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ERA2015 and HERDC modules



ERA2015 Wiki Space : Development

Development

- [Development Plans and Timescales](#)
- [Submission content and summary](#)
- [General processes, workflows, and user access functionality](#)
- [Submission forms](#)
 - [ERA Researchers](#)
 - [ERA Research Outputs](#)
- [ERA Summary Screens](#)   (incorporating SEER dashboards)
- [Output access requirements](#)

ERA2015 Wiki Space : LIVE

Live : from October 2014 (5.1.0)

[ERA2015 Module Documentation](#)

HERDC Wiki Space : Development

Development



- [Development Plans and Timescales](#)

ERA2015 Development Plans and Timescales

ERA Module Development Plans and Timescales

- [Version 5 : 16 Jan 2015](#) 
- [Version 4 : 3 Oct 2014](#) 
- [Version 3 : 22 May 2014](#) 

- [ERA and HERDC Module development diagram](#)  


- [Phase 1 Process Flow](#) : Description of module population functionality available in Phase 1  

Development plans and timescales v3

Development plans and timescales - v3


ERA Element	Form / Functionality	Reporting (Simple)	Reporting (Detailed)	Summary Screen(s) (to incorporate SEER dashboard(s))	Notes
User roles and rights + workflow	1				
ERA Researcher	1	1	2	2	
<ul style="list-style-type: none"> Import of ERA-selected persons 	1				
<ul style="list-style-type: none"> Automatic generation of ERA Researcher records based on specified criteria 	3				
ERA Research Output	1	1	2	2	
<ul style="list-style-type: none"> Import and xml export of ERA-selected outputs 	1				UWA requires
<ul style="list-style-type: none"> Automatic generation of ERA Research Output records based on specified criteria 	3				
<ul style="list-style-type: none"> Portal Development 	1	1			
<ul style="list-style-type: none"> EID tagging export / import functionality 					It is not expected that any customers require this functionality for ERA2015
ERA Applied Measures					It is not expected that any customers require this functionality for ERA2015
ERA Esteem Measures					It is not expected that any customers require this functionality for ERA2015
ERA Research Income					It is not expected that any customers require this functionality for ERA2015

Phase 1

 PUREPROD-1526 - Data cannot be retrieved due to an unexpected error.


- Deliver for October 2014 (5.1 / 4.20)
- Current estimate : 9-10 weeks

Phase 2

 PUREPROD-1654 - Data cannot be retrieved due to an unexpected error.

- Deliver for February 2015 (5.2 / 4.21)
- Current estimate : 10 weeks

Phase 3

 PUREPROD-1623 - Data cannot be retrieved due to an unexpected error.

- Enhancements (no delivery set)

Development plans and timescales v4




Development plans and timescales - v4

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ERA Element	Form / Functionality	Reporting (Simple)	Reporting (Detailed)	Summary Screen(s) (to incorporate SEER dashboard(s))	Notes
User roles and rights : Organisational roles	<input checked="" type="checkbox"/> 1				
User roles and rights : FoR roles	<input type="checkbox"/> 3				
Workflow	<input checked="" type="checkbox"/> 1				
ERA Researcher	<input checked="" type="checkbox"/> 1	<input checked="" type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 2	
• Import and export ERA-selected persons	<input checked="" type="checkbox"/> 1				
• Automatic generation of ERA Researcher records based on specified criteria	<input type="checkbox"/> 3				
ERA Research Output	<input checked="" type="checkbox"/> 1	<input checked="" type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 2	
• Import and export of ERA-selected outputs	<input checked="" type="checkbox"/> 1				UWA requires export
• Automatic generation of ERA Research Output records based on specified criteria	<input type="checkbox"/> 3				
• ERA Repository Development : ERA user access	<input checked="" type="checkbox"/> 1				
• ERA Repository Development : IP authenticated access	<input type="checkbox"/> 2				
• ERA Repository Development : Reporting		<input type="checkbox"/> 2			
• EID tagging export / import functionality					It is not expected that any customers require this functionality for ERA2015
ERA Applied Measures					It is not expected that any customers require this functionality for ERA2015
ERA Esteem Measures					It is not expected that any customers require this functionality for ERA2015
ERA Research Income					It is not expected that any customers require this functionality for ERA2015

Phase 1

 PUREPROD-1526 - Data cannot be retrieved due to an unexpected error.


- Delivered for October 2014 (5.1 / 4.20)

Phase 2

 PUREPROD-1654 - Data cannot be retrieved due to an unexpected error.

- Deliver for February 2015 (5.2 / 4.21)
- Current estimate : 8 weeks

Phase 3

 PUREPROD-1623 - Data cannot be retrieved due to an unexpected error.

- Enhancements (no delivery set)


Development plans and timescales v5

Development plans and timescales - v5

ERA Element	Form / Functionality	Reporting (Simple)	Reporting (Detailed)	Summary Screens : Part 1	Summary Screens : Part 2	Notes
User roles and rights	<input checked="" type="checkbox"/> 1					
• Organisational roles	<input checked="" type="checkbox"/> 1					
• FoR roles	<input type="checkbox"/> 3 / 4					
Workflow	<input checked="" type="checkbox"/> 1					
ERA Researcher	<input checked="" type="checkbox"/> 1	<input checked="" type="checkbox"/> 1	<input checked="" type="checkbox"/> 2	<input checked="" type="checkbox"/> 2 <ul style="list-style-type: none"> • ERA Researcher Summary • ERA Researcher s : Monitoring 	<input type="checkbox"/> 3 / 4 <ul style="list-style-type: none"> • Enhancements to ERA Researchers : Monitoring 	
• Import and export ERA-selected persons	<input checked="" type="checkbox"/> 1					
ERA Research Output	<input checked="" type="checkbox"/> 1	<input checked="" type="checkbox"/> 1	<input checked="" type="checkbox"/> 2	<input checked="" type="checkbox"/> 2 <ul style="list-style-type: none"> • ERA Research Outputs : Monitoring 	<input type="checkbox"/> 3 / 4 <ul style="list-style-type: none"> • Output summary stats : submission stats • Output summary stats : intra / interdisciplinary profile • Research Outputs : Peer Review : Access to Outputs • Research Outputs : FoR Re-assignment • Research Outputs : Low Volume Threshold 	
• Import and export of ERA-selected outputs	<input checked="" type="checkbox"/> 1					
• Automatic generation of ERA Research Output records based on specified criteria	<input type="checkbox"/> 3 / 4					


• ERA Repository Development : ERA user access	<input checked="" type="checkbox"/> 1					
• ERA Repository Development : IP authenticated access	<input checked="" type="checkbox"/> 2					
• ERA Repository Development : Reporting		<input type="checkbox"/> 2				
• EID tagging export / import functionality	<input type="checkbox"/> 4					
Additional summary screens				<input checked="" type="checkbox"/> 2 • ERA2015 Overview	<input type="checkbox"/> 3 / 4 • UoE Summary	
ERA Applied Measures						Functionality to be determined
ERA Esteem Measures						Functionality to be determined
ERA Research Income						Functionality to be determined
ERA XML file	<input type="checkbox"/> 4					

Phase 1

 PUREPROD-1526 - Data cannot be retrieved due to an unexpected error.

- Delivered for October 2014 (5.1 / 4.20)

Phase 2

 PUREPROD-1654 - Data cannot be retrieved due to an unexpected error.

- Delivered for February / March 2015 (5.2 / 4.21)

Phase 3








- Enhancements - ERA2018 preparation
- Concentrate on functionality required to begin ERA2018 preparations
- No delivery set - but scoping work will not begin until customers are LIVE

Phase 4

- Enhancements - ERA2018 preparation
- No delivery set, but development won't begin until after release of the ERA2018 documentation

ERA2015 General processes - workflows - and user access functionality

ERA2015 General processes, workflows, and user access functionality

Item	Date posted / updated	Notes
User roles / rights    Outline of the plans for delivering ERA user roles and rights	11 Aug 2014	
Phase 1 Process Flow : How ERA Researcher and ERA Research Output records will be created  	16 Jul 2014	Phase 3 will deliver the functionality to automatically create ERA content based on prescribed logic
Module navigation  	16 Jul 2014	Agreed not to deliver 'Assessment' layer until next assessment cycle (when there's more than 1 assessment to access). However, the mock-up of the left-hand navigation within the ERA2015 module may still be useful for visualisation purposes.
Workflow requirements	16 Jul 2014	Suggesting the following workflow states: <ul style="list-style-type: none"> • Entry in Progress • Checked • Confirmed
Generation of submission XML	16 Jul 2014	Not required in Phase 1, but will require the ability to export ERA Research Outputs in XML for UWA, and the whole submission via webservice for Monash

ERA2015 Module Documentation




ERA2015 Module Documentation

- [ERA Researchers](#)
- [ERA Research Outputs \(including portfolios\)](#)
- **Installing the ERA module**



ERA2015 - ERA Researchers



ERA2015 : ERA Researchers			
ERA RESEARCHERS	Release	Date posted / updated	Notes
ERA Researchers : Manually create and edit records 	5.1.0	6 Oct 2014	
ERA Researchers : Import records	5.1.0	26 Sept 2014	

ERA2015 - ERA Researchers - Import records

Import ERA Researchers

Item	Date posted / updated
ERA Researcher : Bulk creation of records by file import 	6 Oct 2014
ERA Researcher Import File 	26 Sept 2014

Guidance Notes

1.	An ERA Researcher record will be created for every individual included in the import file.
2.	The only required field is Employee ID .
3.	Error messages will be generated in Pure for each individual included in the import file that doesn't exist in Pure as a Person (i.e. for the ERA Researcher record to be created, the individual must first exist as a Person in Pure).
4.	The import function will include simple validation. The record will not be imported if: <ul style="list-style-type: none"> • the individual does not exist in Pure as a Person • any of the values input don't match the accepted values for the field (see below) • any of the FoR codes input don't match the ERA list • the total FoR % apportionment doesn't add up to 100% • any of the FoR % apportionments is less than 10% • the Employment status = Employed, and an FTE is not provided
5.	Where FoR codes and % apportionments are not set in the import file, the ERA Researcher record created will be default populated with the Discipline Assignment(s) as per the Pure Person record (where populated).
6.	Where Workflow is not set in the import file, the ERA Researcher record created will be placed in the 'ERA Entry in Progress' workflow status.
7.	Where Employment status, Researcher function, and/or Employment level are not set in the import file, the ERA Researcher record created will be placed in the 'Under review' Eligibility status.
8.	Following import, the ERA-specific fields will be editable on the ERA Researcher form itself.
9.	If subsequent imports are done, any new records will be created and any existing records will not be updated (thereby preserving any manual changes made directly in the ERA module in Pure).
1 0.	Last Name and First Name are in the import file for information only (to help identify records by sight). Name details on the ERA Researcher record will be populated from the associated Pure Person record, regardless of the values input here.
1 1.	To use the import file: <ul style="list-style-type: none"> • keep the column headers as they are input - DO NOT EDIT • remove the exemplar data in rows 2 - 4 • ensure that when inputting FoR codes and Employment Level, that, where applicable, the lead zero is displayed (format cell as Text) • FoR %s should be input as integers or decimals, e.g. 50 or 0.50 but must be consistent for each row
12	When the import file is updated with the desired data, create a new File handle under Master data and upload the import file. In the Usage dropdown you must select "ERA2015" To run the job you must setup a new cron job under Administrator -> Jobs -> Cron job scheduling in the dropdown in the bottom under Other you must select the job called ERA2015 Researcher Import Job You must then configure the job clicking the button Edit configuration button you must then select the correct filehandle in the dropdown.

VALUES

For the fields listed below, either the code or the name can be input (but the name must be spelled exactly the same for it to be accepted (using the code is recommended))

Employment status	
1	Employed
2	Employed on a casual basis
3	Other status

Researcher function	
1	Research only
2	Teaching and research
3	Other function

Employment Level	
013	Level E
014	Level D
042	Level C
066	Level B
100	Level A
000	Other

Workflow	
1	Entry in Progress
2	Checked
3	Confirmed



ERA2015 - ERA Research Outputs



ERA2015 : ERA Research Outputs			
ERA RESEARCH OUTPUTS	Release	Date posted / updated	Notes
ERA Research Outputs : Manual creation and editing of records 	5.1.0	6 Oct 2014	
ERA Research Outputs : Import records	5.1.0	1 Oct 2014	
Mappings: <ul style="list-style-type: none"> • Type : Pure Research Output type to ERA Research Output type  • Fields : Pure Research Output fields to ERA Research Output fields  	5.1.0	30 Sept 2014	
ERA Research Outputs : Access to Outputs section 	5.1.0	6 Oct 2014	
ERA Research Outputs : Ensuring ERA Research Outputs are correctly attributed to ERA Journals / Conferences / Publishers 	5.1.0	6 Oct 2014	
ERA Portfolios : Manual creation and editing of records 	5.1.0	15 Oct 2014	

ERA2015 - ERA Research Outputs - Import records


Import ERA Research Outputs

Item	Date posted / updated
ERA Research Outputs : Bulk creation of records by file import 	6 Oct 2014
ERA Research Output Import File 	1 Oct 2014

Guidance Notes

1. An ERA Research Output record will be created for every output included in the import file.
2. The only required fields are:
 - EITHER **Pure Research Output ID** OR **Other Research Output ID** (see (3) below)
 - **ERA Output Type**
 - **Non-Traditional Output Category** (where applicable)
3. Identifiers:
 - Each imported file must use EITHER the Pure Research Output ID OR the Other Research Output ID for all records. If there is a mixed economy of IDs, no records will import (if you have a mixed economy, just do two separate imports).
 - The **Other Research Output ID** is the **primary Source ID** from the Pure Research Output record (e.g. if imported from Scopus, this will be the Scopus ID; if imported from an in-house system, this will be the in-house ID).

External publication ids

[Publication import id](#) 
Scopus: 77952763619

[Additional source ids](#)
PubMed: 20194713 Edit -

[Add additional source...](#)
4. Error messages will be generated in Pure for each output included in the import file that doesn't exist in Pure as Research Output (i.e. for the ERA Research Output record to be created, the output must first exist as a Research Output in Pure).

5.	<p>The import function includes simple validation.</p> <p>The record will not be imported if:</p> <ul style="list-style-type: none"> • the output does not exist in Pure as a Research Output • the output is not associated with at least 1 ERA Researcher • the output was not published during the ERA2015 Reference Period (1 Jan 2008 - 31 Dec 2013) • any of the values input don't match the accepted values for the field (see below) • the Output Type does not match the Pure Research Output type, as per the agreed ERA mapping (e.g. Journal Article to ERA Book) (see Type mapping) (see exception noted in (8) below) • the output has been assigned to a non-traditional ERA Output Type (5a-5e), but no Non-Traditional Output Category has been provided • the output has been assigned to a traditional ERA Output Type (1-4), but a Non-Traditional Output Category has been provided • any of the FoR codes input don't match the ERA list • the total FoR % apportionment doesn't add up to 100% • any of the FoR % apportionments is less than 20% • the output has been assigned to a 'Other' non-traditional ERA Output Type (5a-5d), but has been assigned to a Citation discipline in the Discipline Assignment (see the ERA2015 Discipline Matrix) • any of the Nominated Peer Review Disciplines is a Citation Discipline (see the ERA2015 Discipline Matrix) • the output has been flagged as Sensitive, but the Type of Sensitivity and/or the Sensitive Handling Note has not been provided <p>The record will be imported, but a warning will be generated, if:</p> <ul style="list-style-type: none"> • the output is not yet published (according to the Publication State of the associated Pure Research Output record) • a Research Statement has been provided for a Traditional output (the Research Statement will not import) • the output is flagged as Sensitive, but has not been nominated for Peer Review (Sensitive flag and any associated data (i.e. Type of Sensitivity / Sensitive Handling Note) will not import)
6.	Where FoR codes and % apportionments are not set in the import file, the ERA Research Output record created will be default populated with the Discipline Assignment(s) as per the Pure Research Output record (where populated).
7.	Where Workflow is not set in the import file, the ERA Research Output record created will be placed in the 'ERA Entry in Progress' workflow status.
8.	Where the associated Pure Journal Article is attached to a Journal that is not listed in the official ERA Journal list, it is possible to assign such an output to an ERA Non-Traditional Output category. This is an exception to the note above.
9.	Note that the Research Statement and Sensitive Handling Note fields do not support mark-up; only plain text will be imported.
10.	Following import, the ERA-specific fields will be editable on the ERA Research Output form itself.
11.	Individual portfolio items should be included in the import file. Once the ERA Research Output records are created for the individual portfolio items, the user can then group them together in a single ERA Portfolio as per the process described in the ERA Portfolios User Guide .
12.	If subsequent imports are done, any new records will be created and any existing records will not be updated (thereby preserving any manual changes made directly in the ERA module in Pure).
13.	Output Title and Author(s) are in the import file for information only (to help identify records by sight). These details on the ERA Research Output record will be populated from the associated Pure Research Output record, regardless of the values input here.
14.	<p>To use the import file:</p> <ul style="list-style-type: none"> • keep the column headers as they are input - DO NOT EDIT • remove the exemplar data in rows 2 - 4 • ensure that when inputting FoR codes, that, where applicable, the lead zero is displayed (format cell as Text) • FoR %s should be input as integers (e.g. 50, not 0.50)

VALUES

For the fields listed below, either the code or the name can be input (but the name must be spelled exactly the same for it to be accepted (using the code is recommended))

ERA Output type		Non-Traditional Output Category	
1	Book		
2	Book chapter		
3	Journal article		
4	Conference publication		
5a	Original creative work	1	Visual art work
		2	Design / architectural work
		3	Written work
		4	5a Other
5b	Live performance	1	Music
		2	Play
		3	Dance
		4	5b Other
5c	Recorded or rendered work	1	Film, video
		2	Performance
		3	Inter-arts
		4	Digital creative work
		5	Website / web exhibition
		6	5c Other
5d	Curated exhibition or event	1	Web-based exhibition work
		2	Exhibition / event
		3	Festival
		4	5d Other
5e	Research report for an external body	1	Public sector
		2	Industry
		3	Not for profit
		4	5e Other

Type of Sensitivity	
1	Commercially sensitive
2	Culturally sensitive
3	Non public

Workflow	
1	Entry in Progress
2	Checked
3	Confirmed

ERA2015 - Installing the ERA module



ERA2015 : Installing the ERA module

Due to restrictions provided by HERDC, each university has to seek permission to be able to load in the official journal, conference, and publisher list into Pure. When you have that you need to setup a job for each type and add the corresponding spreadsheet. They need to be modified slightly to fit the format used in Pure. The format is described in the corresponding sections below. Note that only one sheet in each document is allowed, otherwise the jobs will fail.

Journals

The ERA Journal list is loaded in, via the job **ERA2015 Journal synchronisation**. See an example of the format here: [Journal template](#)

For customers with existing Journal data in Pure, the job tries to locate any duplicates and merge the two records together, then flagging the merged Journal record as an 'official' ERA2015 Journal, taking the Journal name and ISSN(s) from the ERA Journal list. The following logic is performed for each ERA Journal imported:

1. It finds existing journals with the same title (ignoring casing)
2. If any duplicate journal by title is found, it looks at the ISSN
3. If no ISSN is available on the existing journal record, the records are merged
4. If the ISSN (or all of the ISSNs (if multiple input)) on the existing journal record is also listed against the ERA Journal, the records are merged
5. If any ISSNs on the existing journal record are not listed against the ERA Journal, the records are not merged
6. After the title matching has been performed the same procedure is performed searching for ISSN, where the title is ignored. Here step 4 and 5 is performed. (This is only performed from 5.1.1)

After this merge function is complete, the status of the job is logged. You are advised to check this log to identify any further merges that may need to be dealt with manually. Go to Administrator -> Jobs -> Job log, and select the job "ERA2015 Journal synchronisation". Then click on warnings to see all those that have been identified as potential duplicates but were not merged due to the logic described above. The following types of warnings are logged

- If a journal with the same name was found, but was not automatically merged due to inconsistent ISSN(s), the following is logged:
 - Found another journal with the same title, you probably want to merge these: <the duplicate journal>
- If a journal with the same ISSN was not found, but was not automatically merged due to inconsistent titles or ISSNs, the following is logged:
 - Found another journal with the same ISSN, you probably want to merge these: <the duplicate journal>

For each journal logged, the Pure ID of the journal is available, together with the title. It is recommended to use the Journal ID when searching for the Journal record (using the quick search in the top right corner). If you are satisfied that an existing journal is the same as an 'official' ERA2015 Journal, you can merge them manually from within the Journal editor, using the merge tab.

Conference series

The ERA Conference series list is loaded in, via the job **ERA2015 Conference Series synchronisation**. See an example of the format here: [Conference template](#)

For customers with existing Event data in Pure, the job tries to locate any duplicates and merge the two records together, then flagging the merged Event record as an 'official' ERA2015 Conference taking the Conference name from the ERA Conference list. The following logic is performed for each ERA Conference imported:

1. It finds existing Event with the same name (ignoring casing)
2. If any duplicate Event by name is found, it is merged into the official ERA Conference

Publishers

The ERA Publisher list is loaded in, via the job **ERA2015 Publisher synchronisation**. See an example of the format here: [Publisher template](#)

For customers with existing Publisher data in Pure, the job tries to locate any duplicates and merge the two records together, then flagging the merged Publisher record as an 'official' ERA2015 Publisher taking the Publisher name from the ERA Conference list. The following logic is performed for each ERA Publisher imported:

1. It finds existing Publisher with the same name (ignoring casing)
2. If any duplicate Publisher by name is found, it is merged into the official ERA Publisher

General import information

These synchronisation jobs should only be scheduled to run once, by selecting manual as the scheduling interval when setting up the job, and then after it has been configured start the job. However, they can all be run additional times. Each time the jobs are run, the duplicate check is performed, and records are automatically merged if existing records are found using the criteria described above.

When all the jobs have completed, it is advised to go through all the warnings to see if any manual merging of records is required. This can also be used to check whether you have created the correct format for the excel file.

If any errors were encountered, try re-running the job, and if this does not solve the problem contact Pure support.

The Journal job sometimes produces errors when merging, which can be resolved by rerunning the job. The fastest way to do this is to click on the error count to show all the errors, and then click on the button "Start job based on these criterias" as shown in the screenshot below:














Redo this until the error count is 0 or it does not change based on an additional run

When all the official Journals, Conference Series, and Publishers have been loaded in, the ERA module is ready to be used. It is advised to start out by loading in ERA Researchers and ERA Research Outputs using the jobs designed for this, see [ERA2015 - ERA Researchers - Import records](#) and [ERA2015 - ERA Research Outputs - Import records](#) for further information.

ERA2015 Output Access Requirements - Repository



ERA Output Access Requirements		
Item	Date posted / updated	Notes
ERA2015 : Pure ERA Repository functionality   Draft outline of the plans for delivering a ERA2015 Repository in Pure	5 Aug 2014	
ERA Repository mockups: <ul style="list-style-type: none"> • Journal article   • Non-traditional output   • Portfolio    	5 Aug 2014	
Summary of access requirements for outputs nominated for Peer Review  	4 Aug 2014	

ERA2015 Submission content and summary

ERA2015 Submission content and summary

Item	Date posted / updated	Notes
Data structures: <ul style="list-style-type: none">• Institution submission  • Institution  	16 Jul 2014	
Data description: <ul style="list-style-type: none">• Institution  	16 Jul 2014	


















ERA2015 Submission Forms



ERA2015 Submission Forms











- [ERA Researchers](#)
- [ERA Research Outputs](#)









ERA2015 ERA Researchers

ERA Researchers		
Item	Date posted / updated	Notes
DATA DESCRIPTION AND STRUCTURE		
<ul style="list-style-type: none"> ERA Researcher eligibility process flow and output submission requirements   ERA Researcher data structure   ERA Researcher data description   	14 Jul 2014	
MAPPING		
<ul style="list-style-type: none"> Mapping of ERA Researcher fields to PURE Person fields   Updated Population of 'Other Name(s)' field    	26 Sept 2014	
FORM SPECIFICATION		
ERA Researcher form specification <ul style="list-style-type: none"> Mock up   	14 Jul 2014	
PROCESS / WORKFLOWS		
Create ERA Researcher Record <ul style="list-style-type: none"> Option A : Manual creation of ERA Researcher record   ERA Researcher import file   	14 Jul 2014	<ul style="list-style-type: none"> In the first instance, Option A will be delivered
SUMMARY SCREEN(S)		
Summary screen(s) specification(s) <ul style="list-style-type: none"> Mock up(s) SEER Dashboards	To be completed	
REPORTING		

ERA2015 ERA Research Outputs


























ERA Research Outputs

Item	Date posted / updated	Notes
DATA STRUCTURE		
<ul style="list-style-type: none"> • ERA Research Outputs Data Structure  	16 Jul 2014	
DATA DESCRIPTION		
<p>ERA Research Outputs Data Descriptions:</p> <ul style="list-style-type: none"> • Traditional Research Outputs   • Non-Traditional Research Outputs   • Portfolio   	19 Aug 2014	
MAPPING		
<p>Output mapping   </p> <ul style="list-style-type: none"> • PURE Research Output type to ERA Output type mapping • Mapping of ERA Output fields to PURE Research Output fields (needs further input) <ul style="list-style-type: none"> ◦ Traditional outputs ◦ Non-traditional outputs (including portfolios) 	26 Sept 2014	
FORM SPECIFICATION		

<p>ERA Research Output form specification</p> <ul style="list-style-type: none"> • Mockups: <ul style="list-style-type: none"> ◦ ERA Research Output - Overall page layout   ◦ Research Output metadata <ul style="list-style-type: none"> ▪ Book   ▪ Book chapter   ▪ Journal article   ▪ Conference publication   ▪ Non-traditional output   ◦ Portfolio   ◦ Eligibility   ◦ Creator(s)   ◦ Discipline Assignment   ◦ Nominated Peer Review Discipline(s)   ◦ Citations   ◦ Access to output   <ul style="list-style-type: none"> ▪ ERA Research Output document error messages    ◦ Sensitivity   ◦ Institution Unit(s)   • ERA Research Output - (parent) Portfolio   	<p>19 Aug 2014</p>	
PROCESS / WORKFLOWS		
<p>Create ERA Research Output Record</p> <ul style="list-style-type: none"> • Option E : Manual creation (supported by import job)  • Create ERA Portfolio record  • ERA Research Output import file   • Output access requirements 	<p>24 Jul 2014</p>	
SUMMARY SCREEN(S)		
<p>Summary screen(s) specification(s)</p> <ul style="list-style-type: none"> • Mock up(s) <p>SEER Dashboards</p>	<p>To be completed</p>	
EID Tagging		
<p>Will not be delivered for ERA2015 as no customers require this functionality at this stage</p>		
REPORTING		



ERA2015 Summary Screens

ERA2015 Summary Screens

Item	Date posted / updated	Notes
Proposals for ERA2015 Summary Screens  	27 Aug 2014	DRAFT!!
<p>Screen Mockups</p> <ul style="list-style-type: none"> • ERA2015 Overview (homescreen + navigation)   • UoE Summary   • ERA Researcher <ul style="list-style-type: none"> ◦ ERA Researcher summary   ◦ ERA Researchers Monitoring   • ERA Research Outputs summary <ul style="list-style-type: none"> ◦ ERA Research Outputs Monitoring   ◦ Output summary stats <ul style="list-style-type: none"> ▪ Submission stats   ▪ Intra / interdisciplinary profile   ◦ Peer Review <ul style="list-style-type: none"> ▪ Summary   ▪ Access to Outputs   ▪ Selection of Outputs   ◦ FoR Re-assignment <ul style="list-style-type: none"> ▪ From ERA Journal and Conference Lists   ▪ From Associated Pure Research Outputs records   ◦ Low Volume Threshold   ◦ Portfolio Summary   (agreed to deliver via filterable lists) 	27 Aug 2014	DRAFT!!

HERDC Development Plans and Timescales

HERDC Development Plans and Timescales

- [Version 1 : 19 Jan 2015](#)  (updated Phase 2 plans : 1 Apr 2015) 


- [ERA and HERDC Module Development diagram](#)  

HERDC Development plans and timescales v1

HERDC Development plans and timescales - v1

HERDC Element	Phase	Notes
Define HERDC eligible outputs and automatically create a HERDC count for eligible outputs	<input checked="" type="checkbox"/> 1	
Calculate and display HERDC counts (part 1) - all but Book Chapters	<input checked="" type="checkbox"/> 1	
Calculate and display HERDC counts (part 2) - Book Chapters	<input type="checkbox"/> 2	
Dashboard / summary screen	<input checked="" type="checkbox"/> 1	
Capture HERDC status on output	<input type="checkbox"/> 2	
Offer functionality to overwrite 'Total number of authors' for any output	<input type="checkbox"/> 2	
HERDC reporting <ul style="list-style-type: none"> • ability to report on HERDC counts against individuals and outputs • ability to report / filter on HERDC status 	<input type="checkbox"/> 2	
HERDC role(s)	<input checked="" type="checkbox"/> 1	HERDC Administrator has been delivered so far
Bulk actions (e.g. move content from 1 HERDC state to another)	<input type="checkbox"/> 2	
Create means to identify 'duplicate' outputs (likely to be delivered outwith HERDC-specific functionality)	<input type="checkbox"/> 2	
Accommodate expected changes to calculations relating to collaborations	<input type="checkbox"/> 2	

Phase 1

 PUREPROD-2728 - Data cannot be retrieved due to an unexpected error.

- Delivered for March 2015 (5.2.1 / 4.21.1)

Phase 2

- Deliver for February 2016 (5.5)
- Requires unification of publication datamodel first (or at least the unification of relevant elements (namely, the capture of Book Chapters))