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Release notes - Pure 5.13.0 (4.32.0)

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Highlights of this release

Research Outputs: Available updates from online sources

As part of our continuing focus on increasing automation to reduce the burden on our users with regard to data entry into Pure, this release introduces exciting new functionality to update existing Pure Research Output records with new and potentially more complete metadata from available online sources. The feature searches online sources (such as, but not limited to, Scopus, Web of Science, and PubMed) for updated information on existing Research Outputs in Pure and presents users with the updated data for consideration. See below for more info ...

ORCID: New Research Output import source

We are very pleased to announce the addition of ORCID as an import source for Research outputs in this release, fully incorporated into our recently added **Automated search by ID** functionality and the **Updates from online sources** feature in this release. See below for more info ...

Pure Portal update status overview

To make it easier to manage and understand Pure Portal updates, we have made the Portal content and configuration update process more transparent. See below for more info ...

ⓘ **Watch the 5.13 New & Noteworthy seminar**

✅ **We are pleased to announce that version 5.13.0 (4.32.0) of Pure is now released**

Always read through the details of the release - including the **Upgrade Notes** - before installing or upgrading to a new version of Pure

Release date: **10 October 2018**

Hosted customers:

- *Staging environments (including hosted Pure Portal) will be updated 10 October 2018 (APAC + Europe) and 11 October 2018 (North/South America)*
- *Production environments (including hosted Pure Portal) will be updated 24 October 2018 (APAC + Europe) and 25 October 2018 (North/South America)*

ⓘ **Download the 5.13 Release Notes** 📄
last updated 10 October 2018

⊘ **PARTICULAR ITEMS TO NOTE WITH THIS RELEASE**

Old Pure web service API will be deprecated in 5.13.0 (October 2018) and removed with 5.14.0 (February 2019)

We announced in the **Pure 5.9.0 release** (June 2017) our plans to remove the old web service API upon the Pure 5.13.0 release in October 2018. Over the past few months, we have received feedback that our users would like us to extend the overlap period of the old web service API. As such we will not be removing the old web service API with the release of Pure 5.13.0, but we will deprecate* it with the 5.13.0 release and remove it in the 5.14.0 release in February 2019.

Deprecation means that we will no longer fix or improve the old web service API, but you can continue using it until its removal in 5.14.0.

We encourage everyone to make sure you have adapted your applications to use the new web service API. Details of the new web service API can be found **here**.

Please also be aware that the new web service API only supports the Unified Project Model. Content in the old Project model will not be available on the new web service API. If you implemented Pure from 4.13 or later (this includes all of Pure 5), you are already are using the Unified Project Model. If you are in doubt, you can check the Administrator tab > Unified Project Model tab. If this tab with the Unified Project Model settings is available, you are using the Unified Project Model. Please contact the Pure Support team for assistance in migrating to the Unified Project Model.

Removal of the 5.9 web service API endpoint

Pure 5.13.0 is the first release where a new web service endpoint (the 5.9 API) will be removed. If you are currently using the 5.9 endpoint, you will need to update your queries to use one of the supported web service endpoints. For this 5.13.0 version these are:

- 5.10 API
- 5.11 API
- 5.12 API
- newly introduced 5.13 API

You can find more information about the web service delivery module in the **Pure 5.9.0 release notes.** We will continuously inform you about removed web service endpoints in the individual **Upgrade Notes** of the release.

Faculty and Academic Activity Reporting (FAAR)

We recently discovered an issue with FAAR functionality such that, under certain conditions, when a batch download of FAAR reports was actioned, Parent organisations were removed from Organisational units in the database, leading to orphaned Organisational units in the hierarchy (if you synchronise your Organisational unit content, Parents would be re-instated upon the next synchronisation). This issue has been resolved in both 5.12.4 and 5.13.0, and a job to resolve the Organisational hierarchy issues caused is expected in the 5.13.0-1 release.

We have been in touch with all customers who have enabled FAAR with more detail on this issue and work being undertaken to fix the Organisational hierarchy issues caused. If you have not heard from us but think you have been affected, please contact the Pure Support team directly).

Espacenet: New API requires access credentials

Espacenet has released a new version of their API, which now requires the use of access credentials. All customers using Espacenet as an import source must upgrade their Pure to at least version 5.12.2. Further details are available from the 5.12.2 release notes.

Funding Discovery

Customers using the Funding Discovery module are requested to upgrade their Java 1.8 version to version 1.8.0_162-b12 or newer. Older versions cause SSL errors (SSL handshake failure from the secure HTTPS connection made from Pure to the Pure funding service).

5.13.0 (4.32.0) New and noteworthy

1. GDPR (General Data Protection Regulation)

In this release we have introduced some GDPR-related access changes to reporting in Pure, based on customer feedback:

- The **Submitter of Research Output** role no longer has access to the Reporting module. We have created a new organisational **Reporter of Research Output role**. To grant access to the Reporting module to Submitters of Research Output, you will need to assign them the new Reporter of Research Output role as well.
- **Raw data spreadsheet layout in Reporting module:** The ability to select the 'Raw data spreadsheet' layout in the Reporting module is now only available to the Administrator role. Access to any existing reports with this layout will be removed for all users other than Administrators.
- **Reporting module:** We have removed all scenarios where it was possible for non-Administrator users to report on Person Gender and Date of birth when reporting on other content.

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2. Web accessibility

2.1. Improved reporting experience for keyboard and screen reader users

The Technology preview of the Reporting Module has been enhanced as part of our continued effort to ensure that the Pure backend is accessible to people with disabilities. This release includes several core navigation components and adds some contextual information for screen readers, bringing the module closer in compliance with the WCAG 2.1 and WAI-ARIA accessibility standards. The core accessibility improvements will roll out across the Pure backend as part of our general user interface refresh.

Click here for more details ..

- **Improved experience navigating the Data table with a screen reader**

  We have enhanced the Data table to allow tab focus on individual cells. Cell values and their context are now announced by screen readers and users can navigate between cells of different rows and columns using the arrow keys.

- **Improved navigation and screen reader accessibility in the Data table Value and Filter panels**

  The Data table tool panels have been updated to improve accessibility for users who rely on keyboard navigation or screen readers. Screen readers are now able to correctly identify each tab and users can navigate between tabs using standard navigation keys.

  Changing the type of value in an existing column has been enhanced with screen reader-friendly markup and navigation, enabling a keyboard user to expand and collapse categories and select values within categories or sub-categories.

  The list of filter options in the filter tab has been made accessible via keyboard navigation using the same navigation as the value tab.

- **Save and warning dialogs are now recognized as dialogs by screen readers**

  Dialogs such as the Save form and full screen warnings are now labeled as such and tab focus is kept within the dialog itself. Dialogs can be closed via the Escape key or by focusing the close icon in the upper right corner.

- **Drop Down components are now accessible for screen readers and announced as aria comboboxes**

- **Screen readers now read descriptions for input fields in range filters**

- **Popup menus, such as the export menu are now recognized by screen readers and implement standard-based navigation and focus handling.**

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3. Pure Core: Administration

3.1. Research outputs: Available updates from online sources

As part of our continuing focus on increasing automation to reduce the burden on our users with regard to data entry into Pure, this release introduces new functionality to update existing Pure Research Output records with new and potentially more complete metadata from available online sources. The feature searches online sources for updated information on existing Research Outputs in Pure and presents users with the updated data for consideration.

By default, this feature is ENABLED and updates are by default only presented to Administrators - except for PRS customers using the QABO '*Scopus Publication Update Job*', where the feature is by default DISABLED. Further information for PRS customers is available **below**.

> ⓘ **Editing records while updates and pending consideration**
> While updates from online sources are pending consideration, Research outputs can still be edited and saved in the normal way, but with some restrictions:
>
> - For users not enabled to access the available updates from online sources (e.g. Personal users), all metadata fields in the Research output editor will continue to be editable while updates from online sources are pending consideration
> - For users enabled to access available updates from online sources (e.g. Administrator), those metadata fields with updates pending consideration will not be editable in the editor. Should the user wish to modify fields with updates pending consideration, the user will first need to address all fields with available updates

3.1.1. Presentation of available updates from online sources

When updated metadata is found for existing Research Output records in Pure (as per the configuration and matching details provided below), Administrators are presented with a list of Outputs with available updates. For each Output, the Administrator can then review these updates and decide the appropriate action (accept, ignore, merge).

Click here for more details...

The list of Research outputs with available updates from online sources is accessible through the menu under **Research outputs**.

Alternatively, records with available updates can be filtered using the filter options in the Research outputs window. Also available is the ability to filter available updates by import source.

NOTE:

- If the only updates available are for the *Keywords* and *Other links* fields, the updates will **not** be presented to the user for consideration and the fields will not be updated. If updates are found for any other fields, the available updates will be presented to the user for consideration.

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3.1.2. Acting upon available updates

To enable authorized users to consider the available updates from online sources, a new 'Available updates from online sources' window of the Research output editor has been introduced, within which the user can choose to accept, ignore, or merge each available update.

Click here for more details ..

Upon selecting an Output with available updates from online sources, the Research output editor opens to a new 'Available updates from online sources' window of the Research output editor.

Differences in metadata fields between the existing Pure Research output record and the import source(s) fields are highlighted in yellow.

- For fields in which the Pure Research output record is null or blank, the value from the import source(s) is pre-selected.
- Users can select from each of the options presented for each metadata field.
- Once selected, the chosen value is highlighted and non-selected values are crossed-out.
- For some metadata fields, the option to merge values is available.
- Updates relating to the Journal field are not available for selection, even if there are differences between the Pure record and the import source(s). This is to ensure that such a fundamental change can only be implemented by directly editing the affiliated Journal in the Research output record itself, and to ensure that master Journal records are not unexpectedly altered.

Note: To edit metadata fields that do not have available updates, simply click the Metadata menu tab and all normal editing options are available.

Viewing current publisher or database version of record

If the user would like to view the most current version of the record, as presented by the publisher (via the DOI) or database, a link is provided at the top of the window.

Saving updated records

Once one metadata field has been updated, either by selecting of merging new data, the user **must** address all metadata fields presented in the *Available updates from online sources* window before being able to save the record. If the user does not address all fields, a message will prompt the user to address those fields where no choice was made.

Changes made to records that have been modified using this feature may be viewed in the **History and comments** window.

3.1.3. Search, matching, and comparison processes

The search for available updates is based on unique identifiers in the Pure Research Output record. These are:

- Scopus publication IDs
- DOIs
- ISBNs
- ORCID ID*

*For those Research outputs with an ORCID ID (i.e. imported from ORCID - see **below**), the ORCID ID will be used to check ORCID for any updated data.*

Click here for more details...

Provided the Pure Research output is within the parameters determined in the configuration settings (see below), the job uses these IDs to check enabled import sources. Once the IDs have been matched to records in each import source, the metadata fields in the Pure Research output are compared against the available metadata fields in each import source.

- For fields in the Pure Research output that are null or blank, all available non-null data for those fields are retrieved.
- For fields in the Pure Research output record that have data, these fields are compared using a comprehensive string or number matching process. Wholly different values and minor differences in spelling or extra or missing characters trigger the fields to be presented to the user in the update candidates user interface.

Publication statuses and dates

For publication dates, care has been taken to only suggest updates that are more refined or wholly different. For example:

	Current published date			
	2 June 2018			
	Source A	Source B	Source C	Source D
Data held by source	2018	2017	June 2018	July 2018
Outcome in Pure	Not suggested as an available update	Suggested as it is wholly different	Not suggested as it is less refined than the existing value	Suggested as it is wholly different

The publication status of records is also considered when checking for updates. For example, where a record has a current publication status of 'ePub ahead of print', any other statuses (and dates) found from online import sources will be presented to the user. If a user selects an additional status and date, this status and date will be **added** to the record, alongside the existing status(es) and date(s). Existing publication states will **not** be overwritten.

Electronic versions (files, DOIs, and links)

This feature will not modify or remove existing files or links held on the record. Existing DOIs will be checked against the available online sources and modifications will be suggested in the same way as other metadata updates are presented. Where a DOI update is selected, default values for related fields are as follows:

- Document version = Final published version
- Public access to file = Unknown
- License to document = Not set

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3.1.4. Supported sources

The 'Available updates from online sources' feature supports the receipt of updates from the following sources:

- Web of Science
- Web of Science (lite)
- Embase
- Mendeley
- PubMed
- Scopus
- ORCID

Only those sources that are enabled as import sources will be included in the update search.

The list of sources will increase over time and notifications of new additions will be included in the relevant release notes.

There is currently no means of ordering or prioritising updates from the different sources; improvements to this are expected in upcoming releases.

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3.1.5. Configuring the Available updates from online sources feature

The 'Available updates from online sources' feature is delivered in Pure as a cron job, with configuration options such as:

- scheduling
- years to search
- authorised user roles
- exclusion of individual import sources.

Click here for more details ..

Enabling the 'Available updates from online sources' feature

The 'Available updates from online sources' job can be added to the schedule by selecting it in the drop down list *Administrator* > *Jobs* > *Cron Job scheduling* > Select job from *Create new job* dropdown list. The job can be found under the '*Synchronisation with external systems*' section.

By default, this feature is ENABLED, except for PRS customers using the QABO '*Scopus Publication Update Job*', where the feature is by default DISABLED. Further information for PRS customers is available **below**.
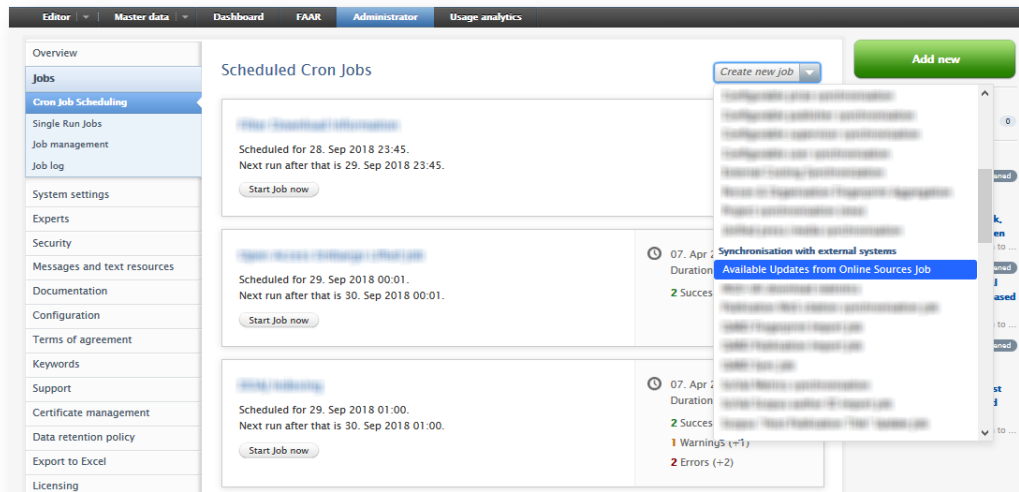
Configuration options

The 'Available updates from online sources' job can be configured as follows:

Starting year

The job is configured to only consider Research outputs published in the specified year and later. The default value is the current year. For example, configuring the Starting year as 2017 will result in only Research outputs published in 2017 being considered.

This configuration can be accessed via *Administrator* > *Jobs* > *Cron Job scheduling* > *Available Updates from Online Sources Job* > *Edit configuration* > *Default configurations*.

Configuration options

Access to results

This feature is, by default, only available to Administrators. But additional user roles (Editors and Validators) can be given access via *Administrator > Research outputs > Import configurations > Available Updates from Online Sources.*

Enabling / Disabling individual online sources

Online sources can be excluded from the feature by toggling on or off for the individual source at *Administrator > Research outputs > Import configurations > Available Updates from Online Sources* (by default, all enabled sources are included). Note that the list of online sources available is limited to those enabled as import sources (as per *Administrator > Research outputs > Import sources*).

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3.1.6. PRS customers

Records updated by normal use of the *Available updates from online sources* feature will affect the functioning of jobs specific to PRS customers that rely on Scopus as an import source.

Click here for more details...

Due to differences in the default scheduling of, and the data state against which checks are made, the *Available updates for online import sources* (daily/live data) and the QABO *Scopus Publication Update Job* (weekly/snapshot data), and the aggressive matching processes of the *Available updates for online import sources* job, it is highly likely that the suggested updates from *Available updates for online import sources* may precede updates added by the QABO job. If any of the suggested metadata updates are accepted through normal use of the *Available updates for online import sources* job, the QABO job, as designed, **will not** look for updates on the specific metadata fields of the records that were updated or modified by the *Available updates for online import sources* job.

Recommendations:

- For PRS customers that rely on the QABO *Scopus Publication Update Job* to update records from Scopus, it is recommended not to enable the *Available updates for online import sources* job to avoid any inadvertent modifications.
- If PRS customers would still like to enable the job, it is recommended that Scopus is excluded from the list of import sources to be used by the *Available updates for online import sources* job (see section on *Configuration options*).
- If PRS customers would still like to enable the job, and have Scopus as an import source to be used by *the Available updates for online import sources* job, **please contact the Pure Support team.**

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3.2. Research Outputs: Addition of Case notes

In response to a number of user requests, we have introduced 'Court cases' as an optional section in the Research output template, enabling the creation of Case notes. This feature will be of interest to those institutions with Law Schools or who undertake legal research, enabling the addition of court case decisions to Research outputs in a systematic manner, and enabling specific filtering and reporting on Case notes as Outputs.

Court case metadata can be added to the following Research output templates:

- Contribution to Journal
- Chapter in Book/Report/Conference proceeding
- Other contribution

These new Court case metadata fields are available in the new Reporting module

Click here for more details ..

Adding Court case details to Research outputs

Once enabled (see details below), Court cases can be added in the Research output editor. Clicking '*Add court case'* will open the Court case information window.
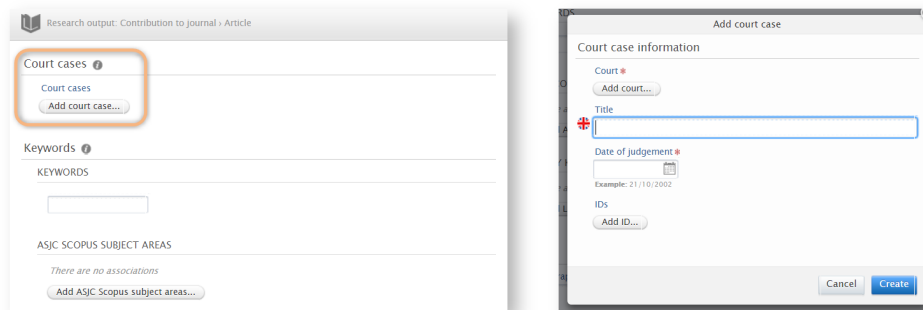
Multiple Court cases can be added to a Research output. The metadata that can be captured per Court case includes:

- Court(s) (mandatory):
  - Court name
  - Court country
- Court case titles
- Court case IDs, with:
  - Multiple ID types per Court case, initially including ECLI and Case numbers, with the possibility for additional ID types
  - Multiple IDs per court case (mandatory if ID type selected)
- Date of judgement (mandatory)

Display formats of Case notes

Display formats of Case notes

A Case note (the combination of a Research output + Court case details) as research output is cited in full detail in the following formats:

- Short render
- Long render
- Standard format
- APA format
- Author format

The Case note will be shown in full detail in CVs so long as one of the citation formats above is selected as the Display format.
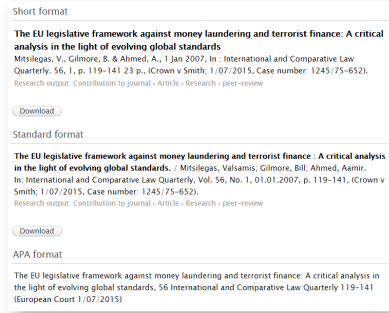
Enabling Court case fields on Research output templates

The ability to add Court cases to Research outputs is DISABLED by default. There is a two-step process for Administrators to enable Court cases.

Enable Court cases in Pure

Navigate to *Administrator > System settings > Research output model >* toggle on *Enable court cases field*
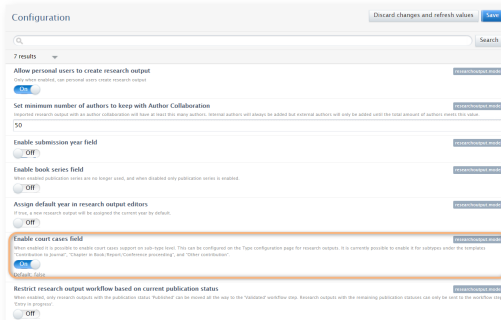
Enable Court cases on individual Research output templates

Court case metadata can be added to the following Research output templates:

- Contribution to Journal
- Chapter in Book/Report/Conference proceeding
- Other contribution

For each desired template, users can enable Court cases via *Administrator > Research outputs* then *Templates and types > Edit [per RO type] > Edit subtype >* toggle on *Court cases*

Enabling Court case fields on Research output templates
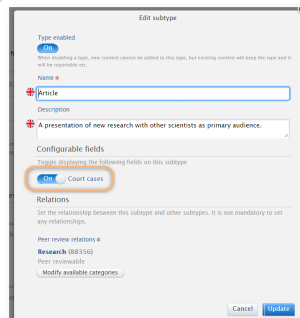
We strongly recommend that if an institution's users frequently create case notes, administrators should create a new 'Case notes' Output subtype, enabling Case notes to be easily identified by subtype and via filtering and reporting. To do so, go to *Administrator > Research outputs* then *Templates and types > Edit [per RO type] > Add subtype >* toggle on *Court cases*.
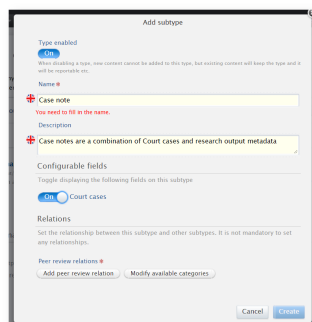
Court case IDs

Course case ID types are managed via the 'Court case sources' classification scheme (/dk/atira/pure/courtcase/sources). By default the following ID types are available, and more can be added via the classification scheme:

- ECLI ID
- Case number
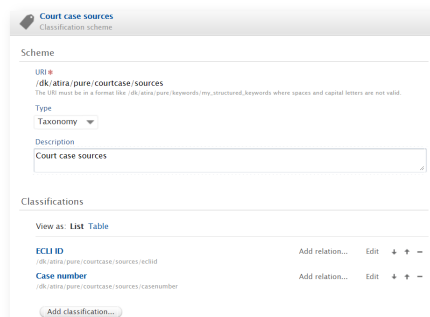
3.3. Research Outputs: Ability to change the order of Publication categories

This release includes improved functionality to enable you to change the order of Publication categories in the Research output editor, which previously could be a very cumbersome exercise. This brings this functionality in line with other content types (e.g. Activities, Press/Media, Prizes) where the order of Categories was defined in the relevant classification scheme.

Click here for more details ...

It is now possible to change the order of Publication categories in the Research output editor via the Publication categories classification scheme (/dk/atira/pure/researchoutput/category). Selecting the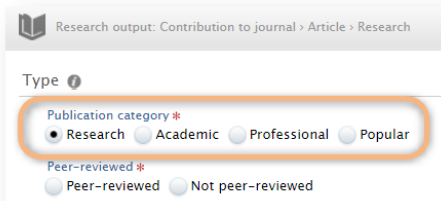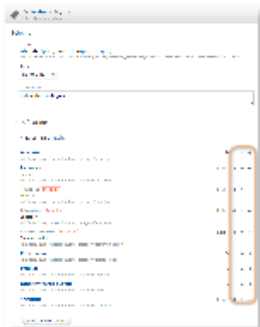 preferred order here, using the up/down arrows, will immediately feed through to the Research output editor, for all templates and sub-types.

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3.4. Unified Project Model: Updates to Cost codes on Applications and Awards

We have updated the behavior on the Cost code field introduced in the **5.12.0 release**. We have added the ability to:

- Change between recording Cost codes on budget or funding level
- Filter on Cost codes
- Sync Cost codes into Awards and Applications

Click here for more details ..

Change between recording Cost codes on budget or funding level
It is now possible to change between recording the Cost code on funding and budget level, even after content has already been created using either of the two levels. This setting is universal over the Pure instance.
This functionality enables greater flexibility for handling organizational or funder changes, allowing Cost codes for existing records to remain where originally captured, with Cost codes for all new Awards and Applications captured at the updated level.
To change the level, go to *Administrator* > *Unified Project Model* > *Module configuration > Configure funding on Applications and Awards*
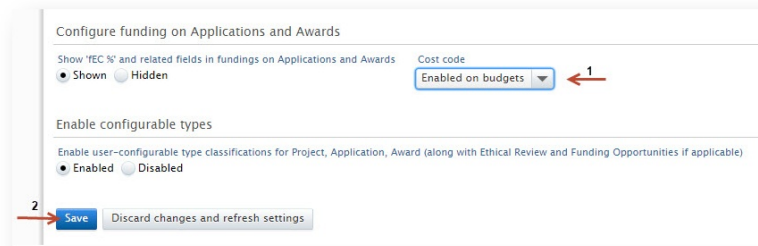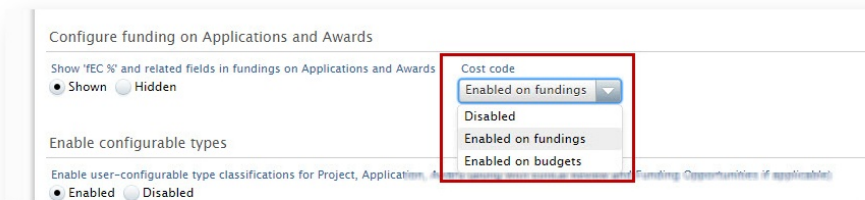
Existing Awards and Applications

The new level is only for use on **NEW** Awards and Applications. Cost codes on existing Awards and Applications remain on the level on which they were originally created, displaying the recorded Cost code on the previous settings as read-only.

In the example given above, where the administrator has changed the level from "Enabled on fundings" to "Enabled on budgets" the following effect is observed in an Application:

Read-only view in the metadata tab	
View of the Cost code level that was made inactive	View of the Cost code level that was made active
Cost code level inactive: Field is read-only in the 'Edit funding' tab	
View of the Cost code level that was made inactive	View of the Cost code level that was made active
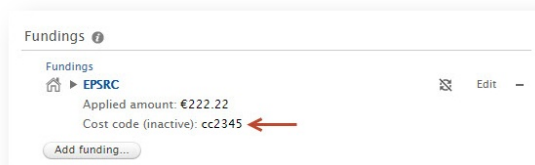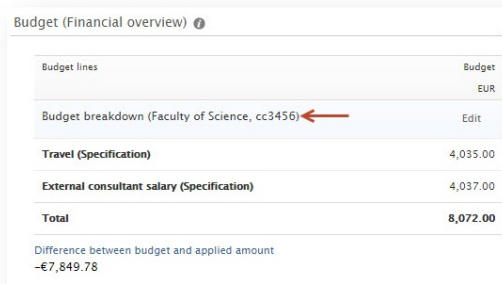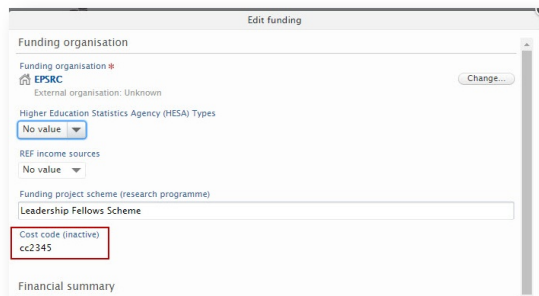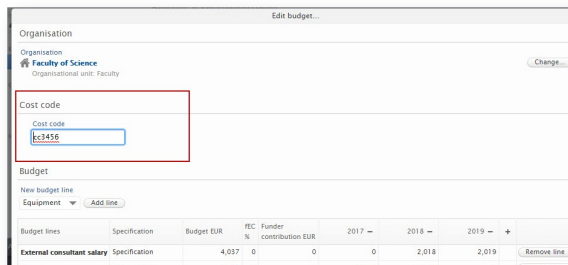
Filtering on Cost codes
It is now also possible to filter Applications and Awards on Cost code.

Filtering on Cost codes
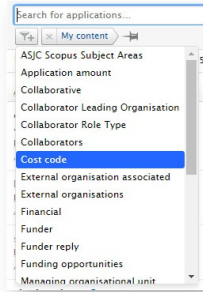
You can filter on whether Cost code is present or not	
When you select that Cost code must be present, you are then able to search for a specific Cost code or a partial code.	
The partial search will search for any Cost codes that contain the value, regardless of position.	
The search also works over multiple values. Here, for example, the search returns Applications where at least one of the Cost codes contains 'a'.	
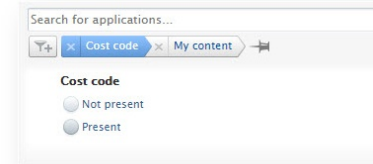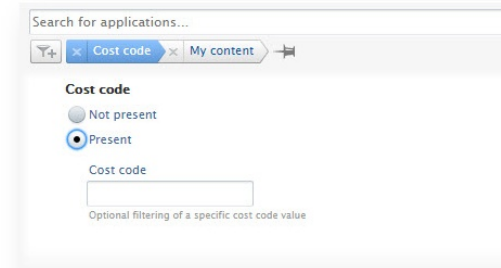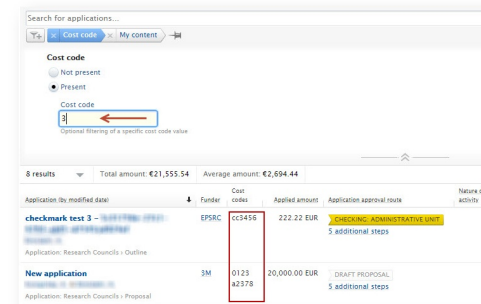
Filtering on Cost codes
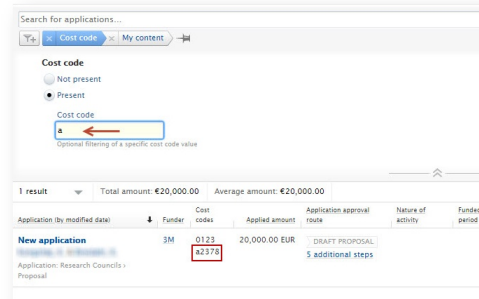
Cost code visible in Tabular view

Add the Cost code field to the tabular view as below, and drag the column to create the appropriate ordering of columns.
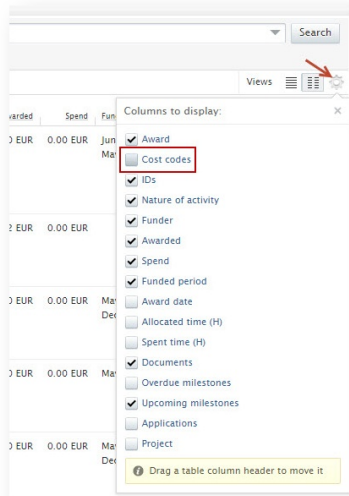
The cost code is then displayed in the column for relevant Applications and Awards. Where the Cost code level has been changed and there are Cost codes in both fundings and budget level, this field displays a combination of these values, allowing you to filter on Cost codes regardless of which level these were created on.
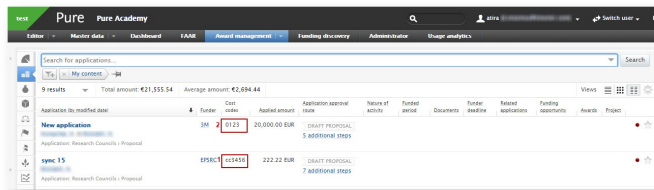
Active Cost code field	Inactive Cost code field
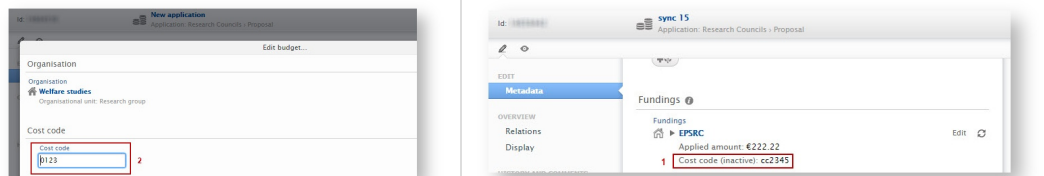
Where there are multiple Cost codes, these are displayed below each other in the column.

Synchronize Cost codes into Awards and Applications

The Cost code field has been added to the XML format for Application and Award synchronizations, making it possible to include Cost codes from your external system.

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3.5. Unified Project Model: Update to integration with external budgeting tools

In the **5.12.0 release** we introduced the facility to synchronize budgeting data into Applications from **BlackDackel**, an external costing system. In this release, we are building upon this functionality by:

- Making it possible to specify other synchronization sources for budgeting data.
- Upgrading the synchronization to make use of the synchronization improvements delivered in **5.12.0.**

Click here for more details ..
There are two ways of setting up the syncronization with an external costing system:

- Synchronization with manual input of external costing project codes
- Synchronization of fixed fields without external costing project codes

Synchronization with manual input of external costing project codes

Set up the synchronization job by enabling the integration at *Administrator > Applications > External costing configuration.*

Synchronization with manual input of external costing project codes

On saving the configuration, the synchronization job is automatically set up and run. To access the job log go to *Administrator > Jobs > Job log > externalCostingSynchronisationCronJob*.

Once the synchronization with the external costing system is enabled, a 'External costing system ID' field is added to each Application, in which the user is able to link the application in Pure to the relevant budgeting item or project in the external system (this is non-mandatory).

After the External costing system ID has been added and the Application has been saved, the Application is now included the regular synchronization of budgets into Applications and a message is displayed in the Application to inform the user:

- That a budget synchronization is in effect for this Application.
- When the next synchronization is expected to run.

Synchronization with manual input of external costing project codes

Notifications are sent to Applicants, Editors, and Administrator of Applications when a synchronization has occurred on a specific Application.

Synchronization of fixed fields without external costing project codes

It is also possible to create the link between the Application in Pure and the project in the external costing system by notifying the external system of relevant applications in Pure. To enable this type of synchronization you must enter a Notification URL when setting up the synchronization at *Administrator > Applications > External costing configuration*

.

Once the configuration is saved, Applications will display a 'Link this application with External costing system' checkbox in the Fundings section:

Checking the box and saving the Application sends a notification of the Application to the external costing system.

Fields that will be synchronized on saving the Application are:

- UUID
- Title
- Type
- Classified IDs
- Applicants (uuid, name, assigned role)
- Organizational units (uuid)
- Managing Organizational Unit (uuid)
- Expected period
- Submission date

If there are any problems in the synchronization settings the Application will not save, and an error message will be displayed. To save the Application in the meantime, uncheck the 'Link this application with External costing system' box.

Synchronization of fixed fields without external costing project codes
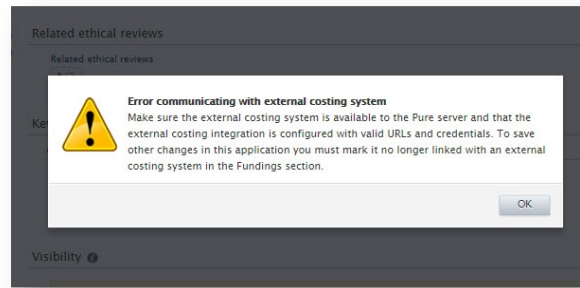
- When synchronization with an external costing system has been enabled:
  - the Fundings section of the Application is no longer mandatory, to allow for that data to be added via the synchronization after the Application has been created in Pure
  - it remains possible to add Fundings manually in Pure - these can just be added to the Application along with the synchronized budgets
- When synchronizing budgets into Pure ensure that the:
  - Base currency is set to the same currency in both the external system as in Pure
  - Budgeting is using the same level of granularity with regard to tracking over years. For example, if the budget in Pure is set to allow tracking of budget annually, and not just as a total value, and the external system is reporting a total value, this will not be synchronized into Pure, as Pure is expecting annual amounts.

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3.6. Unified Project Model: Description fields for Applications, Awards, and Projects now offer same formatting options

In this release, we have introduced formatting options for the Description field for Applications and Awards, bringing these editors in line with the Project editor. This was a particular issue when deriving an Application or an Award from a Project, when formatting would be lost.
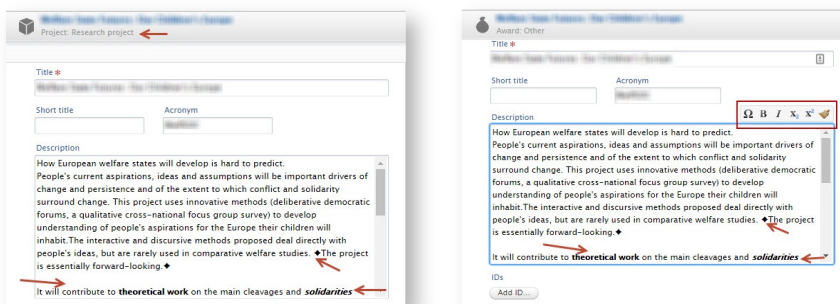
This improvement relates to the following JIRA issues:

- PURESUPPORT-42117 - Award Description / Project Description Rendered Differently `CLOSED`
- PURESUPPORT-30390 - Description format - creating a Project from Award. `RELEASED`
- PURESUPPORT-42383 - ASU: invalid XHTML in Project desc `RELEASED`

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3.7. Unified Project Model: Separate classification scheme for Document types on Awards

When adding documents to an Award, the Document Type field defaulted to 'Other', and the classification was not unique to the Awards content type and therefore included a number of irrelevant types. In this release, we have introduced a new hierarchical Document type classification for Awards called *Award Management: Award Document types*. The default values are:

- Award
- Agreement
- Finance

Previously	5.13.0
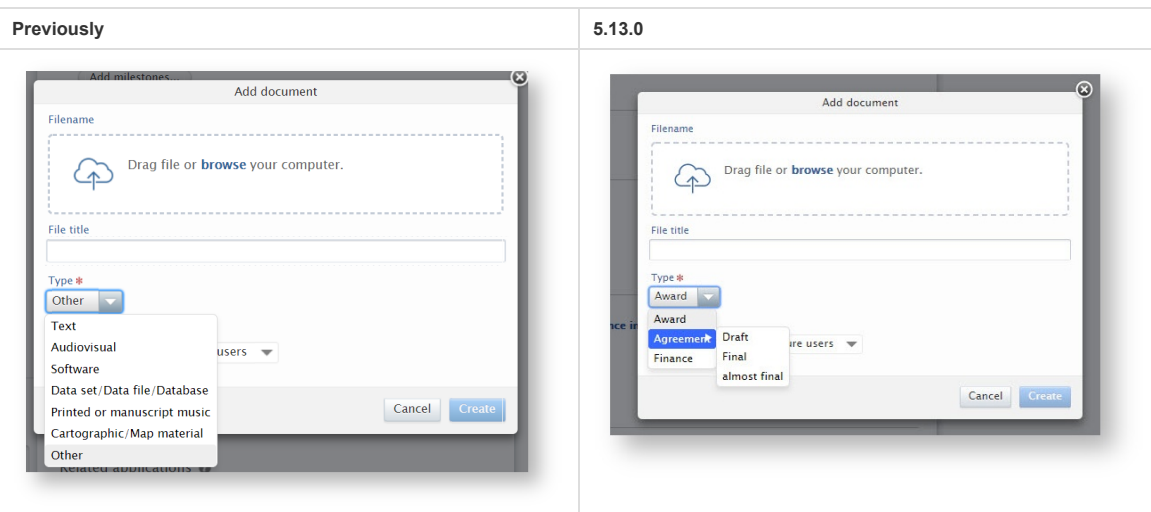
3.8. Unified Project Model: Submitter of applications

We have made it possible for the Submitter of applications to also be able to create new Applications.

To enable this functionality, go to *Administrator > Unified Project Model > Module configuration > Configure which roles are allowed to create content* and select the new option "Administrators, editors and submitters".

3.9. Unified Project Model: Negative budget values in Applications and Awards

We have made it possible to add negative budget values to Applications and Awards.

Click here for more details ...

Application

Add budget line with negative value

Budget overview

Note: The Applied for amount subtracting the negative budget value results in a "Difference between budget and applied amount". This is due to the negative amount included in the budget that implies that an amount is being added to the budget.

Award

Edit budget line with negative value

Overview of budget and expenditure

Note: The Awarded amount subtracting the negative budget value results in a "Difference between budget and awarded amount". This is due to the negative amount included in the budget that implies that an amount is being added alongside the awarded amount.

Project

Funding summary from Application and Award

Overview of Budget and expenditure

Note: Only the applied for sum is displayed in this overview

4. Pure Core: 3rd party import sources

4.1. ORCID: New Research output import source

We are very pleased to announce the addition of ORCID as an import source for Research outputs in this release.

Click here for more details ..

To enable ORCID as an import source for Research outputs, go to *Administrator > Research Output > Import sources > ORCID*.

If you have already enabled the **Export to ORCID functionality**, we will pre-fill the configuration with your ORCID membership credentials and you only need to enable and save. You can of course also use different credentials, if you would like to (but there are no known benefits in Pure to doing so). The use of **Membership API credentials** or **Public API credentials** are supported. If you already have credentials, you can use those or follow the links provided to create new / additional credentials.

Pure will always read from ORCID's public API; all records marked in ORCID as viewable by **everyone** are available to import.

Note: It is only possible to search ORCID by the individual author's ORCID ID - this is the only search function supported by the ORCID API.

⚠ **Interaction between import and export from/to ORCID**
As Pure also provides functionality to export Research outputs to ORCID, in order to prevent the creation of duplicate records, Pure will not present as ORCID import candidates Research outputs that were originally exported from Pure. Given this, users may see fewer import candidates in Pure than there are total records available in ORCID.

In order to deliver this, we have improved the Export to ORCID functionality to include capturing the ORCID works ID on the Research output record in Pure. This enables Pure to identify records being exported to ORCID.

Accordingly, we **strongly encourage** you to export content to ORCID following upgrade to Pure 5.13.0, but before enabling import from ORCID. This will enable the capture of the ORCID works ID for each Output, preventing duplicates from being presented as import candidates.

To do this, run the 'Update ORCID With Pure Data Job' cron job, available at *Administrator > Jobs*:

By default this job is set to run daily, so you do not necessarily have to initiate the job manually, but can wait for its normal cycle to run.

If you don't export content to ORCID, you can disregard this section.

Notes:

- A mapping of Pure Research output types to ORCID works types can be viewed **here**.
- It is possible to enabled automated ORCID ID search, as per the automated search feature introduced in 5.12.0. This is DISABLED by default, but can be easily enabled (see ORCID import source screenshot above).
- We have re-organised the Export to ORCID configuration screen under *Administrator > Integrations > ORCID*.

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4.2. Espacenet: New API requires access credentials

Espacenet has released a new version of their API, which now requires the use of access credentials. All customers using Espacenet as an import source must upgrade to 5.12.2. Details are available in the **5.12.2 release notes**.

4.3. SciVal Access: New user will be created when enabled

Enabling the SciVal Access integration will now create a user with the username 'SciVal_WS_Access'. This user will be used by SciVal to access the new web service API, if additional authentication is enabled. This user is locked if the Export to SciVal feature is disabled.
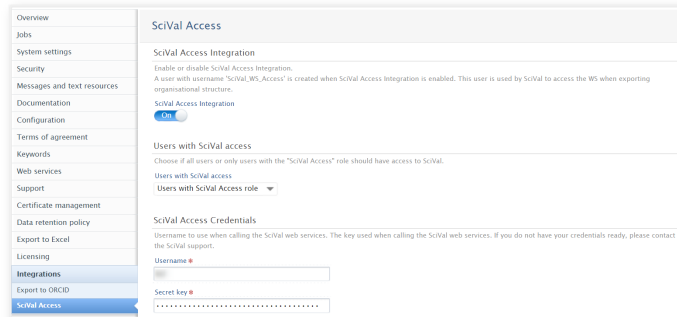
5. Pure Core: Web services

5.1. New Web Service: General Changes to POST calls

Major changes have been made to the POST body for all endpoints to ensure consistency between the XML and the JSON body structure. In addition, a POST body with the content type of **application/xml** is now validated against the web schema for the web service (can be found at https://_your_pure_server_/ws/api/513/xsd/schema1.xsd).

Click here for more details ..
Example of a field that has had a wrapper element added to ensure consistency, for example *UUIDs*

Before:

```xml
<?xml version="1.0"?>
<researchOutputsQuery>
  <uuids>a961a9ec-016b-4bc2-92d6-ea3bdf0580b0</uuids>
  <uuids>ba7fb9ab-cf89-4fb9-a4bf-9ebd5e97ec82</uuids>
  <uuids>4999ea8b-6bf0-4758-8678-3cb047fa369e</uuids>
</researchOutputsQuery>
```

After:

```xml
<?xml version="1.0"?>
<researchOutputsQuery>
  <uuids>
    <uuid>a961a9ec-016b-4bc2-92d6-ea3bdf0580b0</uuid>
    <uuid>ba7fb9ab-cf89-4fb9-a4bf-9ebd5e97ec82</uuid>
    <uuid>4999ea8b-6bf0-4758-8678-3cb047fa369e</uuid>
  </uuids>
</researchOutputsQuery>
```

Affected fields:

- WSActivityQuery
  - typeUris
  - categoryUris
  - degreeOfRecognitionUris
  - workflowSteps
- WSApplicationsQuery
  - typeUris
  - statusUris
  - workflowSteps
- WSAuthorCollaborationsQuery
  - workflowSteps
- WSAbstractAwardsQuery
  - typeUris
  - workflowSteps
- WSClassificationSchemesQuery
  - containedClassificationUris
- WSCoursesQuery
  - titles
  - types
  - formats
  - courseLevels
  - typeUris
  - workflowSteps
- WSCurriculumVitaeQuery
  - typeUris
- WSEducationsQuery
  - typeUris
- WSEquipmentsQuery
  - typeUris
  - workflowSteps
- WSEventsQuery
  - titles
  - typeUris
  - workflowSteps
- WSFingerprintsQuery
  - contentIds
- WSImpactsQuery
  - natureClassificationUris
  - statuses
  - typeUris
  - workflowSteps
- WSAbstractJournalsQuery
  - titles
  - typeUris
  - issns
  - workflowSteps
- WSAbstractQuery (changes for all post queries)
  - uuids
  - locales
  - fallbackLocales
  - renderings
  - fields
  - orderings
- WSAbstractOrganisationQuery
  - organisationalUnitTypeUris
- WSAbstractPersonsQuery
  - employmentTypeUris
  - personOrganisationAssociationTypes
- WSPressMediaQuery
  - typeUris
  - workflowSteps
- WSPrizesQuery
  - degreeOfRecognitionUris
- WSAbstractUPMProjectsQuery
  - workflowSteps
- WSAbstractPublishersQuery
  - names
  - countryUris
  - workflowSteps

- WSAbstractResearchOutputsQuery
  - typeUris
  - publicationCategories
- WSStudentThesesQuery
  - typeUris

5.2. New Web Service: Organisation Hierarchy added

A new call to the web service API **/organisational-units/{id}/hierachy** has been added. This call exposes all Organisational unit IDs from the given ID on in the hierarchy specified in Pure.

Click here for more details ..
There are two parameters relevant for this method:

<hierarchyDepth> Indicates how deep the query should look into the hierarchy. *Default value is 8.*

<hierarchyStrategy> Indicates what hierarchy to query after. The valid values are: (PARENTS,TAKEN_OVER). Default value is PARENTS.

- If the "PARENTS" hierarchy structure is selected, the output will resemble the view you can see in the hierarchy view of your Organisational units structure in Pure.
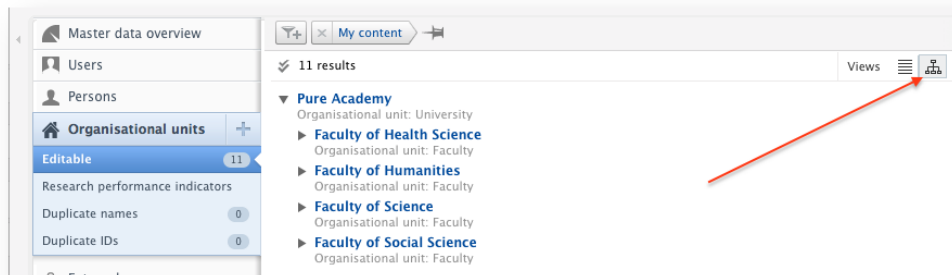
- If "TAKEN_OVER" is selected, the output will list all Organisational units taken over by the specified Organisational unit.
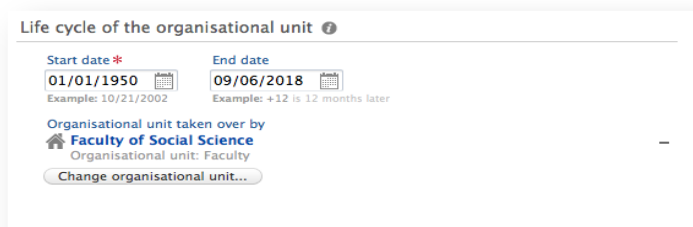
You can now also limit POST queries by your Organisational hierarchy. Where applicable, the POST queries have been expanded with the fields: **<hierarchyDepth>** and **<hierarchyStrategy>**.

5.3. New Web Service: Downloads Endpoint

A new endpoint (/**downloads**/) has been added that will allow you to query the web service API for download information (i.e information on downloaded files from Pure). This endpoint can be used to view a list of most downloaded Research outputs, Activities, etc.

Click here for more details ..
As usual POST & GET are supported for this method. Download counts can be retrieved per ID, to get a list of the supported content types please use /downloads-meta/family.

Example response:

```xml
<download xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:schemaLocation="http://localhost:8080/ws/api/513/xsd/schema1.xsd">
  <pureId>3802906</pureId>
  <contentRef uuid="db67d9fb-4c7a-4353-8141-93b486d760db">
    <link ref="content" href="http://localhost:8080/ws/api/513/research-outputs/db67d9fb-4c7a-4353-8141-93b486d760db?apiKey=83d2d604-cfa2-4a04-bd5c-d013b9c1c913"/>
    <name>College 1</name>
    <type pureId="25739" uri="/dk/atira/pure/researchoutput/researchoutputtypes/bookanthology/book">Book</type>
  </contentRef>
  <downloadCount>1</downloadCount>
</download>
```

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5.4. New Web Service - Award milestones

We have added a new endpoint to query for Award milestones. You will find the following new methods

- GET /award-milestones to retrieve the full list of award milestones
- POST /award-milestones to use additional filtering for advanced queries
- /GET award-milestones/{id} to retrieve a specific milestone by ID.

We have also added two methods to retrieve the available ordering and rendering options for Award milestones. Please find an example for the /GET award-milestones/{id} under details.

Click here for more details ..
Example of the of a query for an Award milestone with Pure ID 3801522:

```xml
<awardMilestone xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" uuid="1b7c31ff-0f14-4cff-b7b2-209e8a968bc2" pureId="3801522" xsi:schemaLocation="http://localhost:8080/ws/api/513/xsd/sch
  <milestoneDeadline>2018-06-30</milestoneDeadline>
  <completed>false</completed>
  <award uuid="1a62fc4c-9e42-411a-977d-63fc09c26d83">
    <link ref="content" href="http://localhost:8080/ws/api/513/awards/1a62fc4c-9e42-411a-977d-63fc09c26d83?apiKey=cbba678c-7518-4123-a8a0-580ec2703b24"/>
    <name locale="en_GB">2018 scholarship</name>
    <type pureId="19452" uri="/dk/atira/pure/award/awardtypes/award/scholarship/award" locale="da_DK"/>
    <type pureId="19452" uri="/dk/atira/pure/award/awardtypes/award/scholarship/award" locale="en_GB">Award</type>
  </award>
  <milestoneStates>
    <milestoneState pureId="18688" uri="/dk/atira/pure/milestone/state/upcoming" locale="da_DK"/>
    <milestoneState pureId="18688" uri="/dk/atira/pure/milestone/state/upcoming" locale="en_GB">Upcoming</milestoneState>
  </milestoneStates>
  <titles>
    <title locale="en_GB">Scholarship start date</title>
  </titles>
  <descriptions>
    <description locale="en_GB">Date that the scholarship begins.</description>
  </descriptions>
```

```xml
    <reminders>
      <reminder pureId="3801525">
        <value>1</value>
        <timeUnit>WEEK</timeUnit>
      </reminder>
    </reminders>
    <academicRoles>
      <academicRole pureId="5042" uri="/dk/atira/pure/award/roles/award/pi" locale="da_DK"/>
      <academicRole pureId="5042" uri="/dk/atira/pure/award/roles/award/pi" locale="en_GB">PI</academicRole>
    </academicRoles>
    <milestoneType>ACADEMIC</milestoneType>
    <contentInformation>
      <createdBy>atira</createdBy>
      <createdDate>2018-06-29T10:28:16.014+02:00</createdDate>
      <modifiedBy>atira</modifiedBy>
      <modifiedDate>2018-06-29T10:28:16.014+02:00</modifiedDate>
    </contentInformation>
  </awardMilestone>
```

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5.5. New Web Service - Highlighted content calls added

We have added the ability to retrieve Highlighted content from Pure's web service API. For each content type that supports Highlighted content, you can find a new call under /persons/{id}/_content_type_/highlighted:

GET	/persons/{id}/projects	Lists projects on a person
GET	/persons/{id}/projects/highlighted	Lists highlighted projects on a person
GET	/persons/{id}/research-outputs	Lists research outputs on a person
GET	/persons/{id}/research-outputs/highlighted	Lists highlighted research outputs on a person
GET	/persons/{id}/student-theses	Lists student theses on a person
GET	/persons/{id}/student-theses/highlighted	Lists highlighted student theses on a person

The call will return content in the same format as for the other non-highlighted calls.

Note: This feature is currently only available to customers with the Pure Portal, as Highlighted Content is defined by the Portal feature introduced in Pure 5.10.0. In an upcoming release (currently planned for 5.14.0), we will expand this functionality to support Pure installations without the Pure Portal.

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5.6. New Web Service - 'Content modified' added as filter option to endpoints

Previously, it was not possible to filter results based on when content was last modified. We have improved the filtering, so now you can find objects modified before a given date, after a given date, or within a period.
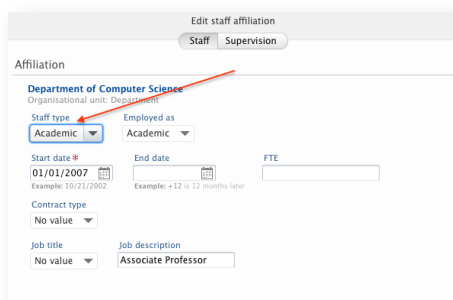
Click here for more details ..
Please find an example below. The dates specified as parameters are inclusive, so the resulting list will include milestones that have been modified in the period 1 January 1980 to 1 January 2525.

```
<?xml version="1.0"?>
<awardMilestoneQuery>
    ...
    <modifiedAfter>1970-01-01T00:00:00.001Z</modifiedAfter>
    <modifiedBefore>2525-01-01T00:00:00.001Z</modifiedBefore>
    ....
</awardMilestoneQuery>
```

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5.7. New Web Service - 'Academic' added as filter option to Persons endpoint

We have added a new filter that enables you to filter for Academic staff relations. This new filter exposes Persons with an Academic organizational affiliation.

Click here for more details ..

This filter accepts Boolean values as parameters:

```
<?xml version="1.0"?>
<personsQuery>
   ...
   <academicStaff>true</academicStaff>
   ...
</personsQuery>
```

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5.8. New Web Service - Author roles filter for advanced queries

It is now possible to filter for author roles when querying for Research outputs in advanced queries (POST).

Click here for more details ..

When querying for Research outputs in a POST call, it is now possible to filter by the author role. You can use this new filter in combination with other filter options to form complex queries.

An example of the new filter in use:

```
<?xml version="1.0"?>
<researchOutputsQuery>
  ...
  <authorRoles>
    <authorRole>/dk/atira/pure/researchoutput/roles/memorandum/editor</authorRole>
  </authorRoles>
  ...
</researchOutputsQuery>
```

We have also added a new method to retrieve all the author roles available on your Pure installation and can be used as a filter value. They are displayed as classification URIs that can be used as a filter in POST/research-outputs.

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5.9. New Web Service - Keyword filter for advanced queries

We have added the possibility to filter for Keywords in advanced queries (POST). This is available for all content types that support Keywords in Pure, and is available for both structured and free Keywords.

Click here for more details ..

An excerpt of a Research output query. The resulting list will only include Research outputs that have the structured Keyword '/dk/atira/pure/core/keywords/A/AC' and the free Keyword 'biofuel' assigned.

```
<?xml version="1.0"?>
<researchOutputsQuery>
    ...
    <keywordUris>
        <keywordUri>/dk/atira/pure/core/keywords/A/AC</keywordUri>
    </keywordUris>
    <freeKeywords>
        <freeKeyword>biofuel</freeKeyword>
    </freeKeywords>
    ...
</researchOutputsQuery>
```

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5.10. New Web Service - Keyword structure on WS results changed

The display of free and structured Keywords has been improved, applying to all results that display one or more Keyword groups.

Click here for more details ..

Keywords are now separated into containers, where structured and free Keywords are bundled together if they are related. Free Keywords are further split into their individual locales for easier assessment.

```
    ...
    <keywordGroups>
        <keywordGroup logicalName="keywordContainers" pureId="546373">
            <type uri="/dk/atira/pure/core/keywords" locale="da_DK"/>
            <type uri="/dk/atira/pure/core/keywords" locale="en_GB">Keywords</type>
            <keywordContainers>
```

```
        <keywordContainer pureId="546374">
          <structuredKeyword uri="/dk/atira/pure/core/keywords/A/AC" disabled="false" pureId="1249">
            <terms>
              <term locale="en_GB">AC Collections. Series. Collected works</term>
            </terms>
            <descriptions>
              <description locale="en_GB">AC Collections. Series. Collected works</description>
            </descriptions>
          </structuredKeyword>
          <userDefined pureId="546375" locale="en_GB">
            <freeKeyword>UKKey1</freeKeyword>
            <freeKeyword>UKKey2</freeKeyword>
          </userDefined>
          <userDefined pureId="546376" locale="da_DK">
            <freeKeyword>DKKey1</freeKeyword>
            <freeKeyword>DKKey2</freeKeyword>
          </userDefined>
        </keywordContainer>
        ...
      </keywordGroup>
    </keywordGroups>
```

5.11. New Web Service - Page information added for paging

The handling of paging and page size in web service responses has been improved. When paging is used, details are included in a new *pageInformation* section.

Click here for more details ..
Please find an example below, a query for 28 total objects with the result displaying the first ten (this is based on the size ten and offset zero).

```
<result xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:schemaLocation="http://localhost:8080/ws/api/513/xsd/schema1.xsd">
    <count>28</count>
    <navigationLink ref="next" href="..."/>
    <pageInformation>
        <offset>0</offset>
        <size>10</size>
    </pageInformation>
    ...
</result>
```

5.12. New Web Service - Links to PDF files added to Curriculum Vitae endpoint

The Curriculum Vitae endpoint will now include links to PDF versions of CVs.

Click here for more details ..
An example of the link:

```
<pdfURLs>
    <pdfURL locale="en_GB" href="http://localhost:8080/ws/cv/export?id=3801844&amp;locale=en_GB"/>
</pdfURLs>
```

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5.13. New Web Service - Supported added for 'pretty' URL links

We have added support to also expose 'pretty' URLs (less complex and shorter URLs for Pure Portal content). These are available to Pure installations with a Pure Portal only and will only be exposed where available.

Click here for more details ..
A pretty URL for a person's profile page on the Pure Portal could look like

https://portal.com/persons/personsName(44055370-9c2e-11db-8ed6-000ea68e967b).html

While a prettyURL can look like this:

https://portal.com/persons/person

An example of the pretty URL structure:

```
<info>
    ...
    <prettyUrls>
        <prettyUrl>https://portal.com/persons/person</prettyUrl>
        <prettyUrl>https://person.com</prettyUrl>
    </prettyUrls>
    ...
</info>
```

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5.14. New Web Service - Support added for Court cases added to research output

We have added support to expose the new Court case metadata fields for Research outputs (see **above**).

Click here for more details ..
Available metadata for Court cases includes: Court name, Judgement date, Case identifier(s), and Court case titles.

An example of the XML structure is shown below:

```
<courtCases>
    <courtCase pureId="[ID]">
      <court uuid="[court_external_ID]">
        <link ref="content" href="[link_text]"/>
        <name>[Court name]</name>
        <type pureId="[ID]" uri="/dk/atira/pure/ueoexternalorganisation/ueoexternalorganisationtypes/ueoexternalorganisation/court">Court</type>
```

```
          </court>
          <title>[Court case title]</title>
          <judgementDate>[Judgement date]</judgementDate>
          <ids>
            <id pureId="[ID]" typeUri="/dk/atira/pure/courtcase/sources/ecliid" type="ECLI ID">[ECLI number]</id>
            <id pureId="[ID]" typeUri="/dk/atira/pure/courtcase/sources/casenumber" type="Case number">[Case number]</id>
          </ids>
        </courtCase>
        <courtCase >
        ... if multiple court cases ...
        </courtCase>
      </courtCases>
```

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5.15. New Web Service - Improved ordering options

We have added a new 'orderBy' parameter to a number of our calls, allowing additional ways of ordering responses. If a sort order is selected in web service calls, the result is ordered ascending by default; with this new parameter, you can now explicitly select descending or ascending order.

Click here for more details ..
Examples of the new parameter in use (note, without API keys):

An example without the new parameter, this defaults to ascending:

```
localhost:8080/ws/api/513/datasets?order=dateAvailable
```

An example of the new orderBy parameter with descending order:

```
localhost:8080/ws/api/513/datasets?order=dateAvailable&orderBy=descending
```

An example of the new with parameter with ascending order explicitly set:

```
localhost:8080/ws/api/513/datasets?order=dateAvailable&orderBy=ascending
```

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5.16. New Web Service - Change in Activities endpoint

We changed the XML structure for Activities that are associated to either an Organisational unit or an External organisation in order to correct an issue in the JSON output format, where associated content was missing. The tag for an associated Organisational unit has been renamed from <organisationalUnit> to <associatedOrganisationalUnit> and for associated External organisation from <externalOrganisation> to <associatedExternalOrganisation>.

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5.17. New Web Service - Planned name change of order options on Research output for 5.14.0

We want to improve some of the naming of the available order strategies on the Research output endpoint as there are some cases where the current names are not sufficiently precise. We will inform you in the 5.14.0 release notes with exact details of the changes; you may need to make minor modifications to your existing queries.
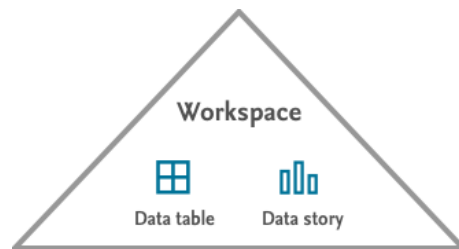
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6. Reporting

6.1. Technology preview of new Reporting module

Following the **release of the technology preview of the new Reporting module in 5.9.0**, and updates to this preview in subsequent releases (**5.9.2**, **5.9.3**, **5.10.0**, **5.10.1**, **5.11.1**, and **5.12.0**) we are continuing to develop the new Reporting module in order to deliver a comprehensive, flexible, and intuitive reporting tool that continues to meet users' evolving reporting needs. New features included in this release are:

- New content types
- Sharing
- Filtering improvements

6.1.1. Terminology

With this release, we have introduced a new term in the Reporting module: **Workspace**. A workspace incorporates both the Data table and its associated Data story (where one has been created). We've introduced this new concept of a 'workspace' in order to more accurately reflect the dynamic nature of what is being created - and to reflect the planned future direction of reporting in Pure.


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6.1.2. Additional content types

The following additional content types are now available in the new Reporting module, with associated filters and the ability to create data stories incorporating these data:

- Applications (Unified Project Model only)
- Awards (Unified Project Model only)
- Projects (Unified Project Model only)
- Milestones
- External organisations
- Activities
- Press/Media
- Facilities/Equipment
- Users
- Events
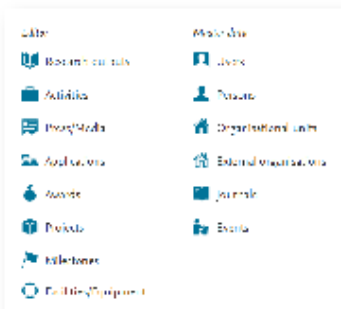
In upcoming releases, we will continue to expand the content types available in the new Reporting module, along with enhancing reporting capabilities (particularly filtering and aggregation strategies) for existing content types.

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6.1.3. Sharing

This release includes the first phase of Sharing functionality, which enables users to share their workspaces with colleagues.

Click here for more details ..

In this first phase of Sharing functionality, we have delivered two distinct functions:

- Share a workspace with all users who have access to the workspace's content (Administrators only)
- Share a workspace with selected Pure users

Sharing a workspace means that the recipient is able to view, but not edit the workspace. If a recipient would like to modify the workspace, they can create a copy and save a local version.

Shared workspaces are tagged as such in your list of saved workspaces.
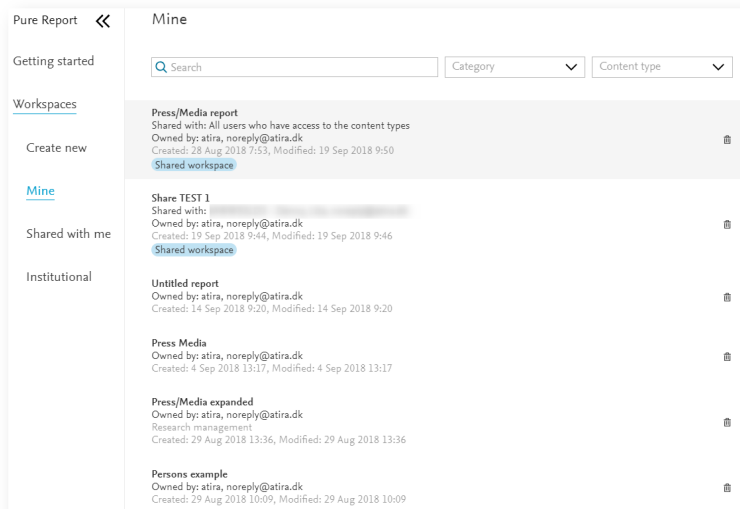
Navigation within the module has been updated to help users find shared workspaces. When an Administrator shares a workspace with all users, these are available to users under the 'Institutional' branch. When a user shares a workspace with named Pure users, these are available to the recipient under the 'Shared with me' branch.
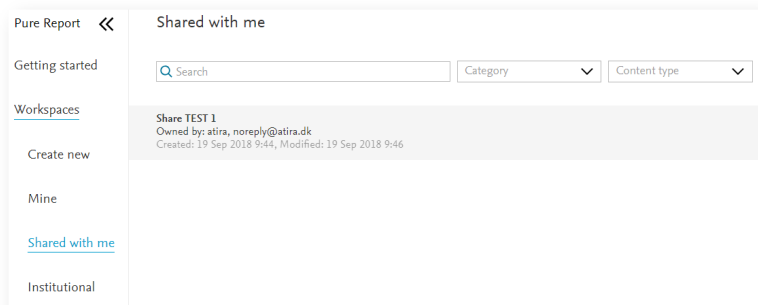
To 'un-share' a report, you can either simply delete it (as the creator) or remove the selected recipients, via the Share function.

In upcoming releases, we plan to build on sharing functionality to support additional features such as sharing a static report outcome with selected individuals, and scheduling the generation of a report for dissemination to selected individuals.
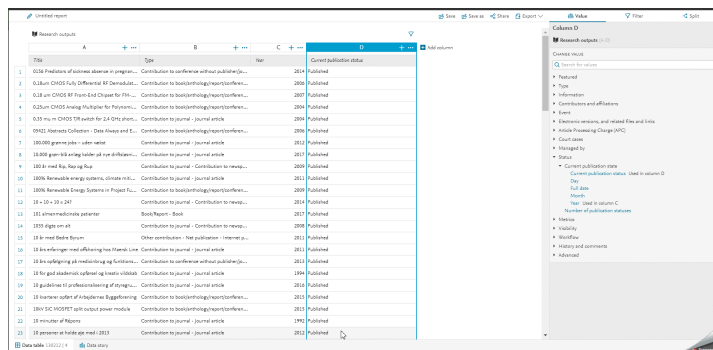
6.1.4. Filtering

We have made some improvements to filtering functionality in this release:

- facility to save a group of filters and have them available for future use.
- easier to see what filters have been applied to a series.
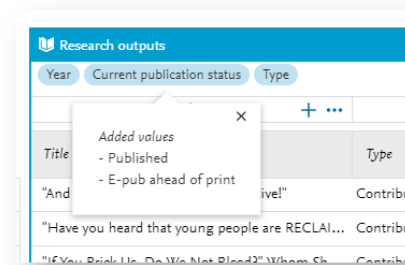
Click here for more details ..

Preset filters

We have introduced 'Saved filters' functionality that enables you to save commonly used filters and/or combinations of filters and have them available for future use.

Display improvements

This release includes improvements to the filtering function that make it easier to see what filters have been applied to a series.

6.1.5. User roles

With the expansion of content types available in the new Reporting module, we have also expanded the roles with access to the new Reporting module.

Click here for more details ...
The Administrator role can always report on all content types.

Content type	Roles
Activity	`activity-administrator`
Press/Media	`clipping-administrator`
Facilities/Equipment	`equipment-administrator`
Event	`event-administrator`
Journal	`journal-administrator`
Organisational unit	`organisation-administrator`
Person	`person-administrator`

Content type	Roles	
Research output	**Confidential**	**Non-confidential**
	`publication-administrator`	• `publication-editor` • `publication-validator` • `publication-reporter` • `localReport`

Content type	Roles	
External organisation	`ueoexternalorganisation-administrator`	
Project	**Confidential**	**Non-confidential**
	• `upm-project-administrator` • `upm-project-global-reporter`	• `upm-project-editor` • `upm-project-validator` • `upm-project-reporter`
Application	**Confidential**	**Non-confidential**
	• `upm-application-administrator` • `upm-application-global-reporter`	• `upm-application-editor` • `upm-application-validator` • `upm-application-reporter`
Award	**Confidential**	**Non-confidential**
	• `upm-award-administrator` • `upm-award-global-reporter`	• `upm-award-editor` • `upm-award-validator` • `upm-award-reporter`

Content type	Roles
Milestone	`upm-award-administrator`
Country-specific content types	
UK: REF1	• `ref2020-staff-administrator` (SuperEditor of REF1a/c) • `ref2020-unitofassessment-supereditor` (SuperEditor of Unit of Assessment REF2021) • `ref2020-unitofassessment-editor` (Editor of Unit of Assessment REF2021) • `ref2020-staff-editor` (Editor of REF1a/c) • `ref2020-administrator` (REF2021 Administrator)
UK: REF2	• `ref2020-unitofassessment-reporter` (REF2021 reporter) • `ref2020-administrator` (REF2021 Administrator)
UK: UoA	• `ref2020-unitofassessment-editor` (Editor of Unit of Assessment REF2021) • `ref2020-unitofassessment-supereditor` (SuperEditor of Unit of Assessment REF2021) • `ref2020-administrator` (REF2021 Administrator)

Content type	Roles
Australia: ERA Researcher	• `era-editor` (Editor of ERA) • `era-fieldofresearch-editor` (Editor of ERA Field of Research) • `era-fieldofresearch-supereditor` (SuperEditor of ERA Field of Research) • `era-administrator` (Administrator of ERA)
Australia: ERA Portfolio	• `era-editor` (Editor of ERA) • `era-fieldofresearch-editor` (Editor of ERA Field of Research) • `era-fieldofresearch-supereditor` (SuperEditor of ERA Field of Research) • `era-administrator` (Administrator of ERA)
Australia: ERA Research output	• `era-editor` (Editor of ERA) • `era-fieldofresearch-editor` (Editor of ERA Field of Research) • `era-fieldofresearch-supereditor` (SuperEditor of ERA Field of Research) • `era-administrator` (Administrator of ERA)
Australia: ERA Field of Research	• `era-fieldofresearch-editor` (Editor of ERA Field of Research) • `era-fieldofresearch-supereditor` (SuperEditor of ERA Field of Research) • `era-administrator` (Administrator of ERA)
Australia: ERA Research income	• `era-editor` (Editor of ERA) • `era-fieldofresearch-editor` (Editor of ERA Field of Research) • `era-fieldofresearch-supereditor` (SuperEditor of ERA Field of Research) • `era-administrator` (Administrator of ERA) • `era-research-income-administrator` (Administrator of ERA Research Income)

Sensitive fields

Sensitive fields are currently defined as follows:

Person	External person
• Gender • DoB • Leave of absence • Retiral date	• gender

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6.1.6. Tips and Feedback functions

With this release we have removed the Tips function from the Reporting Technology Preview. In upcoming releases we plan to improve the onboarding experience by offering short videos demonstrating particular elements of functionality, to help users navigate through and use the new features.

We have also removed the Feedback function. This in no way means that we are not interested in your feedback! We would rather, however, at this stage in the development of the new Reporting module, to capture your feedback via JIRA, in line with feedback on all other Pure functionality. Please do continue to provide your feedback on the new Reporting module via JIRA.

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6.1.7. Pure Academy classes

A **Pure Academy** class was held in July covering all functionality in the new Reporting module so far, our development approach, and upcoming plans. A recording of the class is available **here**.

A Pure Academy class for the new Reporting module developments in 5.13 will be held on 17 October (will be recorded). You can register **here**.

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6.2. FAAR (Faculty and Academic Activity Reporting) enhancements

This release includes enhancements to Faculty and Academic Activity Reporting (FAAR), in response to customer feedback. These enhancements include:

- Introduction of Press/Media content
- Re-working of Courses to include affiliations based on Course occurrences, rather than by affiliations based on Course development
- Summary tables for each content type in the FAAR report
- Updated period filters for all content types to ensure that all 'active' content is included in the FAAR report for the selected period (not just those that started or ended in the selected period)

Click here for more details ..

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7. Pure Portal

7.1. Portal update status overview

We regularly hear from our users that the Pure Portal configuration and content update process can be confusing and that it should be easier to identify what updates are in progress and when changes will go live. To this end, we have worked extensively this release on making this possible.

These changes affect **ALL** Portal customers, including Pure Portals, Custom Portals, and Standard Portals, and are visible to Administrator users only.

Click here for more details ..
Our Portal update process works as follows:

- Changes are collected into batches of updates, which are processed together.
- While one batch is being processed, all new changes that occur are collated into a second batch.
- This batch will continue to build up until the previous update is complete. Once the previous update is complete, the next batch is processed.

For Pure Portal customers, the new 'Update overview' can be accessed via *Administrator > Pure Portal*. The location will vary for Custom/Generic Portal customers - please let the Support Team know if you have any problems locating it.

The 'Update status overview' is broken down into two major sections.

- 'Update in progress'
- Update 'Log'

Update in progress
This shows the current progress of the application of the changes in the current update batch.
It displays the number of items in the batch out of the remaining total. The progress bar shows the percentage completion for the batch, based on estimates of how long each content type takes to update.

Update log

Update log

The update log shows an summary of the most recent Portal updates (max. 10).

By checking the start time of the current update in progress, you can get an idea of whether your recent changes should be in that batch, or are in the queued batch. Any changes you make after the start time of the current update in progress begins will go into the queued batch. We are unable to give detailed information on the full estimated time before new changes are live on the Portal, but this should give you a rough idea.

The timezone for start times is based on the timezone your system runs on. For locally hosted Pure systems, this will be your local timezone, that you have set for your Pure instance. For customers that we host in Amazon (the integrated version), the timezone is set to the your local timezone. For customers that we host fully in Amazon, the timezone will be set automatically to UTC and unfortunately cannot be changed. This is due to technical limitations currently and we apologise for the inconvenience. We may be able to resolve this at a later date.

The 'Details' column shows a more precise breakdown of the items included in the individual batch. You can see the content types included, and the total number of items of each content type. If there are more items than we can show in the table row, you can click 'Show more' for an expanded overview:

7.2. Portal use of upgraded web service API

As first announced with our **Pure 5.9.0** release (June 2017), we are switching to an upgraded web service API for the Pure Portals as of this current release. As such, we have completed the necessary work to prepare Pure Portals for the switch. We expect the upgraded web service to result in overall greater stability and performance. We also now have clearer documentation, with a more consistent, versatile platform.

8. Awards Management

8.1. Milestones accessible throughout workflow

Once an Award has been created in Pure, and during the lifecycle of the Award (including after the content in the Award record has been validated), it is necessary to be able to edit Award milestones in order to manage and track the ongoing process of the Award. In order to facilitate this, we have made it possible for:

- Personal users to edit and create milestones on Awards in the Waiting for approval, Approved, and Validated workflow states.
- Editors of Awards to be able to edit and create milestones on Awards in the Validated workflow state.

Click here for more details ..
Before enabling this function, ensure that Award holders are enabled to modify Awards even if they have not created them. Go to *Administrator > Unified Project Model > Module configuration > Configure which roles are allowed to create content*.
Enable the 'Modifiable by award holders' setting (it is not necessary for the 'Awards to be created by' setting to be set to 'Everybody').
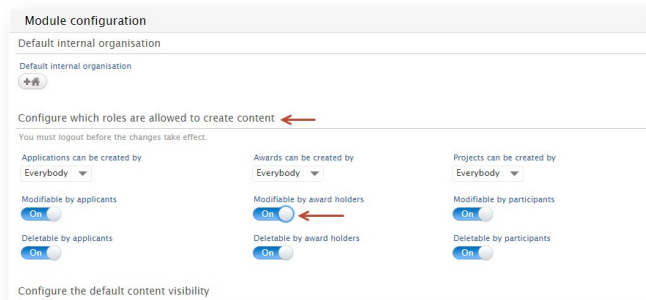
The screenshot below shows how Award milestones are active in the Personal user's read-only view:

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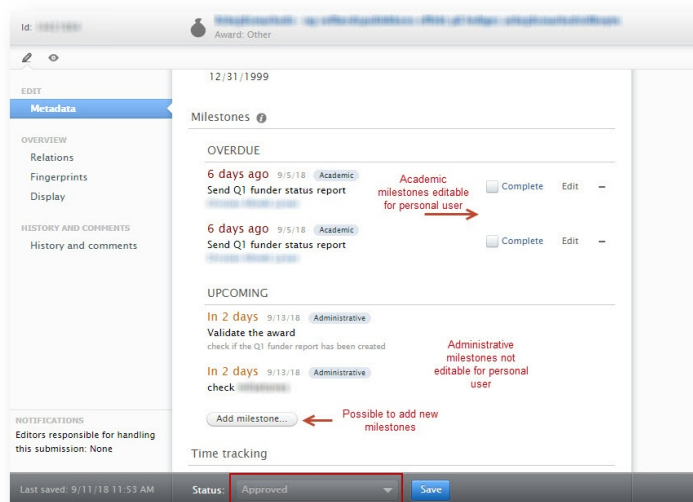
8.2. Update to management of Application, Award, and Project subtypes

In 5.12.0 we made it possible for administrators to **manage Application, Award, and Projects subtypes** and the **relations between them**. Building on this functionality, in this 5.13.0 release Pure now enforces relations created by the Administrator on the subtype level when deriving an Application, Award, or Project. The selections available in the derived Application, Award, or Project are now limited to the allowed subtypes, based on the managed relations.

Click here for more details ..

A worked example	
The Administrator has created 3 new relations between the Outline Application subtype and the Industry, EU, and Research Council Award subtypes (identified as successors).	
When the Application has been successful and marked as such, it is possible to create an Award or Application from the current Application (if a successor relation exists between the current Application subtype and another Application subtype).	
If you choose to create an Award from the successful Application, you can select the appropriate content type of the Award from the list of Award subtypes that are identified as successors to the Outline Application subtype.	
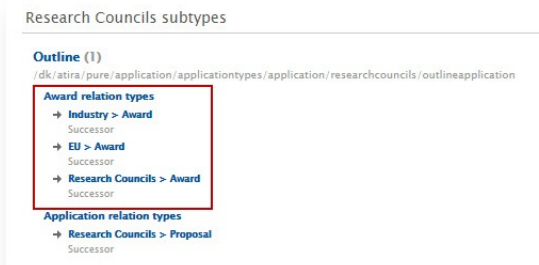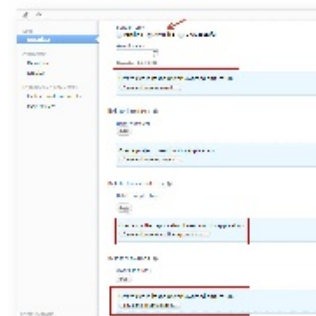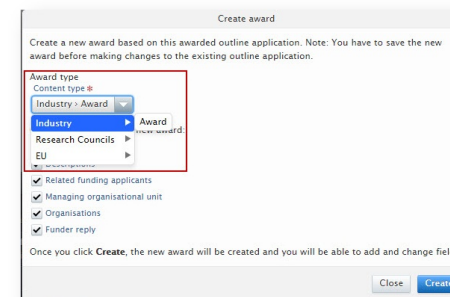
A worked example

Remember that the facility to create a new Award, Application, or Project from the current Application, Award, or Project is only displayed when there are 'successor' relationships identified.

For example, here the Administrator has created one Application successor to the EU Award subtype.
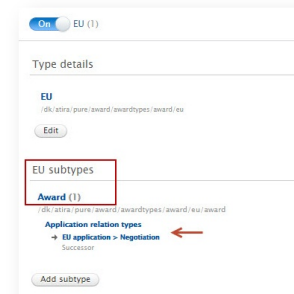
As per the example given above, in an EU Award, you are only presented with an option to create a new Application from the Award. The user cannot create a new Award as there is no successor relationship created to another Award subtype.
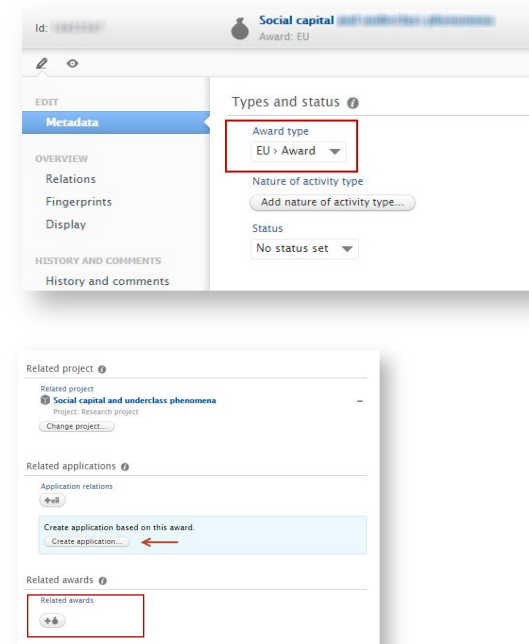
8.3. Tabular view now available for Personal users

Prior to this release, Personal users were only able to view Awards management content in the List or Matrix views. This release brings the ability for Personal users to view their data in Tabular view. To access Tabular view, users need to click on the Tabular view icon when viewing the list / matrix of Awards management content.

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8.4. Applicants can request peer review when in read-only mode

With this new release, applicants who do not have the right to modify Applications can now request Peer review and add a document, while the remainder of the Application remains read-only.

Click here for more details ..

This applies to Personal users who are not able to modify Applications on which they are applicants (this is defined by the setting *Administrator > Unified Project Model > Configure which roles are allowed to create content*):
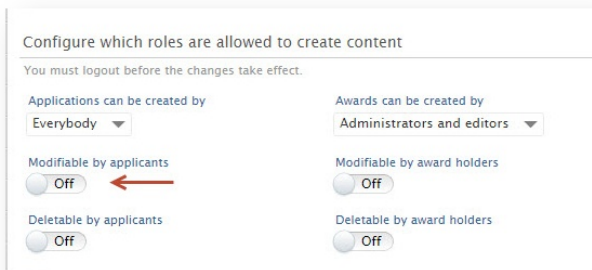
It is now possible to make Peer review functionality available to applicants who are unable to modify Applications. This is done via the setting *Administrator > Award Management > Application peer review > Make peer review accessible, if applicants are not allowed to edit applications on which they are an applicant*:
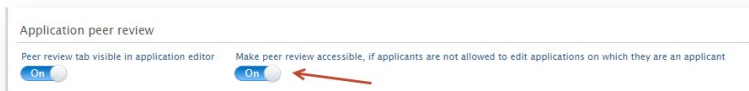
Steps for the applicant to request Peer review

When the applicant accesses an Application which they do not have the right to modify, it will be opened in read-only mode:
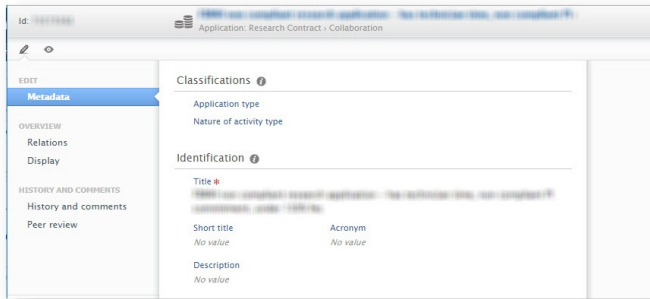
The applicant can then click on the Peer review tab of the Application editor window. If there are no documents in the Application, the applicant can add a document.
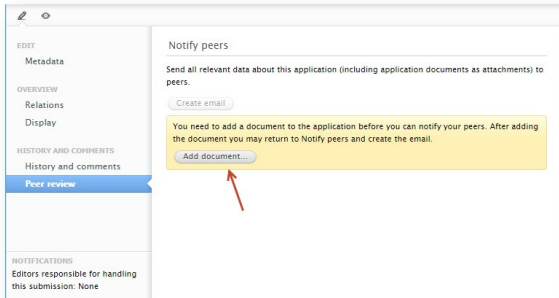
If there is already a document in the Application, and the applicant wants to add a new document for the Peer review request, the applicant can click directly to the metadata tab and add a new document to the Application.

Note: The applicant can only add documents, not delete them.
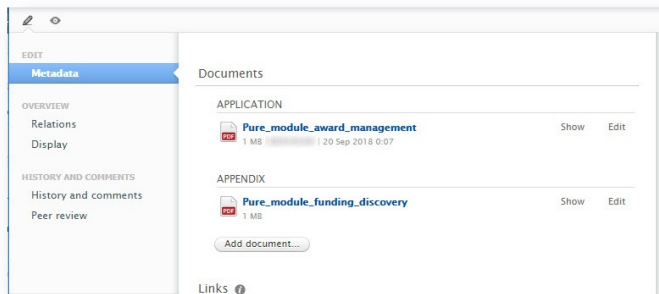
Once a document is added, the applicant can choose to create emails to invite others to review the document.
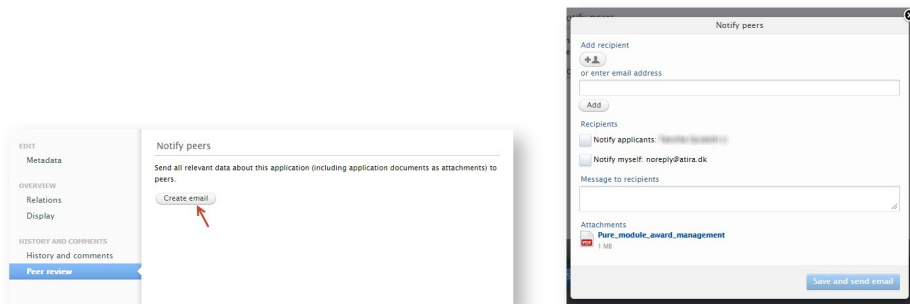
9. Funding discovery

9.1. Upgrade of Funding Discovery module

This release includes upgrades to the underlying service that is used to provide funding opportunities through the Funding Discovery module, one effect of which is more timely updating of funding opportunities.

Additionally, the new service includes:

- Improvements to the formatting of the opportunities received, resulting in more data visible on the opportunities and an enhanced ability to search over these fields.
- Updated fingerprinting, resulting in better fingerprint results on funding opportunities.
- Improvements to search behavior.

Click here for more details ...
Search behaviour in the Funding Discovery module has been improved, in particular:

- Acronym search.
- AND/OR search functions.

Aconyms
Previously, searching for acronyms in the Funding Discovery module would return only opportunities where the acronym was included in the full text of the opportunity, and would not find results where the name was included in full. The search has been improved to find results where the name of the funder is associated with an acronym in the record.
For example:

Old search result: Searching for NSF returns 25 results.	**New search result:** Searching for NSF returns 297 results. *Result includes child organizations related to NSF*

Aconyms
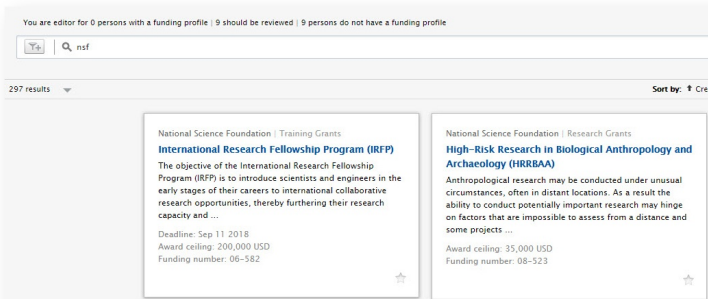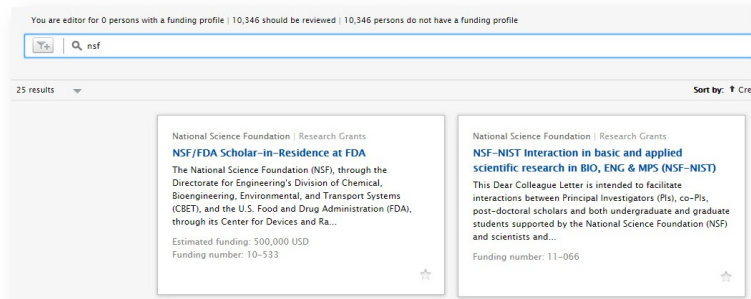
AND/OR search improvements

In **free text search**, when adding more search terms, the search now searches for all terms together (e.g. search term 1 **AND** search term 2), thereby narrowing the search result down, where it previously treated each term separately.

Old search result

New search result
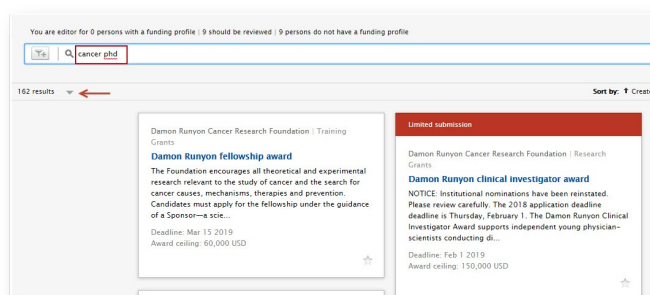
Searching by **Funding body** now treats each Funding body separately (e.g. funding body 1 **OR** funding body 2), where previously the search attempted to narrow the results by searching for opportunities where all selected Funding bodies were present.

Search result for one Funding body: Wellcome Trust	Search result for one Funding body: Dunhill Medical trust	Search result for both Funding bodies: Wellcome Trust OR Dunhill Medical Trust
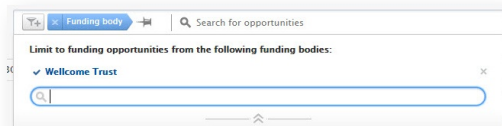
Aconyms		
AND/OR search improvements		

Customers using the Funding Discovery module are requested to upgrade their Java 1.8 version to version 1.8.0_162-b12 or newer. Older versions cause SSL errors (SSL handshake failure from the secure HTTPS connection made from Pure to the Pure funding service).

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10. Country-specific features

10.1. UK: REF2021: Phase 2

In this release, we have made a number of updates in the REF module relating to Open Access compliance functionality.

10.1.1. REF OA compliance monitoring: Updates due to confirmation of final policy

With the publication of the **REF2021 Decisions on staff and outputs**, we now have confirmation that the policy will require outputs to be deposited no later than 3 months after the date of **acceptance** from 1 April 2018. Outputs accepted between 1 April 2016 and 31 March 2018 (inclusive) require outputs to be deposited no later than 3 months after the date of **publication**. Pure's REF OA compliance monitoring has therefore been updated to monitor against Publication date for outputs accepted between 1 April 2016 and 31 March 2018. Outputs accepted on or after 1 April 2018 will continue to be monitored against the acceptance date.

Click here for details on the updates made ...
In implementing the final REF OA policy in Pure, we have made the following changes:

- Updated the Research Output editor to indicate which 'phase' of the policy applies to the output.
- Removed the configuration to set the date upon which to start monitoring OA compliance.

- Added an additional 'No full publication date input' status.

Updated Research Output editor to indicate applicable REF OA policy 'phase'

The 'Assessment' section of the Research Output editor has been updated to include a new 'Applicable OA policy phase' field that indicates which 'phase' of the REF OA policy applies to the output:

- Published date: Earliest of ePub ahead of print or Published date date is between 1 April 2016 and 31 March 2018 (inclusive), and therefore deposit must be made within 3 months of the date of publication.
- Acceptance date: Acceptance date is between 1 April 2018 and 31 December 2020 (inclusive), and therefore deposit must be made within 3 months of the date of acceptance.

The date displayed adheres to the following logic:

- Published date
  - Date displayed is ePub ahead of print date, or if empty, the Published date.
  - If neither is available, 'no value' is displayed.
  - Where no day is input, '1' will be displayed for the day; where no month is input, '1' will be displayed for the month (so an output with a Publication date of just 2017 will be cited here as 01/01/2017).
- Acceptance date
  - Date displayed is Accepted/In press date
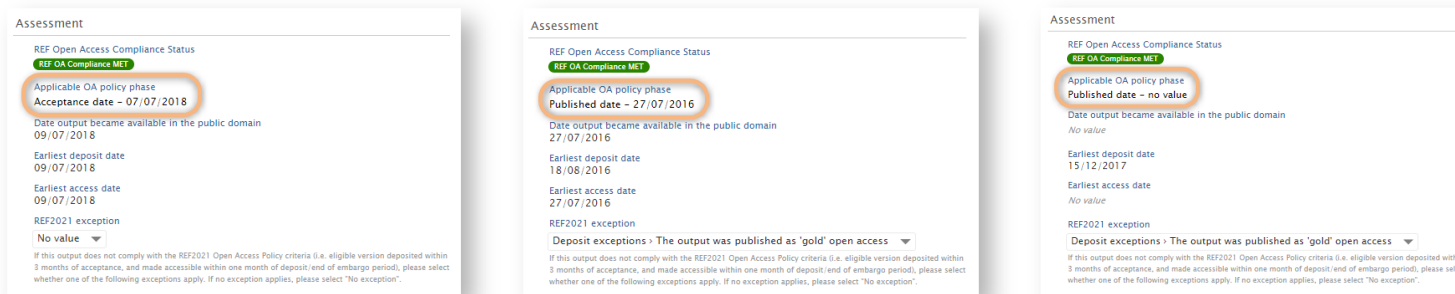
New 'No full publication date input' status

Outputs in the 'Published date' phase of the REF OA policy require the full Publication date (either ePub ahead of Print or Published) in order to accurately monitor compliance with the REF OA policy. Accordingly, we have introduced a new REF OA Compliance status that flags up these Outputs.
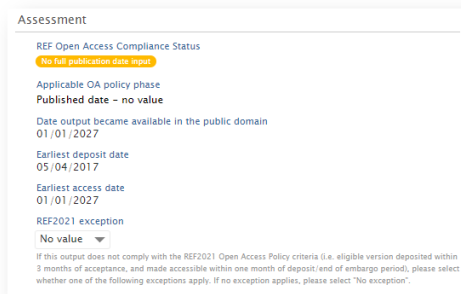
This status will be generated when:

- Acceptance date is between 1 April 2016 and 31 March 2018 (inclusive)

    AND

- ePub ahead of print is populated, but incomplete, OR
- ePub ahead of print is not populated, but Published is populated but incomplete, OR
- neither ePub ahead of print nor Published is populated

Once either the full ePub ahead of print date or the full Publication date are provided, the REF OA Compliance Status will be updated to indicate compliance / not against the relevant policy requirements.

'REF2021 OA compliance start date' configuration removed

Prior to 5.13, it was possible for you to set the date upon which to start monitoring REF OA compliance, using the 'REF2021 OA compliance start date' configuration. With the now confirmed policy requirements and the increased complexity of the REF OA compliance logic, we have removed this configuration. REF OA compliance will always be monitored from 1 April 2016, as per the policy requirements. If, prior to upgrade, your configuration was set to monitor REF OA compliance prior to 1 April 2016, any outputs with an Acceptance date prior to 1 April 2016 will have their REF OA compliance data removed.

REF OA compliance end date introduced

We have introduced a policy end date of 31 December 2020 when monitoring REF OA compliance. This will ensure that when monitoring overall compliance with the REF2021 OA policy, only those outputs subject to the policy will be included.

Exceptions

The **Draft guidance on submissions** outlines the allowable REF OA exceptions. You should note the following:

- The draft guidance includes the 'Deposited within 3 months of publication' as a 'Further' exception. But Pure holds this as a 'Deposit' exception. This will have no impact on the exception returned in the submission.
- The draft guidance no longer includes the 'The output was published as 'gold' open access (which was introduced in the July 2015 update of the **REF OA policy**). Instead, it appears as though such outputs do not need to be specifically flagged, and are to simply be returned as 'Compliant'. Pure retains this as an exception. At the point of generating the submission XML file, we will ignore this exception value and simply return the status of 'Compliant'.

Further details are available in the **REF2021 wiki**.

Click here for details on what happens to your existing data upon upgrade to 5.13.0 ...
When you upgrade to 5.13.0, Pure will apply the updated policy rules to existing data, and will migrate existing content, where appropriate:

- Removal of 'Deposit on publication requirement met' exception where no longer relevant.
- Application of updated policy to all other applicable outputs.

⚠ **In order to ensure as little fluctuation in your REF OA Compliance reporting as possible, you may wish to ensure that prior to upgrade, the full ePub ahead of print or Published date is input for all outputs with Accepted / In press dates between 1 April 2016 and 31 March 2018 (inclusive)**

Application of updated policy to all other applicable outputs

Application of updated policy to all other applicable outputs

Upon upgrade to 5.13.0, Pure will run through all existing Research Output records and apply the updated REF OA policy rules. Accordingly, you may see REF OA compliance status changes for outputs in the Publication date phase.

All outputs with an existing REF OA Compliance Status are listed in a log, accessible by the Administrator:
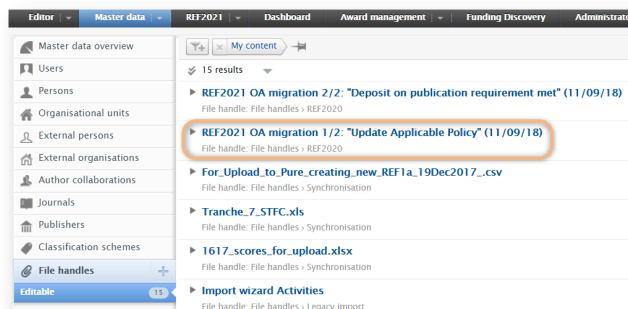
- Go to Master data > File handles > REF2021 OA migration 1/2: "Update Applicable Policy", and download the attached Excel file.

- The file lists all Outputs with an existing REF OA Compliance Status, and shows what the REF OA Compliance Status was prior to upgrade, and following upgrade.

Content ID	REF OA Compliance status before	REF OA Compliance status after
60961841	REF OA Compliance MET	No full publication date input
60289280	REF OA Compliance NOT MET - Confirm exception applicability	REF OA Compliance NOT MET - Confirm exception applicability
58077577	REF OA Compliance MET	REF OA Compliance MET
58766979	REF OA Compliance NOT MET - Confirm exception applicability	No full publication date input
40943556	REF OA Compliance MET	REF OA Compliance MET
60643074	REF OA Compliance NOT MET - Confirm exception applicability	REF OA Compliance NOT MET - Confirm exception applicability
56624010	REF OA Compliance MET	REF OA Compliance MET
36108127	REF OA Compliance MET	REF OA Compliance MET
48690112	REF OA Compliance MET	REF OA Compliance MET
53603642	REF OA Compliance MET	REF OA Compliance MET
53067403	REF OA Compliance MET	REF OA Compliance MET
59162034	REF OA Compliance MET	REF OA Compliance MET
60926839	REF OA Compliance MET	REF OA Compliance MET
58243968	REF OA Compliance NOT MET - Confirm exception applicability	REF OA Compliance NOT MET - Confirm exception applicability
60676160	REF OA Compliance MET	REF OA Compliance MET
48511043	Not eligible	Not eligible
59766268	REF OA Compliance MET	No full publication date input
60007237	REF OA Compliance MET	No full publication date input

Why has the REF OA Compliance status changed?

- The REF OA Compliance status may change once the updated policy has been applied if the output is in the Publication date phase of the policy:
  - If insufficient publication date information is available on the Output, the REF OA Compliance Status will change to 'No full publication date input' (see above).
  - If the output previously did not meet the Acceptance date deposit requirement, but meets the Publication date deposit requirement, the status will change accordingly.

Note that those outputs included in the second 'Deposit on publication requirement met' migration (see details below) may have their REF OA compliance status updated again as per the logic of that migration.
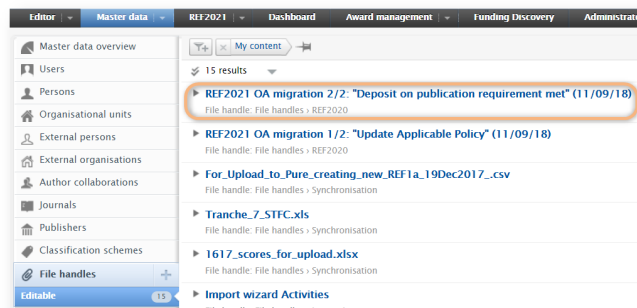
Removal of 'Deposit on publication requirement met' exception where no longer relevant

As described in the **5.7 Release notes**, it has always been our intention to remove the 'Deposit on publication requirement met' exception for all those outputs in the **Publication** date phase of the policy (i.e. Acceptance date is between 1 April 2016 and 31 March 2018 (inclusive)) once the final policy was known and applied in Pure. Accordingly, the following will take place upon upgrade to 5.13.0.

Publication date phase

- Where the 'Deposit on publication requirement met' exception has been selected, and the output falls in the **Publication** date phase of the policy (i.e. Acceptance date is on or before 31 March 2018), upon upgrade this exception is **removed** and the REF OA Compliance status is re-calculated based on the updated logic

- All affected Outputs are listed in a log, accessible by the Administrator:
  - Go to Master data > File handles > REF2021 OA migration 2/2: "Deposit on publication requirement met", and download the attached excel file.
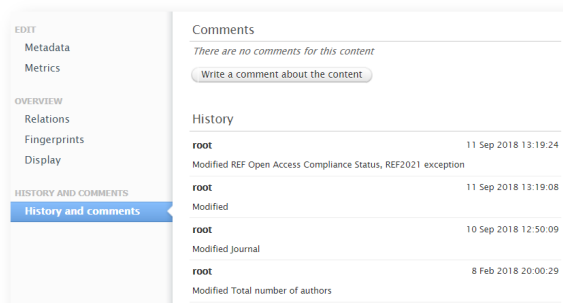
Removal of 'Deposit on publication requirement met' exception where no longer relevant

- The file lists all outputs where the 'Deposit on publication requirement met' exception has been removed, and shows what the REF OA Compliance Status was of the Output prior to upgrade, and following upgrade

- **Why has the REF OA Compliance status changed?**
  - If the 'Deposit on publication requirement met' exception had been applied correctly and indeed the electronic version was deposited within 3 months of Publication, then the output should remain 'Compliant'
  - However, if this exception had not been applied correctly, and indeed the electronic version was **not** deposited within 3 months of Publication, when Pure runs the updated logic (described above), the output's REF OA Compliance Status will change to 'NOT compliant - confirm exception applicability'
  - Further, if insufficient publication date information is available on the Output, the REF OA Compliance Status will change to 'No full publication date input'

- Additionally, the History of all affected outputs is updated with an entry to indicate that the REF OA compliance status and REF2021 exception have been modified.

Acceptance date phase

- Where the 'Deposit on publication requirement met' exception has been selected, and the output falls in the **Acceptance** date phase of the policy (i.e. Acceptance date is on or after 1 April 2018), upon upgrade this exception is **retained**

Further details are available in the **REF2021 wiki**.

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10.1.2. REF OA monitoring: Summary screen updates

We have made a number of updates to the REF OA Monitoring screens:

- New 'Potentially subject to policy' column in the **Overall compliance summary screen**, identifying outputs where no full Acceptance date has been input and therefore are *potentially* subject to the REF OA policy.
- New 'No full publication date set' column in the **Overall compliance summary screen**, identifying outputs in the 'Publication date' phase where no complete publication date has been input.
- New hierarchical layout and grouping options for both REF OA monitoring screens.
- New grouping option by UoA of the associated REF2s.

Click here for more details ...

New 'Potentially subject to policy' column

As described in the **REF2021 wiki**, a full Acceptance date must be input for Pure to monitor REF OA compliance – if only a year or year+month is input, REF OA compliance will not be monitored. In order to help you identify outputs that might potentially 'fall through the cracks' as the full Acceptance date has not been input, the **REF OA monitoring: Overall compliance summary screen** has been updated to include a column identifying outputs that are 'Potentially subject to the policy'.

The new 'Potentially subject to policy' column uses the following logic:

- Output type:
  - Contribution to journal
  - Contribution to specialist publication
  - Chapter in Book/Report/Conference proceeding > Conference contribution
- Publication states and dates:
  - Acceptance date is null OR incomplete (and in that case between 2016 and 2020 (inclusive)) AND
  - At least one of the Acceptance, ePub, or Published dates are between 2016 and 2020 (inclusive)

So, for example, the following output publication states and dates would be captured in this column:

- Output A
  - ePub ahead of Print = 23 July 2017
  - Published = 2017
- Output B
  - Accepted / In press = February 2016
- Output C
  - Published = 2019

Once the full Acceptance date has been input, the output will be removed from the 'Potentially subject to policy' column.

Additionally, a new 'REF2021 OA Output potentially subject to policy' filter has been introduced for Research Outputs.

New 'No full publication date set' column

As described above, Outputs in the 'Published date' phase of the REF OA policy require the full Publication date (either ePub ahead of Print or Published) in order to accurately monitor compliance with the REF OA policy. Accordingly, we have introduced a new REF OA Compliance status that flags up these Outputs, and we have updated the **REF OA monitoring: Overall compliance summary screen** to include a column identifying these outputs.

New hierarchical layout and grouping options for Managing organisation

New hierarchical layout and grouping options for Managing organisation

On both REF OA monitoring screens, when grouping content based on Managing organisation, we have introduced a hierarchical layout, enabling you to more easily see Organisations and their children/parents.

Additionally, we have introduced the option to select the hierarchical level on which to group. For example, if you only want to view the data by Faculty, hiding individual Schools and Departments, you can select that hierarchical level, and all underlying content will be rolled up and reported by Faculty.

By default, the grouping is on level 5 of your organisational hierarchy. Anything beyond level 5 is rolled up to be included its parent value(s).

Notes:

- Where a particular Organisational unit has multiple parents:
  - The child's outputs will be listed under all parents.

  - If grouping down to only the parent level, the child's outputs will be listed under all parents.

    The 'Total number of unique outputs' row at the bottom of the table resolves any duplicates

New grouping option by UoA of associated REF2s

On both REF OA monitoring screens, we have introduced a new grouping option that enables you to limit the screen to only show those outputs with associated REF2s, grouped by the UoA(s) of the associated REF2s.

10.1.3. REF OA compliance status now shown on REF2 record

We have updated the REF2 editor to indicate the REF OA compliance status (synchronised from the associated Research Output)

Additionally, it is possible to filter REF2 records by REF OA compliance status properties (in the Editable list, the 'classic' reporting module, and the new reporting module):

- REF OA compliance status.
- Output has REF2021 exception (filters for whether an exception has been selected or not)
- REF2021 exception.

10.1.4. Re-naming of 'Not REF eligible' REF OA compliance status

Given the expectation that there will be some allowance for outputs that do not meet the policy requirements nor have an exception applied, we have re-named the 'Not REF Eligible' REF OA compliance status as 'NOT compliant - confirmed'.

10.1.5. New "Compliant outputs with 'No exception' selected" editorial task

Outputs that are compliant with the REF OA policy in their own right (by meeting the Deposit and Access requirements) but where the 'No exception' exception has also been selected in error, these outputs are counted in the "Compliant - Exception applies" column of the **REF OA Monitoring: Overall compliance summary** screen, resulting in an overstatement of the Exception rate.

We have introduced an Editorial task for Administrators and REF Administrators to easily identify these records.

Click here for more details ...
This release includes a new "Compliant outputs with 'No exception' selected" editorial task for Administrators and REF Administrators. This task identifies those outputs that are compliant with the REF OA policy in their own right (by meeting the Deposit and Access requirements) but where the 'No exception' exception has also been selected in error (the 'No exception' exception should only be applied when confirming that an output that has not met either the Deposit or Access requirements, and no exception applies - making the output non-compliant).

Notes:

- This Editorial task is by default DISABLED, but can be enabled via the My editorial tasks 'gear' icon.
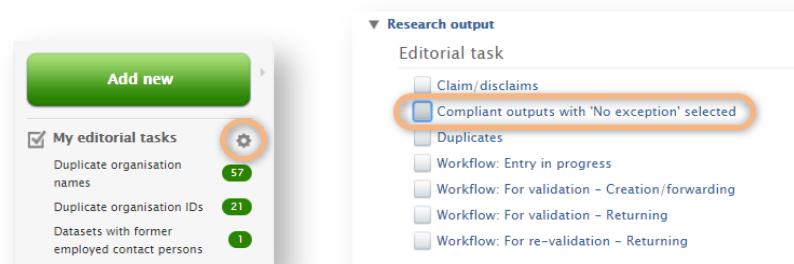
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10.1.6. New 'REF2021 Exception' bulk action

To aid users in actioning the new "Compliant outputs with 'No exception' selected" editorial task, we have introduced a new 'REF2021 Exception' bulk action on Research Outputs, enabling you to edit REF2021 OA exceptions in bulk.
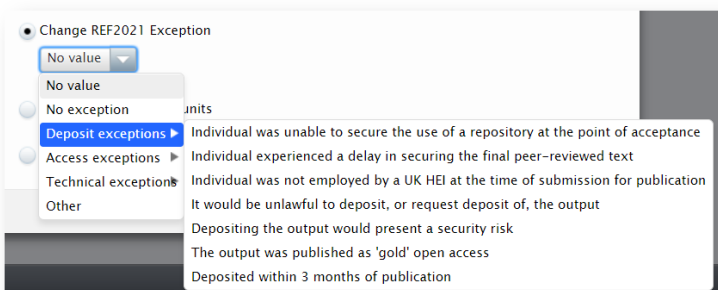
When using this bulk action to remove the 'No exception' value from otherwise compliant outputs, select 'No value' for the 'REF2021 Exception'. This will remove the 'No exception' value, retain the Compliant status for the output(s), move the output(s) from the 'Compliant (exception applies)' column in the **REF OA Monitoring: Overall compliance summary** screen to the 'Compliant' column, and the Exception rate will be re-calculated.

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10.1.7. Pure Academy classes

Following every major release, we have been offering **Pure Academy** classes covering new functionality in the REF module. Recordings of the classes are available **here**.

A Pure Academy class covering REF Open Access functionality (including all 5.13 developments) will be held on 24 October (will be recorded). You can register **here**.

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10.2. Netherlands: SEP/KUOZ enhancements

Following on from updates delivered in the **5.12.1 release**, this 5.13.0 release includes a number of enhancements to SEP/KUOZ functionality, as prioritised by the Dutch User Group.

10.2.1. Export to Excel option for all SEP and KUOZ tables

In response to requests for the SEP/KUOZ tables to display more years of data (which unfortunately is not possible without compromising the user experience), we have instead delivered the function to be able to export SEP/KUOZ tables to Excel.

By default, SEP/KUOZ tables will continue to only display up to:

- 6 years of data for SEP.
- 3 years of data for KUOZ.

But should the user wish to view more (up to 10 years), there is now an 'Export to Excel' option available. The table on screen will continue to be limited as per the ranges described above, but the full range (up to 10 years) will be available upon export.

KUOZ C: Research output

Year range 2007 – 2012 Apply Export to Excel Only 3 years of data can be viewed at any one time. Up to 10 years can be exported to Excel.

		2010				2011				2012		
KUOZ output type	Academic	Professional	Popular	Other	Academic	Professional	Popular	Other	Academic	Professional	Popular	Other
A: 'Refereed' journal article	–	–	–	16	–	–	–	16	–	–	–	15
B: 'Non-refereed' article	–	0	0	–	–	0	0	–	–	0	0	–
D: Book chapter	0	0	0	0	0	0	0	0	0	0	0	1
N: Other conference contribution (abstract, poster)	0	0	0	2	0	0	0	2	0	0	0	0
total:	0	0	0	18	0	0	0	18	0	0	0	16

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10.2.2. Visibility configurations expanded to include visibility of SEP/KUOZ tab on Persons

We have expanded the SEP/KUOZ visibility options to include the visibility of the SEP/KUOZ tab on the Person record. We have also consolidated the existing SEP and KUOZ type visibility configuration on Outputs, Activities, Prizes, and Press/Media into a single configuration.

Depending on your settings prior to upgrade, the first configurations may either be DISABLED or ENABLED - it is recommended you check your configuration upon upgrade. The "SEP/KUOZ tab in Person editor window visible only to Editors/Administrators" configuration is by default DISABLED (meaning that by default, Personal users can see the SEP/KUOZ tab on their Person record).

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10.2.3. Updated FTE/MJE and Funding data import file

We have updated the FTE/MJE and Funding data import file template to support the following additional information:

- Additional IDs beyond just the Pure ID (e.g. Employee ID, Scopus Author ID, External source IDs).
- Inclusion of Employment type and Job title details, enabling users to better define FTE splits when an individual has multiple organisational affiliations in a single calendar year.

Further information is available in the **SEP wiki**.

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10.2.4. Warning message to highlight impact on SEP/KUOZ FTE if Organisational unit affiliation period is updated

Previously, if an Organisational affiliation was edited such that the year of a SEP/KUOZ FTE input was no longer valid, the SEP/KUOZ FTE was simply deleted. In this release, we have introduced warning messages to inform the user if a change to an Organisational affiliation will impact on the captured SEP/KUOZ FTE. This is available both in the Person editor (if the Org affiliation is manually edited) and in the Person sync job:

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10.2.5. Improved display of SEP/KUOZ content on Person record

In response to user feedback, we have made some improvements to the display of SEP/KUOZ content on the Person record:

- Display not only Organisational unit name, but also type
- Ensure that the order of Organisational units in the SEP/KUOZ screen reflects the order in the main Person editor
- By default, any Organisation affiliations with no SEP/KUOZ FTE data are collapsed
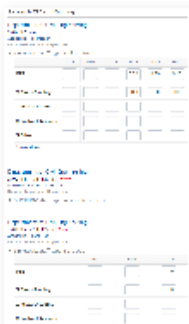
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10.2.6. New SEP/KUOZ Reporter role

We have introduced a new Organisational SEP/KUOZ Reporter role. This role can view the following content as 'read-only' (expanded view), along with the SEP/KUOZ tables:

- Persons
- Research Outputs
- Activities
- Prizes
- Press/Media

Further detail on SEP/KUOZ user roles is available **here** .

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10.3. Australia: Validation on FoR % apportionments outwith ERA module

In relation to issues raised in ⬛ PURESUPPORT-23599 - Research Output and Person - Field of Research (FoR) % apportionment field should not allow 0 or blank value `RELEASED` , since 5.8 we have made updates to non-ERA content such that FoR assignments must have a percentage apportionment greater than 0, and the total FoR % apportionment must be equal to 100%.

Click here for more details ..
We have introduced validation such that individual records cannot be saved if the FoR percentage apportionment does not add up to 100%, or any individual FoR's percentage apportionment is null or zero.

This relates to the following non-ERA content types:

- Person
- Research Output
- Activity
- Project
- Award
- Application

In order to help you identify existing content where the FoR % apportionment does not equal 100%, or where there are any FoRs with no % apportionment, we introduced a "Field of Research Apportionment Correction" job. This job corrects FoR percentages whenever it can do so without removing manually input percentage allocations:

- If there is only 1 FoR and it's % apportionment is not 100%, the job will change it to 100%
- If there are multiple FoR assignments, and they are all 0 or not set, the job will evenly allocate the % apportionment across the assigned FoRs
- Where the total FoR apportionment is equal to 100%, but there are individual FoRs with zero % allocation, the job will log these so you can update the records manually.

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11. Additional features of this release

11.1. Visibility of content: Revised information text when enabling confidential content

Previously, 'Locked' users were included in the list of users for whom Confidential content would be visible. In this release, we have rectified this such that 'Locked' users are no longer included in this list. **Additionally, email addresses associated with users in this list have been de-duplicated, and technical and vendor support user roles have been classed in a separate 'Technical' group.**

This improvement is available for all content types where Confidential visibility is available.
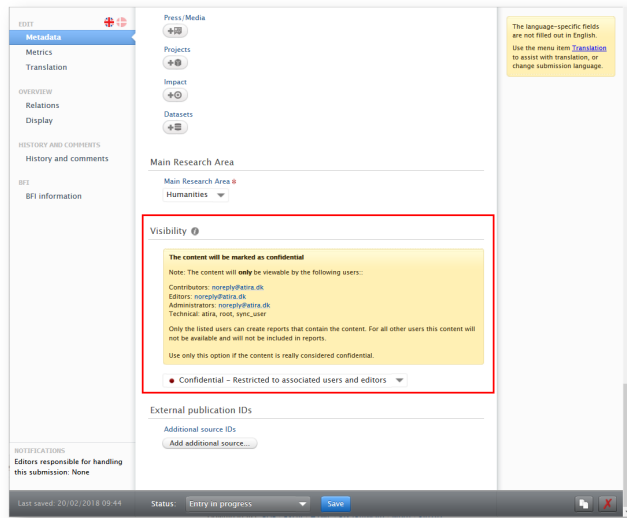
11.2. Personal profile: Student users now able to edit profiles

Previously, only specific Pure customer bases had the ability to enable their student users (users with only a student affiliation) to modify their personal profiles. This functionality has now been extended to all Pure customer bases.

As this functionality is tied with the ability for all Personal users to edit their profiles, it is enabled via *Administrator > System* *Settings > Person >* toggle on *Show edit profile button*.

11.3. Personal profile: File size limit for Profile photos

In order to reduce load times for Personal profile pages and Pure Portal pages, new Profile photos uploaded to a user's Personal profile are now limited to 1MB. Previously uploaded pictures that exceed this file limit will not be affected.

11.4. User documentation: Dynamic loading

The user documentation within Pure (accessed from *Help and support → Manual*) can now be loaded dynamically from S3 buckets rather than accessed as static HTML pages from within your Pure instance (as in previous versions).

This means that the documentation can be updated to address any errors or missing information without you having to upgrade your version of Pure.

Click here for more details ..
You can configure whether the *Help and support → Manual* link should access a set of static HTML pages and PDFs installed with your Pure, or query an S3 bucket to load this HTML and PDFs dynamically.

By default all Pure instances will automatically switch to the dynamic documentation from version 5.13.0. If you do not wish to use the dynamic documentation, you can disable this by setting *Administrator > System settings > Help > Use the online version of Pure manual* to false.

The dynamic documentation is hosted in various regions around the world to ensure that the documentation loads quickly for you (the fastest-loading region is chosen). The advantage of dynamic loading is that the documentation can be frequently updated to include more content and correct errors, as well as that usage analytics (if enabled in your Pure instance) are also enabled on the documentation pages.

The analytics will be used to see which search queries users enter and which pages of the documentation they visit frequently, which will help inform product development by indicating areas that are not intuitive to use, highlight answers to frequently asked questions and to identify areas that are lacking documentation.

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Resolved issues

Minor releases do not normally include the release of new features. The lists below detail the JIRA issues that have been resolved in this release.

Issues reported by YOUR INSTITUTION

Improvements

Bugs

Complete list (all issues)

ALL issues

Improvements

Bugs

Complete list (all issues)

Improved Pure Support experience

We recently launched an **improved Pure Support experience**!

Following requests from our clients, we have redesigned our JIRA system to give you a simpler interface and a more intuitive way of working with support requests.

Easier to see what is going on

- Using a new dashboard, you can see a transparent overview of your engagement with Pure Support, such as the support requests created by yourself and your colleagues. You can also customize your own dashboard to follow issues important to you.
- Our Pure Support system, JIRA, is now available on **https://support.pure.elsevier.com** with your usual login credentials.
- You can learn more about using JIRA in this **small guide**.

All the help you need – in one place

To make it easy for you to find the help you need, we have created a Pure Service Center webpage, available at **https://pure.elsevier.com**. From here, you can go directly to the Pure Support system (JIRA), the online Pure documentation (Wiki), visit the **Pure Academy** site, and stay up-to-date with planned new features via the Pure Roadmap. We suggest you bookmark the page, it is a great place to start your search for Pure help and inspiration.

Installation and downloading

See the Request Pure distribution file page for information about how to request a new version of Pure.

Other Resources and Links

If you have problems with this release please contact Pure Support to get help.

Pure hosting requirements

See the Pure Requirements page for more information about the current hosting requirements for Pure.

No labels