Release notes - Pure 5.11.0 (4.30.0)

Created by Manya Buchan, last modified on Feb 19, 2018

Highlights of this release

Updated Facilities/Equipment data model

Continuing our work on strengthening the foundation of Pure, the Facilities/Equipment data model has been unified across all bases and updated to make it even more useful for customers. The update includes a number of improvements, such as:

- Moving Facilities/Equipment out of Master data, enabling greater local management of Equipment content
- Updates to the data model such as enabling multiple sets of details to be recorded and multiple photos to be uploaded on a single record
- Updating the Pure Portal display of Facilities/Equipment in order to better showcase Facilities/Equipment at the institution

See below for more info ...

GDPR: General Data Projection Regulation

Following a thorough audit of all relevant parts of Pure, we can confirm that Pure is fully GDPR-compliant from this release. See below for more info ...

Author Collaboration and hyperauthorship

In this release we have introduced Author Collaborations as a new Master content type, as a first step in improving how Pure captures the output of large author collaborations (also called *hyperauthorship*). See below for more info ...

ⓘ   **Watch the 5.11 New & Noteworthy seminar**

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

PubMed: API key introduction

From 1 May 2018, PubMed will introduce **API key functionality** for the API used for integration with Pure. You are recommended to sign up for an API key and add it to Pure prior to 1 May. Further details are available **below**.

Author collaboration: Deletion of content

The 5.11.0 release includes new 'Author collaboration' functionality. During the 5.11.0 upgrade process, a job will run that will delete all external authors and external organizations beyond the first 50 for all imported Research Output records that have an affiliated Author collaboration. Further details are available **below**.

Facilities/Equipment: Deletion of content

The unified Facilities/Equipment model does not include the facility to attach documents to Facility/Equipment records. During the upgrade to 5.11.0, any documents attached to existing Facility/Equipment records will be deleted. Further details are available **below**.

5.11.0 (4.30.0) New and noteworthy

- 1. GDPR (General Data Protection Regulation)
- 2. Administration module
    - 2.1. Facilities/Equipment: New unified model

✓ **We are pleased to announce that version 5.11.0 (4.30.0) of Pure is now released**

Always read through the details of the release before installing or upgrading to a new version of Pure

Release date: 9 February 2018

Hosted customers:

- *Staging environments (including hosted Pure Portal) will be updated 14 February 2018 (APAC + Europe) and 22 February 2018 (North/South America)*
- *Production environments (including hosted Pure Portal) will be updated 28 February 2018 (APAC + Europe) and 8 March 2018 (North/South America)*

⚠ ***Be aware of the Upgrade Notes - failing to adhere to these may result in loss of functionality***

Content validation

You are generally encouraged to check all content in the re-validation workflow step prior to upgrade as changes to the underlying data model may not be reflected in the re-validation overview screen (see example)

Further, you are encouraged to check if all content can validate prior to an upgrade of Pure. This check is done by running the **Check content and files** job and resolving any data validation issues that are flagged by the job

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

ⓘ **Mendeley Data integration is free for Pure customers!**

The **Mendeley Data Repository** is a data repository that allows researchers to store and publish their datasets according to the FAIR data principles.

Click here for more information ...

Any researcher can use the Mendeley Data Repository (for free) to store and share their data.

Mendeley Data also ensures long-term archiving, DOI minting, versioning, online preview, link sharing, embargo periods and choice of license from a broad range of open data licenses.

The integration with Pure enables an institution to automatically detect datasets posted by its researchers and import them in Pure through standard validation workflows and is freely available to all Pure clients.

If you are interested, please contact data@mendeley.com.

1. GDPR (General Data Protection Regulation)

The **EU General Data Protection Regulation (GDPR)** replaces previous data protection directives and is designed to harmonize data privacy laws across Europe, to protect and empower all EU citizens' data privacy, and to reshape the way organizations across the region approach data privacy. GDPR enforcement commences 25 May 2018.

Click here for more information on Pure's GDPR compliance ...
Under the GDPR, in the context of a Pure installation, Elsevier acts as a Data Processor and the customer as the Data Controller.

Controllers and processors are required to *"implement appropriate technical and organisational measures"* to comply with the GDPR, taking into account *"the state of the art and the costs of implementation"* and *"the nature, scope, context, and purposes of the processing as well as the risk of varying likelihood and severity for the rights and freedoms of individuals."*

In order to ensure that the Pure application is GDPR-compliant and to help all those customers that will be affected by the EU GDPR regulation we have audited all relevant parts of Pure. This audit has been conducted thoroughly in liaison with Elsevier's GDPR audit team, and required Pure to pass several stage gates in order to be endorsed as GDPR-compliant. **The outcome of the audit is that the Pure application is fully GDPR-compliant with this 5.11.0 release.**

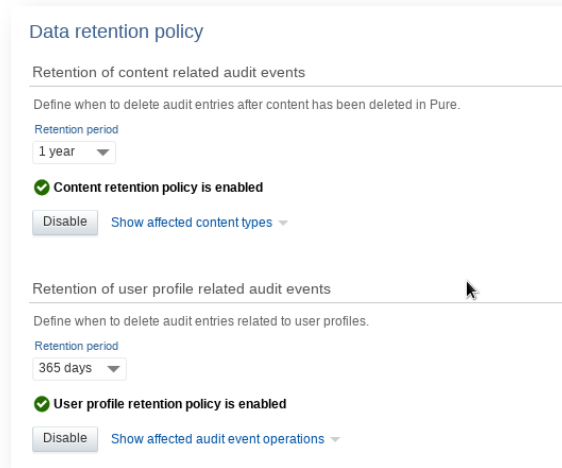| Personal identifiable information in Pure |
| --- |
| Based on the GDPR audit undertaken, we have created a **Personal Data Inventory** for all properties and data elements in Pure that can capture Personal Identifiable Information (PII). In the personal data inventory we have also addressed suggested retention actions and if there is a related business rule in place for a retention action.

We recommend that all customers affected by GDPR familiarize themselves with the **Personal Data Inventory** . |

Data retention actions in Pure

As part of the GDPR requirements we have implemented two configurable data retention actions for audit log entries:

- Retention action for audit entries related to content that has been deleted
- Retention action for audit entries related to user actions (logins, failed logins etc.)

Data retention policy

Retention of content related audit events

Define when to delete audit entries after content has been deleted in Pure.

Retention period
1 year ▼

✓ **Content retention policy is enabled**

[Disable]   Show affected content types ▼

Retention of user profile related audit events

Define when to delete audit entries related to user profiles.

Retention period
365 days ▼

✓ **User profile retention policy is enabled**

[Disable]   Show affected audit event operations ▼

The configuration can be accessed via the **Administrator > Data retention policy** tab. There is no retention policy configured by default, so audit entries will not be pruned unless a retention policy is actively configured.

Hosting - Recommendations for on-premise hosted customers

For customers hosted by Elsevier, the hosting environment will be encrypted and GDPR-compliant before GDPR will come into force 25 May 2018.

For on-premise customers we recommend the following to ensure technical GDPR-compliance of your Pure installation:

- All customer data should be encrypted, this includes the database files and the application server disks that contain Pure logs, index and audit files. We recommend full disk-encryption in order to be future-proof.
- Access to customer data via the database, database host or to the application server host should be with personal credentials and audit logged.
- Configure the data-retention policies in Pure to be in compliance.
- Ensure that there are no Pure user accounts shared between multiple people or systems.
- Ensure that there are backup processes in place and that the backups are protected appropriately.
- Ensure that there are technical measures and processes in place to protect personal data and detect any breach, including notification of the relevant data protection agency within 72 hours of detection.

Elsevier supporter role authentication

Elsevier supporter role authentication

We have added a specific authentication mechanism in Pure so Elsevier support personnel are authenticated using their personal credentials and all actions performed on behalf of a customer are logged using the supporter's username instead of the "atira" username.

The "Elsevier AD FS" authentication mechanism authenticates against the Elsevier federated Active Directory, ensuring that only authorized Elsevier support personnel can log in as a part of a support flow. Also any changes made by Elsevier employees will be audited using personalized credentials instead of the generic support user.

Elsevier AD FS Authentication   Active   Save   Cancel

☑ Active

Usernames are case insensitive

false ▼

The user that will be assumed by Elsevier employees logging in via this mechanism
When an Elsevier employee logs in via this authentication mechanism, the employee will assume the rights of this user.

atira

The authentication mechanism is activated by default. If the Pure installation does not have internet access or you deactivate the mechanism it will be necessary for you to create the support users manually for Elsevier supporters when necessary.

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2. Administration module

2.1. Facilities/Equipment: New unified model

In 5.11.0 we have unified the Facilities/Equipment data model (previously called 'Equipment'). This means that the underlying metadata model is now aligned across all users of Pure, enabling us to consolidate and future-proof the code base of Pure. Additionally, we have included new functionality:

- Moving Facilities/Equipment out of Master data, enabling greater local management of Equipment content
- Updates to the data model such as enabling multiple sets of details to be recorded and multiple photos to be uploaded on a single record
- Configurations that enable you to specify which user roles have the right to create, modify, and delete Facility/Equipment records

As different metadata models existed across the Pure code bases prior to this release, the consequences of this unification will be different according to the code-base of your Pure installation. For the majority of Pure clients, the changes to the Facilities/Equipment data model are minimal and you will only notice the new functionality accompanying the unification. Consequences per code-base can be found **here**.
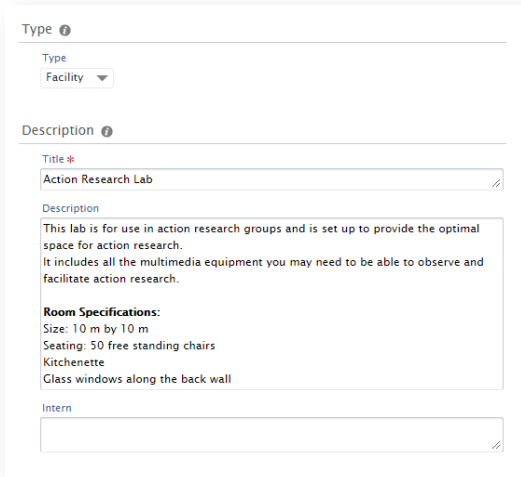
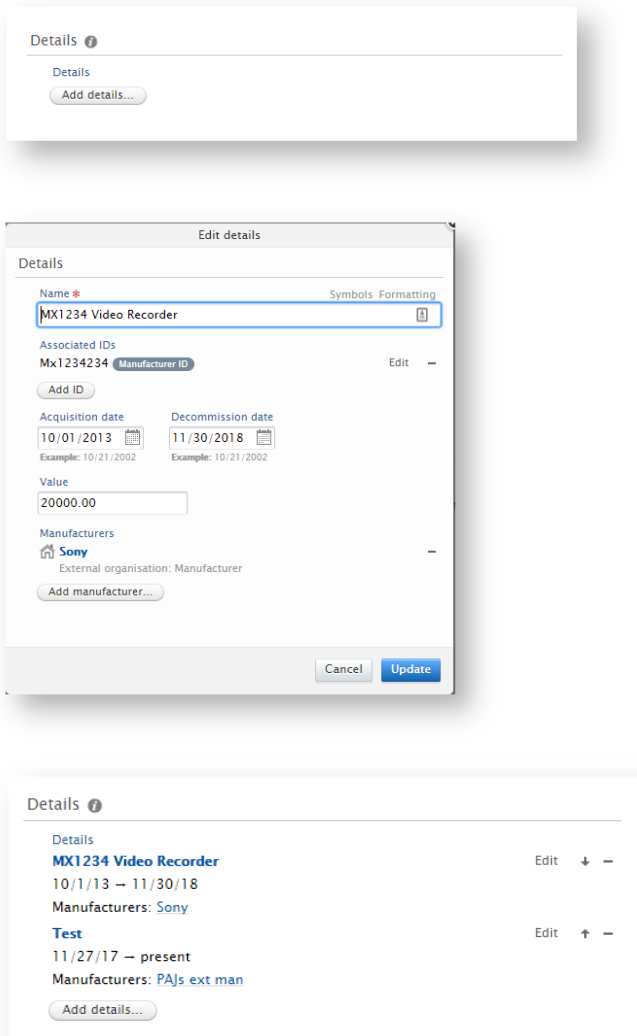### 2.1.1. Updated Facilities/Equipment data model

As part of the unification of the Facilities/Equipment data model, we took the opportunity to consult with customers to identify the use cases for Facilities/Equipment in Pure and the data model updates required in order to meet these use cases. We have updated the Facilities/Equipment data model accordingly.
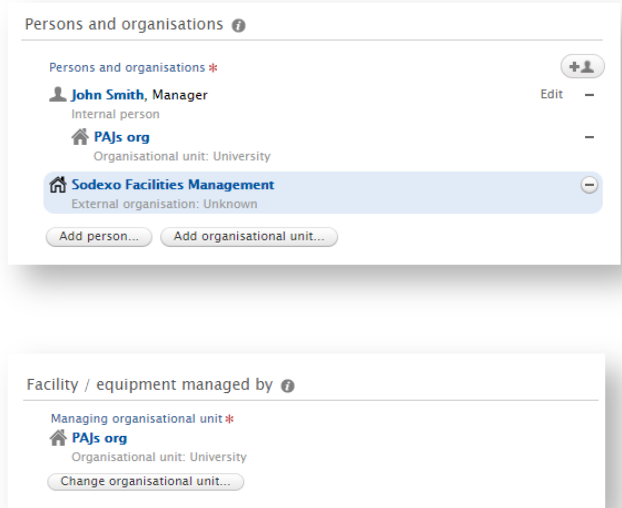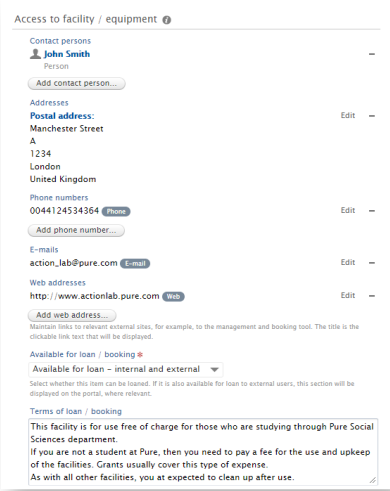Click here for more details ...
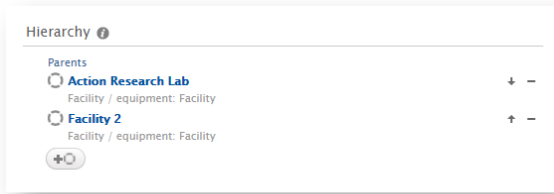Below is a summary of the key data model changes made in this release.

Section	Screenshot	Notes

Section	Screenshot	Notes
Description		The Title and Description fields are displayed on the Pure Portal, where this is available. Additional classified description fields added by the institution (see **below**) are only available in the backend of Pure.

Section	Screenshot	Notes
Details		The Details section enables you to add specific details such as Associated IDs (e.g. Asset register ID, serial number, etc.), Acquisition and Decommission dates, Value, and Manufacturer. It is possible to add multiple sets of details to a Facilities/Equipment record, enabling you to record all relevant details of individual items of equipment or components, without having to create individual records for each individual component. You may find such functionality useful if you wish to have a single Facility/Equipment record for a bank, for example, of microscopes, with the details of each individual microscope captured in that single record. **Manufacturer** When adding an External organization as a Manufacturer, the list of available External organizations to select from is filtered to only show those External organizations where Nature of the organization's work = Manufacturer. Upon upgrade to 5.11.0, External organizations associated as Manufacturers in existing Equipment records will be updated capture Manufacturer in the Nature of the organization's work.

Section	Screenshot	Notes
Persons and Organizations		Each Facility/Equipment record must be associated with at least one internal Person or Organizational unit.

Access to Facility/Equipment		This section enables you to provide details on how to access the Facility/Equipment, including:
		
		• Contact persons(s)
		• Address
		• Phone numbers
		• Emails
		• Web addresses
		• Whether the Facility/Equipment is available for loan/booking
		
		Notes:
		
		• Web addresses:
		  ○ By default, there are 4 types of web addresses:
		    ▪ Website
		    ▪ Brochure/Documentation
		    ▪ Booking/Management
		    ▪ Unspecified
		  ○ New types can be added, and existing types edited via the */dk/atira/pure/equipment/equipmentwebaddresstype* classification
		  ○ When displayed in the Pure Portal, the classification title is used
		• Available for loan/booking:
		  ○ When an item is marked as *Available for loan - internal and external*, the content in the *Terms of loan/booking* field will be displayed in the Pure Portal

Photos		It is now possible to add multiple photos to each Facilities/Equipment record. All photos will be displayed in the Pure Portal, see **below**.

Section	Screenshot	Notes
Hierarchy		Following the same hierarchical model applied to Organizational units, it is possible to capture the Parent of each Facility/Equipment.

⊙ **Deletion of existing documents**

In the unified Facilities/Equipment model it is not possible to attach documents to the record. During the upgrade to 5.11.0, any **documents attached to existing Facility/Equipment records will be deleted**. We recommend that customers use the new web addresses field to provide links to documentation relevant for the Facility/Equipment record.

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**2.1.2. Access, create, and modify Facilities/Equipment**

With this release, Facilities/Equipment has been moved out of Master data, enabling greater local control over Equipment content. Additionally, configurations are now available that enable you to specify which user roles have the right to create, modify, and delete Facility/Equipment records.
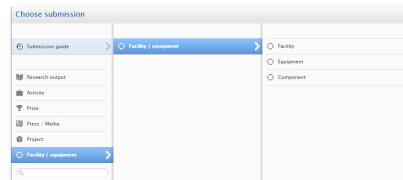
Click here for more details ...

Create and access Facilities/Equipment

Create and access Facilities/Equipment

Access and start creating Facilities/Equipment on the Editor tab of the Pure workspace. The Facilities/Equipment tab is shown in the left navigation:
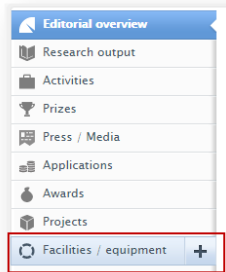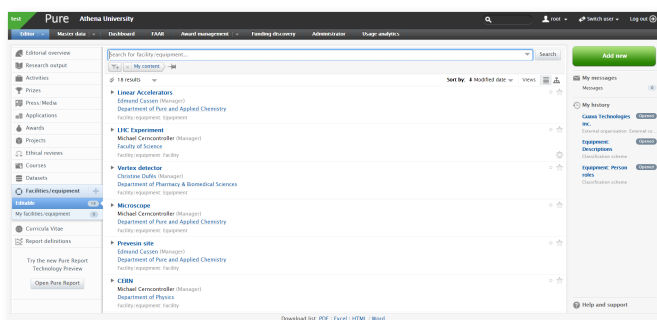

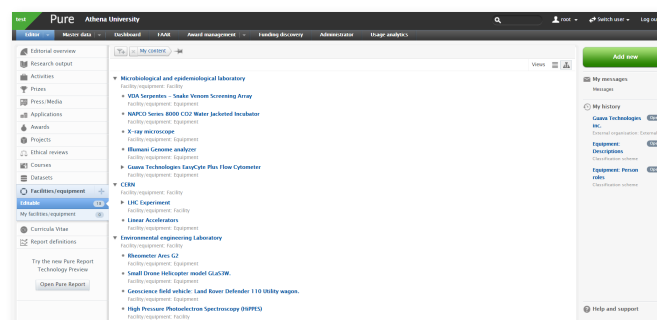and you can also add a new Facility/Equipment item with the **Add new** button:

View Facilities/Equipment Editable list

List view	Hierarchical view

Facilities/Equipment user roles

Two specific Facilities/Equipment user roles are now available:

- Administrator of Facilities/Equipment (Global role)
- Editor of Facilities/Equipment (Organizational role)

Configure which roles are allowed to create Facilities/equipment

Configure which roles are allowed to create Facilities/equipment

Facilities/Equipment settings can be modified via the Facilities/Equipment tab in the Administrator space.

In the **Administrator** > **Facilities/equipment** > **Configuration** tab, you can configure which roles are allowed to create Facilities/Equipment content, and whether Facilities/Equipment records can be modified and/or deleted by associated Persons.
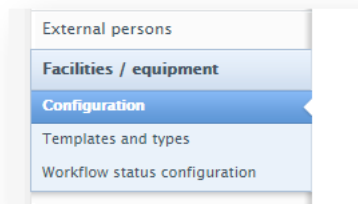
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2.1.3. Flexible configuration of Facility/Equipment types

You can now configure Facility/Equipment types in the similar way as was introduced for Research Outputs, Activities, Prizes, Press/Media and other unified content types.

Click here for more details ...
With this new feature you can now add Facility/Equipment types specific to your institution. You can also delete types where there are no associated existing records.

Pure Administrators can configure types (and other items such as Roles and classified Descriptions) on the **Administrator** tab > **Facilities/Equipment** > **Templates and types** then by clicking **Edit**.

There are three default types of Facilities/Equipment in Pure:

- Facilities
- Equipment
- Component
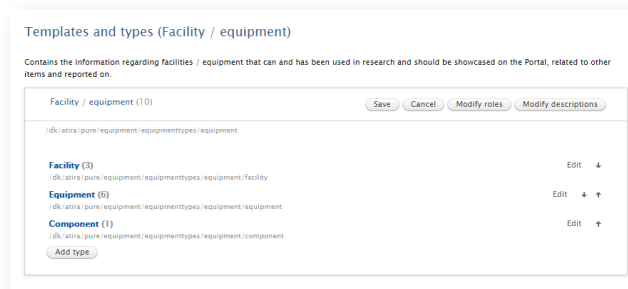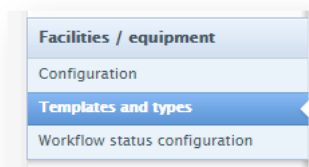
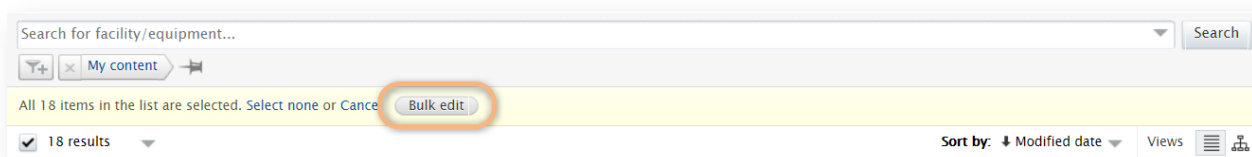### 2.1.4. Bulk change of Facility/Equipment Types

As with other recently unified content types (e.g. Activities and Research Outputs), we have introduced new Bulk Edit functionality that enables you to bulk change Facility/Equipment Types.
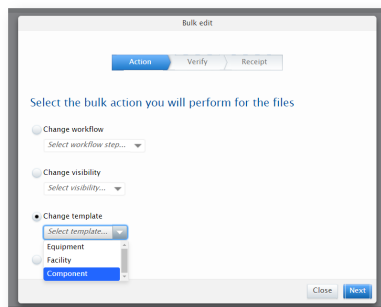
Click here for more details ...

	To bulk edit the Facilities/Equipment Type
1	In the Facilities/Equipment editable list (list view), filter for those Facility/Equipment records with the type you want to edit.
2	Choose the bulk action function.
3	Select all records (or the just the records you want to bulk edit the type of).

	To bulk edit the Facilities/Equipment Type
4	Select the **Bulk edit** option that appears.
5	Select the **Change template** option and choose the new template and type for the records.
6	Follow the remaining steps in the wizard. At the conclusion of the wizard you can download an XLS file with the changes that were made during this bulk operation.

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2.1.5. Further notes

- **Reporting:** Unifying the Facilities/Equipment data model has necessitated some changes to the model. As such, we cannot guarantee that all existing Facilities/Equipment reports will continue to work as expected. We recommend that you check your saved report definitions, paying especial attention to managed and scheduled report definitions.
- **Web service:**
    - For customers that had the Equipment module prior to 5.11.0, regardless of whether the module was enabled, it will be possible to use the old web services to access the unified Facilities/Equipment content.
    - For customers that did not have the Equipment module prior to 5.11.0, it will not be possible to access the unified Facilities/Equipment content through the old web service.
    - All customers on release 5.11.0 are able to access Facilities/Equipment content through the new web services.
- **Portals:**
    - Custom portals (i.e. Advanced portals) and Standard portals should generally not see any major changes resulting from the unification of the Facilities/Equipment content type. However, if you currently display Equipment content, we advise that you review your Portal in your TEST environment prior to upgrading Pure in PRODUCTION.
    - For customers that had the Equipment module prior to 5.11.0, the Pure Portal updates for Facilities/Equipment will take effect automatically - further details are available **below.**
    - For customers that did not have the Equipment module prior to 5.11.0, you will not be able to showcase Facilities/Equipment on your Pure Portal until after the 5.12.0 release when the Pure Portal will make use of the new Facilities/Equipment web service.
- **Synchronizations:** XML synchronization and bulk import support for the new Facilities/Equipment model is included in this release; further details are available **below.**

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2.2. Research Outputs: Author collaborations and hyperauthorship

In this release we have introduced Author Collaborations as a new Master data content type, as a first step in improving how Pure captures the output of large author collaborations (also called hyperauthorship) (as we see in fields such as high energy physics and biomedicine).

This new content type has a dual purpose:

- Provides improved support for hyperauthorship
- Replaces the 'Group authors' element in the Research Output data model

As mentioned above this is a first release. We will continue to look at whether the implemented behavior should be adjusted and as usual, your feedback as you use the functionality will be appreciated.

2.2.1. Upon upgrade to 5.11.0

When you upgrade to 5.11.0, the following will take place automatically:

- Pure will create Author Collaborations records, based on Scopus collaborations data
- Pure will migrate existing Group authors over to Author Collaborations
- For content previously imported from Scopus where the author collaboration had been imported as an External Person, these author collaborations will be migrated over to Author Collaborations, similarly to what we are doing for Group authors. These External Persons are identified as Author Collaborations based on their Scopus Author ID.
- Pure will calculate the total number of authors and store and display this on the Research Output
- For all Outputs with an affiliated Author collaboration, where the total number of authors is over 50*, Pure will delete affiliated External authors and External Organizations beyond the first 50 authors - ALL Internal authors and Organizational units are retained

Details on maintaining Author Collaborations, and creating Research Output records with Author Collaborations both manually and using import sources are available in the following sub-sections.

Note that this removal of External authors and External organizations from Research Outputs will impact on the reporting of collaborations with External organizations and Persons, and will alter the collaboration map in the Pure Portal.

Australian customers - please see the ERA2018 wiki as the default settings have been altered for ERA submission purposes

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2.2.2. Create and maintain Author Collaborations

Author Collaborations are a Master content type, modifiable only by authorized user roles. Author Collaboration content will be automatically populated upon upgrade to 5.11.0, and can be maintained using manual creation, de-duplication, and other related functionality.

Click here for more details ...

2.2.2.1. Author Collaboration data model	

2.2.2.1. Author Collaboration data model

The Author Collaboration data model includes the following fields:

- Name
- Name variants
- Associated IDs
- External organizations

It is important to add as many Associated IDs as are available for all sources (e.g. Scopus Collaboration ID). This helps to ensure accurate matching during the Research Output import process.

Notes:

- It is currently only possible to add External organization to Author Collaborations. Internal Organizational units can be affiliated with Author Collaborations via the Research Output records themselves, using the standard author affiliation functionality.
- The Author Collaboration data model does not include Persons. In designing the data model, it was felt that it would be difficult to maintain accurate membership records, and would significantly increase your burden in attempting to do so. For most major collaborations, author membership in the collaboration is maintained by the organization itself. For example, the **CERN ATLAS Authorship Committee** maintains the membership list of the ATLAS experiment.

The Research Output editor has been updated, with the 'Add group author' button being replaced by the new 'Add author collaboration' button. A new 'Total number of authors' field has also been added, and is automatically populated when content is sourced from on-line sources (e.g. Scopus, WoS).
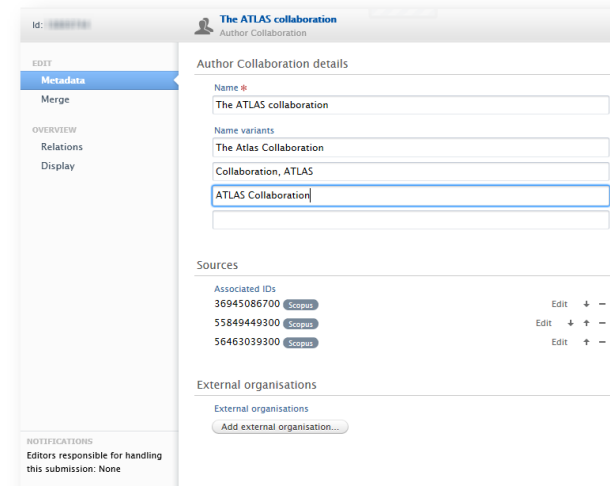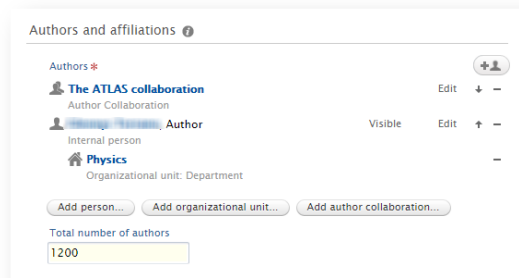
2.2.2.2. Author Collaborations user role

As a master data content type, Author Collaborations can be created, edited, and deleted by the *Administrator* and the new *Administrator of Author Collaborations* user roles.
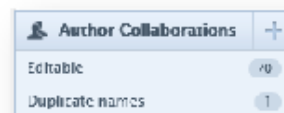
2.2.2.3. Auto-created Author Collaborations

As described above, upon upgrade to 5.11.0, Pure will automatically source Author Collaborations from:

- Scopus collaborations data
- Existing Group author content

**2.2.2.4. Manual creation of Author Collaborations**

Authorized users (see below) can create Author Collaborations via Master data > Author collaborations > **+** button.
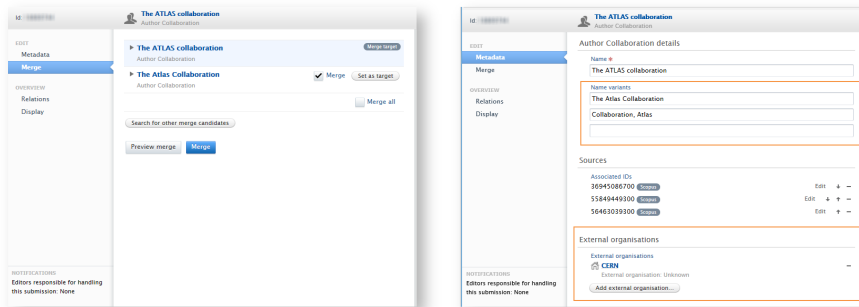
2.2.2.5. Maintaining Author Collaboration content: De-duplication

Minor variations in Author Collaboration names can result in the creation of multiple Author Collaboration records for a single Author Collaboration. Accordingly, we have introduced de-duplication (i.e. merge) functionality for Author Collaborations. There are two methods for identifying and resolving duplicates, similar to Research Output de-duplication functionality:

1	Check the **Duplicate names** tab in the Author Collaboration menu
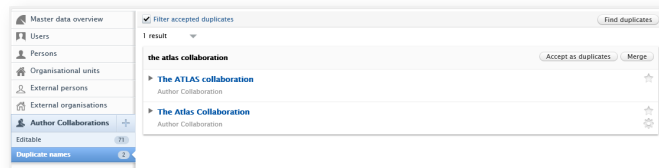
As with de-duplication functionality elsewhere in Pure, selecting the Merge function will open the first Author Collaboration record in the list as the merge target and presents the second record as a merge candidate. When merged, content from the merge candidate will be incorporated into the target record (as shown in the last screenshot)

2	Via the Merge tab in the Author Collaboration editor. If none are immediately identified, it is possible to find merge candidates by selecting the **Search for merge candidates** button.
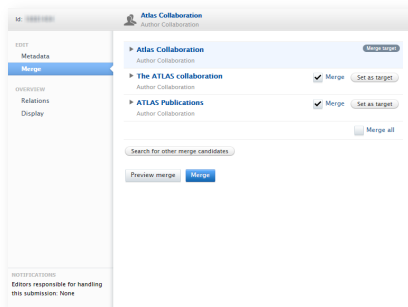
2.2.2.6. Maintaining Author Collaboration content: Filtering

2.2.2.6. Maintaining Author Collaboration content: Filtering

We recommend that appropriate user(s) set up a saved filter in order to monitor the creation of new Author Collaboration content and the creation of Research Outputs with large numbers of co-authors that you may wish to convert into Author Collaborations. The new filters delivered to support this are:

- Author count
- Author Collaboration associated

2.2.2.7. Maintaining Author Collaboration information for the Pure community

Going forward, the Pure team will maintain a central list of Author Collaborations in order to update all instances of Pure in future releases (this list is initially made up of Scopus collaborations data). This is important in order to ensure that Research Outputs imported from online sources are correctly matched and attributed to Author Collaborations and handled as described below.

In order to ensure this central list is as complete and accurate as possible, we would like to request that you let us know when a new author collaboration (not specific to your institution) has been identified. The same applies if you become aware of an additional ID associated with an existing Author Collaboration. We will then make the necessary updates to the central list and update all instances of Pure in the next release.

2.2.3. Create Research Outputs with Author Collaborations

Importing from online sources functionality has been updated to capture Author Collaboration details. With each tool for creating Research Output records, Author Collaborations can be captured:

- Manual import: automatic assignment
- PRS import: automatic assignment
- Manual input
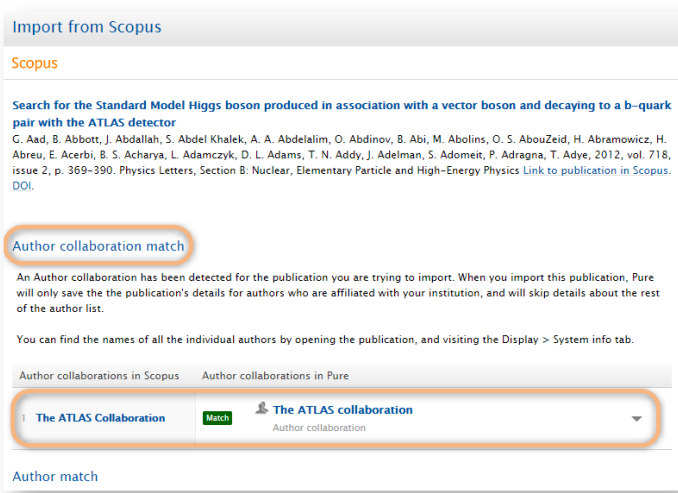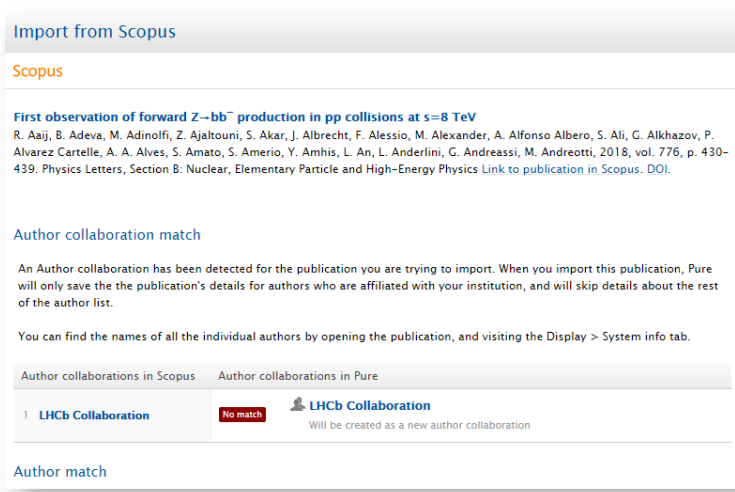
Click here for more details ...

2.2.3.1. Manual import: automatic assignment

When research output is imported from an on-line source (e.g. Scopus or Web of Science) Pure will first try to determine whether there is a recognized author collaboration, either:

- as a specific author collaboration field/element as defined by the external source, or
- as an author, where the author ID corresponds to one of the author collaboration IDs specified for the specific import source in the Author Collaboration records in Pure

Scenario	Screenshot

2.2.3.1. Manual import: automatic assignment

Scenario	Screenshot
When an Author Collaboration is provided by the external source and a match is found in Pure, the user is presented with the suggested match(es). If more than one match is found, the user can choose which, if any, of the suggested matches is the correct author collaboration.	
When an Author Collaboration is provided by the external source but no match is found in Pure, upon import, a new Author Collaboration will be created (much the same as with External persons).	

2.2.3.1. Manual import: automatic assignment

Scenario	Screenshot
When no Author Collaboration is provided by the external source, but the record has more than 50 listed authors, Pure flags this up as a potential 'hyperauthored' output and provides the user with the opportunity to affiliate the output to an existing Author Collaboration or create a new one.	
Below the Author Collaboration matches, the user is presented with the Author matches. A minimum of 50 authors will be automatically imported, including all internal authors and as many external authors and their associated organizations, in the order that they are included on the record, until a total of 50 is reached. Where the number of internal authors exceeds 50, no external authors will be imported.	

**PRS import: Automatic assignment**

The Author Collaboration matching behavior is as described above, except that:

- if the Author Collaboration is matched the result of a match is automatically imported without the external authors or organizations
- if the Author Collaboration is not matched it will be imported with all internal and external authors and organizations included

Manual input

Manual input

It is also possible to manually affiliate an Author Collaboration with a Research Output, using the 'Add author collaboration' button. As with other content (e.g. External organizations), the user can search for an existing Author Collaboration or create a new one.
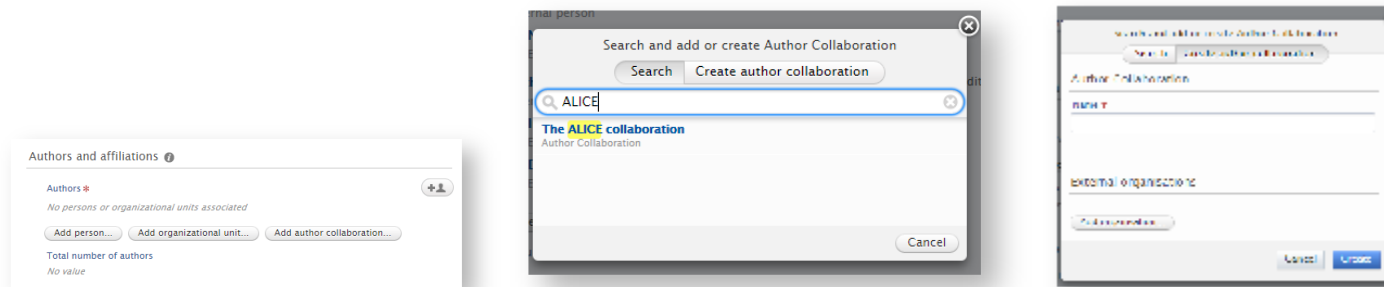
[Back to top of page](#)

2.3. Student thesis: Model updates

The Student Thesis model is now available for all clients (was previously available only on the common base) and can be enabled via the Administrator interface as with other content types.

The model has also been updated to bring it more in line with the Research Output > Thesis template:

- The order of the fields in the editor has been improved to align the two models and to to have a more natural flow in the editor.
- You can now specify the name of the Supervisor at the time of supervision, similar to how Research Output authors are captured.
- Internal and External Organizations can be specified for Supervisors.

No data has been removed/migrated from the existing model.

Notes:

- This Student thesis content type cannot be enabled if you have another type of Student Thesis/Project content type enabled (available only for Danish and Belgian clients).

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2.4. Applications, Awards, and Projects: New user roles and rights

In response to user feedback, we have introduced new roles to support the management of Applications, Awards, and Projects content:

- Read-only access to Applications, Awards, and Projects for affiliated Personal users and Editors
- Global and organizational *Reporter* roles for Applications, Awards, and Projects

[Click here to for more details ...](#)

**Read-only access for affiliated Personal users and Editors**

Read-only access for affiliated Personal users and Editors

Prior to this release, when Applications, Awards and Projects entered the 'Validated' workflow state, Personal users and Editors of Applications, Awards or Projects were no longer able to access the full content in these records, making it difficult for such 'interested parties' to retain access to important information on the relevant entities. As such, we have enhanced the rights of these user roles to enable read-only access to validated Applications, Awards, and Projects.

- Personal Users have read-only access to their own Applications, Awards, and projects
- Editor of Applications, Awards, and/or Projects have read-only access to the Applications, Awards and/or Projects to which they have editorial access
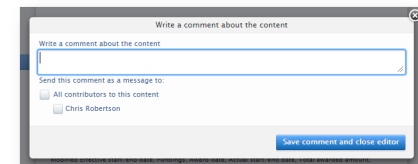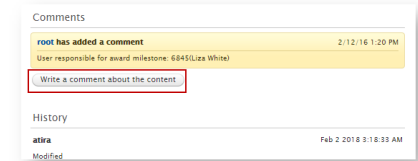- Those users with read-only access are also able to add and view Comments
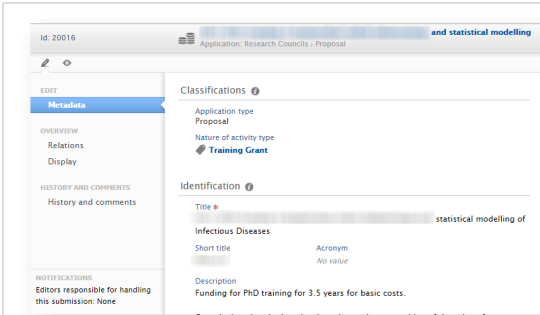
Read-only users are able to view all content in the editor, without being able to edit
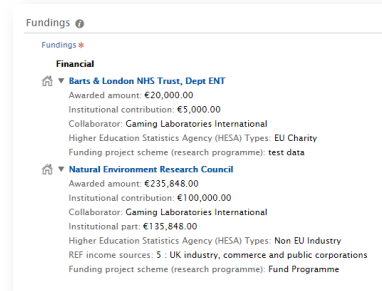
In the **Fundings** section of Applications and Awards, the following fields from the Funding Institution screen are displayed in the read-only view:

- Amounts
  - Applied amount
  - Institutional contribution
  - Collaborator and Institutional part for the collaborator
- All keywords

Those users with read-only access are also able to add and view Comments

Global and Organizational Reporter role for Applications, Awards, and Projects

Applications, Awards and Projects are often marked as 'Confidential' visibility to ensure that only authorized users are able to access the record. However, support staff are often required to report on all Application, Award, and Project data and therefore must be able to report on 'Confidential' content. To support this requirement, we have introduced a number of new *Reporter* roles:

	Reporter of Applications	Reporter of Awards	Reporter of Projects
Global	The user can report on all Applications for the entire organization	The user can report on all Awards for the entire organization	The user can report on all Projects for the entire organization
Organizational	The user can report on all Applications affiliated with the Organizational unit for which they have been given the reporter role	The user can report on all Awards affiliated with the Organizational unit for which they have been given the reporter role	The user can report on all Projects affiliated with the Organizational unit for which they have been given the reporter role

3. Usage analytics

3.1. Engagement dashboard

With this release, we are excited start the process of communicating detailed usage information about Pure at your institution. If you have enabled usage analytics for your institution, information has been passed on via Talkback and Adobe Analytics, and we are able to provide you the first insights into the engagement of your users with Pure.

Click here for more information on usage analytics ...
With this release, we have created two interactive dashboards and added two new report definitions.

Interactive dashboards

The interactive dashboards can be found on the Usage analytics tab of your Pure instance and are visible to the Pure Administrator only.
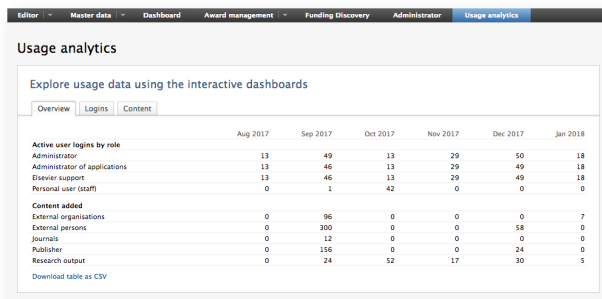
The dashboards provide you an overview of Pure usage at your institution, as well as two interactive graphs with information on:

Active user logins in your Pure installation	The overview shows the division per role, which you can zoom into using the graphical representation for a chosen time period.
Your institution's activity around added content	The dashboard on content types shows the net monthly addition of content, split by content type. The interactive graph shows the aggregated content types over time, segmented per role and shows the distinction between created, modified or deleted content.

Report definitions

Moreover, the Reporting module of your Pure instance now has some options that can be used for investigating the usage of Pure. While Pure passes on anonymized data to the usage analytics tab, the Reporting module allows you to drill down to user name level. To help you explore these possibilities, two report definitions have been attached: "Last Login" and "Import sources – current year" and are available for you to install on your Pure installation

	Report name	Description	Report definition xml
1	Import sources - current year	This report shows which import sources have been used to source Research Output content in Pure. The report only includes Research Outputs created in Pure within the current calendar year.	**Import_sources_-_current_year.xml**
2	Last login	This report provides you with a list of all users in your Pure installation and information on the last time they logged into Pure. This enables you to investigate, for example, which users have never logged into Pure or which users have not logged in during the past year.	**Last_login.xml**

Feedback

We continue to welcome your feedback and input as we develop this usage analytics capability further – please reach out to Henrik Rasmussen.

More information

The public-facing **Usage analytics** website describes in detail what usage analytics in Pure is, how and what we are collecting, as well as who is affected.

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4. Pure Portal

4.1. Facilities/Equipment enhancements

To support the updates made to the Facilities/Equipment model (see **above**), this release also includes display changes and enhancements to Facilities/Equipment in the Pure Portal. This includes:

- New support for the display of multiple photos
- Revised hierarchical view, including a configuration to determine the default view (hierarchical or grid)
- Overall layout enhancements, including updated placement of contact and access information

Click here for more details ...

| **Photos**	
Multiple photos can be uploaded in the Facilities/Equipment content editor, for display in the Pure Portal. • Open the Facilities/Equipment editor window > Metadata tab and scroll down to the Photo section, select Add file... • A pop-up will appear that will allow the Editor to choose the photo that they wish to upload. If you want to upload multiple photos, follow this process multiple times. • Press Save at the bottom of the editor.	
The photo(s) are now made visible in the Pure Portal. If multiple photos have been uploaded, they can be viewed via the scroll arrows in the photo section. The photos can also be enlarged in the Portal by simply clicking on the photo.	
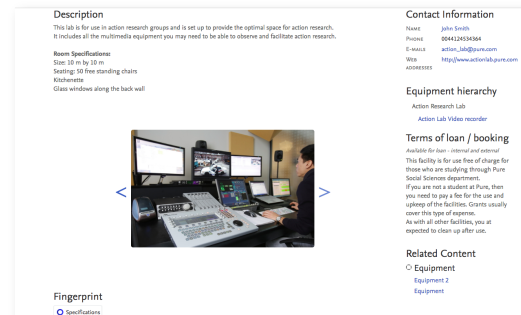
Grid/Hierarchical view	

A new configuration is available that enables you to set the view for Facilities/Equipment in the Pure Portal.
 	
• Open the **Administrator** > **Pure Portal** tab.
• Within the open tab, click the **Configuration** tab.
• In the **Families** section, click **Edit** next to Facilities/Equipment. The following settings are exposed:
    • In the Overview section, there is a new **Show hierarchical list view as default** check box. By default, this box is un-checked, and the Portal will display Equipment with the standard Grid view as the initial view. If checked, the Portal will display Equipment in the Hierarhical View as the initial view.
    • The Metrics section is not applicable to Equipment/Facilities.
• Click **Save** to ensure your changes are saved.	
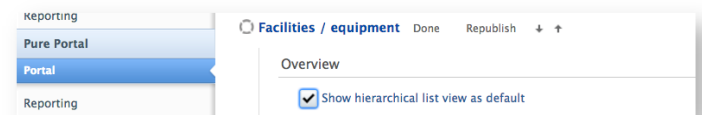
Grid/Hierarchical view
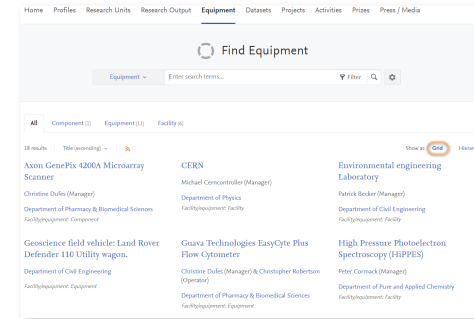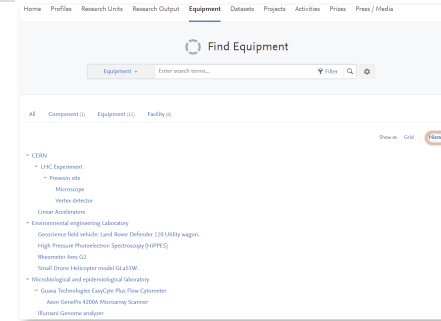
Layout enhancements

Layout enhancements

Access to Facility/Equipment

Contact Information, Hierarchy, Terms of loan/booking, and Related Content are now visible in the right hand portion of the page

Layout enhancements

Map

If an address has been input for the Facility/Equipment, the location of the Facility/Equipment is displayed in the Portal using Google Maps.
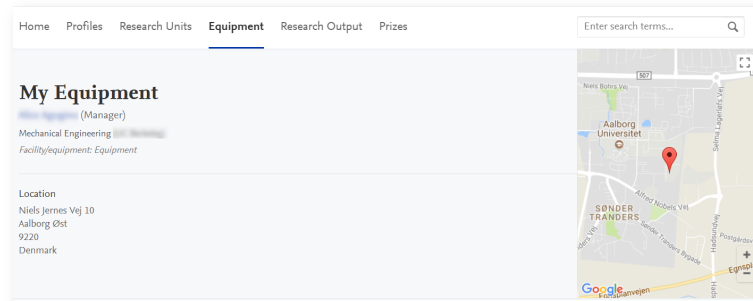
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4.2. Fingerprint and Search Improvements

As part of the continuing effort to improve fingerprinting and search, we are happy to include the following improvements in the 5.11 release.

- Prizes are now a fingerprintable piece of content, performed automatically once a Title and Description have been added for a Prize.
- Weightings can now also be applied to fingerprintable content to adjust the extent to which different content types contribute to Persons' overall fingerprints. Prizes, Research Interest Statements and Research Output fingerprints can be weighted to provide a more accurate, and holistic fingerprint.
- It is now possible to configure the Institutional Home Page to not display Concepts.

Click here for more details ...

Addition of Prizes to fingerprinting

Prizes are now a fingerprintable piece of content, performed automatically once a Title and Description have been added for a Prize.

Prizes have been added to fingerprints in order to:

- expand the fingerprintable content in Pure.
- include more concepts to a Person's aggregate fingerprint, in the case that they are performing important work that has been recognized by a Prize but not necessarily captured by traditional Research Outputs.
- better represent researcher expertise beyond Research Outputs.

Prizes are automatically fingerprinted if both a Title and Description (Abstract) are present. Once fingerprinted, Prizes will also appear in a separate tab as part of the Concept search functionality in the Pure Portal.

It is also possible to configure whether or not to include Prizes in Persons' fingerprints:

1. Open the Administrator > Fingerprint > Configuration tab.
2. In the Selected sources for Fingerprints section, toggle the slider to On or Off for each content type (Research Output, Prizes or Research Interest Statement). Where the toggle is On (the default setting), this content type will be included in associated Persons' fingerprints.
3. Click **Save** to ensure your changes are saved.
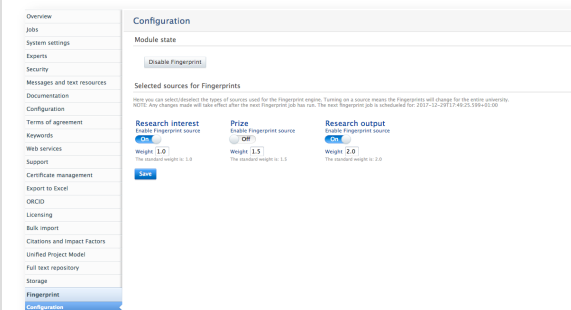
Weighting of fingerprint signals

Weighting of fingerprint signals

With this release, it is now possible to assign weightings to the content that make up the fingerprint (Research Output, Prizes and Research Interest Statement), enabling you greater control over which content contributes most to Person fingerprints.

This feature can help better represent a Person's true expertise, and allow for a more accurate fingerprint visualization and Concept search result set.

The weightings control how heavily valued a this source is in a Person's fingerprint. Each content type has a aggregated fingerprint created (i.e. a fingerprint for Research Output, and a fingerprint for Prizes). It is the aggregated fingerprint that is weighted against each other in order to provide a holistic fingerprint that best represents expertise. Once set, the weightings are applied to all Persons within the Pure installation and will appear on the Portal after it is next updated from Pure.

By default, the weighting values have been set to 1.0 for Research Outputs, 1.0 for Research Interest Statement and 1.0 for Prizes.

This feature is visible the Administrator, and can be viewed as follows:

1. Open the Administrator > Fingerprint > Configuration tab
2. In the Selected sources for Fingerprints section, the weighting given to each source is shown.
3. To request a change to the weightings please contact: pure-support@elsevier.com

Configurable number of Concepts displayed now includes zero

On occasion, an institution may not wish to display the aggregated fingerprint for the institution on the Pure Portal home page as it is felt it does not accurately reflect the breadth of research undertaken at the institution.

In order to address this requirement, we have expanded the ability to configure the number of concepts displayed on the Home Page fingerprint to include zero.

1. Open the Administrator > Pure Portal tab.
2. Within the open tab, make sure you are on the **Styling & layout** sub-tab.
3. Scroll to the Maps section.
4. Select the number of Concepts that you wish to display - if 0 is selected, no concepts will be displayed on the Pure Portal home page.

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4.3. Personal configuration enhancements

We have enhanced the Personal configurations introduced in **5.10** in order to provide clarity and a better user experience. These include:

- Improved user interface to enable Personal users more easily identify their Primary organizational affiliation
- When selecting content for highlighting, only content with Visibility = 'Public' or 'Campus' will be available for selection
- Research output metrics sources must first be enabled by the Administrator in order to be selectable for display in the Personal configurations

Click here for more details ...

Primary organizational affiliation visibility	
In this release we have improved the Personal user's Portal Profile editor in order specifically flag the primary organizational affiliation (as per their Person record). When an individual wishes to highlight select organizational affiliation(s) for display (when multiple affiliations exist), they will now be able to easily see which one is their Primary affiliation.	
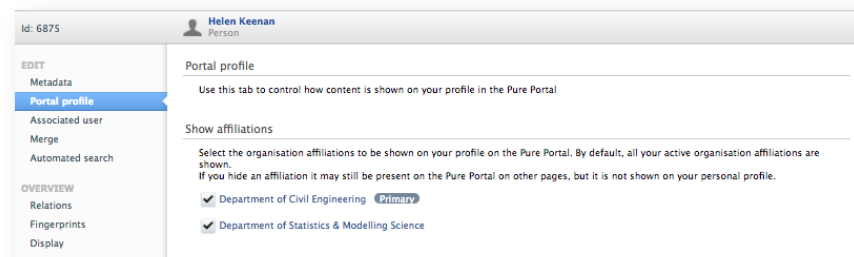
Content visibility	
When selecting content for highlighting (via Personal Configurations in Portal Profile), only content with Visibility = 'Public' or 'Campus (restricted to IP range view only)' will be available for selection. Content that is marked 'Backend' or 'Confidential' will be marked as such, and will not be able to be selected for highlighting.	
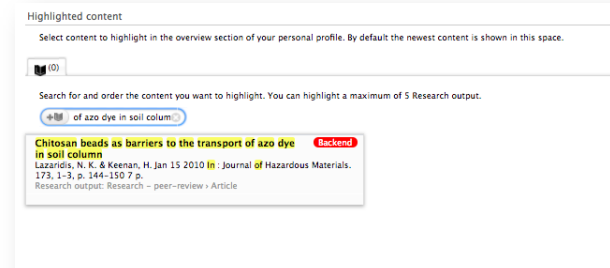
| **Metrics sources**	

Metrics sources	
Research Output metrics sources must first be enabled by the Administrator to be displayed in the Pure Portal. Once a source is enabled, the Personal user can edit their personal Portal configurations to disable that source (e.g. to not display H-index or citation counts on their personal Portal page). As an Administrator, to select the metrics you wish to enable, go to Administrator > Pure Portal > Configuration > Research Output > Click **Edit** > Citations As a Personal user, to select which of the enabled metrics to display on the personal Portal page: 1. Navigate to your Personal overview screen and click 'Edit profile'. 2. In the Person editor window, click the **Portal profile** tab. 3. In the **Show metrics** section select the desired metrics for display.	
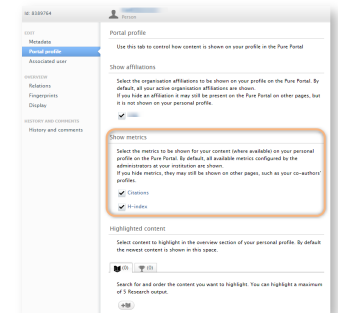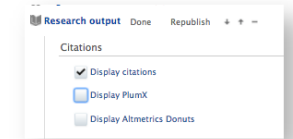
<div align="right">Back to top of page ⬆</div>

5. Import module

5.1. Scopus: Updated mapping of document types

The Scopus type mapping has been updated to cover more scenarios based on whether the ISSN, ISBN, and conference information is available.

The **Scopus type mapping table** has been updated to reflect these updates.

<div align="right">Back to top of page ⬆</div>

5.2. SSRN: New Research Output import source

We are delighted to announce that we have added the Social Science Research Network (**SSRN**) as an online import source for Research Outputs.

Click here for more details ...
SSRN is a worldwide collaboration of over 352,400 authors and more than 2.2 million users that is devoted to the rapid worldwide dissemination of research. Founded in 1994, it is now composed of a number of specialized research networks.

- SSRN's email abstract eJournals cover over 1,000 different subject areas
- the Abstract Database contains information on over 756,400 scholarly working papers and forthcoming papers
- the eLibrary currently contains over 639,200 downloadable electronic documents

To enable SSRN as an online import source please visit **Administrator** > **Research output** > **Import sources** and select **SSRN**. SSRN can be enabled right away; no subscription is required.

Please note that keywords can only be imported from SSRN if you have user-defined keywords enabled on Research Outputs. User-defined keywords are by default enabled, so unless you have edited this setting, you should not be impacted by this feature. If you are unsure, please contact the Pure Support Team.

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5.3. PubMed: API key introduction

From 1 May 2018, PubMed will introduce **API key functionality** for the API used for integration with Pure. You are recommended to sign up for an API key and add it to Pure before 1 May 2018.
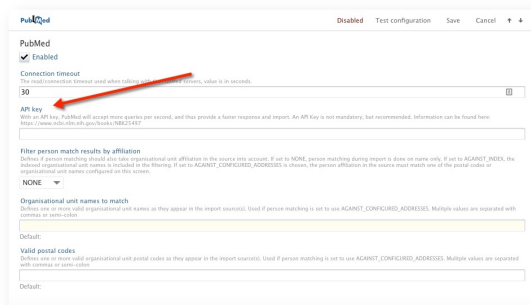
Click here for more details ...

While using an API key for PubMed will be optional after May 2018, queries not using an API key will be limited in their frequency, so you may experience timeouts while importing content from PubMed. We therefore recommend that you sign up for an API key and add it to Pure now, to be prepared in time.

In order to get an API key, you will need a NCBI account. Instructions on how to get a NCBI account and create an API key can be found **here**.

Once the API key has been retrieved, it can be added to Pure under Administrator > Research output > Import sources > PubMed.

Your API key will be used automatically as soon as it is added.

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5.4. Facilities/Equipment: XML synchronization and bulk import

This release includes XML synchronization and bulk import support for the new Facilities/Equipment model.

Click here for more details ...

The 'Configurable Equipment Synchronisation' job can be found in the cron job list under Administrator > Jobs. XML example files and XSDs are available directly on the job.

As with other content types, the import functionality can found under Administrator > Bulk import. XML example files and XSDs are available directly in the wizard.

If you had set up a database Equipment synchronization previous to 5.11.0, this will continue to work and populate your Facilities/Equipment in Pure. This will however only be supported for the fields previously existing in the old Equipment model. If you would like to change your existing synchronization (to synchronize fields introduced in 5.11.0), you will need to switch to the new XML-based synchronization jobs.

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6. Web services

6.1. Updated format of the *classification-schemes* endpoint

We changed the way we expose classification of the classification-schemes endpoint in order to achieve a clearer and more easy-to-use format.

Click here for more details ...

This change was implemented to achieve a clearer and more easy-to-use format. The previous output format was repetitive and bloating the responses for clients using Pure with multiple languages. With this improvement we aim to return a well-structured, non repetitive format, that should improve response times as well.

Please find an example of the new format below:

```xml
<classificationScheme xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" uuid="2d0adb79-8f85-4896-844a-b8b23f0952e5" pureId="58" xsi:schemaL
    <baseUri>/dk/atira/pure/organisation/namevariants</baseUri>
    <typeClassifications>
        <typeClassification pureId="45" uri="/dk/atira/pure/core/classificationschemes/taxonomi">Taxonomy</typeClassification>
    </typeClassifications>
    <descriptions>
        <description>Organisation name variants</description>
    </descriptions>
    <containedClassifications>
        <containedClassification uri="/dk/atira/pure/organisation/namevariants/shortname" disabled="false" pureId="60">
            <terms>
                <term>Short name</term>
            </terms>
        </containedClassification>
        <containedClassification uri="/dk/atira/pure/organisation/namevariants/sortname" disabled="false" pureId="62">
            <terms>
                <term>Sort name</term>
            </terms>
        </containedClassification>
        <containedClassification uri="/dk/atira/pure/organisation/namevariants/webname" disabled="false" pureId="64">
            <terms>
                <term>Web name</term>
            </terms>
        </containedClassification>
        <containedClassification uri="/dk/atira/pure/organisation/namevariants/full" disabled="false" pureId="5781">
            <terms>
                <term>Full name</term>
            </terms>
        </containedClassification>
    </containedClassifications>
    <info>
        <createdBy>root</createdBy>
        <createdDate>2016-03-17T14:14:14+01:00</createdDate>
        <modifiedBy>root</modifiedBy>
        <modifiedDate>2016-03-17T14:14:38+01:00</modifiedDate>
        <additionalExternalIds/>
    </info>
</classificationScheme>
```

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6.2. IDs: Improvements to how IDs are exposed

We have received a lot of feedback that users of the web service would like to see more IDs on the output formats of the web service, to make it easier to identify content and further process the responses. As a result you will now find the internal Pure ID, the internal UUID and external IDs (like the IDs used on synchronizations) on the responses where these are available.

Click here for more details ...
Please find an example of the new format below:

```xml
<person xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" uuid="somepersonuuid" pureId="250758" externalId="8218846" externalIdSource="synchronis
    <name>
        <firstName>John</firstName>
        <lastName>Doe</lastName>
    </name>
    <nameVariants>
        <nameVariant pureId="543235">
            <classification pureId="43246" uri="/dk/atira/pure/person/names/former">Former name</classification>
            <name>
                <firstName>Jon</firstName>
                <lastName>Dow</lastName>
            </name>
        </nameVariant>
    </nameVariants>
    <titles>
        <title pureId="54353" externalId="source135432" externalIdSource="synchronisedUnifiedPerson" typeUri="/dk/atira/pure/person/titles/postnomina
    </titles>
    <ids>
        <id pureId="432432" externalId="scopus432543" externalIdSource="synchronisedUnifiedPerson" typeUri="/dk/atira/pure/person/personsources/scopu
    </ids>
    <staffOrganisationAssociations>
        <staffOrganisationAssociation pureId="5432543" externalId="source4326542" externalIdSource="synchronisedUnifiedPerson" externallyManaged="tru
            <person uuid="somepersonuuid">
                <link ref="content" href="http://devel.atira.dk/somepure/ws/api/511/persons/somepersonuuid?apiKey=someapikey"/>
                <name>John Doe</name>
            </person>
            <affiliationId>564754</affiliationId>
            <emails>
                <email pureId="5435353" externalId="source4326544" externalIdSource="synchronisedUnifiedPerson" typeUri="/dk/atira/pure/person/person
            </emails>
            <phoneNumbers>
                <phoneNumber pureId="76574575" externalId="source6548832" externalIdSource="synchronisedUnifiedPerson" typeUri="/dk/atira/pure/person
            </phoneNumbers>
            <organisationalUnit uuid="someorganisationuuid">
                <link ref="content" href="http://devel.atira.dk/somepure/ws/api/511/organisational-units/someorganisationuuid?apiKey=someapikey"/>
                <name>
                    <![CDATA[Nursing & Midwifery]]>
                </name>
                <type pureId="5772" uri="/dk/atira/pure/organisation/organisationtypes/organisation/5">Unit</type>
            </organisationalUnit>
            <period>
                <startDate>2016-08-01</startDate>
            </period>
            <isPrimaryAssociation>false</isPrimaryAssociation>
            <contractType pureId="4324" uri="/dk/atira/pure/person/personcontracttype/openended">Open ended</contractType>
            <staffType pureId="43246" uri="/dk/atira/pure/person/personstafftype/academic">Academic</staffType>
            <jobDescription>Professor of Nursing</jobDescription>
            <jobTitle pureId="423432" uri="/dk/atira/pure/person/jobtitles/atrp">
                <![CDATA[Academic (Teaching & Research) Professor]]>
```

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6.3. Activities: 'Hosting a visitor': Improvements to how Person and Organizational unit associations are exposed

We have changed the way Person and Organizational unit associations are exposed on the "Hosting a visitor" Activity template, in order to reflect that the Activity type "Hosting a visitor" does not require a person association like the other activity types. Therefore, Person and Organization associations have moved from the general activity element to the type-specific ones.

Click here for more details ...
Please find an example of the new format below.

Changed "Hosting a visitor" Activity template:

In comparison, see an example of the unchanged "Visiting an external institution" Activity template:

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6.4. Information about available endpoints

We have added information about the available API versions of a Pure instance, so you can easily retrieve the API versions supported by a certain Pure instance.

Click here for more details ...
This information is available at */ws/apiversions*, so if your Pure URL is https://pureuniversity.dk you can retrieve this information via: https://pureuniversity.dk/ws/apiversions

You will be presented a list of supported endpoints and their deprecation version:

```xml
<?xml version="1.0" encoding="UTF-8" standalone="yes"?>
<apiVersionURLRoot>
    <apiVersionURLS>
        <apiDeprecatedVersion>514</apiDeprecatedVersion>
        <apiModule>api510</apiModule>
        <apiVersion>510</apiVersion>
    </apiVersionURLS>
    <apiVersionURLS>
        <apiDeprecatedVersion>515</apiDeprecatedVersion>
        <apiModule>api511</apiModule>
        <apiVersion>511</apiVersion>
    </apiVersionURLS>
    <apiVersionURLS>
        <apiDeprecatedVersion>513</apiDeprecatedVersion>
        <apiModule>api59</apiModule>
        <apiVersion>59</apiVersion>
    </apiVersionURLS>
</apiVersionURLRoot>
```

6.5. Pure Hosted: Web Service throttling

Included in the 5.11 release is the ability to throttle access to the Pure web service. This has been implemented to protected the stability of Pure against errornous or malignant use of the web service, that could previously bring down all of Pure including the administrative interface.

Initially the web service will have the following limits:

- 1 concurrent request to the change stream per client
- 10 concurrent requests/100 http sessions to the old REST WS per client
- 20 concurrent requests/100 http session to the new REST WS per client
- 5 concurrent requests/100 http session to other WS resources

If any of these limits are exceeded, the caller will get a http 429 return code and an explanation about which of the limits were exceeded.

We will monitor this feature, and make adjustments to the limits if required.

7. Awards Management

7.1. Editor of Application (Checking)/(Approving) role: Expansion of rights

It is now possible to provide the Editor of Application (Checking) and/or Editor of Application (Approving) roles with the ability to edit Applications.

Click here for more details ...

In order to allow an Editor of Application (Checking) or Editor of Application (Approving) to be able to edit Applications, the Administrator must enable the functionality in the Administrator tab.

Go to Administrator > Applications > Workflow > enable **Allow editors of user defined steps to modify applications** setting. **Save** the change.
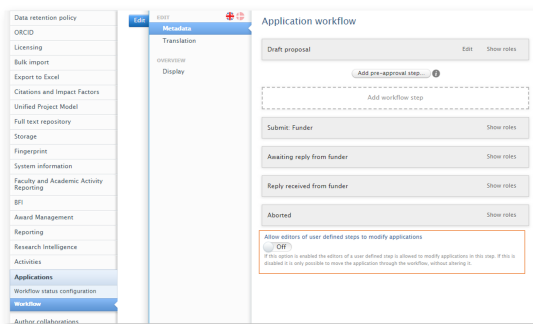
8. Country specific features

8.1. Australia: ERA2018: Phase 4

In this (expected) final phase of ERA2018 module development, we have built upon existing ERA functionality to deliver the following features. Further details are available in the ERA2018 wiki via the links below.

- **Submission XML and validation**
- Updated **ERA Research Income** job

Additionally, earlier 5.10 minor releases included ERA2018 module developments:

- **5.10.1 release** which included ERA Dark Repository functionality and other enhancements
- **5.10.2 release** which included EID Tagging functionality and other enhancements
- **5.10.3 release** included ERA Applied Measures functionality, rationalization of Publication Year, and other enhancements
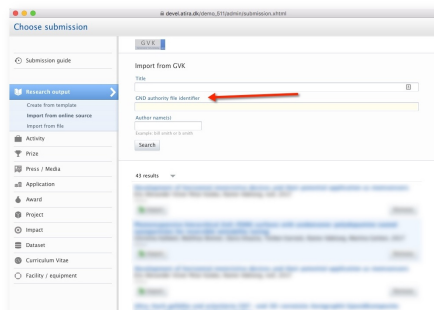
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8.2. Finland: Fennica and Arto Research Output import sources added to the common base

We have added **Fennica** and **Arto** as Research Output import sources for Finnish customers on the common base (previously only available on the Finnish base).

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8.3. Germany: Support of GND as parameter for imports from GVK Plus

We have added support for the GND ID as a parameter to retrieve import candidates from **GVK Plus**. By using the GND ID, users can more accurately source a list of candidates using this unique identifier.

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9. Additional features of this release

9.1. Integrations: Detect environment and host changes to pause scheduled cron job execution

In this release we have introduced a warning message when Pure detects a change in the environment or server host name, in order to help ensure that integrations are configured carefully based on whether the Pure environment is a Production, Test, or other environment.

Click here for more details ...

Pure integrates with a number of external systems. These integrations should be configured carefully based on whether the Pure environment is a Production, Test, or other environment. Failure to do so can result in data loss, test data bleeding into production, or vice versa.

For this reason, we have introduced a warning message when Pure detects a change in the environment or server host name.

A typical situation in which you need to take action is when a production database is copied and used in test environment. You should then configure storage to no longer use production file paths and services. Third-party integrations such as ORCID should be switched to sandbox.

Once properly configured, you can re-enable the automatic execution of scheduled cron jobs at the bottom of the warning message that is shown:

9.2. Custom Portals: DOIs now render the full URL

How DOI URLs are displayed in Custom Portals has been improved to align with **DOI.org** standards. This full render of the DOI impacts both Research Outputs and Datasets by default.

New DOI URL example	Old DOI URL example
https://doi.org/10.1109/5.771073	10.1109/5.771073

9.3. Open Access: Update to Embargo lifting job

We have always taken a conservative approach and lifted the embargo on full text files on the day after the embargo date entered in Pure. In this release, we have adjusted this to be consistent with how repository systems handle the embargo end date and Pure now lifts the embargo on the end date.

9.4. Personal user access to their own sensitive data

Gender and Date of Birth are sensitive data fields in Pure and were not previously visible nor editable by the Personal user or any other users other than Editor and Administrator of Persons, and the Administrator. 'Retirement date' and were previously also not visible to the Personal user.

In this release, we have introduced functionality to enable you to configure whether to allow all Personal users to be able to view and edit the above mentioned fields.

- Go to to **System settings** on the **Administrator** tab
- Click through to **Person** and enable the **Personal users can view and edit their own sensitive information** setting
- Save

This update only affects the data that can be viewed and edited by Personal users in the Pure backend user interface. This does not make sensitive data available through the web service.

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Resolved issues

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.

No labels