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ERA2023



ERA2023 Module development
Development Plans and Timescales

ERA2023 released functionality
ERA2023 module documentation

ERA2023 Reference periods and census date
Reference periods and census date

ERA2023 related improvement tickets
ERA2023 related improvement tickets

ERA2023 Related release notes
ERA2023 related release notes

ERA Working Group
ERA Working Group and meeting notes

ERA2021 Reference periods and census date

Data type	Reference period	Years
Research Outputs	1 January 2016 – 31 December 2021	6
Research Income	1 January 2019 – 31 December 2021	3
Staff Census Date	As of 31 March 2022	

Reference: <https://www.arc.gov.au/excellence-research-australia/era-2023>

ERA2023 module development plan



Phase overview

The development of the ERA submission has been scheduled for 4 phases. Phases 1 and 2 are already released, whereas the remaining 2 phases are scheduled.

Upcoming phase (phase 3): 5.24.1, 5.24.2, 5.24.3, 5.24.4, 5.25.0

Last phase (phase 4): 5.25.1, 5.25.2, 5.25.3, 5.25.4

Final fixes: 5.25.4 – no development, only reserved for potential quick fixes

Development on ERA will be added to both minor and major versions of Pure

[Phase 1](#)

[Phase 2](#)

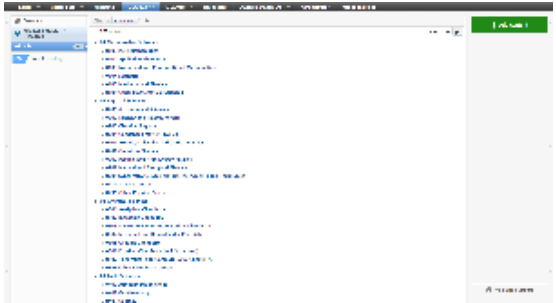
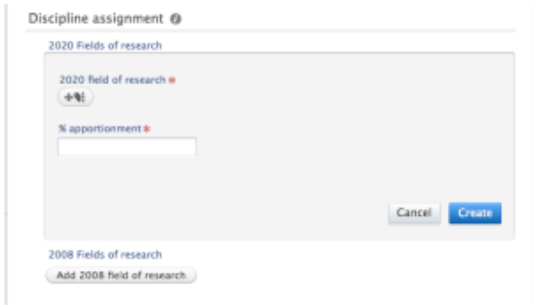
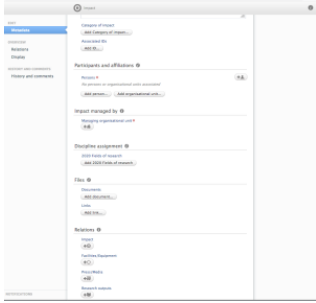
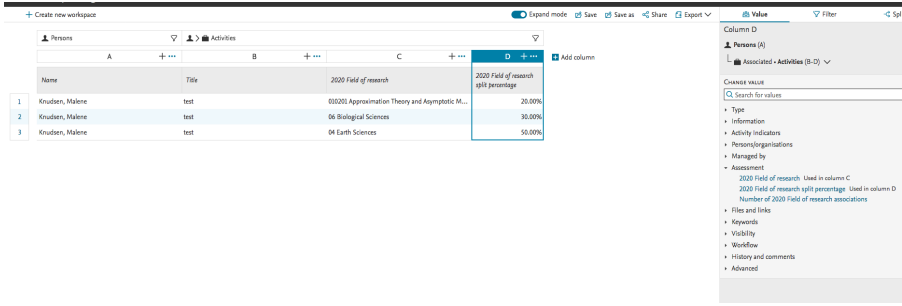
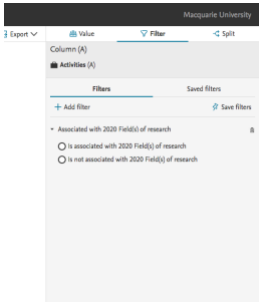
[Phase 3](#)

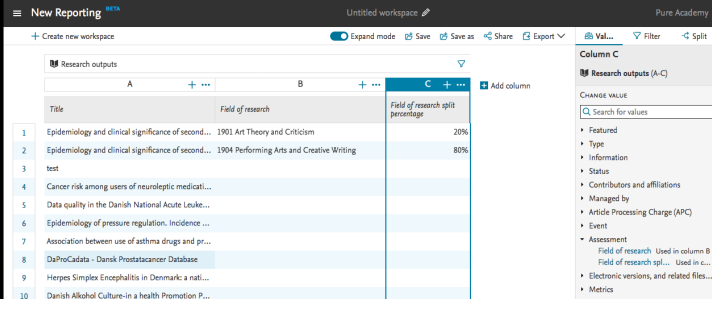
[Phase 4](#)

Notice

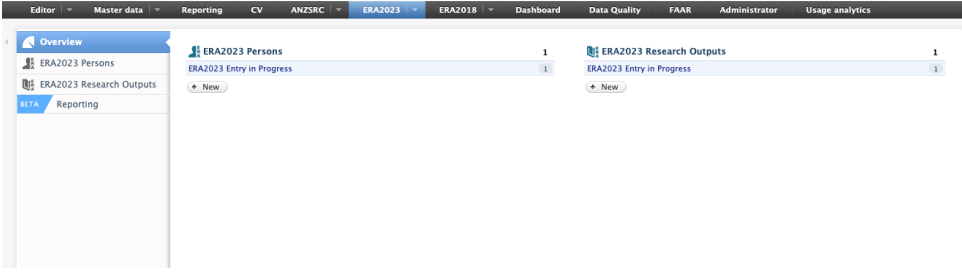
All versions mentioned are estimated release dates. Some features might require more time and therefore have a later release date, whereas other features will be added sooner if time permits.

Phase 1

Item	Description	Screenshot	Planned release																				
ERA2023 Tab	ERA2023 tab created containing "2020 Fields of Research" - These FoR comes pre-populated and will be displayed at 2nd and 4th level.		<div style="background-color: #28a745; color: white; padding: 5px; text-align: center; border-radius: 5px;">RELEASED : 5.19.0</div>																				
"2020 Field of Research" added to ERA related content	<p>All ERA related content (Person, Research Output, Awards, Activities, Journals, Publisher) now has the option of being assigned to "2020 Field of Research", alongside of indicating % apportionment. Notice you can appoint at 2, 4 and 6 level</p> <p>Notice the "2008 Field of Research" is still available</p>		<div style="background-color: #28a745; color: white; padding: 5px; text-align: center; border-radius: 5px;">RELEASED : 5.19.0</div>																				
"2020 Field of Research" added to non-ERA related content as Discipline assignment	All content types now have the option of capturing "2020 Field of Research" as a discipline assignment		<div style="background-color: #28a745; color: white; padding: 5px; text-align: center; border-radius: 5px;">RELEASED : 5.19.0</div>																				
"2020 Field of Research" + "% apportionment" made reportable	The ability to report on 2020 Field of Research (FoR) and Field of Research split percentage has been added to the report module	 <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th></th> <th>Name</th> <th>Title</th> <th>2020 Field of research</th> <th>2020 Field of research split percentage</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Knudsen, Malene</td> <td>text</td> <td>05020 Approximation Theory and Asymptotic M...</td> <td>20.00%</td> </tr> <tr> <td>2</td> <td>Knudsen, Malene</td> <td>text</td> <td>06 Biological Sciences</td> <td>30.00%</td> </tr> <tr> <td>3</td> <td>Knudsen, Malene</td> <td>text</td> <td>04 Earth Sciences</td> <td>50.00%</td> </tr> </tbody> </table>		Name	Title	2020 Field of research	2020 Field of research split percentage	1	Knudsen, Malene	text	05020 Approximation Theory and Asymptotic M...	20.00%	2	Knudsen, Malene	text	06 Biological Sciences	30.00%	3	Knudsen, Malene	text	04 Earth Sciences	50.00%	<div style="background-color: #28a745; color: white; padding: 5px; text-align: center; border-radius: 5px;">RELEASED : 5.19.0</div>
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3	Knudsen, Malene	text	04 Earth Sciences	50.00%																			
Filter to locate content without "2020 Field of Research"	<p>To locate content that is missing 2020 Field of research - a new filter has been added to the report module.</p> <p>"Associated with 2020 Field of research"</p>		<div style="background-color: #28a745; color: white; padding: 5px; text-align: center; border-radius: 5px;">RELEASED : 5.19.0</div>																				

<p>Import "2020 Field of Research" has been added to Pure, and can be used for discipline assignments on all content in Pure</p>	<p>The new "2020 Fields of Research" has been added to Pure, and can be used for discipline assignments on all content in Pure</p>																																																		
<p>Additional reporting options on Field of Research</p>	<p>The ability to report on 2008 Field of Research (FoR) and Field of Research split percentage has been added to the report module. As a starting point, this has been added to reporting on Research Output. In later releases, the ability will be added to the remaining ERA related content types.</p>	 <table border="1" data-bbox="402 323 873 630"> <thead> <tr> <th></th> <th>A</th> <th>B</th> <th>C</th> </tr> <tr> <th></th> <th>Title</th> <th>Field of research</th> <th>Field of research split percentage</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Epidemiology and clinical significance of second...</td> <td>1901 Art Theory and Criticism</td> <td>20%</td> </tr> <tr> <td>2</td> <td>Epidemiology and clinical significance of second...</td> <td>1904 Performing Arts and Creative Writing</td> <td>80%</td> </tr> <tr> <td>3</td> <td>test</td> <td></td> <td></td> </tr> <tr> <td>4</td> <td>Cancer risk among users of neuroleptic medicati...</td> <td></td> <td></td> </tr> <tr> <td>5</td> <td>Data quality in the Danish National Acute Leuke...</td> <td></td> <td></td> </tr> <tr> <td>6</td> <td>Epidemiology of pressure regulation. Incidence ...</td> <td></td> <td></td> </tr> <tr> <td>7</td> <td>Association between use of asthma drugs and pr...</td> <td></td> <td></td> </tr> <tr> <td>8</td> <td>DaProCadata - Dansk Prostatacancer Database</td> <td></td> <td></td> </tr> <tr> <td>9</td> <td>Herpes Simplex Encephalitis in Denmark: a nati...</td> <td></td> <td></td> </tr> <tr> <td>10</td> <td>Danish Alcohol Culture-in a health Promotion P...</td> <td></td> <td></td> </tr> </tbody> </table>		A	B	C		Title	Field of research	Field of research split percentage	1	Epidemiology and clinical significance of second...	1901 Art Theory and Criticism	20%	2	Epidemiology and clinical significance of second...	1904 Performing Arts and Creative Writing	80%	3	test			4	Cancer risk among users of neuroleptic medicati...			5	Data quality in the Danish National Acute Leuke...			6	Epidemiology of pressure regulation. Incidence ...			7	Association between use of asthma drugs and pr...			8	DaProCadata - Dansk Prostatacancer Database			9	Herpes Simplex Encephalitis in Denmark: a nati...			10	Danish Alcohol Culture-in a health Promotion P...			<p>RELEASED : 5.16.0</p>
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Phase 2

Item	Description	Screenshot	Planned release
ERA 2023 module	<p>ERA 2023 module, which can be enabled by request. The module contains ERA Persons and ERA Outputs to which you can add only FoR codes.</p> <p>This will allow you to start looking at the pool of Persons and Outputs that should be considered for the ERA 2023 exercise. We have also enabled reporting on these new content types such that you can create reports to help get an overview of the pool of ERA Persons and ERA Outputs.</p>	 <p>The screenshot shows a web application interface for the ERA 2023 module. At the top, there is a navigation bar with tabs for 'Editor', 'Master data', 'Reporting', 'CV', 'ANZSRC', 'ERA2023', 'ERA2018', 'Dashboard', 'Data Quality', 'FAAR', 'Administrator', and 'Usage analytics'. The 'ERA2023' tab is selected. Below the navigation bar, there is a left-hand menu with 'Overview' selected, and sub-items for 'ERA2023 Persons', 'ERA2023 Research Outputs', and 'Reporting'. The main content area displays two summary cards: 'ERA2023 Persons' and 'ERA2023 Research Outputs'. Each card shows a count of '1' and a link to 'ERA2023 Entry in Progress'. There are also '+ New' buttons for each card.</p>	<p>RELEASED : 5.23.0</p>

Phase 3

Updated July 4th, 2002





Notice






All versions mentioned are estimated release dates. Some features might require more time and therefore have a later release date, whereas other features will be added sooner if time permits. All references to Jira tickets are for internal Elsevier usage and are therefore not accessible.





5.24.1 Released






5.24.1 Planned






Phase 1: 5.24.1 5.25.0 (July 2022 October 2022)




Item	Description	Estimated release	Note
Discipline checking state on the ERA content	<p>It should be possible the have a new state on the ERA content and make this a classification such that clients have an option to add to the state. The default values should be:</p> <ul style="list-style-type: none"> • Not reviewed • Initial review • Reviewed <p>Editors</p> <p>This should be placed in the same section as the discipline assignment in the editor and it should be at the very top of that section.</p> <p>Content list filters</p> <p>It should be possible to filter on this classification, such that users can find all content in one or more of these states.</p> <p>Reporting</p> <p>It should also be possible to include this state in reporting, also with filters.</p> <div style="border: 1px solid orange; padding: 10px; margin-top: 10px;">  PUREDEV-25987 - Data cannot be retrieved due to an unexpected error. </div>	<p>RELEASED: 5.24.1-2</p> <p>(Medio July)</p>	
Note field on FoR assignment	<p>We need a new text input field on the FoR discipline assignment for the ERA content. It should be shown below the review status field.</p> <p>Reporting</p> <p>It should be possible to include this field in the reporting module.</p> <p>Filter</p> <p>It should be possible to filter content on to those that either have data in this field or those that don't.</p> <div style="border: 1px solid orange; padding: 10px; margin-top: 10px;">  PUREDEV-25993 - Data cannot be retrieved due to an unexpected error. </div>	<p>RELEASED: 5.24.1-2</p> <p>(Medio July)</p>	

<p>Update ERA person with FoR from Person</p>	<p>When creating a new ERA researcher the FoR 2020 codes from the Person, should be applied to the ERA researcher.</p> <p>Bulk upload</p> <p>This should also be the case when doing the bulk upload, such that if no FoR is specified in the spreadsheet, then the FoR on the persons is being used if there are any.</p> <div data-bbox="428 302 1190 472" style="border: 1px solid orange; padding: 10px; margin-top: 10px;">  PUREDEV-25934 - Data cannot be retrieved due to an unexpected error. </div>	<p style="background-color: #2e8b57; color: white; padding: 2px 5px; border-radius: 3px;">RELEASED: 5.24.1-2</p> <p>(Medio July)</p>	
<p>Update ERA content using the bulk upload files</p>	<p>It should be possible to update the ERA content in Pure when running the bulk upload job. Therefore, if a person or output mentioned on the list isn't already created in the ERA module, the job should just function as before.</p> <p>If the person or output is already present, then we should update the ERA content with the information from the sheet, overwriting any information that is already present in Pure.</p> <div data-bbox="428 636 1190 806" style="border: 1px solid orange; padding: 10px; margin-top: 10px;">  PUREDEV-25983 - Data cannot be retrieved due to an unexpected error. </div>	<p style="background-color: #2e8b57; color: white; padding: 2px 5px; border-radius: 3px;">RELEASED: 5.24.1-2</p> <p>(Medio July)</p>	
<p>ERA administration page</p>	<p>We need an ERA2023 admin page, similar to what we had for ERA2018. It should be possible to upload a new mapping file, and this should also serve as the place to capture specific settings for the ERA2023 module.</p> <div data-bbox="428 905 1190 1075" style="border: 1px solid orange; padding: 10px; margin-top: 10px;">  PUREDEV-25770 - Data cannot be retrieved due to an unexpected error. </div>	<p style="background-color: #2e8b57; color: white; padding: 2px 5px; border-radius: 3px;">RELEASED: 5.24.2</p> <p>(Primo August)</p>	
<p>Output mapping</p>	<p>This is already in Pure, but hidden. It will be available on the ERA Admin page.</p>	<p style="background-color: #2e8b57; color: white; padding: 2px 5px; border-radius: 3px;">RELEASED: 5.24.2</p> <p>(Primo August)</p>	
<p>Report on the apportioned count of outputs</p>	<p>We need to be able to calculate the apportioned count of outputs per FoR code assigned to the output.</p> <p>Each output has a weight of 1, except for books that have a weight of 5. The apportionment is calculated as follows: weight x FoR %</p> <p>We should also be able to roll up the apportionment for all 4 and 6 digits FoR codes, to the 2 digits FoR codes. As an example, from Appendix C of the Guides:</p> <div data-bbox="428 1451 1211 1535" style="border: 1px solid orange; padding: 10px; margin-top: 10px;">  This will only be available for administrators from 5.24.2, for other users, this will be shown as 0. We will be expanding this for other roles later. </div> <div data-bbox="428 1598 1190 1768" style="border: 1px solid orange; padding: 10px; margin-top: 10px;">  PUREDEV-25232 - Data cannot be retrieved due to an unexpected error. </div>	<p style="background-color: #2e8b57; color: white; padding: 2px 5px; border-radius: 3px;">RELEASED: 5.24.2</p> <p>(Primo August)</p>	

<p>Unlock all previous synched /locked ERA journals/Publishers /Conferences</p>	<p>We need to make sure that the old ERA journals, conferences and publishers are no longer synched and therefore locked. This will enable users to modify the content that was previously locked due to the ERA synchronisation.</p> <div data-bbox="428 260 1190 430" style="border: 1px solid orange; padding: 10px; margin: 10px 0;">  PUREDEV-25795 - Data cannot be retrieved due to an unexpected error. </div>	<p style="background-color: #008000; color: white; padding: 2px; text-align: center;">RELEASED: 5.24.2</p> <p>(Primo August)</p>	
<p>Updates to the FoR template - Outputs that are required based on the FoR</p>	<p>Update the FoR with information about Low volume threshold etc.</p> <p>We need to update the FoR codes with information from the attached spreadsheet. This should only be applied if the client has the ERA2023 module.</p> <p>Design</p> <p>Screenshot from ERA2018 The Cluster, is renamed to Committee</p> <p>When this is implemented, we also need to look at the ERA outputs, where we now can show the hidden information based on the information in the FoR, such as peer review etc.</p> <p>Additions</p> <p>We should add two new fields:</p> <ul style="list-style-type: none"> Peer review discipline yes/no Other NTRO Assesseble yes/no <p>The peer review should be true, if one of the columns F-K is yes The Other NTRO Assesseble should be true if one of the columns P is yes</p> <div data-bbox="428 961 1190 1131" style="border: 1px solid orange; padding: 10px; margin: 10px 0;">  PUREDEV-25229 - Data cannot be retrieved due to an unexpected error. </div>	<p style="background-color: #008000; color: white; padding: 2px; text-align: center;">RELEASED: 5.24.2</p> <p>(Primo August)</p>	
<p>Research income</p>	<p>As an administrator, I can bulk upload Research income data using an Excel sheet, where I can specify all the FOR assignments per year that I need. As a reporting user, I can report on Research Income and I can see the data existing in Pure, such as the total amount per Research income category and the total amount per year. As an ERA Editor, I can manually enter Research Income data using the editor in Pure, and the editor flags a validation error if the total apportionment isn't 100% across the FOR codes per year.</p> <div data-bbox="428 1297 1190 1467" style="border: 1px solid orange; padding: 10px; margin: 10px 0;">  PUREDEV-23511 - Data cannot be retrieved due to an unexpected error. </div>	<p style="background-color: #008000; color: white; padding: 2px; text-align: center;">RELEASED: 5.24.2</p> <p>(Primo August)</p>	
<p>ERA Roles, remove create and delete from the FoR editor and FoR super editor</p>	<p>ERA/ANZSRC Editors should not be able to create or delete ERA content, such as persons, outputs and portfolios.</p> <div data-bbox="428 1549 1190 1719" style="border: 1px solid orange; padding: 10px; margin: 10px 0;">  PUREDEV-26173 - Data cannot be retrieved due to an unexpected error. </div>	<p style="background-color: #FFA500; padding: 2px; text-align: center;">5.24.2</p> <p>Postponed to</p> <p style="background-color: #FFA500; padding: 2px; text-align: center;">5.24.3</p> <p>(Primo September)</p>	

<p>Create validation on FoR apportionment for ERA research outputs</p>	<p>It should not be possible to assign an apportionment lower than 20% for a given FoR code on an ERA output.</p> <p>With the exception of FoR 45, there the minimum is 50%</p> <div data-bbox="428 239 1190 409" style="border: 1px solid orange; padding: 10px; margin-top: 10px;">  PUREDEV-25238 - Data cannot be retrieved due to an unexpected error. </div>	<div style="background-color: #FFC000; padding: 2px; text-align: center;">5.24.2</div> <p>Postponed to</p> <div style="background-color: #FFC000; padding: 2px; text-align: center;">5.24.3</div> <p>(Primo September)</p>
<p>ERA Reference period for Research Outputs</p>	<p>It should not be possible to select an output for ERA if the following isn't true:</p> <ul style="list-style-type: none"> It must be published from 1 January 2016 – 31 December 2021, looking at Published and E-pub dates At least one of the authors must also be an ERA person <div data-bbox="428 552 1190 722" style="border: 1px solid orange; padding: 10px; margin-top: 10px;">  PUREDEV-25892 - Data cannot be retrieved due to an unexpected error. </div>	<div style="background-color: #FFC000; padding: 2px; text-align: center;">5.24.2</div> <p>Postponed to</p> <div style="background-color: #FFC000; padding: 2px; text-align: center;">5.24.3</div> <p>(Primo September)</p>
<p>Create validation on FoR apportionment for ERA researcher</p>	<p>It should not be possible to assign less than 10% for each FoR code.</p> <div data-bbox="428 783 1190 953" style="border: 1px solid orange; padding: 10px; margin-top: 10px;">  PUREDEV-25899 - Data cannot be retrieved due to an unexpected error. </div>	<div style="background-color: #FFC000; padding: 2px; text-align: center;">5.24.2</div> <p>Postponed to</p> <div style="background-color: #FFC000; padding: 2px; text-align: center;">5.24.3</div> <p>(Primo September)</p>
<p>Journal/Publisher/Conference lists</p>	<p>See description in ERA2023 Research Outputs - Journals, conferences, and publishers</p> <div data-bbox="428 1014 1190 1184" style="border: 1px solid orange; padding: 10px; margin-top: 10px;">  PUREDEV-26142 - Data cannot be retrieved due to an unexpected error. </div>	<div style="background-color: #FFC000; padding: 2px; text-align: center;">5.24.3</div> <p>(Primo September)</p>
<p>Show Peer review and citation count on ERA output</p>	<p>When the ERA output is assigned to an FoR, show the appropriate sections based on the FoR information, for either Citations or Peer review.</p> <ul style="list-style-type: none"> If the Journal article citation analysis is true, show the Journal article indexing and the Citation sections in the ERA outputs. If the Peer review is true, show the Nominated peer review disciplines section in the ERA outputs, <p>Note, that both can be true, so show both in that case.</p> <div data-bbox="428 1409 1190 1579" style="border: 1px solid orange; padding: 10px; margin-top: 10px;">  PUREDEV-25919 - Data cannot be retrieved due to an unexpected error. </div>	<div style="background-color: #FFC000; padding: 2px; text-align: center;">5.24.3</div> <p>(Primo September)</p>





<p>Ability to select outputs for peer-review</p>	<p>For the FoR codes where Peer review is needed, it should be possible to select which FoR codes the output should be peer-reviewed in.</p> <p>Reporting</p> <p>It should be possible to report on the peer review FoR codes and to get an overview of the number of outputs selected for Peer-review such that it is possible to see if the needed number of outputs has been selected.</p> <div data-bbox="428 388 1190 556" style="border: 1px solid orange; padding: 10px; margin-top: 20px;">  PUREDEV-26144 - Data cannot be retrieved due to an unexpected error. </div>	<p style="background-color: #FFC000; padding: 2px;">5.24.3</p> <p>(Primo September)</p>	
<p>Identify outputs as 'Indexed'</p>	<p>Update the model to capture the information on whether the output is indexed in WoS.</p> <div data-bbox="428 619 1190 787" style="border: 1px solid orange; padding: 10px; margin-top: 20px;">  PUREDEV-26147 - Data cannot be retrieved due to an unexpected error. </div>	<p style="background-color: #FFC000; padding: 2px;">5.24.3</p> <p>(Primo September)</p>	
<p>Portfolio</p>	<p>Create the portfolio model</p> <div data-bbox="428 850 1190 1018" style="border: 1px solid orange; padding: 10px; margin-top: 20px;">  PUREDEV-25228 - Data cannot be retrieved due to an unexpected error. </div>	<p style="background-color: #FFC000; padding: 2px;">5.24.3</p> <p>(Primo September)</p>	
<p>Ability to load citation tagging information</p>	<p>Similar to ERA2018, it should be possible to upload the EID for the ERA outputs to ensure that they are tagged</p> <div data-bbox="428 1102 1190 1270" style="border: 1px solid orange; padding: 10px; margin-top: 20px;">  PUREDEV-26172 - Data cannot be retrieved due to an unexpected error. </div>	<p style="background-color: #FFC000; padding: 2px;">5.25.0</p> <p>(October)</p>	
<p>Removed possibility to add ERA2008 FoR codes</p>	<p>The 'old' ERA 2008 codes should be in read-only mode, and only editable by an administrator. This goes for all content that had the FoR 2008 codes.</p> <div data-bbox="428 1354 1190 1522" style="border: 1px solid orange; padding: 10px; margin-top: 20px;">  PUREDEV-25424 - Data cannot be retrieved due to an unexpected error. </div>	<p style="background-color: #FFC000; padding: 2px;">5.24.3</p> <p>(Primo September)</p>	
<p>Summary Screens</p> <p>incl. Access to files - Ability to identify and check peer review documents (Summary screen)</p>		<p style="background-color: #FFC000; padding: 2px;">5.25.0</p> <p>(October)</p>	<p>Content to be discussed</p>

ERA landing page	<p>We need an ERA2023 admin page, similar to what we had for ERA2018. It should be possible to upload a new mapping file, and this should also serve as the place to capture specific settings for the ERA2023 module.</p> <div data-bbox="428 220 1190 390" style="border: 1px solid orange; padding: 5px; margin-bottom: 10px;">  PUREDEV-21419 - Data cannot be retrieved due to an unexpected error. </div> <div data-bbox="428 413 1190 583" style="border: 1px solid orange; padding: 5px;">  PUREDEV-25940 - Data cannot be retrieved due to an unexpected error. </div>	<div style="background-color: #FFC000; padding: 2px; text-align: center;">5.25.0</div> (October)	
RCI	<p>As an administrator, I can upload RCI information to my Pure, such that I can use this information when choosing and optimising the ERA submission</p> <p>Design It should be possible to upload a sheet with RCI information and this should be stored on the FoR codes. We also need to calculate the RCI value from the data selected for a given FoR code, such that they can compare the Pure RCI with the RCI uploaded.</p> <p>Reporting It should be possible to report on the RCI both the numbers uploaded in the sheet, and also the numbers that Pure can calculate, such that they can compare those numbers.</p> <p>Functions If possible it would be good to be able to calculate how close Pure's RCIs are compared to the RCI values uploaded, in percentage. This would give an indicator in % that would be easy to read</p> <div data-bbox="428 993 1190 1163" style="border: 1px solid orange; padding: 5px; margin-top: 20px;">  PUREDEV-26084 - Data cannot be retrieved due to an unexpected error. </div>	<div style="background-color: #FFC000; padding: 2px; text-align: center;">5.25.0</div> (October)	
ERA roles	Investigate if additional roles are needed based on the personas document	<div style="background-color: #FFC000; padding: 2px; text-align: center;">5.25.0</div> (October)	TBD

Phase 4

 **Notice**

All versions mentioned are estimated release dates. Some features might require more time and therefore have a later release date, whereas other features will be added sooner if time permits. All references to Jira tickets are for internal Elsevier usage and are therefore not accessible.

Item	Description	Estimated release	Note
Business rules	 PUREDEV-26185 - Data cannot be retrieved due to an unexpected error.	<div style="background-color: #FFC107; padding: 2px; display: inline-block;">5.25.1</div> (Primo November)	
Additional filters in the list		<div style="background-color: #FFC107; padding: 2px; display: inline-block;">5.25.1</div> (Primo November)	
Ability to capture explanatory statements	 PUREDEV-26186 - Data cannot be retrieved due to an unexpected error.	<div style="background-color: #FFC107; padding: 2px; display: inline-block;">5.25.2</div> (Primo December)	
Export of data in XML	<ul style="list-style-type: none"> • Creation of the submission XML • Validation of the submission XML <ul style="list-style-type: none"> ◦ Overview Screens to handle validation errors  PUREDEV-26187 - Data cannot be retrieved due to an unexpected error.	<div style="background-color: #FFC107; padding: 2px; display: inline-block;">5.25.2</div> (Primo December)	
Dark repository	 PUREDEV-26188 - Data cannot be retrieved due to an unexpected error.	<div style="background-color: #FFC107; padding: 2px; display: inline-block;">5.25.3</div> (Primo January)	

ERA2023 related release notes

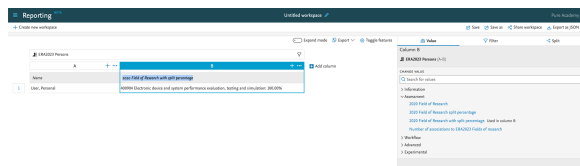
5.23

Table of content

ERA module

We have made the initial version of the new ERA 2023 module, which can be enabled by request. This module contains ERA Persons and ERA Outputs to which you can add only FoR codes. This will allow you to start looking at the pool of Persons and Outputs that should be considered for the ERA 2023 exercise. We have also enabled reporting on these new content types such that you can create reports to help get an overview of the pool of ERA Persons and ERA Outputs.

We will add more fields to the ERA Person and ERA Output once we know more about the upcoming ERA 2023. Also, right now we don't have any limits on the FoR codes: we will work in collaboration with the ERA working group to determine what types of limits and validations need to be implemented. Please watch the [ERA2023 space](#), if you don't already.



Create new workspace

Toggle features

Choose the content type that sets the starting point for the report.

For instance, if you want to create a workspace containing Persons and their number of publications, select 'Persons'.

Editor	Master data	ERA2023	ANZSRC
Research outputs	Users	ERA2023 Persons	Fields of Research
Activities	Persons	ERA2023 Research Outputs	Types of Activity
Prizes	Organisational units		Socio-Economic Objectives
Press/Media	External organisations		
Applications	External persons		
Awards	Publishers		
Projects	Journals		
Courses	Events		
Funding opportunities			
Impacts			
Datasets			
Facilities/Equipment			

Import existing workspace

- 5.23
 - ERA module
 - ERA Research Outputs and ERA person
- 5.22
 - Pure API: Disciplines (ANZSRC Module)
 - Wide preview of FoR, and SEO % in Reporting
 - Job for correcting Field of Research associations on records
- 5.21
 - AU: ERA 2023 module now called ANZSRC
 - Socio-Economic Objectives (SEO) codes
 - ToA codes
 - Reporting on ANZSRC codes
- 5.19
 - AU: Field of Research
 - 2020 FoR codes
 - 2020 Bulk upload of FoR codes
- 5.16
 - AU: ERA
 - Additional reporting functionality on FoR

ERA Research Outputs and ERA person

We have updated the ERA research output and the ERA person in accordance with the ERA guidelines and the ERA working group. With this update, you can now capture information needed for ERA on ERA research output and ERA person. We have also added the ability to bulk upload both ERA research outputs and ERA persons, please refer to the [ERA2023 module documentation](#) for more information on this. We have also updated the reporting module to be able to report on the ERA research output and the ERA person.

Information	Screenshot
ERA person with new fields	Will be added
ERA research output with new fields	Will be added
Example of reporting on the ERA person	Will be added

5.22

Pure API: Disciplines (ANZSRC Module)

We have added a new generic concept to the API called disciplines.

Disciplines is a generic concept which is available as options on all endpoints, which can be used to retrieve additional information about different discipline schemes and content associated to these disciplines.

The API now supports the following disciplines, if the ANZSRC module is enabled:

- Fields of Research (for)
- Socio-Economic Objectives (seo)
- Types of Activity (toa)

The intention is to add more over time and maybe add support of managing your own disciplines.

As this is a generic functionality, all content types has discipline endpoints added, but we use research output as an example.

First you need to retrieve which discipline schemes are available for the content type, this is done by invoking

```
https://{your Pure hostname}/ws/api/research-outputs/disciplines/allowed-discipline-schemes
```

If the ANZSRC module is enabled, this will return

```
{
  "count": 2,
  "items": [
    {
      "disciplineScheme": "for",
      "title": "Fields of Research"
    },
    {
      "disciplineScheme": "seo",
      "title": "Socio-Economic Objectives"
    }
  ]
}
```

To know which values are available for a given discipline scheme you need to invoke the endpoint **/research-outputs/disciplines/{discipline-scheme}/allowed-disciplines** with one of the disciplineSchemes retrieved earlier, e.g.

```
https://{your Pure hostname}/ws/api/research-outputs/disciplines/for/allowed-disciplines
```

Bulk retrieve disciplines

To retrieve information about what disciplines are assigned to one or more research output, you will have to invoke the endpoint **/research-outputs/disciplines/{discipline-scheme}/search** with the UUIDs of the research outputs to retrieve disciplines for.

Notice that you can supply multiple UUIDs at a time to retrieve discipline values for multiple research outputs in one call, and it is performed as a post operation, so an example could be the following


```
https://{your Pure hostname}/ws/api/research-outputs/disciplines/for/search
POST:
{
  "uuids": [
    "05652022-578e-4e0d-b327-f4a5152da2ce",
    "97085e4b-1fe4-42d7-81e3-dfe1dacf1f58"
  ]
}
```

You will then retrieve the discipline assignments for the the provided research outputs within the discipline scheme.

You will retrieve the discipline ID and the split percentage. Notice the discipline ID corresponds to the IDs returned by the corresponding endpoint **/research-outputs/disciplines/for/allowed-disciplines**

Notice: the request is paginated, and the default page size is 10, so if you supply more than 10 UUIDs you need to increase the page size or make multiple calls.

Furthermore it is possible to omit the UUIDs and then just paginate through the content, to retrieve all content with the associated disciplines e.g.

```
https://{your Pure hostname}/ws/api/research-outputs/disciplines/for/search
POST:
{
  "size": 10,
  "offset": 0
}
```

Then continue calling it with the offset increased by the page size, to retrieve all FOR disciplines for all research outputs in your Pure instance.

Single content retrieve and update of disciplines

To get disciplines for a single piece of content the following GET endpoint has been added:

```
https://{your Pure hostname}/ws/api/research-outputs/{uuid}/disciplines/{discipline-scheme}
```

The response is similar to the POST /search operation described above for bulk, but only for one piece of content.

The same endpoint has been added as PUT operation to be able to update the disciplines for a piece of content, like other PUT operations in the Pure API, the format is the same as the result from a GET call.

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Wide preview of FoR, and SEO % in Reporting

It is now possible to use the FoR and SEO in a wide preview mode in the Reporting module. We have added new values called: 2020 Field of Research with split percentage and 2020 Socio-Economic Objective with split percentage. It is possible to view the columns with these values in wide preview to see the pairs of FoR codes and split percentages so that you can create a report of the FoR codes, and their corresponding split percentages.

Column B

Research outputs (A-B)

CHANGE VALUE

- > Featured
- > Type
- > Information
- > Formats
- > Status
- > Contributors and affiliations
- > Managed by
- > Article Processing Charge (APC)
- > Event
- ✓ Assessment
 - 2020 Field of Research
 - 2020 Field of Research split percentage
 - 2020 Field of Research with split percentage Used i...
 - 2020 Socio-Economic Objective
 - 2020 Socio-Economic Objective split percentage
 - 2020 Socio-Economic Objective with split percentage
 - Number of associated 2020 Field(s) of Research
 - Number of associated 2020 Socio-Economic Object...

	A	B
1	Title	2020 Field of Research with split percentage
2		
3		3001 Agricultural biotechnology: 10.00% / 3004 Crop and pasture production: 20.00% / 3007 Forestry sciences: 70.0...
4		3001 Agricultural biotechnology: 80.00% / 3002 Agriculture, land and farm management: 20.00%
5		3001 Agricultural biotechnology: 100.00%
6		

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Job for correcting Field of Research associations on records

Prior to 5.21.0, it was possible to add more than three 2020 Fields of Research to records. In 5.21.0, the limit was set to three, but this may have potentially left some records in an invalid state (these records cannot then be saved). We have now introduced a job that fixes such records. When booting 5.22.0 (or 5.21.4), the job will run automatically and clean the content to make sure that there are no longer any records in invalid state.

If there are more than three FoR codes on any piece of content, the job will remove all but the first three FoR codes. The resulting split % will be 33.33 for the remaining three codes on the content. We log any changes to content in the job log, so that you can always double-check the changes and make necessary adjustments. The log will contain information about the ID of the changed content, as well as what the discipline assignment was before then change with split percentages, and then what the content looks like after the change.



The job log can be found in Administrator > Jobs > Job log (find and expand 'anzsrcCleanupForsLoggingJobCallableFactory').

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5.21

AU: ERA 2023 module now called ANZSRC

Big news for the Australian and New Zealand clients: we have changed the name of the ERA2023 module to ANZSRC to be more in line with the Australian Bureau of Statistics (ABS) and StatsNZs definitions. We have also introduced two new codes (Socio-Economic Objectives (SEO) and Type of Activity (ToA)) which means that we now support all three classifications:

- Type of Activity (ToA)
- Fields of Research (FoR)
- Socio-Economic Objectives (SEO)



The three codes can only be used when the ANZSRC module is enabled, the default state of the module, is disabled. Our support team will be happy to help you enable the module in your Pure.

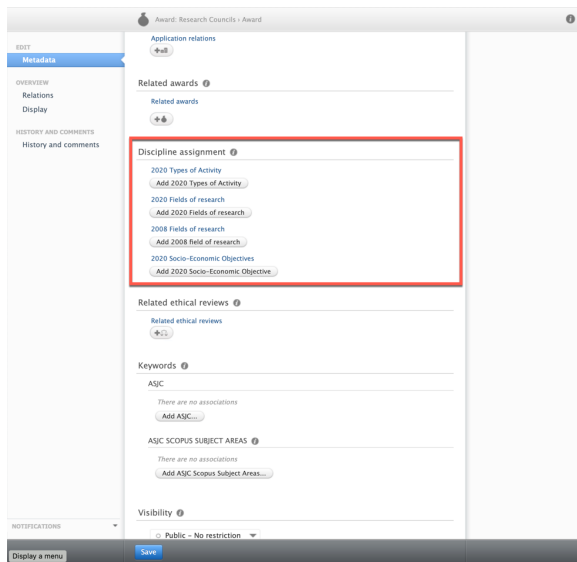
Socio-Economic Objectives (SEO) codes

You can now classify content in Pure using the ANZSRC SEO classification. You can classify the same types of content as with the FoR classification, and you can assign up to three SEO codes per content item, and specify the proportion on each SEO code. You can also add the SEO codes in bulk by using the upload job we have created for this. Read more in the [SEO discipline assignment bulk upload](#) section of the documentation.

Content types

SEO codes can be added to the following content types:

- Research Output
- Application
- Project
- Award
- Person
- Activity
- Journal
- Event
- Prizes
- Press/Media
- Impact
- Datasets
- Student Thesis



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ToA codes

You can now classify content in Pure using the ANZSRC ToA classification. You can classify:

- Awards
- Applications
- Projects

You can assign up to three ToA codes per content item, and specify the proportion on each ToA code. You can also add the ToA codes in bulk by using the upload job we have created for this. Read more in the [ToA discipline assignment bulk upload](#) section of the documentation.

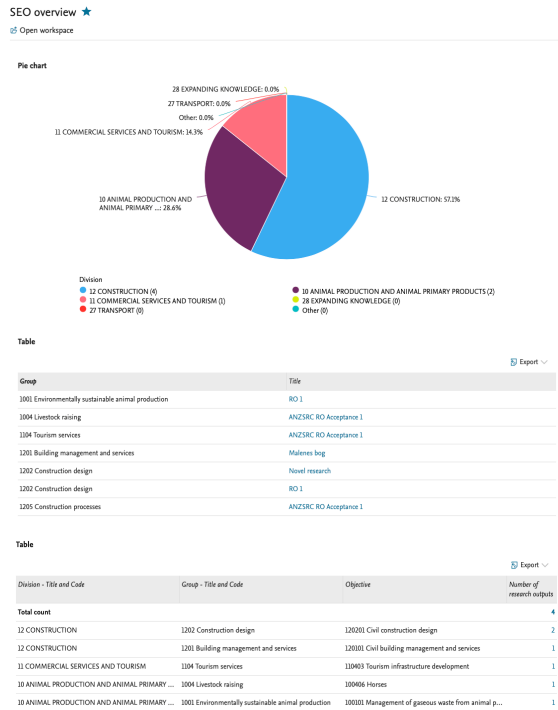
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Reporting on ANZSRC codes

Big updates are also coming in reporting on ANZSRC codes, as we have added the hierarchy specified in the definition from [ABS](#) to SEO and FoR.

This means that it is now possible to create reports that provide an overview of classified content (outputs, activities, applications, etc.) on a **Division**, **Group**, or **Objective** level.

Here is an example of the type of workspaces that can be created using the hierarchy that is built into the SEO and FoR codes. The example is using SEO, but a similar workspace can be built using FoR codes instead.



Example workspace

SEO overview w. json

Roles

We have introduced a number of new roles that can be used for reporting on the SEO, ToA, and FoR codes.

Role name	Can report on
Administrator of ANZSRC	<ul style="list-style-type: none">• SEO• ToA• FoR
Global reporter of ANZSRC	<ul style="list-style-type: none">• SEO• ToA• FoR
2020 Field of Research Reporter	<ul style="list-style-type: none">• FoR
2020 Socio-Economic Objective Reporter	<ul style="list-style-type: none">• SEO
2020 Type of Activity Reporter	<ul style="list-style-type: none">• ToA

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5.19

AU: Field of Research

In this release, we have made updates to the Australian and New Zealand clients relating to the updated 2020 Field of Research codes.

2020 FoR codes

We have introduced the new 2020 Field of Research (FoR) codes with this release, so now you can add the new 2020 FoR codes to content in Pure. We have updated the Pure models to support the new FoR codes, and you can now add them to thirteen content types. We have also updated the new Reporting Module to support the new codes, and introduced new filters to help you find content that does not yet have a 2020 FoR code.

We have also changed the name of the existing FoR code to 2008 Field of Research to help differentiate between the old and the new codes. When adding the FoR codes, it is possible to add a percentage if there is more than one, just like it was possible with the 2008 FoR codes.

The list of content types where it is possible to add the new 2020 FoR codes is as follows:

1. ResearchOutput
2. Application
3. UPMProject
4. Award
5. Person
6. Activity
7. Journal
8. Event
9. Prizes*
10. Press/Media*
11. Impact*
12. Datasets*
13. Student Thesis*

*new compared to the ERA 2018 module

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2020 Bulk upload of FoR codes

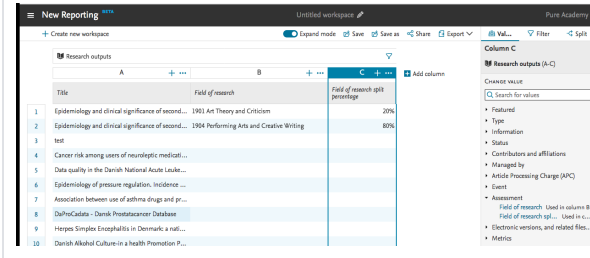
With the introduction of the new Field of Research codes, we have also created an bulk upload option to populate the content in Pure with these new codes. Read more about the job and how to create the bulk import file in the [Field of Research discipline assignment bulk upload](#) wiki, where you can also find the template file to be used for the bulk upload.

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AU: ERA

Additional reporting functionality on FoR

The ability to report on Field of Research (FoR) and Field of Research split percentage has been added to the report module. As a starting point this has been added to reporting on Research Output. In later releases the ability will be added to the remaining ERA related content types.



	A	B	C
	Title	Field of research	Field of research split percentage
1	Epidemiology and clinical significance of second...	1901 Art Theory and Criticism	20%
2	Epidemiology and clinical significance of second...	1904 Performing Arts and Creative Writing	80%
3	test		
4	Cancer risk among users of neuroleptic medicati...		
5	Data quality in the Danish National Acute Leuka...		
6	Epidemiology of pressure migraines, incidence ...		
7	Association between use of pattern drugs and gra...		
8	Dzho-Cadate - Dansk Prostatiskancer Database		
9	Herpes Simplex Encephalitis in Denmark: a nat...		
10	Danish Alcohol Culture-in-a health Promotion P...		

ERA2023 module documentation

Discipline assignment - ANZSRC 2020

- [Field of Research discipline assignment bulk upload](#)
- [SEO discipline assignment bulk upload](#)
- [ToA discipline assignment bulk upload](#)

ERA2023 Researcher

- [ERA2023 Researchers - Bulk creation](#)
- [ERA2023 Researchers - Manual Creation](#)

ERA2023 Research Outputs

- [ERA2023 Research Outputs - bulk upload](#)
- [ERA2023 Research Outputs - Journals, conferences, and publishers](#)

ERA2023 User roles

ERA 2023 Research Income

Getting started with ERA2023

Discipline assignment - ANZSRC 2020



ANZSRC Discipline bulk upload jobs

We have a number of bulk upload jobs for the ANZSRC disciplines, you can read more about the individual jobs on the following pages.

- [Field of Research discipline assignment bulk upload](#)
- [SEO discipline assignment bulk upload](#)
- [ToA discipline assignment bulk upload](#)

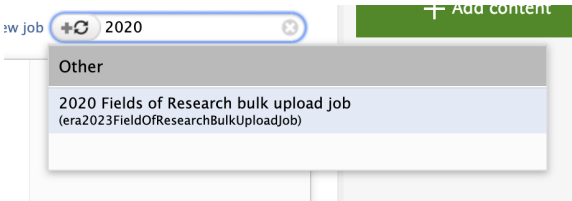
Field of Research discipline assignment bulk upload

Released: 5.19.0

FoR : Bulk upload job


The **2020 Fields Of Research Bulk Upload** Job enabled discipline assignment for the new 2020 Field of Research to all 13 content types that supports FoR.

The job can be found under Administrator > Cron jobs



The screenshot shows a search bar with the text '2020' and a green '+ Add content' button. A dropdown menu is open, showing a search result for '2020 Fields of Research bulk upload job' with the ID '(era2023FieldOfResearchBulkUploadJob)'.

Import file template




FoR upload template.
xlsx

Creating the import file

Please use the template file provided above, the template file have a tab called Help, which explains how to create the data to be imported. All columns in the template file must exist, but not all must be populated - see details below.

Column	Expected content	Required?	Notes
Content ID	This is the Pure ID of the content that should have an FoR code	Y	
2020 FoR code	2020 FoR code to import	Y	
Split %	The split % for the FoR if there are more than one against the same content ID	Y	
Title	Title of research output, this is to help with the readability of the sheet, this is not used in the actual import	N	

 To add more than one FoR to a particular content, just add one row per FoR assignment.

 The bulk upload will override any 2020 FoR already entered.

Uploading the import file

Go to Administrator > Cron job > **2020 Fields Of Research Bulk Upload Job** upload the Excel file to the appropriate location

2020 Fields Of Research Bulk Upload Job

Unsaved

Import 2020 Fields of Research from the provided excel document

Use the template below to create an Excel sheet for the import

 [Excel sheet template](#)

Runs job Era2023FieldOfResearchBulkUploadJob as user root

Schedule

Scheduled for 27. Aug 2020 01:00. Next run after that is 28. Aug 2020 01:00.

[Change schedule](#)

Configuration

Please correct the invalid configuration values.

General configuration

Name *

2020 Fields of Research bulk upload job

Run as user *

root

Job configuration

Default configurations

2020 Fields of Research Import File *

See the ERA2023 wiki for guidance and the import file template



Drag file or **browse** your computer.

[Update](#)

[Cancel](#)

When the file is uploaded you can run the job, after the job has been started it is possible to check the progress via Administrator > Jobs > Job log.

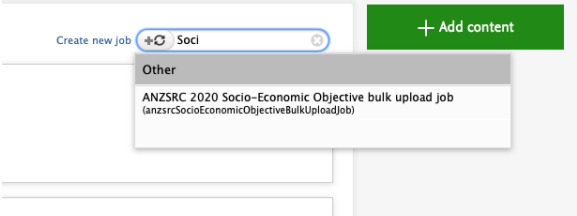
SEO discipline assignment bulk upload

Released: 5.21.0

FoR : Bulk upload job

The **2020 SEO Bulk Upload** Job enabled discipline assignment for the new 2020 SEO codes to all 13 content types that supports SEO.


The job can be found under Administrator > Cron jobs



The screenshot shows a 'Create new job' interface. A search bar contains the text 'Soci'. To the right is a green button labeled '+ Add content'. A dropdown menu is open below the search bar, showing the following options:

- Other
- ANZSRC 2020 Socio-Economic Objective bulk upload job (anzsrcSocioEconomicObjectiveBulkUploadJob)

Import file template



SEO upload template.
xlsx

Creating the import file

Please use the template file provided above, the template file have a tab called Help, which explains how to create the data to be imported. All columns in the template file must exist, but not all must be populated - see details below.

Column	Expected content	Required?	Notes
Content ID	This is the Pure ID of the content that should have an SEO code	Y	
2020 SEO code	2020 SEO code to import	Y	
Split %	The split % for the FoR if there are more than one against the same content ID	Y	
Title	Title of research output, this is to help with the readability of the sheet, this is not used in the actual import	N	



To add more than one SEO to a particular content, just add one row per SEO assignment.



The bulk upload will override any 2020 SEO already entered on content that is in the file

Uploading the import file

Go to Administrator > Cron job > **2020 Fields Of Research Bulk Upload Job** upload the Excel file to the appropriate location

ANZSRC 2020 Socio-Economic Objective Bulk Upload Job

Unsaved

Import ANZSRC 2020 Socio-Economic Objective from the provided excel document

Use the template below to create an Excel sheet for the import

 [Excel sheet template](#)

Last run logged **19** success and **2** errors starting at 06. May 2021 15:49, running for 0:00:04 hours.
Runs job AnzsrcSocioEconomicObjectiveBulkUploadJob as user root

Schedule

Scheduled for 07. May 2021 01:00. Next run after that is 08. May 2021 01:00.

[Change schedule](#)

Configuration

Configure which user to run the job as, and any additional settings that apply to this job.

General configuration

Name *

ANZSRC 2020 Socio-Economic Objective bulk upload job

Run as user *

root

Job configuration

Default configurations

[Update](#)

[Cancel](#)

[Save](#)

[Cancel](#)

When the file is uploaded you can run the job, after the job has been started it is possible to check the progress via Administrator > Jobs > Job log.

ToA discipline assignment bulk upload

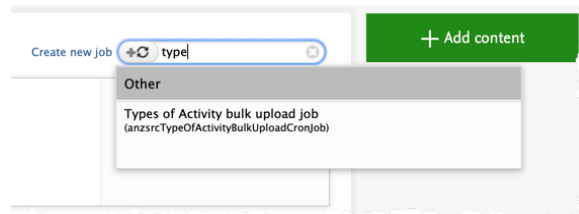
Released: 5.21.0

FoR : Bulk upload job

The **Types of Activity bulk upload job** can be used to bulk upload ToA on

- Projects,
- Applications, and
- Awards

The job can be found under Administrator > Cron jobs



Import file template



ToA upload template.
xlsx

Creating the import file

Please use the template file provided above, the template file have a tab called Help, which explains how to create the data to be imported. All columns in the template file must exist, but not all must be populated - see details below.

Column	Expected content	Required?	Notes
Content ID	This is the Pure ID of the content that should have an FoR code	Y	
ToA	2020 Type of Activity code to import	Y	
Split %	The split % for the FoR if there are more than one against the same content ID	Y	
Title	Title of research output, this is to help with the readability of the sheet, this is not used in the actual import	N	



To add more than one ToA to a particular content, just add one row per ToA assignment.



The bulk upload will override any 2020 ToA already entered for the content IDs in the Excel sheet.

Uploading the import file

Go to Administrator > Cron job > **Type of Activity Bulk Upload Job** and upload the Excel file to the appropriate location

Types Of Activity Bulk Upload Job

Unsaved

Import Types of Activity from the provided excel document

Use the template below to create an Excel sheet for the import

 [Excel sheet template](#)

Runs job AnzsrcTypeOfActivityBulkUploadCronJob as user root

Schedule

Scheduled for 08. May 2021 01:00. Next run after that is 09. May 2021 01:00.

[Change schedule](#)

Configuration

Please correct the invalid configuration values.

General configuration

Name *

Types of Activity bulk upload job

Run as user *

root

Job configuration

Default configurations

2020 Types of Activity Import File *

See the ANZSRC wiki for guidance and the import file template



Drag file or [browse](#) your computer.

[Update](#) [Cancel](#)

[Save](#) [Cancel](#)

When the file is uploaded you can run the job, after the job has been started it is possible to check the progress via Administrator > Jobs > Job log.

ERA2023 Researcher

ERA Researcher records are created in the ERA module and are associated to Person records in Pure.

There are two means available for creating ERA Researcher records:

- Manual creation
- Bulk import

Guidance for both of these is available below.



Creating and editing ERA Researchers
ERA2023 Researchers - Manual Creation
ERA2023 Researchers - Bulk creation

Mapping
ResearcherMapping_ERA2023.xlsx

ERA2023 Researchers - Bulk creation

- [Prepare import file](#)
- [Upload import file](#)
- [Guidance notes](#)
- [Values](#)



Prepare import file

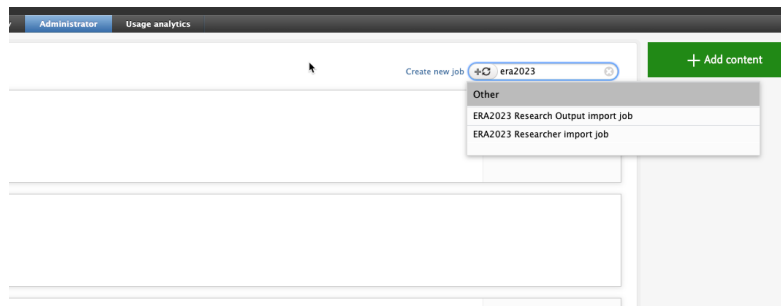
Import ERA Researchers	
1	<p>To use the import file:</p> <ul style="list-style-type: none"> • keep the column headers as they are input – DO NOT EDIT • remove the exemplar data in rows 2–4 • ensure that when inputting FoR codes and Employment Level, that, where applicable, the lead zero is displayed (format cell as Text) • FoR percent should be input as integers, e.g. 50
2	An ERA Researcher record will be created for every individual included in the import file, as per the logic described below.
3	The only required field is Employee ID OR Pure ID or UUID and Gender
4	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).
5	<p>The import function will include simple validation. The record will not be imported if:</p> <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
6	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).
7	Workflow will default to ERA2023 Entry in progress if not specified
8	Eligibility will default to Under Review if not specified
9	Following import, the ERA-specific fields will be editable on the ERA Researcher form itself.
10	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.
11	<p>To specify the not eligible reason, please use the URI token for the classification that should be used.</p> <p>As an example to specify the reason as No affiliation, look at the Classification scheme for ERA2023 Researcher eligibility reasons and find the URI for the option to use, in this instance it would be <code>/dk/atira/pure/era2023person/era2023personeligibility/no_affiliation</code> and only use the last part <code>no_affiliation</code></p>
12	If subsequent imports are done, any new records will be created and any existing records will be updated with the information in the spreadsheet overriding any existing information in Pure.

ERA2023 Researchers: Import
file template

[ERA_Researcher_upload.xlsx](#)

Upload import file

To use the newly created bulk upload file, you need to go to **Administrator Jobs**, and either create a new job, called **ERA2023 Researcher import job**.



After creating the job, or clicking on the job in the list, you need to attach the Excel sheet

ERA2023 Researcher Import Job

Create/Import ERA2023 Researchers based on the provided excel document
Runs job Era2023PersonImportJob as user root

Schedule
Scheduled for 28. Jun 2022 01:00. Next run after that is 29. Jun 2022 01:00.
[Change schedule.](#)
[List previous changes in audit log](#)

Configuration
Configure which user to run the job as, and any additional settings that apply to this job.

General configuration

Name #
ERA2023 Researcher Import job

Job configuration

Default configurations

ERA2023 Researcher Import File #
See the ERA2023 wiki for guidance and the import file template

Drag file or [browse](#) your computer.

[Update](#) [Cancel](#)

Log entries

Start Duration (hours) Success Warnings Errors Fatal errors

If this job have run before, you would need to click the **Remove** button before uploading a new file

Job configuration

Default configurations

ERA2023 Researcher Import File #
See the ERA2023 wiki for guidance and the import file template

ERA_Researcher_upload.xlsx
10.3 KB, application/vnd.openxmlformats-officedocument.spreadsheetml.sheet [Remove](#)

Remember to set the schedule of the job to **manual**, otherwise the job will run daily.

Schedule

Will be scheduled for 28. Jun 2022 01:00. Next run after that is 29. Jun 2022 01:00.

Interval

Daily

Daily
Weekly
Monthly
Quarterly
Yearly
Manual
Custom

[Cancel](#) — or — [Remove from schedule](#)

Configuration

After updating the setting, click on the **Start job now** button

ERA2023 Researcher Import Job

Create/Import ERA2023 Researchers based on the provided excel document

Runs job Era2023PersonImportJob as user root

Schedule

Scheduled for 28. Jun 2022 01:00. Next run after that is 29. Jun 2022 01:00.

[Change schedule](#)

[Start Job now](#)

[List previous changes in audit log](#)

Configuration

Configure which user to run the job as, and any additional settings that apply to this job.

[Edit configuration](#)

The job log will include any messages on the outcome of the job.

Guidance notes

Values

For the fields listed below, only the code can be used as input

Employment status		Researcher function		Employment level		Workflow		Indigenous Status		Eligibility	
1	Employed	A	Research only	0 13	Level E	1	Entry in progress	2	Non-Indigenous - neither Aboriginal nor Torres Strait Islander origin	1	Eligible
2	Employed on a casual basis	B	Teaching and research	0 14	Level D	2	Checked	3	Of Aboriginal origin but not Torres Strait Islander	2	Under review
3	Other employed	C	Other function	0 42	Level C	3	Confirmed	4	Of Torres Strait Islander but not Aboriginal	3	Not Eligible
				0 66	Level B			5	Both Aboriginal and Torres Strait Islander Origin		
				1 00	Level A			9	No Information		
				0 01	Vice-Chancellor						
				0 05	Deputy Vice-Chancellor						
				2 20	Non-academic staff - senior executive						
				2 01	Level 1						
				2 02	Level 2						
				2 03	Level 3						
				2 04	Level 4						
				2 05	Level 5						
				2 06	Level 6						
				2 07	Level 7						
				2 08	Level 8						
				2 09	Level 9						
				2 10	Level 10						
				0 00	Other						

ERA2023 Researchers - Manual Creation

ERA Researcher: Manual creation and editing of records

ERA Researcher records can be created in 2 ways:

- manually, one by one
- in bulk, using an import file

This guide describes how to manually create ERA Researcher records, one by one, and how to edit them.

Before you begin

Administrator, Administrator of ERA, and Editor of ERA can perform this function.
In order to create an ERA Researcher record, the individual must already exist in Pure as a Person.

About this task

Creating ERA Researcher records is the first stage of ERA submission preparation, as ERA Researchers must exist before creating other ERA content (most other ERA content must be related to a submitted ERA Researcher).
This task can be used in combination with other means of creating ERA Researchers. For example, you may wish to create your ERA Researcher records in bulk, using an import file. However, after making the initial import, you realise that a few individuals were missed out. Rather than undertaking an additional import, you may wish to create the missing records simply manually, one by one.


Create an ERA Researcher record

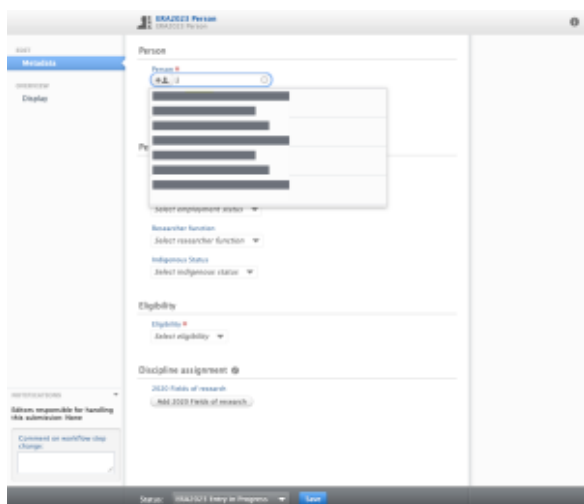
Go to the Assessment module, and select + next to ERA2023 Researchers
This will open a blank ERA Researcher record.



Person

In the search box in the Person section, type in the name of the individual for whom you wish to create an ERA Researcher record and select them from the list.

 Individuals who already exist as ERA Researchers will be so flagged and you will be unable to create a new ERA Researcher record for them.



If an individual is a former employee at the time of creating the ERA Researcher record or becomes a former employee after the ERA Researcher record has been created, they will be flagged as such and it will be possible to report on these individuals to ensure that they are not included in the submission.

Former, Joe (55441)
ERA2018 Researcher

Person

Person *

▶ **Former, Joe**

School of Chemistry - Professor, Former

The selected person does not have an active organisation association at the census date

Person status

Employment level *

Select employment level ▼

Employment status *

Select employment status ▼

Researcher function *

Select researcher function ▼

The following ERA fields will be sourced from the Person record in Pure and therefore do not need to be re-input in the ERA Researcher record:

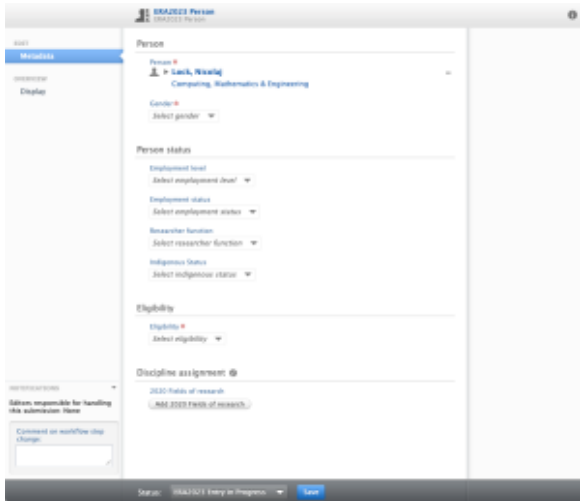
- Staff Reference
- First Name
- Honorific
- Last Name
- Middle Name
- Gender

'Other Names' will be sourced from the author names input on associated Pure Research Outputs included in the ERA submission.

Person Status

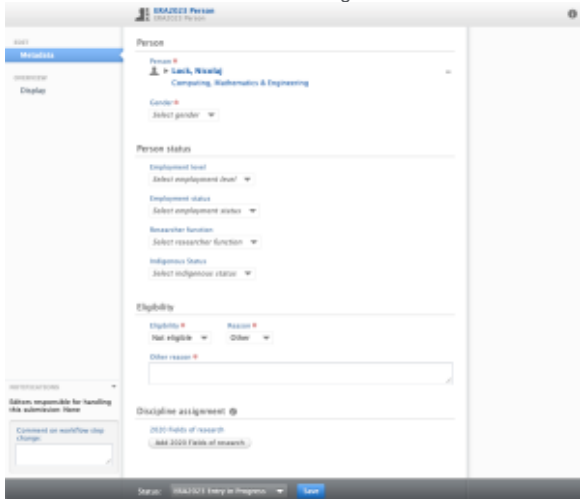
In the Person Status section, you can provide the values for:

- Employment level
- Employment status
- Researcher function
- Indigenous Status
- FTE at census date (only where Employment status = Employed)



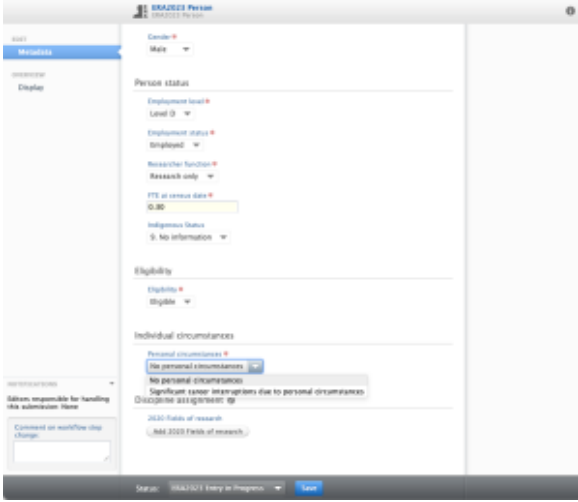
Eligibility

Upon record creation, the default Eligibility status is not set. However, if it is deemed at any point during the submission preparation process that the individual is no longer eligible for submission to ERA2018, or that their eligibility is under review, this can be recorded. If it is decided that the individual is not eligible for submission, the reason can be captured (and is available for reporting). The Not Eligible reasons are locally-defined, as a classification scheme. If 'Other' is selected, there is the opportunity to capture the reason as free text. ERA Researchers selected as 'Not Eligible' will not be included in the submission XML.



Individual circumstances

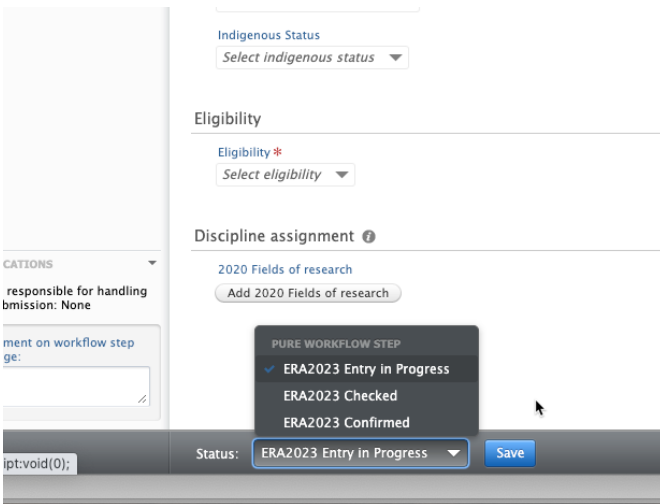
Where an individual has the Employment Status = 'Employed' and FTE at census date is < 0.4, there is the option to capture whether the individual experienced significant career interruptions because of personal circumstances. This value is not returned in the ERA submission but is intended to be used internally to enable appropriate management of ERA Researchers with no associated ERA Research Outputs with a relevant publication association. The default value is always 'No personal circumstances'.



Workflow

Three ERA-specific workflow states are available to indicate the status of the ERA Researcher record:

- ERA Entry in Progress
- ERA Checked
- ERA Confirmed



ERA2023 Research Outputs

ERA Research outputs records are created in the ERA module and are associated with a research output record in Pure.

There are two means available for creating ERA Research output records:

- Manual creation
- Bulk import

Guidance for both of these is available below.



ERA2023 Research Output creation
ERA2023 Research Outputs - bulk upload


ERA2023 Research Outputs - bulk upload



Guidance Notes

Template upload file

[ERA_Research_Output_upload_template.xlsx](#)

1	<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
2	An ERA Research Output record will be created for every output included in the import file.
3	<p>The only required fields are:</p> <ul style="list-style-type: none"> • EITHER Pure Research Output ID OR Other Research Output ID (see (4) below) • ERA Output Type • Non-Traditional Output Category (where applicable) <p>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.</p>
4	<p>Identifiers:</p> <ul style="list-style-type: none"> • 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). <p>External publication ids</p> <p>Publication import id  Scopus: 77952763619</p> <p>Additional source ids PubMed: 20194713 Edit —</p> <p>Add additional source...</p>
5	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).
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) (if not populated in the Pure Research Output record, and no values are set in the import file, the ERA Research Output will not be created).
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 Eligibility is not set in the import file, the ERA Research Output record created will have the eligibility of Under review
9	<p>To specify the not eligible reason, please use the URI token for the classification that should be used.</p> <p>As an example to specify the reason as Not research, look at the Classification scheme for ERA A2023 Research Output eligibility reasons and find the URI for the option to use, in this instance it would be <code>/dk/atira/pure/era2023researchoutput/era2023researchoutputeligibility/not_research</code> and only use the last part <code>not_research</code>.</p>
10	Note that the Research Statement and Sensitive Handling Note fields do not support mark-up; only plain text will be imported.
11	Following import, the ERA-specific fields will be editable on the ERA Research Output form itself.
12	If subsequent imports are done, any new records will be created and any existing records will be updated with the information from the sheet overriding any information in Pure.

Values

For the fields listed below, only the code is accepted

ERA Output type		Non-Traditional Output Category		Workflow		Eligibility	
1	Book			1	Entry in progress	1	Eligible
2	Chapter in research book			2	Checked	2	Under review
3	Journal article			3	Confirmed	3	Not Eligible
4	Conference proceeding						
5a	Original creative work	1	Visual art work				
		2	Design /architectural work				
		3	Textual work				
		4	5a Other				
5b	Live performance	1	Music				
		2	Play				
		3	Dance				
		4	5b Other				
5c	Recorded or rendered work	1	Audio/visual recording				
		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				
		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				

ERA2023 Research Outputs - Journals, conferences, and publishers

Journal, Publisher, and Conferences

This page describes the proposed functionality regarding the official journal, publisher, and conference lists in Pure.



Importing information

With ERA2023, Pure will not import/synchronize the entire list of either Journals, Publisher, or Conferences, instead, we will match existing journals, publishers, and events to their corresponding items on the lists. If found, we will add the ID from the list to the journal, publisher, or events as well as any FoR codes from the lists. This is different compared to ERA2018, where all journals from the journal list were synchronized into Pure, and they were locked, resulting in a lot of records in Pure that weren't used and since the journals were locked it made changed to them impossible, such as merging etc.

Automatic updating

When a new journal, publisher or event is entered into the system, Pure will attempt a match against the lists, if a match is found the ID and FoR codes will be added to the newly created content. Pure will also have a job that runs once a day, to see if any journal, publisher, or event in Pure which doesn't have an ID can be found in the list.

Matching

For publishers and Conferences, we're doing matching on the name, as this is all the information that is available in the list. For the journals, we use the ISSNs. Pure will only try to find a match once to avoid unnecessary matching. It will be possible to mark a journal, publisher, or Event to stop any matching, in the case that Pure have made a match that isn't correct.

Manually updating

The ID and FoR codes, will not be locked in Pure, and it will be possible to manually change this information in Pure, for instance, if a particular journal cannot be matched in the lists, it is possible to manually enter the ID if this is known. There is an input field where it is possible to enter information as to why an ID has been entered or changed.

Merging

When merging journals, publishers, or events where both contents have an ERA ID, then a warning will be shown, and the target record's ID will be used.

Reporting

The IDs will be reportable, and there will be filters to identify any journal that either has an ERA ID or doesn't such that it will be possible to identify journals that need manually ID tagging and similar.

ERA2018 Journals, conferences, and publisher

As part of preparing for the new lists, we're also changing the status of the 'old' journals, conferences, and publishers that were part of the ERA2018 lists. We're changing the synchronized status of these to be previously synchronized, meaning that they will no longer be locked. By doing this, you will still have all the data that was being used for the previous ERA, but you will be able to update the content, such as merging journals with other journals and doing all of your normal data clean up tasks.

Journal, Publisher and conference lists

[ERA2023 Submission Journal List.xlsx](#)

[ERA2023ConferenceList.xlsx](#)

[ERA2023PublisherList.xlsx](#)

ERA2023 User roles



ERA2023 User roles

The following ERA2023 user roles are available:

User role	Nature of role	ERA Rights								
		ERA Researcher	ERA Research Output	ERA Portfolio	ERA Research Income	ERA Applied Measures	ERA Submission XML + validation	ERA module configurations	ERA module jobs	Notes
Administrator	Global	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Edit <input checked="" type="checkbox"/> Create <input checked="" type="checkbox"/> Delete	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Edit <input checked="" type="checkbox"/> Create <input checked="" type="checkbox"/> Delete	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Edit <input checked="" type="checkbox"/> Create <input checked="" type="checkbox"/> Delete	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> Generate	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Initiate	
Administrator of ERA	Global	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Edit <input checked="" type="checkbox"/> Create <input checked="" type="checkbox"/> Delete	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Edit <input checked="" type="checkbox"/> Create <input checked="" type="checkbox"/> Delete	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Edit <input checked="" type="checkbox"/> Create <input checked="" type="checkbox"/> Delete	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> Generate			
Administrator of ANZSRC	Global	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Edit <input checked="" type="checkbox"/> Create <input checked="" type="checkbox"/> Delete	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Edit <input checked="" type="checkbox"/> Create <input checked="" type="checkbox"/> Delete	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Edit <input checked="" type="checkbox"/> Create <input checked="" type="checkbox"/> Delete	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> Generate			
Reporter of ERA	Global	<input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> View				
ERA Field of Research Reporter	ERA FoR	<input checked="" type="checkbox"/> View For all content assigned to the FoR(s) to which they have rights If the user removes the 'my content' filter, they can view all ERA content	<input checked="" type="checkbox"/> View For all content assigned to the FoR(s) to which they have rights If the user removes the 'my content' filter, they can view all ERA content	<input checked="" type="checkbox"/> View For all content assigned to the FoR(s) to which they have rights If the user removes the 'my content' filter, they can view all ERA content	<input checked="" type="checkbox"/> View For all content assigned to the FoR(s) to which they have rights If the user removes the 'my content' filter, they can view all ERA content	<input checked="" type="checkbox"/> View For all content assigned to the FoR(s) to which they have rights If the user removes the 'my content' filter, they can view all ERA content				

Editor of ERA Field of Research	ERA FoR	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Edit <input type="checkbox"/> Create <input type="checkbox"/> Delete	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Edit <input type="checkbox"/> Create <input type="checkbox"/> Delete	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Edit <input type="checkbox"/> Create <input type="checkbox"/> Delete						<ul style="list-style-type: none"> • Can move content up to 'ERA checking underway' workflow step • Can view content in 'ERA confirmed' workflow step • Cannot remove content from a FoR to which they do not have rights • Cannot claim content from a FoR to which they do not have rights • WG request removal of 'Create' and 'Delete' for this role.
SuperEditor of ERA Field of Research	ERA FoR	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Edit <input type="checkbox"/> Create <input type="checkbox"/> Delete	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Edit <input type="checkbox"/> Create <input type="checkbox"/> Delete	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Edit <input type="checkbox"/> Create <input type="checkbox"/> Delete						<ul style="list-style-type: none"> • Can move content up to 'ERA confirmed' workflow step • Cannot remove content from a FoR to which they do not have rights • Cannot claim content from a FoR to which they do not have rights • WG request removal of 'Create' and 'Delete' for this role.
Editor of ERA	Organisational unit	-	-	-	-	-	-	-	-	<p>With the introduction of FoR roles, we recommend that this Organisational Editor of ERA role is no longer used. We have marked this role for depreciation and therefore recommend that any users you have assigned to this role be re-assigned to a FoR role.</p> <p>WG would like this, but discussion with Product concluded this may not be possible.</p>

ERA 2023 Research Income

First draft of the import template: [ERA_Research_Income_Upload_Template.xlsx](#)


Getting started with ERA2023

(copy things from [Getting started with ERA2018](#))

ERA2023 related improvement tickets

This page page list all open improvements in Jira containing the component "ERA" or "ERA module"

key summary type created updated due assignee reporter priority status resolution

 Data cannot be retrieved due to an unexpected error.

[View these issues in Jira](#)

ERA Working group members

Members

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Malene Knudsen	m.knudsen@elsevier.com	Elsevier

Outstanding items

Description	Due date	Assignee	Task appears on
<input type="checkbox"/> Knudsen, Malene (ELS-AAL) make sure to send out emails to user group on dash releases containing ERA elements		Knudsen, Malene (ELS-AAL)	ERA meeting 2022-08-11
<input type="checkbox"/> Create pages in ERA space for local documentation Knudsen, Malene (ELS-AAL)		Knudsen, Malene (ELS-AAL)	ERA meeting 2022-07-14
<input type="checkbox"/> Review the roles Lock, Nicolaj (ELS-AAL)		Lock, Nicolaj (ELS-AAL)	ERA meeting 2022-06-16
<input type="checkbox"/> Have a meeting about summary screens, editors etc. Boydell, Daniel (ELS-SYD)		Boydell, Daniel (ELS-SYD)	ERA meeting 2022-02-17

Meeting notes

[Create meeting notes](#)

Title	Creator	Modified
ERA meeting 2022-07-14	Lock, Nicolaj (ELS-AAL)	Aug 16, 2022
ERA meeting 2022-08-11	Lock, Nicolaj (ELS-AAL)	Aug 11, 2022
ERA meeting 2022-03-17	Lock, Nicolaj (ELS-AAL)	Aug 11, 2022
ERA meeting 2022-02-17	Lock, Nicolaj (ELS-AAL)	Aug 11, 2022
ERA meeting 2022-06-16	Lock, Nicolaj (ELS-AAL)	Jul 11, 2022
ERA meeting 2022-06-29	Lock, Nicolaj (ELS-AAL)	Jul 11, 2022
ERA meeting 2022-05-05	Boydell, Daniel (ELS-SYD)	May 09, 2022

ERA meeting 2022-02-17

Date

17 Feb 2022

Attendees

- [Lock, Nicolaj \(ELS-AAL\)](#)
- [Boydell, Daniel \(ELS-SYD\)](#)
- [Knudsen, Malene \(ELS-AAL\)](#)
- [Haslund, Asger Ågård \(ELS-AAL\)](#)
- [Kate Croker](#)
- [Amanda Shepherd](#)
- [Simon Barrett](#)
- [Goh, Adam Jia Kang \(ELS-SNG\)](#)
- [Magdalena Slabuszewska](#)

Notes

[ERA user group meeting 17th of February 2022.docx](#)

Action items

- Send REF screens example [Knudsen, Malene \(ELS-AAL\)](#) REF overview screen.pptx
- Have a meeting about summary screens, editors etc. [Boydell, Daniel \(ELS-SYD\)](#)
- Create a plan and update ERA wiki page [Lock, Nicolaj \(ELS-AAL\)](#)
- Look at bulk upload functionality [Lock, Nicolaj \(ELS-AAL\)](#)

ERA meeting 2022-03-17

Date

17 Mar 2022

Attendees

- [Lock, Nicolaj \(ELS-AAL\)](#)
- [Knudsen, Malene \(ELS-AAL\)](#)
- [Boydell, Daniel \(ELS-SYD\)](#)
- [Amanda Shepherd](#)
- [Simon Barrett](#)
- [Kate Croker](#)
- [Paul Quilty](#)
- [Wade Kelly](#)

Goals

Discussion items

Time	Item	Who	Notes
	Test data and servers	Lock, Nicolaj (ELS-AAL)	<ul style="list-style-type: none">• We want to set up servers can we use some of your data, or should we set up individual servers• Also, can we get some commitment to testing on the servers we set up?
	Demo of new ERA models and functionality	Lock, Nicolaj (ELS-AAL)	

Action items

- ✓ Look into a possible claim option for managing the FoR codes, such that ERA editors can claim content without an FoR code, or content belonging to another FoR. [Lock, Nicolaj \(ELS-AAL\)](#)
- ✓ Looking setting up a test system with data from ERA working group members [Boydell, Daniel \(ELS-SYD\)](#)
- ✓ Update ERA module timeline in wiki [Lock, Nicolaj \(ELS-AAL\)](#)

ERA meeting 2022-05-05

Date

05 May 2022

Attendees

- [Boydell, Daniel \(ELS-SYD\)](#)
- [Amanda Shepherd](#)
- [Simon Barrett](#)
- [Kate Croker](#)
- [Paul Quilty](#)
- Leonie Worley
- Brock Askey
- Fiona Pearson

Goals

- Have agreement from the Working Group on the roles (permissions) required for ERA 2023 Module.

Discussion items

Time	Item	Who	Notes
40min	User Roles	Boydell, Daniel (ELS-SYD)	<p>Roles - Reviewed ERA 2018 roles</p> <ul style="list-style-type: none"> • Administrator - This is <i>complete</i> • Administrator of ERA 2023 - Group agreed this was needed as per ERA 2018 role. • Administrator of ERA 2023 Applied Measure - No longer required for ERA 2023. • Administrator of ERA 2023 Research Income - Group do not see this role as necessary, as no need to just have view of this for a user. Dan to confirm if Product see any other need. • Global Reporter and Reporter of ERA 2023 - Dan to discuss with Product these roles as we're moving to New Reporting. <p>FoRs</p> <ul style="list-style-type: none"> • 2023 Field of Research Reporter - This has been developed. • Editor of 2023 Field of Research - This has been developed. Group would prefer that 'Create' and 'Delete' ability be removed for this. Dan to discuss with Product. • Super Editor of 2023 Field of Research - This has been developed. Group would prefer that 'Create' and 'Delete' ability be removed for this. Dan to discuss with Product. <p>Org Unit</p> <ul style="list-style-type: none"> • Editor of ERA 2023 - This had been removed for ERA 2018 in preference for FoR code roles. However, Group agreed there is a need for this, that way FoR Coordinators can bring in Support from Faculty experts if necessary without giving them access to further records under FoR.
10min	Other priorities	ALL	<p>Reporting - top priorities needed for reporting now</p> <ul style="list-style-type: none"> • Apportionment • Ability to report on indexed records - Dan to discuss with Product best way to do this.
10min	Other requests	ALL	<p>Audit</p> <ul style="list-style-type: none"> • Group agreed they would like better auditing on ERA module records, i.e. details of what and who changed. TBD <p>Workflow</p> <ul style="list-style-type: none"> • More levels of workflow requested - as different users need to have parallel process. TBD • Ability to lock a record so it cannot be edited (but full Admin can reverse lock). <p>Communication</p> <ul style="list-style-type: none"> • Is it possible for more sophisticated communication within the record, rather than giving people access to edit, can user flag to Admin records to be added, removed, edits. Dan to check with Product on options. • Group would like a way to quickly view who is responsible for a given FoR. Dan suggested putting the responsible person against the FoR code section in the ERA 2023 module, when that FoR section has been developed. Check with Product.

5min	Person as	Boydell, Daniel (ELS-SYD)	<p>Group discussed the users that would take part in the ERA exercise. Dan has listed the below and requested group but some details in a shared document. Dan has shared this on google docs, will review on 16 May 2022</p> <ul style="list-style-type: none"> FoR Coordinator FoR Coordinator Support ERA Strategy Organisation Unit Support Peer-review Manager Eligibility Admins
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Action items

- Share document to provide details of institutions Personas relevant to ERA. Boydell, Daniel (ELS-SYD)

ERA meeting 2022-06-16

Date

16 Jun 2022

Attendees

- [Lock, Nicolaj \(ELS-AAL\)](#)
- [Knudsen, Malene \(ELS-AAL\)](#)
- [Boydell, Daniel \(ELS-SYD\)](#)
- [Amanda Shepherd](#)
- [Simon Barrett](#)
- [Kate Croker](#)
- [Paul Quilty](#)
- [Ashley Stewart](#)

Goals

Discussion items

Time	Item	Who	Notes
10 min	Status	Lock, Nicolaj (ELS-AAL)	<ul style="list-style-type: none">• Working on Research income• More reporting on apportionment Next: <ul style="list-style-type: none">▪ Discipline matrix on FoR▪ Journal list logic▪ Portfolio
5 min	Questions	Lock, Nicolaj (ELS-AAL)	Research income, how many FoRs are necessary? Currently, a limit of 5.

Action items

- Option to mark ERA content's review state: Not reviewed, Initial review, done review, could this be a keyword?
- Note field on the FoR assignment
- Review the roles [Lock, Nicolaj \(ELS-AAL\)](#)

ERA meeting 2022-06-29

Date

29 Jun 2022

Attendees

- Lock, Nicolaj (ELS-AAL)
- Haslund, Asger Ågård (ELS-AAL)
- Knudsen, Malene (ELS-AAL)
- Amanda Shepherd
- Simon Barrett
- Kate Croker
- Paul Quilty
- Ashley Stewart

Goals

Discussion items

Time	Item	Who	Notes
	Citation provider	Lock, Nicolaj (ELS-AAL)	<ul style="list-style-type: none">• Do we know who the citation provider is?<ul style="list-style-type: none">◦ Interim, show both WoS and Scopus ID
	'Old' ERA2018 jobs	Lock, Nicolaj (ELS-AAL)	Can we delete the old era2018 jobs, such as journal list synchronisation, publisher, etc.?
	Data dumps	Lock, Nicolaj (ELS-AAL)	Would it be possible to get a data dump to use when testing the migration and new development?
	Test system	Lock, Nicolaj (ELS-AAL)	We have created a test system, all should have received a login mail. https://era2023-test.devel.elsevierpure.com/admin/login.xhtml

Action items

- Add eligibility to the import file for persons and outputs Lock, Nicolaj (ELS-AAL)
- Update import job, to be an update job Lock, Nicolaj (ELS-AAL)
-

Decision

Amanda Shepherd and Simon Barrett said it was ok for us to take a dump of their data for the development of the ERA 2023 module and testing new models and migrations etc.

ERA meeting 2022-07-14

Date

14 Jul 2022

Attendees

- [Lock, Nicolaj \(ELS-AAL\)](#)

Goals

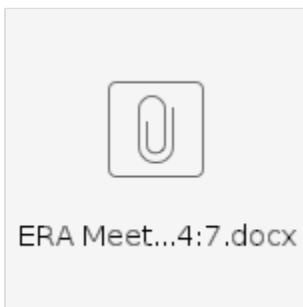
Discussion items

Time	Item	Who	Notes
	Status/demo of new features	Lock, Nicolaj (ELS-AAL)	
	Ability to capture explanatory statements	Lock, Nicolaj (ELS-AAL)	<ul style="list-style-type: none">• Where to capture this information?
	Tagging information	Lock, Nicolaj (ELS-AAL)	Do we know more about this yet? How to get the information.

Action items

- Setup server where we have data dumps
- Look into the tech specs for the Explanatory statement
- Create a report for the WoS tagging Amanda Shepherd
- Create pages in ERA space for local documentation [Knudsen, Malene \(ELS-AAL\)](#)

Notes from meeting



ERA meeting 2022-08-11

Date

11 Aug 2022

Attendees

- [Lock, Nicolaj \(ELS-AAL\)](#)

Goals

Discussion items

Time	Item	Who	Notes
20	Status	Lock, Nicolaj (ELS-AAL)	<ul style="list-style-type: none">• Discipline Checking status• Note and reporting• Using FoR codes from person/output• ERA Admin page• Unlock all 'old' sync'ed journals• Research income <p>Upcoming</p> <ul style="list-style-type: none">• Summary screens• Bulk upload
15	Journal lists	Lock, Nicolaj (ELS-AAL)	Demo of functionality Questions: <ul style="list-style-type: none">▪ How to apply FoR codes at the journal level
5	RCI	Lock, Nicolaj (ELS-AAL)	Timing, when would this make the most value?

Notes:

[ERA meeting 11:8.docx](#)

Action items

- [Knudsen, Malene \(ELS-AAL\)](#) make sure to send out emails to user group on dash releases containing ERA elements
-

Recording

https://elsevier.zoom.us/rec/share/vsYgPRUbEUC0PmBRzpKg4Dd_Fzr5MwpSblITtKUAggDet358R4Nhssk-JqvHwp0R.PikiHWvKG268UhWg
Passcode: AUWtA\$%9

ERA meeting 2022-08-25

Date

25 Aug 2022

Attendees

- [Lock, Nicolaj \(ELS-AAL\)](#)

Goals

Discussion items

Time	Item	Who	Notes
	Status	Lock, Nicolaj (ELS-AAL)	<ul style="list-style-type: none">• Plan for 5.24.3
	ERA Journal list	Lock, Nicolaj (ELS-AAL)	<ul style="list-style-type: none">▪ ERA journal list, how should we handle the 2-digit FoR codes when checking for differences?<ul style="list-style-type: none">▪ Would it be enough if they have one in the group, or▪ should it be one in each group if there are more than one 2-digit level FoR code▪ Should we have a check where we don't allow any journal list IDs that isn't on the list? <p>Decision: Don't auto select one 4-digit, validation, it is enough to have one 4-digit from either of the 2-digit groups, if more.</p>
	Citation tagging	Lock, Nicolaj (ELS-AAL)	How should the import file look? Do you have any examples of the tagging job?

Notes:

[era25:8.docx](#)

Action items




Local ERA documentation

This page is created in order for you to share your locally created ERA documentation with your fellow Pure colleagues. It might be good inspiration for others on how the ERA process is handled in your institution 😊

Just send an email to Malene Knudsen, m.knudsen@elsevier.com and I will upload the data to the space.



Before uploading your ERA documentation, make sure it does not contain in person related data, that cannot be shared outside your institution

Organisation (contact)	Target audience	Content	Link/File	Note
Charles Sturt University Amanda Shepherd	The intended audience for this document is for FoR code experts who will be working in the module.	How to assign FoR codes and apportionments to ERA 2023 Research Outputs		Note that we have given Administrator of ANZSRC access to all of our experts because we need them to be able to assign away from their codes as necessary (if an output is assigned away it goes into another checking state for the person in the other code to review anyway). The other roles don't have this ability and it makes it too restrictive given we have close to 100 academic staff working within the module at asynchronous times

Pure documentation

Institution name: Target audience - file/link, ect

Usefull ERA related reports

As the ERA submission preparation phase progresses, we will share (and we encourage customers to share) ERA report definitions on this page. If you have created a report that you find useful and would like to share with other please just send the report to m.knudsen@elsevier.com and I will update this page



Report workspaces has been moved to the Reporting Community. ERA related reports has been tagged with ERA2023.

<https://doc.pure.elsevier.com/dosearchsite.action?qql=space+%3D+%22REP%22+and+type+%3D+%22blogpost%22+and+label+%3D+%22era2023%22>