities
$\boxed{\P_+}$ \times Category type $>$ \times Type $>$ My content \rightarrow
All 5 items in the list are selected. Select none or Cancel Bulk edit
✓ 5 results ✓
 Sth International conference on The financial crisis, welfare state challenges and new forms of risk management Andersson, K. (Participant) Mar 3 2011 Activity: Participating in or organising an event > Participation in conference > Scientific
 2nd Conference on Street-level Research in the Employment and Social Policy Area Dorte Caswell (Participant), Flemming Larsen (Participant), Merete Monrad (Participant), <u>Andersson, K.</u> (Participant) Jun 21 2017 → Jun 22 2017 Activity: Participating in or organising an event > Participation in conference > Scientific

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'.

Bulk	edit				
Action Ver Select the bulk action you will pe	ify Receipt				
Change workflow					
Select workflow step 🔻					
 Select visibility Change template Select template Hosting a visitor Visiting an external institution Membership Talk or presentation Consultancy Participating in or organising an event Publication peer-review and editorial work Other Examination Update organisational units 	 Participation in conference Participation in workshop, seminar, course Other 				
Delete content	Delete content				
	Close 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.

Editorial overview	Search for activities
Research outputs	▼+ × Type × My content →
Activities -	Selected types
Editable 21	
My activities 0	Participating in or organising an event
🍸 Prizes	✓ Other
Press/Media	Publication peer-review and editorial work
B Applications	Editorial activity
lacktriangle Awards	Publication peer-review
Projects	
Courses	Participating in or organising an event
O Impacts	 Participation in conference Participation in workshop, seminar, course
Datasets	
Facilities/Equipment	Talk or presentation
S Report definitions	Invited talk
	Oral presentation
Try the new Pure Report	Consultance
Technology Preview	·
Open Pure Report	🕉 5 results 🔍
	 Sth International conference on The financial crisis, welfare state challenges and new forms of risk management Andersson, K. (Participant)
	Mar 3 2011
	Activity: Participating in or organising an event > Other > Academic

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'.

	В	ılk edit
	Action	Verify Receipt
Select Char	t the bulk action you will nge workflow ect workflow step	perform for the files
Char Sel	nge visibility ect visibility 💌 nge template	
Sel Hos Visi Mer Tall Cor	ect template	 Participation in conference
Part Pub Oth Exa Upda	ticipating in or organising an event Ilication peer-review and editorial wo ier mination ate organisational units te content	Participation in conference Participation in workshop, seminar, course Other
		Close 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.

On Participating in or organising an event (7)	Save Cancel 🕈 🕹
Type details	
Participating in or organising an event /dt/atia/pure/lathihypepi/attendance Purpose of the template is to register attendance at or organisation of a past or current event (conference, workshop, symposium etc.), including capturing details of the event. Edit	
Participating in or organising an event subtypes	
Participation in conference (5) /dk/atira/pure/activity/activity/ses/attendance/conferenceparticipation Types of Conference participation Category relations + Scientific + Professional + Propear + Academic (5)	Edit ↓
Participation in workshop, seminar, course (2) /dk/atira/pure/activity/activity/activity/statendance/workshopseminarcourseparticipation	Edit 🕹 🕈
Other /dk/atira/pure/activity/activity/pss/attendance/other Category relations + Academic	Edit
Add subtype	

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:

related to	Edit subtype		6
	ware see () pe		
	Type enabled		
	On		
	When disabling a type, new content cannot be added to this type, but existing content will keep will be reportable etc.	the type a	and it
	Name *		
*	Participation in conference		
	Description		
*	Types of Conference participation		
			- 10
20	Indicator relations		
	Add indicator relation Modify available indicators		
	Indicators will be available as a drop down in the template editor. Multiple indicators can be add	led.	
	Category relations		
	Scientific	Edit	Θ
	Professional	Edit	-
	Popular	Edit	-
	Academic (5)		
	Modify available categories		
	Categories will be accessible in the template editor		
at			_
	Cancel	Upd	ate

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 Profes	isional 🔵 Popular
Activity information	
Activity information	
Activity information Attending event * Add event	
Activity information Attending event * Add event Description	

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

CI	Edit
	Classification enabled Off Off keep the classification and it will be reportable etc.
	URI /dk/atira/pure/activity/category/scientific
	Term *
*	Scientific
an an	Description
1	<i>"</i> #
	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