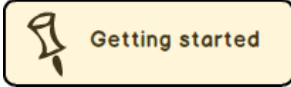


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SEP - KUOZ

Getting started

Details on enabling the SEP / KUOZ module and getting started



SEP Tables D3a / D3c : Research Staff FTE and Funding

Details on how to capture Research staff FTE and Funding on Person records



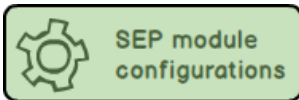
SEP Units

Details of how SEP Units of evaluation are handled in the SEP / KUOZ module



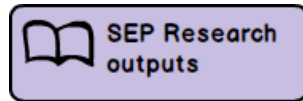
SEP / KUOZ Configuration

Details of configuration options for the SEP / KUOZ module



SEP Tables D3b : Main categories of research outputs

Details on how to capture the SEP Output type on Research Output records



SEP Reporting

Examples of reports that may be useful for SEP and SEP-related reporting

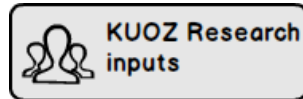


SEP Users

SEP User Roles	Date distributed
SEP User Roles 	October 2018

KUOZ A : Research input

Details on how to capture the KUOZ Staff type and funding

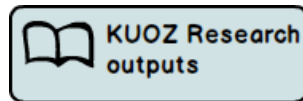


SEP Module development plans

[Audit of SEP / KUOZ requirements](#) (June 2018)

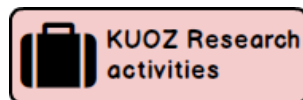
KUOZ C : Research output

Details on how to capture the KUOZ Output type on Research Output records



KUOZ D : Research activities

Details on how to capture the KUOZ Activity type on Activity, Prize, and Press / Media records



Datasets

Details on how to capture Datasets in SEP
Table D3b and KUOZ Table C



KUOZ - Research Inputs

RELEASED : 5.10.0

The SEP / KUOZ module supports the construction of **KUOZ A : Research input**

KUOZ A: Research input

Year range: 2016 - 2017 Only 3 years of data can be viewed at any one time Views

KUOZ Category	2016				2017			
	WPI FTE	WPI #	WPI FTE	WPI #	WPI FTE	WPI #	WPI FTE	WPI #
Post Doc	0.50	1.0	0.50	1.0	1.00	1.0	0.50	1.0
Support staff			0.50	1.0	0.50	1.0	0.50	1.0
Visiting fellows	0.50	1.0			1.00	1.0	0.50	1.0
Full professor	0.25	1.0	0.75	1.0	1.00	1.0	0.25	1.0
Associate professor			0.80	1.0			0.80	1.0
Assistant professor			0.50	1.0	0.50	1.0		
PHD employed	1.00	1.0			1.00	1.0		
Summary	0.75	2.0	3.05	4.0	2.00	4.0	5.80	7.0

The table can be filtered by attributes such as KUOZ output type, Organisation, and Year range.

In order to deliver this table, the SEP Staff model has been expanded to capture the more granular KUOZ Staff types. Capturing SEP and KUOZ Inputs is performed using the same function - see [SEP - Research Staff FTE and Funding](#).

Notes to KUOZ A

- As agreed with the User Group, the following mapping of funding sources is applied:
 - WP1 = Direct Funding in SEP Table D3c
 - WP2 = Research Grants in SEP Table D3c
 - WP3 = Contract research + Other in SEP Table D3c

KUOZ - Research Outputs

RELEASED : 5.9.0
 UPDATED : 5.12.1

The SEP / KUOZ module supports the construction of **KUOZ C : Research output**



KUOZ C: Research output

Year range: 2016 - 2018 Only 3 years of data can be viewed at any one time Views

KUOZ output type	2016				2017				2018			
	Academic	Professional	Popular	Other	Academic	Professional	Popular	Other	Academic	Professional	Popular	Other
A: Refereed journal article	2	-	-	-	0	-	-	-	1	-	-	-
B: Non-refereed article	3	-	1	1	0	-	-	-	0	-	-	-
C: Book (authored)	1	1	0	0	0	0	0	0	0	0	0	0
D: Book chapter	1	0	0	0	0	0	0	0	0	0	0	0
E: Dissertation (EDIP)	1	-	-	-	0	-	-	-	0	-	-	-
G: Non-refereed conference publication	1	0	-	-	0	0	-	-	0	0	-	-
F: Protocol	-	3	-	-	-	2	-	-	-	0	-	-
J: Report	-	3	-	-	-	3	-	-	-	0	-	-
total:	9	7	1	1	0	5	0	0	1	0	0	0

The table can be filtered by attributes such as KUOZ output type, Organisation, and Year range.

In order to deliver this table, the Research Output model has been extended to allow for the capture of KUOZ output type.

Research output: Contribution to journal › Article › Academic

Type

Publication category *

Academic Professional Popular

Peer-reviewed *

Peer-reviewed Not peer-reviewed

SEP output type

Non-refereed article ▼

KUOZ output type

'Non-refereed' article ▼

Change to Publication categories available for selection : 5.12.1

Upon upgrade to 5.12.1, where the publication category 'Scientific' is employed for Research Outputs, the classification will automatically be updated to 'Academic'. Further details are available in the [5.12.1 Release notes](#).



Change to Publication categories available for selection : 5.9.0

Upon upgrade to 5.9, where the SEP / KUOZ module is enabled, if for an output template / sub-type, none of 'Scientific', 'Professional', or 'Popular' Publication categories is currently enabled, all categories will subsequently be available for selection (Scientific, Professional, Popular, Other).

For example, if currently the Output type Contribution to Journal > Book / Film / Article review only has the Publication category 'Other' available for selection, upon upgrade to 5.9, this sub-type will be updated to make all Publication categories available for selection:

The image displays two screenshots of a web interface for selecting publication categories. Both screenshots are for the output type 'Book/Film/Article review'.

The top screenshot is titled 'Research output: Other research output > Book/Film/Article review'. Under the 'Type' section, the 'Publication category' is set to 'Other research output'. The 'SEP output type' is set to 'Not eligible'.

The bottom screenshot is titled 'Research output: Professional > Book/Film/Article review'. Under the 'Type' section, the 'Publication category' is set to 'Professional' (indicated by a selected radio button). Other available categories are 'Scientific', 'Popular', and 'Other research output'. The 'SEP output type' is set to 'Not eligible' and the 'KUOZ output type' is set to 'Book review'.

Notes to KUOZ C

- For an output to be included:
 - it must be in the Published state (i.e. the date of publication has passed)
 - it must have an internal organisational affiliation
- Apportionment of Outputs to SEP units:
 - Each author claims the full output count, except where those authors are in the same Organisational unit (in which case the output is counted only once for the Organisational unit)
 - Pure looks to the affiliated Organisation(s) on the Research Output record in order to determine the appropriate SEP count
- PhD Theses are apportioned to SEP units in the KUOZ tables according to the same logic applied for SEP - [see details here](#)

KUOZ - Update Output type mapping

RELEASED : 5.9.0
UPDATED : 5.12.1

In order to capture Research Outputs according to the Output types defined by KUOZ, a mapping must be defined that maps the Pure Output types to the KUOZ Output types (i.e. 'Refereed' journal article, 'Non-refereed' journal article, Book (authored), etc.)

[Output type mapping file template](#)



The default mapping is described [here](#)

Pure is initially populated with this default mapping, but this may not match your local Output types. If this is the case, you must - **immediately upon enabling the SEP / KUOZ module** - upload an updated mapping.

Update the mapping file - starting out

To update the mapping, download the template above and make the required edits (note that this is an XML file - if you need any assistance in editing the file, please contact us).

Once the file is ready, it should be uploaded via the Administrator > SEP / KUOZ tab. The existing **KUOZ Research output type mapping file** should be removed and your new mapping file should be uploaded.

The screenshot displays the 'SEP/KUOZ' configuration page. On the left is a navigation menu with 'Configuration' selected. The main content area is divided into sections for different mapping files, each with a 'Remove' button:

- SEP/KUOZ employment type mapping file**
 - SEP/KUOZ Employment type mapping file
 - SEP_personmapping_rules.xml (10 KB, application/xml)
- SEP and KUOZ output type mapping files**
 - SEP Research Output type mapping file
 - SEP_outputmapping_rules_TEST4.xml (6 KB, application/xml)
 - KUOZ Research Output type mapping file** (highlighted with an orange border)
 - KUOZ_outputmapping_rules_ORIGINAL_TEST7.xml (14 KB, application/xml)
- KUOZ Activity type mapping files**
 - KUOZ Activities - Activity type mapping file
 - KUOZActivity_DefaultMapping_Activities_TEST1.xml (3 KB, application/xml)
 - KUOZ Activities - Prize type mapping file
 - KUOZActivity_DefaultMapping_Prizes_TEST1.xml (525 bytes, application/xml)
 - KUOZ Activities - Press/Media type mapping file
 - KUOZActivity_DefaultMapping_PressMedia.xml (382 bytes, application/xml)

Once you select 'Save' at the bottom of the page, the **sEPUpdateResearchOutputCronJob** job will be initiated automatically. You can follow the progress of this job via the Administrator > Jobs > Job log.

Job log				
Name	Start	Duration (hours)	User	Status
newsflippingSynchronisationJob	05. Jul 2018 10:45	0:00:02	root	Success
currentPublicationStatusCronjob	05. Jul 2018 04:00	0:00:00	root	Success
updatePersonIntrinsicsCronjob	05. Jul 2018 02:00	0:00:00	root	Success
auditReviewEmbargoCronjob	05. Jul 2018 02:00	0:00:00	root	Success
reportHostsKeptCronjob	05. Jul 2018 01:25	0:00:00	root	Success
systemInfoFormatStageEventStatisticsPopulatingCronjob	05. Jul 2018 01:00	0:00:00	root	Success
talkbackJob	05. Jul 2018 01:00	0:00:03	sync_user	Success
deleteExpiredSystemMessagesCronjob	05. Jul 2018 01:00	0:00:00	root	Success
job				
StatusEmailDaily	05. Jul 2018 01:00	0:00:00	root	Success
openAccessEmbargoLiftedCronjob	05. Jul 2018 00:01	0:00:00	root	Success
embargoLiftedAuditJob	05. Jul 2018 00:01	0:00:05	root	Success
compute download statistics metrics	04. Jul 2018 23:45	0:00:01	root	Success
updateResearchOutputCronjob	04. Jul 2018 20:29	0:00:01	atlas	Success

Start	Duration (hours)	Success	Warnings	Errors	Fatal errors
04. Jul 2018 20:29	0:00:01	37	0	0	0

All log entries Search Export log entries as MS Excel

Status: Table description

Success: INFO: Found valid SEP XML mapping file with 12 rules.

Success: INFO: Found valid KUOZ Research Output XML mapping file with 23 rules.

Success: INFO: Found valid KUOZ Activities - Activity XML mapping file with 10 rules.

Success: INFO: Found valid KUOZ Activities - Press/Media XML mapping file with 1 rules.

Success: INFO: Found valid KUOZ Activities - Prize XML mapping file with 1 rules.

Success: Starting job.

Success: INFO: A total of 82 outputs will be processed.

Success: About to process 38 research outputs.

Success: Research Output: Chapter 10

INFO: No valid mapping or fallback rule used. Leaving SEP output type as /dk/atira/pure/assessmenttype/noneeligible.
Content-ID: 18535

Notes:

- 1:many and many:1 Pure output type to KUOZ output type relationships are supported - if a 1:many mapping is provided in the mapping file, by default the first KUOZ Output type listed will be applied, but the user can edit the Research Output record to select from the available mapped KUOZ output types
- Content not eligible to be counted for KUOZ:
 - In 5.12.1 we updated the SEP / KUOZ functionality to distinguish between outputs that had been manually selected as 'Not eligible' and those that were not eligible as per the mapping file
 - Prior to this release, 'Not eligible' covered two things:
 - the content type does not exist in the mapping file, so is not eligible for KUOZ counting
 - the individual item of content has been manually selected as 'Not eligible' (for various reasons)
 - When updating a mapping file, Pure would re-visit all mappings and make the necessary changes to the records. But this also meant that all 'Not eligible' items were updated as well - whether they were not eligible because they didn't previously have a mapping, or they were manually selected as not eligible. This was problematic for those items manually selected as Not eligible - these should not automatically update.
 - With this release, we have introduced two new elements to better handle ineligible content:
 - A new classification for 'Not eligible (manual selection)'. This value is never automatically updated - even if the specific mapping for that item's type is updated.
 - A new classification name - 'Not eligible (mapped value)' - for those items that are not eligible because they don't exist in the mapping file. If the mapping is updated in the future, such that the type in question is eligible for KUOZ counting, the value will be updated as per the mapping file.

Research output: Contribution to journal > Article > Academic

Type

Publication category *

Academic Professional Popular

Peer-reviewed *

Peer-reviewed Not peer-reviewed

SEP output type

Non-refereed article

KUOZ output type

'Non-refereed' article

'Non-refereed' article

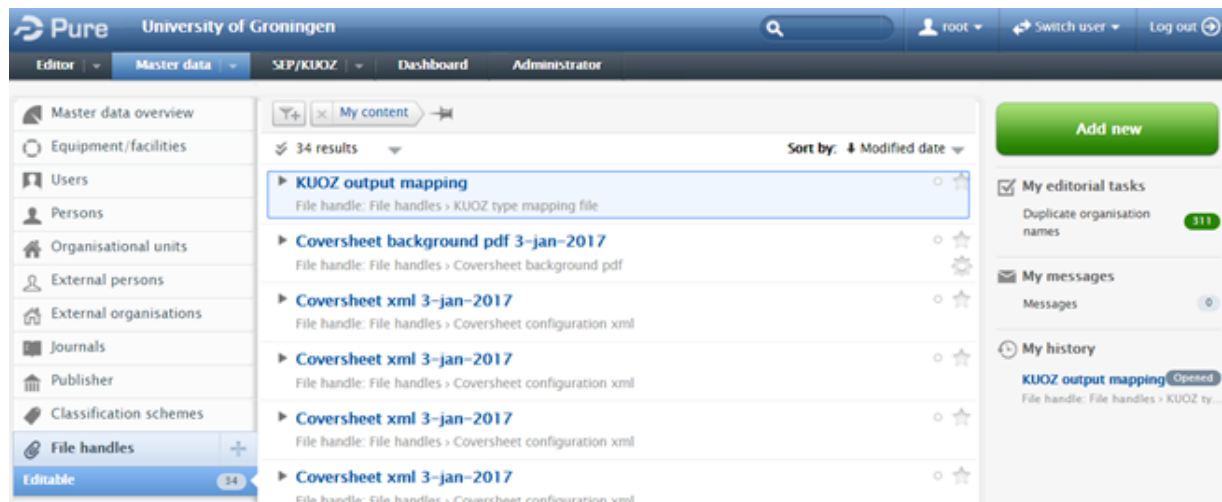
Not eligible (mapped value)

Not eligible (manual selection)

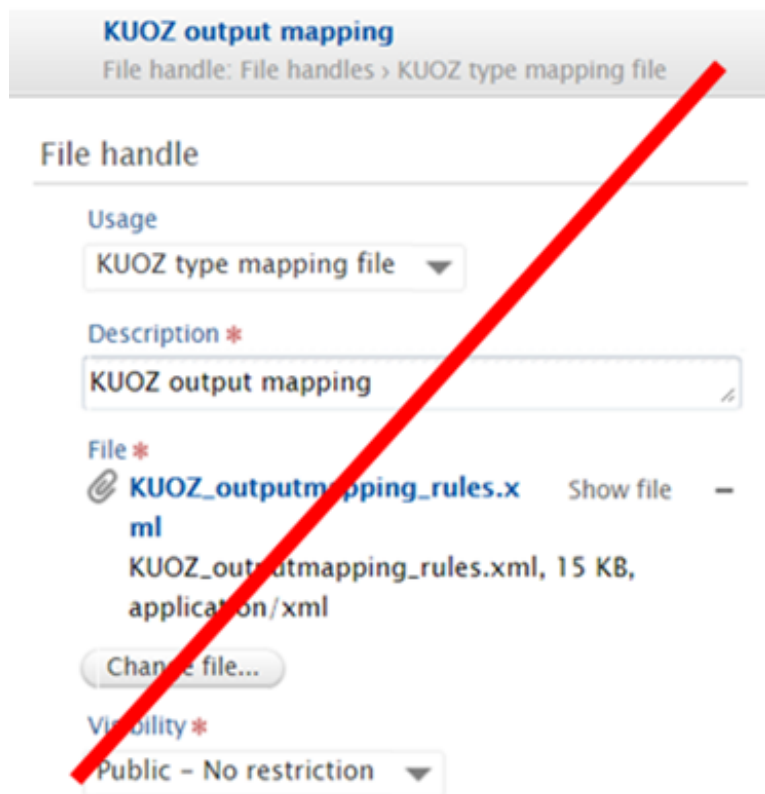
- At the bottom of the mapping file is a 'fallback rule', assigning all output type / peer review / publication category combination mappings not included in the mapping file as 'Not eligible' for KUOZ.

Update the mapping file - already in use

It is recommended that you try to keep the mapping file constant over time (therefore some thought must be put into the mapping from the outset, to ensure that it will work for all Units and Output types). However, if in the future you need to update the mapping file, you should first download the mapping file from Pure (to ensure you are working off of the existing mapping). The mapping file can be downloaded from Pure via the Master Data > File Handle > KUOZ output mapping.



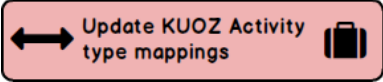
To change the file, **DO NOT** simply change the existing file in the File Handle! Follow the instructions above for uploading the file via the SEP / KUOZ configuration tab.



KUOZ - Research Activities

RELEASED : 5.11.2
 UPDATED : 5.12.1

The SEP / KUOZ module supports the construction of **KUOZ D : Research activities**



KUZ category	2017				2018				
	Academic	Professional	Popular	Other	Academic	Professional	Popular	Other	
A. (R) / reviewing	-	-	1122	-	-	-	885	-	883
C. Pressing	-	-	790	-	-	-	100	-	95
D. Exchange	-	-	2	-	-	-	-	-	-
E. Organising	-	-	167	-	-	-	34	-	28
F. Award	-	-	70	-	-	-	6	-	2
G. Membership	-	-	99	-	-	-	76	-	73
H. Teaching	-	-	35	-	-	-	8	-	7
I. Advising	19	-	44	14	-	-	20	15	37
Total	19	0	2392	14	0	0	1138	15	1079

Notes for KUOZ D : Research Activities

1	For an item to be counted in KUOZ Table D, it must have an internal organisational affiliation
2	<p>Apportionment of activities to SEP units</p> <ul style="list-style-type: none"> Each contributor claims the full activity count, except where those contributors are in the same Organisational unit (in which case the activity is counted only once for the Organisational unit) Pure looks to the affiliated Organisation(s) on the Activity / Prize / Press/Media record in order to determine the appropriate KUOZ count
3	<p>Categories</p> <ul style="list-style-type: none"> KUOZ Table D has 4 Category columns: <ul style="list-style-type: none"> Academic Professional Popular Other If an item has no Category defined, it will be counted in the 'Other' column If an item has a Category defined that is not included in the above list, it will be counted in the 'Other' column
4	<p>KUOZ Table D navigation</p> <ul style="list-style-type: none"> As KUOZ Table D includes 3 different Pure content types (Activities, Prizes, Press / Media), we've had to introduce some navigation rules based on the default mapping to ensure a functioning user experience. Namely: <ul style="list-style-type: none"> 'Media' items will always navigate to Press / Media content 'Award' items will always navigate to Prizes content All other items will always navigate to Activities content

5 KUOZ Table D filters

- As this table contains multiple Pure content types (Activities, Prizes, Press / Media), the filters available do not work across all content types
 - The Organisation filter applies to all three content types
 - The Year range filter applies to all three content types
 - The KUOZ Activity type filter applies to all three content types
 - All other filters only work on Activities

NOTE:

- If you have applied Roles to your mapping (see [KUOZ - Update Activity type mapping](#)), in some scenarios the counts when filtered down to Organisation may not perform as expected
 - For example:
 - You have an Activity (Participating in or organising an event) where only the Role 'Participant' is mapped to the KUOZ type 'Presenting'
 - There are two Persons affiliated with this Activity:
 - Person X Role is Participant, Organisation is School of A
 - Person Y Role is Speaker, Organisation is School of B
 - This Activity will be counted as 'Presenting' in both School of A and School of B

6 Period

- Each Activity, Prize, and Press / Media item is listed in the year(s) in which it is active.
- For **Activities**, either the Specific date is used to determine the year, or the Period of time
 - If a start year and end year have been input, the Activity will be listed in each year that the Activity is active
 - If only a start year has been input, the Activity is counted as active from that year

Period *

Specific date

Period of time

Year * Month Day — Year Month Day

—

- For **Prizes**, the Awarded date is used to determine the year

Awarded date

Year * Month Day

- For **Press / Media**, the Date of each individual Media contribution item is used to determine the year(s) (see further detail on Press / Media content below)

Type

Type *

Media contribution Media coverage

Description

Title *

Description/Abstract

Persons and affiliations

Persons and organisations *

No persons or organisational units associated

Add person Add organisational unit

Details

Date *

Example: 21/10/2002

7 **Press / Media content**

- When counting 'Media' items in KUOZ Table D, the table is not counting Press / Media records, but rather the number of 'Media contributions' within Press / Media records. So, for example, a single Press / Media item that has 3 individual 'Media contribution' items will be counted as '3' in KUOZ Table D.
 - Note though that when navigating from KUOZ Table D, the numbers won't necessarily match up (so, as per the example above, if there are 3 items of 'Media' in Table D, if you navigate to the Press / Media list, only 1 record will be displayed).

KUOZ Test 1
Press/Media: Research

Type

Type
Research

KUOZ Activities output type
Media

Description

Title of theme/story *
KUOZ Test 1

Description

B *I* U ABC | [List Icons] | Paragraph Font Size

Media contribution and media coverage ⓘ

Media contribution and media coverage *
MEDIA CONTRIBUTIONS


▶ Media contribution test 3 01/02/2014	Edit -
▶ Media contribution test 1 01/01/2014	Edit -
▶ Media contribution test 2 01/01/2014	Edit -

Add media contribution or media coverage...

KUOZ - Update Activity type mapping

RELEASED : 5.11.2
UPDATED : 5.11.3, 5.12.1




In order to capture Activities, Prizes, and Press / Media according to the Activity types defined by KUOZ, mappings must be defined that map the Pure Activity, Prize, and Press / Media types to the KUOZ Activity types (i.e. External appointment, Conference participation, External collaboration & partnerships, etc.).

The default mapping is described [here](#) 

Pure is initially populated with this default mapping, but this may not match your local Activity, Prize, and Press / Media types. If this is the case, you will need to upload an updated mapping and ensure the **SEP /KUOZ : Update mapping of SEP/KUOZ research output categories** job is run (normally initiates automatically upon upload of a new mapping file).



KUOZ Activity Type mapping templates

- [Activities : KUOZ Activity type mapping template](#) 
- [Prizes : KUOZ Activity type mapping template](#) 
- [Press / Media : KUOZ Activity type mapping template](#) 

Update the mapping files - starting out

To update the mappings, download the templates above and make the required edits (note that these are XML files - if you need any assistance in editing the file, please contact your IT support, or Pure support).

There is one mapping file for each content type in Pure:

- Activities
- Prizes
- Press / Media

Restrictions


In order to ensure the navigation in Table D functions as expected, restrictions on the mappings are enforced as follows (from 5.11.3):

Pure content type		KUOZ Activity type
Activities	can only be mapped to	All KUOZ Activity types other than Awards and Media
Prizes	can only be mapped to	Awards
Press / Media	can only be mapped to	Media


If you attempt to upload an invalid mapping file, you will receive a warning message, and errors will be generated in the job:

KUOZ Activity type mapping files

KUOZ Activities - Activity type mapping file


 KUOZActivity_DefaultMapping_Activities.xml
4 KB, application/xml Remove

KUOZ Activities - Prize type mapping file

 KUOZActivity_PrizesToActivity_3.xml
366 bytes, application/xml Remove

The uploaded mapping file is invalid or does not contain any rules. Please verify the file.

KUOZ Activities - Press/Media type mapping file

 KUOZActivity_DefaultMapping_PressMedia.xml
382 bytes, application/xml Remove

SEPUpdateResearchOutputCronJob 29. Apr 2018 22:37 0:00:00 root **Fatal errors**

Start	Duration (hours)	Success	Warnings	Errors	Fatal errors
29. Apr 2018 22:37	0:00:00	4	0	0	1

All log entries Export log entries as MS Excel

Status	Title and description
Success	INFO: Found valid SEP XML mapping file with 12 rules.
Success	INFO: Found valid KUOZ Research Output XML mapping file with 24 rules.
Success	INFO: Found valid KUOZ Activities - Activity XML mapping file with 11 rules.
Success	INFO: Found valid KUOZ Activities - Press/Media XML mapping file with 1 rules.
Fatal	FATAL: SEP/KUOZ module is not configured correctly. Check the KUOZ configuration page and upload a valid KUOZ Activities - Prize output mapping XML file.

Notes

- 1:many and many:1 Pure type to KUOZ Activity type relationships are supported - if a 1:many mapping is provided in the mapping file, by default the first KUOZ Activity type listed will be applied, but the user can edit the record to select from the available mapped KUOZ activity types
- Content not eligible to be counted for KUOZ:
 - In 5.12.1 we updated the SEP / KUOZ functionality to distinguish between outputs that had been manually selected as 'Not eligible' and those that were not eligible as per the mapping file
 - Prior to this release, 'Not eligible' covered two things:
 - the content type does not exist in the mapping file, so is not eligible for KUOZ counting
 - the individual item of content has been manually selected as 'Not eligible' (for various reasons)
 - When updating a mapping file, Pure would re-visit all mappings and make the necessary changes to the records. But this also meant that all 'Not eligible' items were updated as well - whether they were not eligible because they didn't previously have a mapping, or they were manually selected as not eligible. This was problematic for those items manually selected as Not eligible - these should not automatically update.
 - With this release, we have introduced two new elements to better handle ineligible content:
 - A new classification for 'Not eligible (manual selection)'. This value is never automatically updated - even if the specific mapping for that item's type is updated.
 - A new classification name - 'Not eligible (mapped value)' - for those items that are not eligible because they don't exist in the mapping file. If the mapping is updated in the future, such that the type in question is eligible for KUOZ counting, the value will be updated as per the mapping file.

Prize 8
Prize > Academic

Type

Type
Prize

Category *
 Academic Professional Popular Other

KUOZ Prize type
Award

Pri
Award
Not eligible (manual selection)
Not eligible (mapped value)

- Unlike other SEP / KUOZ mapping files, there is no 'fallback rule' in the XML mapping files; any Activity, Prize, or Press / Media type not included in the mapping file will be captured as 'Not eligible' for KUOZ.

Adding additional granularity in terms of Categories and /or Roles

If you wish to apply **Categories** (e.g. Academic, Professional, Popular, Other) to your KUOZ Activity mapping, you can add these to the XML mapping file as follows:

- /dk/atira/pure/prize/category
- /dk/atira/pure/clipping/category
- /dk/atira/pure/activity/category

Category command

```
<ActivityMappingRule>
  <!-- input -->
  <outputTypeUri>/dk/atira/pure/activity/activitytypes/talk/invited_talk<
/outputTypeUri>
  <outputCategoryUri>/dk/atira/pure/activity/category/academic</outputCategoryUri>

  <!-- output -->
  <mappedOutputTypeUri>/dk/atira/pure/kuozactivities/kuozassessmenttype/presenting<
/mappedOutputTypeUri>
</ActivityMappingRule>
```

If you wish to apply **Roles** to your KUOZ Activity mapping (e.g. only capture 'Participating in or organising an event' Activities as KUOZ type 'Organizing & contributing to an event' if the contributor has the role of 'Organizer'), you can add these to the XML mapping file as follows:

Role command

```
<ActivityMappingRule>
  <!-- input -->
  <outputTypeUri>/dk/atira/pure/activity/activitytypes/attendance</outputTypeUri>
  <personRoleUri>/dk/atira/pure/activity/roles/attendance/organizer</personRoleUri>

  <!-- output -->
  <mappedOutputTypeUri>/dk/atira/pure/kuozactivities/kuozassessmenttype/organizing<
/mappedOutputTypeUri>
</ActivityMappingRule>
```

Note that if applying a Role-based mapping, you should be aware of the implications if different roles for the same Activity type are mapped to different KUOZ Activity types.

For example, say you have the following mappings:

- Activity > Participating in or organising an event (with Role = Participant) KUOZ Presenting
- Activity > Participating in or organising an event (with Role = Organizer) KUOZ Organizing

And you have a single Activity, with multiple contributors with different roles

- Participating or organising an event
 - Prof Mary Smith (Organizer)
 - Dr Joe Bloggs (Participant)

That single Activity can be assigned to only one KUOZ type:


- Presenting (based on Joe Blogg's role)
- Organizing (based on Mary Smith's role)
- Not eligible

See also the implications on counts of Activities when using Role-based mappings (Item 5 at [KUOZ - Research Activities](#))

Once the files are ready, they should be uploaded via the Administrator > SEP / KUOZ tab. The existing **KUOZ Activity mapping files** should be replaced with your local mapping files.

KUOZ Activity type mapping files

KUOZ Activities – Activity type mapping file

 KUOZActivity_DefaultMapping_Activities.xml
3 KB, application/xml

Remove

KUOZ Activities – Prize type mapping file



Drag file or **browse** your computer.

KUOZ Activities – Press/Media type mapping file



Drag file or **browse** your computer.

Once you select 'Save' at the bottom of the page, the **SEPUpdateResearchOutputCronJob** job will be initiated automatically. You can follow the progress of this job via the Administrator > Jobs > Job log.

Overview		Job log				
Jobs		20 results				
Cron Job Scheduling		Name	Start	Duration (hours)	User	Status
Single Run Jobs		newsForClippingSynchronisationJob	05. Jul 2018 10:45	0:00:02	root	Success
Job management		currentPublicationsStatusCronJob	05. Jul 2018 04:00	0:00:00	root	Success
Job log		updatePersonsWithRulesCronJob	05. Jul 2018 02:00	0:00:00	root	Success
System settings		auditRetentionPurgerCronJob	05. Jul 2018 02:00	0:00:00	root	Success
Security		reportHousekeepingCronJob	05. Jul 2018 01:25	0:00:00	root	Success
Messages and text resources		systemInformationUsageEventStat	05. Jul 2018 01:00	0:00:00	root	Success
Documentation		statsPopulatingCronJob				
Configuration		salibackupJob	05. Jul 2018 01:00	0:00:03	sysf_user	Success
Terms of agreement		deleteExpiredSystemMessagesCron	05. Jul 2018 01:00	0:00:00	root	Success
Keywords		job				
Support		StatusEmailDaily	05. Jul 2018 01:00	0:00:00	root	Success
Certificate management		openAccessEmbargoLiftedCronJob	05. Jul 2018 00:01	0:00:00	root	Success
Data retention policy		embargoLiftedAuditJob	05. Jul 2018 00:01	0:00:05	root	Success
Export to Excel		Compare download statistics	04. Jul 2018 23:45	0:00:01	root	Success
ORCID		metrics				
Integrations		SEPUpdateResearchOutputCronJob	04. Jul 2018 20:29	0:00:01	atra	Success
Bulk import		Start	Duration (hours)	Success	Warnings	Fatal errors
Citations and Impact Factors		04. Jul 2018 20:29	0:00:01	37	0	0
Unified Project Model		All log entries	Search:	Export log entries as MS Excel		
Full text repository		Status	Title and description			
Storage		Success	INFO: Found valid SEP XML mapping file with 12 rules.			
Fingerprint		Success	INFO: Found valid KUOZ Research Output XML mapping file with 23 rules.			
SEP/KUOZ		Success	INFO: Found valid KUOZ Activities – Activity XML mapping file with 10 rules.			
		Success	INFO: Found valid KUOZ Activities – Press/Media XML mapping file with 1 rules.			
		Success	INFO: Found valid KUOZ Activities – Prize XML mapping file with 1 rules.			
		Success	Starting job.			
		Success	INFO: A total of 62 outputs will be processed.			
		Success	About to process 38 research outputs.			
		Success	Research Output: Chapter 10			
		Success	INFO: No valid mapping or fallback rule used. Leaving SEP output type as /dk:/atra:/pure:/assessmenttype:/noteligible/.			
			Content-ID: 18535			

Update the mapping files - already in use

It is recommended that you try to keep the mapping files constant over time (therefore some thought must be put into the mapping from the outset, to ensure that it will work for all Units and Activity, Prize, and Press / Media types). However, if in the future you need to update the mapping file, you should first download the mapping file from Pure (to ensure you are working off of the existing mapping). The mapping files can be downloaded from Pure via Master Data > File Handle:

- KUOZ Activities - Activity mapping
- KUOZ Activities - Prize mapping
- KUOZ Activities - Press/Media mapping

Editor | Master data | SEP/KUOZ | Dashboard | Administrator | Usage analytics

- Master data overview
- Users
- Persons
- Organisational units
- External persons
- External organisations
- Author collaborations
- Journals
- Publisher
- Classification schemes
- File handles** +
- Editable 39

My content

39 results

- KUOZ Activities – Prize mapping**
File handle: File handles > KUOZ Activities type mapping file
- KUOZ Activities – Activity mapping**
File handle: File handles > KUOZ Activities type mapping file
- SEP output mapping**
File handle: File handles > SEP type mapping file
- KUOZ output mapping**
File handle: File handles > KUOZ type mapping file
- KUOZ Activities – Press/Media mapping**
File handle: File handles > KUOZ Activities type mapping file
- Default coversheet background for student theses coversheets**
File handle: File handles > Student thesis frontpage


To change the file, **DO NOT** simply change the existing file in the File Handle! Follow the instructions above for uploading the file via the SEP / KUOZ configuration tab.

KUOZ Activities – Activity mapping
File handle: File handles > KUOZ Activities type mapping file

File handle

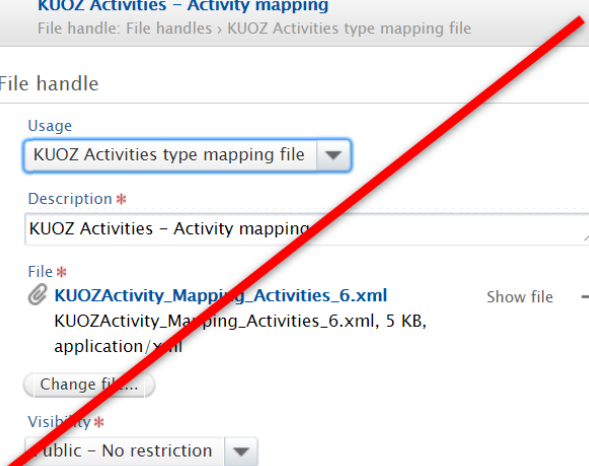
Usage
KUOZ Activities type mapping file

Description *
KUOZ Activities – Activity mapping

File *
 **KUOZActivity_Mapping_Activities_6.xml** Show file -
 KUOZActivity_Mapping_Activities_6.xml, 5 KB,
 application/xml

Change file...

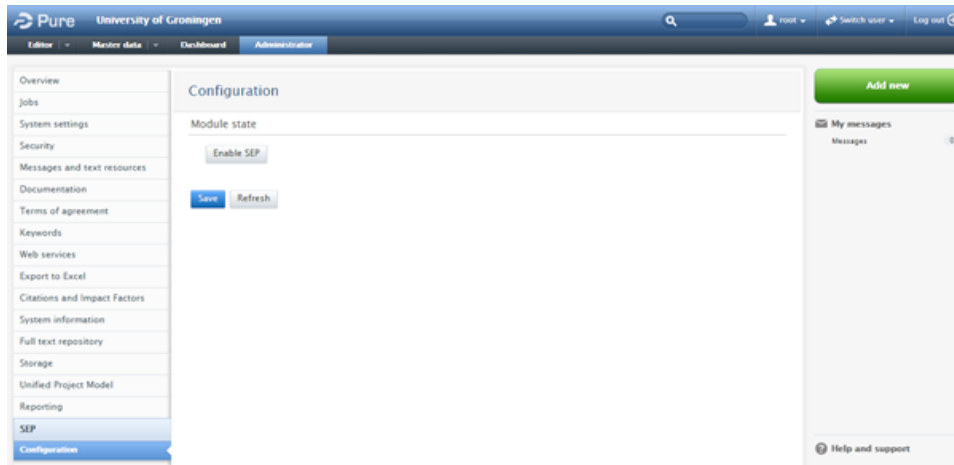
Visibility *
Public – No restriction



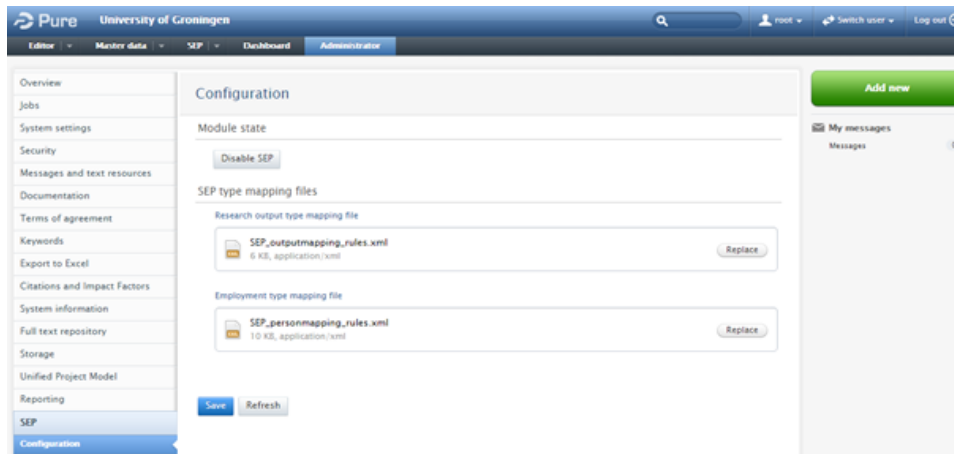
SEP-KUOZ - Getting started

RELEASED : 5.4.0
UPDATED : 5.9.0







- 1 To turn the SEP / KUOZ module on, go to Administrator > SEP / KUOZ and Enable the module:



- 2 Following enabling the module, Pure must be re-started in order for the SEP / KUOZ module to be available for use. Upon re-start, the default KUOZ type mapping file for Research outputs, and the SEP type mapping files for Persons and for Research outputs will be applied.



- 3 You should immediately update the mapping files to ensure that your local classifications are mapped correctly:

SEP	
 Update SEP Staff type mapping 	 Update SEP Output type mapping 
KUOZ	
 Update KUOZ Output type mapping 	

SEP-KUOZ - Module configuration

RELEASED : 5.5.0
UPDATED : 5.9.0, 5.13.0

Once the SEP / KUOZ module is enabled, you can configure particular features / functionality to meet local needs.

SEP / KUOZ type visibility

SEP/KUOZ type visibility

SEP/KUOZ type visible only to Editors/Administrators

Off

SEP/KUOZ tab in Person editor window visible only to Editors/Administrators

Off

You can choose to restrict the visibility of SEP/KUOZ data to only Editors / Administrators.

SEP / KUOZ type visible only to Editors / Administrators

When enabled, only Editors / Administrators will be able to see the SEP / KUOZ type on:

- Research outputs
- Activities
- Prizes
- Press / Media

Type ?

Publication category *

Academic Research Professional Popular

Peer-reviewed *

Peer-reviewed Not peer-reviewed

SEP output type

Refereed article ▼

KUOZ output type

'Refereed' journal article ▼

SEP / KUOZ tab in Person editor window visible only to Editors / Administrators

When enabled, only Editors / Administrators will be able to see the SEP / KUOZ tab on the Person record.

Id: 4134842 **Michelle Williams** Person

EDIT

Metadata **Research FTE and Funding**

SEP/KUOZ **Department of Civil Engineering**

Associated user **2/02/12 – present**

Merge **Academic - Professor**

Automated search **Organisational unit: Department**

OVERVIEW

Relations

Fingerprints

Display

HISTORY AND COMMENTS

History and comments

▼ SEP/KUOZ Staff type: Full professor

	2013	2014	2015	2016	2017	2018
FTE				0.50	0.50	0.50
% Direct Funding				100	100	100
% Research Grants						
% Contract Research						
% Other						

Show all years

Department of Civil Engineering

2/02/14 – 31/12/16 View

Academic - Assoc Professor

Organisational unit: Department

▼ SEP/KUOZ Staff type: Associate professor

Department of Civil Engineering

1/01/15 – 31/12/17 View

Academic - Post Doc

Organisational unit: Department

▼ SEP/KUOZ Staff type: Post Doc

	2015	2016	2017
FTE			0.50
% Direct Funding			100
% Research Grants			
% Contract Research			
% Other			

Earliest start year

You can choose to include legacy SEP / KUOZ content for Persons (Research FTE and Funding Source) in the SEP / KUOZ module by extending the Earliest start year. The default is 2009.

By default, the SEP screen in the Person editor goes back to 2010, and the user can expand the columns by selecting 'Show all years'. Only years for which the Person has an organisation affiliation will be displayed (e.g. if a Person has only been a member of staff since 2012, only columns from 2012 will exist).

Earliest start year

Year *

2009

Id: 10973 **Grace McDonald**
Person

EDIT
Metadata
SEP
Associated user
Translation
Merge
Automated search

OVERVIEW
Relations
Display

HISTORY AND COMMENTS
History and comments

Research FTE and Funding

Faculty B

Support staff

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
% Direct Funding						100	100	100	100	100	100	
% Research Grants												
% Contract Research												
% Other												

Show fewer years

Enforce total 1.0 FTE / MJE for Research staff

You can choose whether or not to enforce a maximum of 1.0 FTE / MJE for each member of research staff if any single calendar year.

- Where enabled, an error will be generated if a total of more than 1.0 research FTE / MJE is assigned to an individual in any single calendar year.
- If validation is turned off, support for a 'matrix' organisational structure can be supported, with SEP FTE / MJE assigned to both the departmental structure (y axis) and the research structure (x axis)
 - Customers are advised to disable this validation with caution, and to offer strong user support, as SEP content will need to be continually filtered by organisation (or organisation type) to ensure accurate counts

Enforce total 1.0 FTE/MJE for Research staff

Where enabled, an error will be generated if a total of more than 1.0 research FTE/MJE is assigned to an individual. Disabling this restriction should be undertaken with caution; if disabled, users must understand that research FTE/MJE counts in the SEP/KUOZ tables will overstate actual values unless filtered appropriately by organisation or organisation type.

Enforce total 1.0 FTE/MJE

On

Pure University of the Netherlands

Editor Master data SEP Dashboard Administrator

Persons

Selected persons

Francis Underwood

Search by start entering person name, job title or organisation
Search results will be updated while you type

D3c: Funding Overview

Year range 2012 - 2016 Apply Views

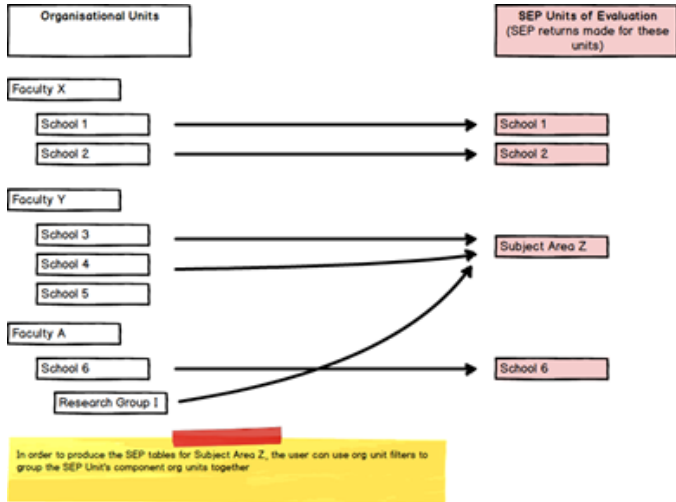
SEP Funding Type	2012		2013		2014		2015		2016	
	FTE	N	FTE	N	FTE	N	FTE	N	FTE	N
Direct funding	0.48	24	0.48	24	0.50	25	0.50	25	0.50	25
Research grants	0.63	32	0.63	32	0.65	32	0.65	32	0.65	32
Contract research	0.74	37	0.74	37	0.60	30	0.60	30	0.60	30
Other	0.15	8	0.15	8	0.25	12	0.25	12	0.25	12
Total	2.00	100	2.00	100	2.00	100	2.00	100	2.00	100

SEP - Organisational units

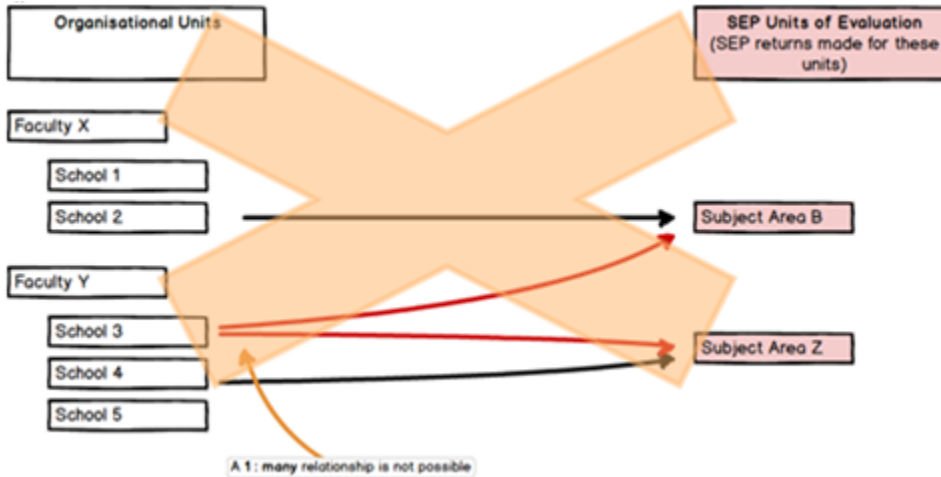
Pursuant to customer feedback, we have not enabled the facility to create separate SEP Units of evaluation. Customer feedback indicated a strong preference to not create specific SEP Units as the units of evaluation are already in Pure (in the Organisational hierarchy), or could be grouped (if necessary).

We have therefore interpreted this to mean that there is always either a 1:1 or many:1 relationship between Organisational Units and SEP Units of evaluation. A 1:many relationship will not be possible in this model.

For example:



A 1:many relationship (e.g. attempting to split School 3 into two separate SEP Units of Evaluation) will not be possible (well, it's possible, but it will mean that School 3's content will be counted fully in both Subject Area B and Z's returns):






SEP - Reporting

RELEASED : 5.5.0



This page shows some report examples that will hopefully help customers in reporting on SEP and SEP-related content in Pure. Note that these examples will only report on content correctly from 5.5.0 / 4.24.0.

Research staff FTEs and source(s) of funding

Content	Report definition (for import directly into Pure)	.xls output
<p>All Persons with a SEP FTE. Report includes:</p> <ul style="list-style-type: none"> Name IDs (Pure ID, Employee ID, Digital Author ID) SEP staff type Year FTE Funding source Funding % 	<p>SEP_Person_report.xml </p> <p>NOTE that where filters / groupings / projections have not yet been 'enabled' in your local report configuration, these will come up as 'errors' or 'warnings' when you first import the report definition. It is recommended that you ensure all fields included in the report definition (as per the screenshots) are enabled prior to importing the report definition.</p>	<p>SEP_Person_report.xlsx </p> <p>SEP_Person_report_ADDITIONAL.xlsx </p> <ul style="list-style-type: none"> Output with additional work, enabling direct comparison with Table D3a screen in Pure



Project participant content

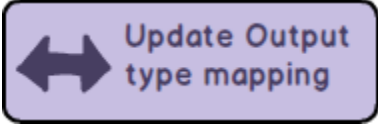
Content	Report definition (for import directly into Pure)	.xls output
<p>All Projects (filtered for those active today). Report includes:</p> <ul style="list-style-type: none"> Project IDs (Pure ID, Source ID) and title Project participants: <ul style="list-style-type: none"> name and Pure ID project association period planned researcher commitment 	<p>SEP_Project_Reporting.xml </p> <p>NOTE that where filters / groupings / projections have not yet been 'enabled' in your local report configuration, these will come up as 'errors' or 'warnings' when you first import the report definition. It is recommended that you ensure all fields included in the report definition (as per the screenshots) are enabled prior to importing the report definition.</p>	<p>SEP_Project_Reporting.xlsx </p>



SEP - Research Outputs

RELEASED : 5.4.0
 UPDATED : 5.6.0

The SEP module supports the construction of **Table D3b : Main categories of research output**



SEP output type	2010	2011	2012	2013	2014	2015
Refereed articles	0	0	0	0	0	1
Books	0	0	0	0	0	1
Book chapters	0	0	1	0	0	0
Non-refereed articles	0	0	0	0	0	1
Professional publications	0	0	0	1	0	0
PhD theses	0	1	0	0	1	0
Total	0	0	0	1	0	0
Publications aimed at the general public	0	0	0	0	1	0
Other research output (forward-passions)	0	0	0	0	1	0
Total	0	1	1	2	3	3

The table can be filtered by attributes such as SEP output type, Organisation, and Year range.

In order to deliver this table, the Research Output model has been extended to allow for the capture of SEP output type.

Notes to Table D3b

- For an output to be included:
 - it must be in the Published state (i.e. the date of publication has passed)
 - it must have an internal organisational affiliation
- Apportionment of Outputs to SEP units:
 - Each author claims the full output count, except where those authors are in the same Organisational unit (in which case the output is counted only once for the Organisational unit)
 - Pure looks to the affiliated Organisation(s) on the Research Output record in order to determine the appropriate SEP count

PhD Theses

- are captured from Research output > PhD Thesis
- in order for the calculation to act correctly, you will need to ensure that all PhD Theses awarded by your institution are input as Research Outputs, and ensure that PhD Theses not awarded by your institution correctly attribute the thesis to the appropriate external organisation

Apportionment of Theses to SEP units

- By default, PhD Theses are apportioned to the SEP unit(s) of the PhD Candidate, in the same way as other outputs (as per description above)

- But there is now a configurable option to affiliate PhD Theses to the Promoter(s)' Organisational Unit(s), rather than that of the PhD Candidate
- If this configuration is enabled:
 - PhD Theses will be attributed to the organisational affiliation(s) of the Promoter(s) (which must be internal for the Thesis to be included in Table D3b)
 - For a Thesis to be included in Table D3b, at least one of the Promoters must have an internal organisational affiliation
 - If no Promoters or Internal Organisations are selected in the 'Thesis information' section, the Thesis will not be counted in Table D3b
 - It is also possible to limit to specific Promoter / Supervisor roles, such that, for example if the Role "Assessment Committee member" is excluded, the Thesis will not be attributed to the organisation(s) of any individuals associated with the Thesis with that role.
 - Note that where the configuration is limited to certain Supervisor roles, any Theses not attributed directly to a Supervisor (i.e. where an Organisational unit is affiliated directly on the Thesis as Supervisor(s) / Advisor) will also be excluded

SEP/KUOZ PhD theses

Attribute SEP/KUOZ PhD theses to Promoters / Supervisors, rather than PhD Candidates



If enabled, PhD theses will be attributed to the SEP organisation(s) of the Promoter(s) / Supervisor(s). If disabled, PhD theses will be attributed to the SEP/KUOZ organisation(s) of the PhD candidate.

Limit to specific Promoter / Supervisor roles

supervisor

When the configuration above is enabled, this setting can be used to limit to specific Promoter / Supervisor roles. The roles should be listed here as per the last part of the URI of the Thesis supervisor roles classification (/dk/atira/pure/researchoutput/roles/internalexternal/thesis) and comma separated. If no roles are specified, all Promoter / Supervisor roles will be counted.

Some examples, where the above configuration is enabled		
<p>Authors and affiliations</p> <p>Authors *</p> <ul style="list-style-type: none"> Opie Winston, Author (Internal person) <ul style="list-style-type: none"> Research Programme 3 (Organisational unit: Research) Research Institute Q (Organisational unit: Interfaculty Research) <p>Research output managed by</p> <p>Managing organisational unit *</p> <ul style="list-style-type: none"> Research Programme 3 (Organisational unit: Research) <p>Supervisors/Advisors</p> <p>Supervisor(s)/Advisor</p> <ul style="list-style-type: none"> Tammy Taylor, Supervisor (Internal person) <ul style="list-style-type: none"> Faculty C (Organisational unit: Faculty) Lisa J. Mauer, Advisor, University College London (External person) <ul style="list-style-type: none"> University College London (External organisation: Unknown) 	<p>Thesis will be attributed to Faculty C</p>	<p>Authors and affiliations</p> <p>Authors *</p> <ul style="list-style-type: none"> Jesse Pinkman, Author (Internal person) <ul style="list-style-type: none"> Faculty B (Organisational unit: Faculty) <p>Research output managed by</p> <p>Managing organisational unit *</p> <ul style="list-style-type: none"> Faculty B (Organisational unit: Faculty) <p>Supervisors/Advisors</p> <p>Supervisor(s)/Advisor</p> <ul style="list-style-type: none"> A. J. Kenyon, Supervisor, University of Boston (External person) <ul style="list-style-type: none"> University of Boston (External organisation: University)

Thesis will not be counted as the only Promoter is External

Authors and affiliations ⓘ

Authors * + | -

Jesse Pinkman, Author Edit -
Internal person
Research Programme 1 -
Organisational unit: Research

[Add person...](#) [Add organisational unit...](#) [Add group author...](#)

Research output managed by ⓘ

Managing organisational unit *
Research Programme 1
Organisational unit: Research
[Change organisational unit...](#)

Supervisors / Advisors

Supervisor(s) / Advisor + | -

Francis Underwood, Co-supervisor Edit + -
Internal person
Research Programme 1 -
Organisational unit: Research

Jimmy McNulty, Co-supervisor Edit + -
Internal person
Research Programme 2 -
Organisational unit: Research

[Add person...](#) [Add organisational unit...](#)

Thesis will not be counted as there is no Promoter with the role 'Supervisor' affiliated with the thesis. Both Promoters are 'co-supervisors', which are excluded as per the configuration settings

Authors and affiliations ⓘ

Authors * + | -

Tyra Collette, Author Edit -
Internal person
Faculty D -
Organisational unit: Faculty

[Add person...](#) [Add organisational unit...](#) [Add group author...](#)

Research output managed by ⓘ

Managing organisational unit *
Faculty D
Organisational unit: Faculty
[Change organisational unit...](#)

Supervisors / Advisors

Supervisor(s) / Advisor + | -

No persons or organisational units associated

[Add person...](#) [Add organisational unit...](#)

Thesis will not be counted as the research promoter is assigned

Authors and affiliations

Authors *

Jesse Pinkman, Author
Internal person
Faculty B
Organisational unit: Faculty

Research output managed by

Managing organisational unit *
Faculty B
Organisational unit: Faculty

Supervisors / Advisors

Supervisor(s) / Advisor

Research Institute Q
Organisational unit: Interfaculty Research

This thesis will not be counted as there is no Promoter with the role 'Supervisor' affiliated with the thesis

Authors and affiliations

Authors *

Stringer Bell, Author
Internal person
Research Programme 1
Organisational unit: Research

Faculty A
Organisational unit: Faculty

Research output managed by

Managing organisational unit *
Research Programme 1
Organisational unit: Research

Supervisors / Advisors

Supervisor(s) / Advisor

Opie Winston, Supervisor
Internal person
Research Institute Q
Organisational unit: Interfaculty Research

This thesis will not be counted as there is no ORGANS ational affiliation provided for the 'Supervisor'

Authors and affiliations

Authors *

John Carter, Author
Internal person
University College London
External organisation: Unknown

Research output managed by

Managing organisational unit *
Faculty B
Organisational unit: Faculty

Supervisors / Advisors

Supervisor(s) / Advisor

Francis Underwood, Supervisor
Internal person
Research Institute R
Organisational unit: Interfaculty Research

This thesis will be attributed to Research Institute R

Authors and affiliations

Authors *

Joe Bloggs, Author
Internal person
Faculty B
Organisational unit: Faculty

Research output managed by

Managing organisational unit *
Faculty B
Organisational unit: Faculty

Supervisors / Advisors

Supervisor(s) / Advisor

Hans Clevers, Supervisor
Internal person
University
Organisational unit: University

This thesis will not be counted as there is no

SEP - Update Output type mapping

RELEASED : 5.4.0
UPDATED : 5.5.0, 5.12.1

In order to capture Research Outputs according to the Output types defined by SEP, a mapping must be defined that maps the Pure Output types to the SEP Output types (i.e. Refereed article, Professional publication, Publication aimed at the general public, etc.)

[Output type mapping file template](#)



The default mapping is described [here](#)

Pure is initially populated with this default mapping, but this may not match your local Output types. If this is the case, you must - **immediately upon enabling the SEP module** - upload an updated mapping.

Update the mapping file - starting out

To update the mapping, download the template above and make the required edits (note that this is an XML file - if you need any assistance in editing the file, please contact us).

Once the file is ready, it should be uploaded via the Administrator > SEP / KUOZ tab. The existing **Research output type mapping file** should be removed and your new mapping file should be uploaded.

The screenshot shows the 'SEP/KUOZ' configuration page. On the left is a navigation menu with 'Configuration' selected. The main content area is titled 'SEP/KUOZ employment type mapping file' and contains several sections for uploading mapping files. The 'SEP and KUOZ output type mapping files' section is highlighted with a red box and contains a file named 'SEP_outputmapping_rules_TEST4.xml' (6 KB, application/xml) with a 'Remove' button. Other sections include 'KUOZ Research Output type mapping file' with 'KUOZ_outputmapping_rules_ORIGINAL_TEST7.xml' (14 KB, application/xml), 'KUOZ Activity type mapping files' with 'KUOZActivity_DefaultMapping_Activities_TEST1.xml' (3 KB, application/xml), 'KUOZ Activities - Prize type mapping file' with 'KUOZActivity_DefaultMapping_Prizes_TEST1.xml' (527 bytes, application/xml), and 'KUOZ Activities - Press/Media type mapping file' with 'KUOZActivity_DefaultMapping_PressMedia.xml' (382 bytes, application/xml).

Once you select 'Save' at the bottom of the page, the **SEPUpdateResearchOutputCronJob** job will be initiated automatically. You can follow the progress of this job via the Administrator > Jobs > Job log.

The screenshot shows the 'Job log' page with a table of 20 results. The 'SEPUpdateResearchOutputCronJob' job is highlighted in red. The table has columns for Name, Start, Duration (hours), User, and Status. Below the table, there is a search bar and an 'Export log entries as MS Excel' button. The log entries show the following details:

Name	Start	Duration (hours)	User	Status
newsflippingSynchronisationJob	05. Jul 2018 10:45	0:00:02	root	Success
currentPublicationStatusCronjob	05. Jul 2018 04:00	0:00:00	root	Success
updatePersonUserRolesCronjob	05. Jul 2018 02:00	0:00:00	root	Success
auditRetentionPurgerCronjob	05. Jul 2018 02:00	0:00:00	root	Success
reportHousekeepingCronjob	05. Jul 2018 01:25	0:00:00	root	Success
systemInformationOnImageEventStat	05. Jul 2018 01:00	0:00:00	root	Success
statsPopulatingCronjob				Success
talkbackjob	05. Jul 2018 01:00	0:00:03	sync_user	Success
deleteExpiredSystemMessagesCron	05. Jul 2018 01:00	0:00:00	root	Success
job				Success
StatusEmailDaily	05. Jul 2018 01:00	0:00:00	root	Success
openAccessEmbargoLiftedCronjob	05. Jul 2018 00:01	0:00:00	root	Success
embargoLiftedAuditjob	05. Jul 2018 00:01	0:00:05	root	Success
Compute download statistics	04. Jul 2018 23:45	0:00:01	root	Success
metrics				Success
SEPUpdateResearchOutputCronJob	04. Jul 2018 20:29	0:00:01	atira	Success

Summary: 04. Jul 2018 20:29, Duration (hours): 0:00:01, Success: 37, Warnings: 0, Errors: 0, Fatal errors: 0.

Notes:

- 1:many and many:1 Pure output type to SEP output type relationships are supported - if a 1:many mapping is selected, note that users will then need to select the relevant SEP output type when creating the Research Output record
 - Content not eligible to be counted for SEP:
 - In 5.8 we updated functionality here such that any output type not included in the mapping file will be flagged as 'Not eligible' for SEP
 - In 5.12.1 we further updated this functionality to distinguish between outputs that had been manually selected as 'Not eligible' and those that were not eligible as per the mapping file
- Prior to this release, 'Not eligible' covered three things:
 - the content type does not exist in the mapping file, so is not eligible for SEP counting
 - the content type has been specifically mapped to 'Not eligible' in the SEP output mapping file
 - the individual item of content has been manually selected as 'Not eligible' (for various reasons)
 - When updating a mapping file, Pure would re-visit all mappings and make the necessary changes to the records. But this also meant that all 'Not eligible' items were updated as well - whether they were not eligible because they didn't previously have a mapping, or they were manually selected as not eligible. This was problematic for those items manually selected as Not eligible - these should not automatically update.
 - With this release, we have introduced two new elements to better handle ineligible content:
 - A new classification for 'Not eligible (manual selection)'. This value is never automatically updated - even if the specific mapping for that item's type is updated.
 - A new classification name - 'Not eligible (mapped value)' - for those items that are not eligible because they don't exist in the mapping file or have been specifically mapped to not eligible in the SEP output mapping file. If the mapping is updated in the future, such that the type in question is eligible for SEP counting, the value will be updated as per the mapping file.

Research output: Contribution to journal > Article > Academic

Type

Publication category *

Academic Professional Popular

Peer-reviewed *

Peer-reviewed Not peer-reviewed

SEP output type

Non-refereed article

Non-refereed article

Not eligible (mapped value)

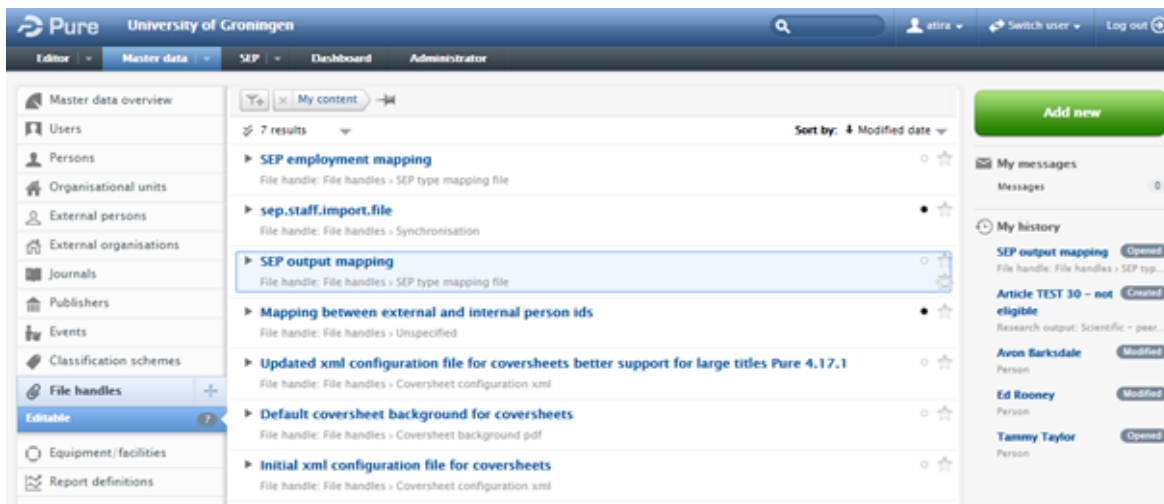
Not eligible (manual selection)

- To specifically map an output type / category / peer-review to 'Not eligible' as a SEP output type, the following command should be used:

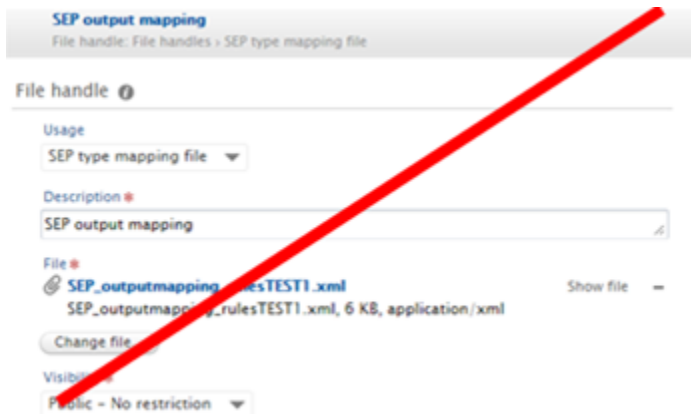
```
<mappedResearchOutputTypeUri>/dk/atira/pure/assessmenttype/noteligible</mappedResearchOutputTypeUri>
```

Update the mapping file - already in use

It is recommended that you try to keep the mapping file constant over time (therefore some thought must be put into the mapping from the outset, to ensure that it will work for all Units and Output types). However, if in the future you need to update the mapping file, you should first download the mapping file from Pure (to ensure you are working off of the existing mapping). The mapping file can be downloaded from Pure via the Master Data > File Handle > SEP output mapping.



To change the file, **DO NOT** simply change the existing file in the File Handle! Follow the instructions above for uploading the file via the SEP / KUOZ configuration tab.



SEP - Research Staff FTE and Funding

RELEASED : 5.4.0
 UPDATED : 5.6.0, 5.13.0

The SEP module supports the construction of the following tables:

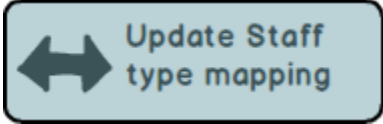


Table D3a : Research staff

- Shows the annual headcount and FTE / MJE, aggregated by SEP Staff Type
- The table can be filtered by attributes such as:
 - Organisation / SEP Unit
 - SEP staff type
 - Year range (calendar year)

SEP Staff Type	2010		2011		2012		2013		2014		2015	
	FTE	#	FTE	#	FTE	#	FTE	#	FTE	#	FTE	#
Scientific staff	1.70	2	1.80	2	1.70	2	1.70	2	3.00	4	3.00	4
Post docs	1.90	2	1.90	2	1.90	2	1.90	2	1.90	2	1.90	2
PhD students												
Total research staff	3.60	4	3.70	4	3.60	4	3.60	4	4.90	6	4.90	6
Support staff												
Visiting fellows												
Total staff	3.60	4	3.70	4	3.60	4	3.60	4	4.90	6	4.90	6

Table D3c : Funding

- Shows the annual FTE, grouped by SEP Funding Type
- (only supports the 'top half' of the table (the Total Funding element))
- The table can be filtered by attributes such as:
 - Organisation / SEP Unit
 - SEP staff type
 - SEP funding type
 - Year range (calendar year)
 - *Note that the Total FTEs, by default, will be equivalent to the Total Staff FTE in Table D3a - but you can filter the table by SEP Staff Type to only include desired staff, if necessary*

SEP Funding Type	2010		2011		2012		2013		2014		2015	
	FTE	%	FTE	%	FTE	%	FTE	%	FTE	%	FTE	%
Direct funding	2.70	75	2.80	76	2.70	75	2.70	75	2.60	53	2.85	58
Research grants	0.90	25	0.90	24	0.90	25	0.45	12	1.85	38	1.60	33
Contract research												
Other							0.45	12	0.45	9	0.45	9
Total	3.60	100	3.70	100	3.60	100	3.60	100	4.90	100	4.90	100

In order to deliver these tables, the Person model has been extended to allow for the capture of annual SEP Research FTE / MJE, along with the percentage of that FTE / MJE sourced from each funding type.

Research FTE and Funding

Department of Civil Engineering

2/02/12 – present

Academic - Professor

Organisational unit: Department

▼ SEP/KUOZ Staff type: Full professor

	2013	2014	2015	2016	2017	2018
FTE	<input type="text"/>	<input type="text"/>	<input type="text"/>	0.50	0.50	0.50
% Direct Funding	<input type="text"/>	<input type="text"/>	<input type="text"/>	100	100	100
% Research Grants	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
% Contract Research	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
% Other	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Show all years

Department of Civil Engineering

2/02/14 – 31/12/16 (Former)

Academic - Assoc Professor

Organisational unit: Department

► SEP/KUOZ Staff type: Associate professor

Department of Civil Engineering

1/01/15 – 31/12/17 (Former)

Academic - Post Doc

Organisational unit: Department

▼ SEP/KUOZ Staff type: Post Doc

	2015	2016	2017
FTE	<input type="text"/>	<input type="text"/>	0.50
% Direct Funding	<input type="text"/>	<input type="text"/>	100
% Research Grants	<input type="text"/>	<input type="text"/>	<input type="text"/>
% Contract Research	<input type="text"/>	<input type="text"/>	<input type="text"/>

There are two methods for capturing FTE / MJE and Funding data:

- In bulk, via file import (follow the "Upload FTE / MJE and Funding data" button above)
- Individually, via the Person record

SEP - Update Staff type mapping

RELEASED : 5.4.0
 UPDATED : 5.6.0, 5.10.0

In order to capture Research staff FTE / MJE and funding sources according to the Staff types defined by SEP / KUOZ, a mapping must be defined that maps the Pure Employment type (and the Pure Job Title type, if desired) to the SEP / KUOZ staff types (i.e. Full Professor, Associate Professor, Post-docs, PhD students, etc.)

[Staff Type mapping file example](#) 

The mapping is taken from Pure Employment type (scheme: /dk/atira/pure/person/employmenttypes) and Job Title type (if desired) (scheme: /dk/atira/pure/person/jobtitles)

Pure is initially populated with a default mapping (based only on Employment Types), but this will not match your local Employment Types. As such, you must - **immediately upon enabling the SEP module** - upload an updated mapping.

To update the mapping, you can download the example above and make the required edits (note that this is an XML file - if you need any assistance in editing the file, please contact us or your local IT support). If you have already employed a mapping file for SEP and want to update it to capture the new (more granular) SEP / KUOZ staff types, simply update your existing mapping file (as per the instructions below) using the updated classification urls available in the example file above, and removing the old classifications:

- `<sepPersonTypeUri>/dk/atira/pure/sep/stafftypes/scientific_staff</sepPersonTypeUri>`
- `<sepPersonTypeUri>/dk/atira/pure/sep/stafftypes/phd_students</sepPersonTypeUri>`

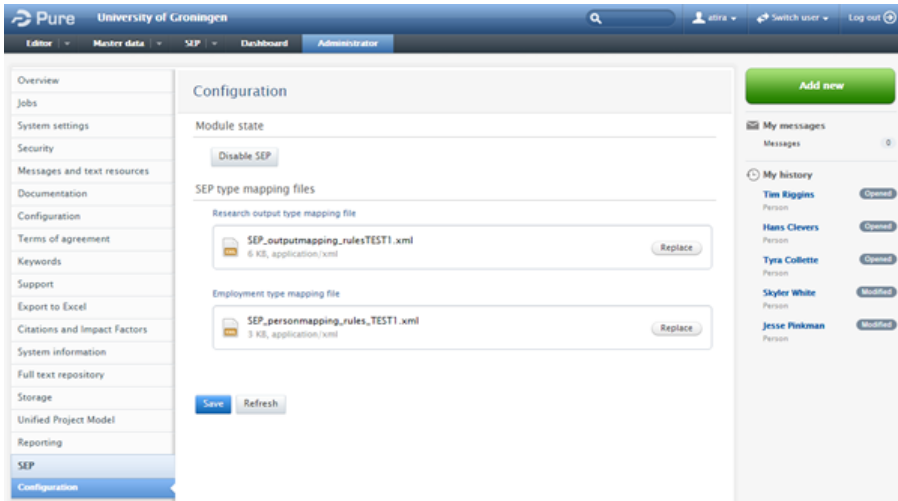
(these have been replaced by the new, more granular classifications)

Mapping command not using Job Titles	Mapping command using Job Titles
<pre><sepPersonMappingRule> <sepPersonTypeUri>/dk/atira/pure/sep /stafftypes/full_professor</sepPersonTypeUri> <personTypeUri>/dk/atira/pure/person /employmenttypes/wp</personTypeUri> </sepPersonMappingRule></pre>	<pre><sepPersonMappingRule> <sepPersonTypeUri>/dk/atira/pure/sep /stafftypes/full_professor</sepPersonTypeUri> <personJobtitleUri>/dk/atira/pure/person /jobtitles/hgl</personJobtitleUri> <personTypeUri>/dk/atira/pure/person /employmenttypes/wp</personTypeUri> </sepPersonMappingRule></pre>

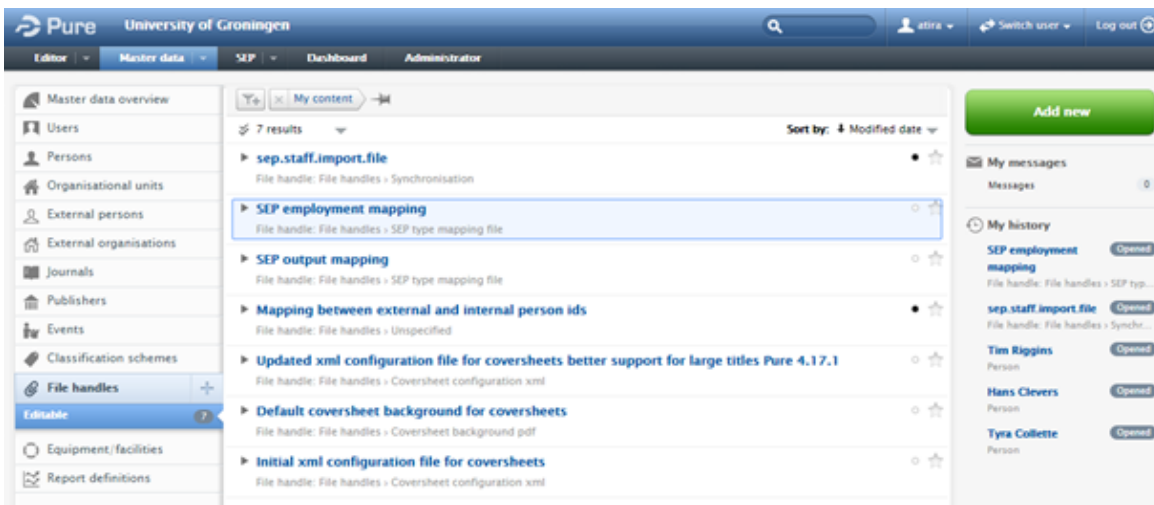
Notes:

- any Pure Employment Type or Job Title not included in the mapping file will simply be assumed to be not eligible to be counted for SEP / KUOZ and will not be mapped to a SEP / KUOZ staff type.
- If you do not wish to use Job Titles in your mapping, simply do not include the command in your mapping file
- 1:1 and many:1 relationships between Pure Employment type (+ Pure Job Title) to SEP / KUOZ staff type is supported - 1:many relationships are not possible

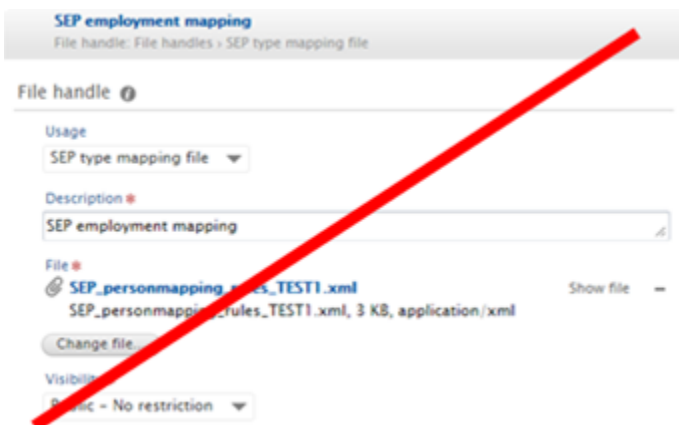
Once the file is ready, it should be uploaded via the Administrator > SEP / KUOZ tab. The existing **SEP / KUOZ Employment type mapping file** should be replaced with your local mapping file.



It is recommended that you try to keep the mapping file constant over time (therefore some thought must be put into the mapping from the outset, to ensure that it will work for all Units). However, if in the future you need to update the mapping file, you should first download the mapping file from Pure (to ensure you are working off of the existing mapping). The mapping file can be downloaded from Pure via the Master Data > File Handle > SEP / KUOZ employment mapping.



To change the file, **DO NOT** simply change the existing file in the File Handle! Follow the instructions above for uploading the file via the SEP / KUOZ configuration tab.



Apply the mapping to existing content

After updating the mapping file and saving the configuration, the **SEP / KUOZ : Update Mapping of SEP / KUOZ Staff Types** cron job initiates automatically to update the SEP Staff type on all existing Person records. The results can be seen in the Job log for **sepUpdatePersonCronJob**.

sepUpdatePersonCronJob		22. Aug 2018 09:58	0:00:02	atira	Success		
Start	Duration (hours)	Success	Warnings	Errors	Fatal errors		
22. Aug 2018 09:58	0:00:02	1	0	0	0		

All log entries [Export log entries as MS Excel](#)

Status	Title and description
Success	Processing persons INFO: Found 21 persons to process INFO: Done!

SEP - Upload FTE-MJE and Funding Data

RELEASED : 5.4.0
 UPDATED : 5.5.0, 5.13.0

There are two methods for capturing FTE / MJE and Funding data:

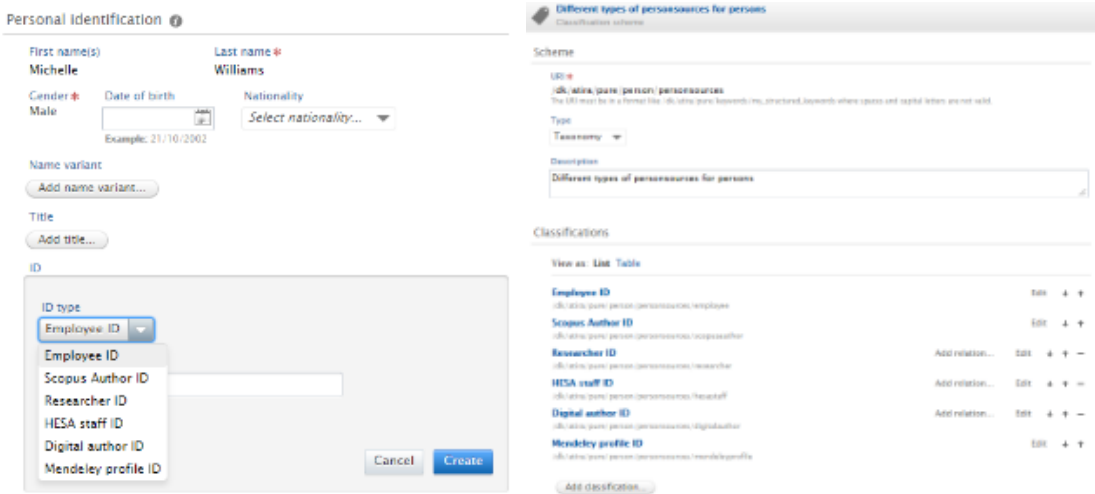
[SEP / KUOZ FTE + Funding Import File Template](#) 

- In bulk, via file import
- Individually, via the Person record

This page describes how to import the data.

Import file

The import file template (available above) must be used to import the data. The columns required are as follows:

<p>ID</p>	<p>Pure ID for the Person</p> <p><i>One ID type must be provided per Person, either:</i></p> <ul style="list-style-type: none"> • Pure ID, OR • Classified ID, OR • External source ID
<p>Classified ID type</p>	<p>Provide the suffix of the 'Different types of personsources for persons' classification uri (/dk/atira/pure/person/personsources) for the desired ID type (e.g. as per the screenshot below, the Classified ID type to provide in the import file for Employee ID would be 'employee')</p>  <p><i>One ID type must be provided per Person, either:</i></p> <ul style="list-style-type: none"> • Pure ID, OR • Classified ID, OR • External source ID
<p>Classified ID</p>	<p>ID related to the selected Classified ID type. <i>Mandatory if 'Classified ID type' is provided.</i></p> <p><i>One ID type must be provided per Person, either:</i></p> <ul style="list-style-type: none"> • Pure ID, OR • Classified ID, OR • External source ID

Source ID type	<p>Provide the name of the desired External source ID type.</p> <p>External sources ⓘ</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <p>Source Source-ID</p> <p>synchronisedUnifiedPerson <input style="width: 100px;" type="text" value="676257"/></p> <p>hrrecord</p> <p>synchronisedUnifiedPerson</p> </div> <p>One ID type must be provided per Person, either:</p> <ul style="list-style-type: none"> • Pure ID, OR • Classified ID, OR • External source ID
Source ID	<p>ID related to the selected Source ID type. <i>Mandatory if 'Source ID type' is provided.</i></p> <p>One ID type must be provided per Person, either:</p> <ul style="list-style-type: none"> • Pure ID, OR • Classified ID, OR • External source ID
Name	<p>Name (not required)</p>
Org	<p>Organisation ID</p> <p>Could be either the:</p> <ul style="list-style-type: none"> • Pure ID for the Organisation (recommended) • Organisation ID (classified source ID) • Source ID (primary import source ID) <p><i>(not required)</i></p>
Org name	<p>Organisational unit name <i>(not required)</i></p>

Job title

Where a Person has multiple affiliations with the same Organisational unit, providing the Job title and/or the Employment type will help you better define the appropriate FTE splits across affiliations.

Provide the suffix of the 'Job title' classification uri (/dk/atira/pure/person/jobtitles) for the desired affiliation.

Affiliation

Department of Civil Engineering

Organisational unit: Department

Staff type Employed as
Academic Academic

Start date *
02/02/2012
Example: 21/10/2002

End date
No value
Example: +12 is 12 months later

FTE

Contract type

No value ▼

Job title
Professor

Job description

Scheme

URI *
/dk/atira/pure/person/jobtitles
The URI must be in a format like /dk/atira/pure/keywords/my_structured_keywords where spaces and capital letters are not valid.

Type
Misc ▼

Description
Job title

Classifications

View as: List Table

Professor /dk/atira/pure/person/jobtitles/professor	Add relation...	Edit	↕	↕	↔
Assoc Professor /dk/atira/pure/person/jobtitles/assoc_professor	Add relation...	Edit	↕	↕	↔
Asst Professor /dk/atira/pure/person/jobtitles/asst_professor	Add relation...	Edit	↕	↕	↔
PhD staff /dk/atira/pure/person/jobtitles/phd_staff	Add relation...	Edit	↕	↕	↔
PhD contract /dk/atira/pure/person/jobtitles/phd_contract	Add relation...	Edit	↕	↕	↔
Post Doc /dk/atira/pure/person/jobtitles/post_doc	Add relation...	Edit	↕	↕	↔

[Add classification...](#)

(not required)

Employment type	<p>Where a Person has multiple affiliations with the same Organisational unit, providing the Job title and/or the Employment type will help you better define the appropriate FTE splits across affiliations.</p> <p>Provide the suffix of the 'Employment type' classification uri (/dk/atira/pure/person/employmenttypes) for the desired affiliation.</p> <div data-bbox="329 262 1187 1270"> <p>Affiliation</p> <hr/> <p>Department of Civil Engineering Organisational unit: Department</p> <p>Staff type Academic Employed as Academic</p> <p>Start date * 02/02/2012 Example: 21/10/2002</p> <p>End date No value Example: +12 is 12 months later</p> <p>FTE <input type="text"/></p> <p>Contract type No value ▼</p> <p>Job title Professor</p> <p>Job description <input type="text"/></p> <hr/> <p>Employment type Classification scheme</p> <p>Scheme</p> <p>URI * /dk/atira/pure/person/employmenttypes <small>The URI must be in a format like /dk/atira/pure/keywords/my_structured_keywords where spaces and capital letters are not valid.</small></p> <p>Type Misc ▼</p> <p>Description <input type="text" value="Employment type"/></p> <p>Classifications</p> <p>View as: List Table</p> <table border="0"> <tr> <td>Academic /dk/atira/pure/person/employmenttypes/academic</td> <td>Add relation...</td> <td>Edit</td> <td>+</td> <td>↑</td> <td>-</td> </tr> <tr> <td>Honorary /dk/atira/pure/person/employmenttypes/honorary</td> <td>Add relation...</td> <td>Edit</td> <td>+</td> <td>↑</td> <td>-</td> </tr> <tr> <td>Research assistant /dk/atira/pure/person/employmenttypes/research_assistant</td> <td>Add relation...</td> <td>Edit</td> <td>+</td> <td>↑</td> <td>-</td> </tr> </table> <p><input type="button" value="Add classification..."/></p> <p><i>(not required)</i></p> </div>	Academic /dk/atira/pure/person/employmenttypes/academic	Add relation...	Edit	+	↑	-	Honorary /dk/atira/pure/person/employmenttypes/honorary	Add relation...	Edit	+	↑	-	Research assistant /dk/atira/pure/person/employmenttypes/research_assistant	Add relation...	Edit	+	↑	-
Academic /dk/atira/pure/person/employmenttypes/academic	Add relation...	Edit	+	↑	-														
Honorary /dk/atira/pure/person/employmenttypes/honorary	Add relation...	Edit	+	↑	-														
Research assistant /dk/atira/pure/person/employmenttypes/research_assistant	Add relation...	Edit	+	↑	-														
Year	Each year for which you wish to upload data (will only import data for years the individual is affiliated with the institution)																		
FTE	Research FTE to be returned for the individual in that year																		
% Direct funding	% of the FTE attributed to Direct funding (stated as an integer (i.e. 50% is stated as 50))																		
% Research grants	% of the FTE attributed to Research grants (stated as an integer (i.e. 50% is stated as 50))																		
% Contract research	% of the FTE attributed to Contract research (stated as an integer (i.e. 50% is stated as 50))																		
% Other	% of the FTE attributed to Other sources (stated as an integer (i.e. 50% is stated as 50))																		

Notes:

- If an individual has multiple organisational affiliations in any single calendar year, it is recommended that you make use of the 'Org', 'Job title', and 'Employment type' columns to identify which organisation affiliation the stated FTE and funding source(s) apply. When using this function, you should include one row for each Person-Org affiliation for each calendar year. For example:

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
ID	Classified ID type	Classified ID	Source ID type	Source ID	Name	Org	Org name	Job title	Employment type	Year	FTE	% Direct funding	% Research grants	% Contract research
1	employee	12345			Kalin, Bob	6791	Civil Engineering	professor	academic	2016	0.50	100		
2	employee	12345			Kalin, Bob	6791	Civil Engineering	professor	academic	2017	0.50	100		
4	employee	12345			Kalin, Bob	6791	Civil Engineering	professor	academic	2018	0.50	100		
5	employee	12345			Kalin, Bob	6791	Civil Engineering	asst_professor	academic	2016	0.25		100	
6	employee	12345			Kalin, Bob	6791	Civil Engineering	asst_professor	academic	2017	0.25		100	
7	employee	12345			Kalin, Bob	6791	Civil Engineering	asst_professor	academic	2018	0.25		100	
8	employee	12345			Kalin, Bob	6791	Civil Engineering	asst_professor	academic	2016	0.25			100
9	employee	12345			Kalin, Bob	6791	Civil Engineering	asst_professor	academic	2017	0.25			100
10	employee	12345			Kalin, Bob	6791	Civil Engineering	asst_professor	academic	2018	0.25			100

- Note that there is the facility to disable validation against a maximum 1.0 FTE / MJE per person per calendar year. If validation is turned off, support for a 'matrix' organisational structure can be supported, with SEP FTE / MJE assigned to both the departmental structure (y axis) and the research structure (x axis). Customers are advised to disable this validation with caution, and to offer strong user support, as SEP content will need to be continually filtered by organisation (type) to ensure accurate counts. Further information is available on the [SEP-KUOZ - Module configuration](#) page.
- Including rows for years where the individual does not have an internal organisational affiliation will result in an Error during the job:

Log entries

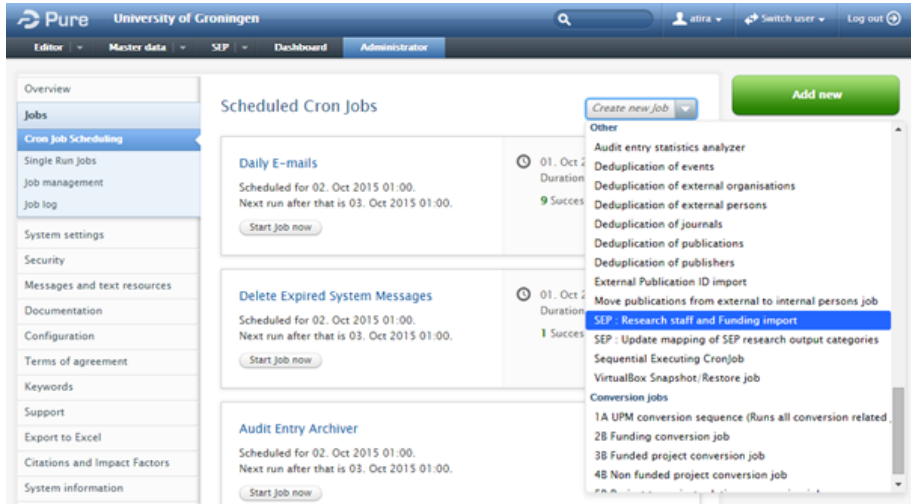
Start	Duration (hours)	Success	Warnings	Errors	Fatal errors
01. Oct 2015 20:50	0:00:01	44	2	16	0

Errors Search: 10944 Export log entries as MS Excel

Status	Title and description
Error	ERROR: No organisation association found for year 2010 for person id: 10944
Error	ERROR: No organisation association found for year 2011 for person id: 10944
Error	ERROR: No organisation association found for year 2012 for person id: 10944
Error	ERROR: No organisation association found for year 2013 for person id: 10944
Error	ERROR: No organisation association found for year 2014 for person id: 10944

SEP / KUOZ : Research staff and Funding import Cron Job

Once the import file is ready for import, you will need to run the SEP / KUOZ : Research staff and Funding import cron job




The job should be configured to run **Manually**, and the import file uploaded in the **Job Configuration**. Additionally, in the **Job Configuration**, you can choose whether existing SEP / KUOZ content should be overwritten or not with the new import.

Job configuration

Default configurations

Import file *
The excel file used to import new SEP staff data.

 **SEP_D3a_Import3_2016.01.14_3.xlsx**
9 KB, application/vnd.openxmlformats-officedocument.spreadsheetml.sheet

Replace

Overwrite existing data *
If turned on, this imports all data and possibly overwrites manually entered data. If turned off, it only adds data which does not exist already.

On

If the 'overwrite existing data' function is turned **ON**, the overwrite rules operate as follows:

- If an individual was included in Import 1 and is included again in Import 2, the SEP content for that individual will be overwritten
- If an individual was included in Import 1 but is not included in Import 2, the SEP content for that individual will remain unchanged
- If an individual was included in Import 1, then their data was manually adjusted in the SEP tab on the Person record, and then that individual was included again in Import 2, the SEP content for that individual (including that that was manually input) will be overwritten
- If an individual's data was manually input in the SEP tab on the Person record, and then the individual was included in an import, the SEP content for that individual will be overwritten

If the 'overwrite existing data' function is turned **OFF**, the overwrite rules operate as follows:

The import function will check each SEP unit association included in the import file

- If there is an existing SEP unit association but the FTE and Funding source % fields are all empty, data from the file is imported.
- If there is an existing SEP unit association and there is any value other than 'null' in the FTE and Funding source % fields, data from the file will not be imported.




Notes associated with the import functionality:




- If you encounter any fatal errors during the job, you will need to resolve the error and run the job again as it is very likely that the job stopped running after generating the fatal error and other, unconnected records, will not have been updated
- If an individual is included in the import file and FTE data is provided for a year for which the individual has no organisational affiliation in Pure, this will generate an error and that FTE data will not be imported
- Where an individual has multiple organisational affiliations / employment types / job titles in a single calendar year:
 - If your import file has not provided sufficient detail to identify the appropriate affiliation to which to assign the FTE, the job will return a warning, advising that the FTEs / MJE provided have been split across the individual's organisational affiliations. Therefore, you are likely to need to manually update these in the Person record to ensure the desired values.
- This import can be run as many times as required - see the overwrite rules described above
- Following import:
 - the outcome per individual can be viewed on the SEP / KUOZ tab in the Person record, and can be edited manually where required
 - the outcome per organisational unit can be viewed in the SEP / KUOZ tables in the SEP / KUOZ module



SEP-KUOZ audit of requirements

SEP / KUOZ development suggestions

Below is a list of all known requests for further SEP / KUOZ module development in Pure. This list has been provisionally prioritised by the User Group.

	Item	Priority	Estimated size	Notes	Additional information	JIRA	Status
1	<p>SEP / KUOZ : Reporting</p> <p>Include SEP / KUOZ content type in new reporting module</p>			<p>We do not intend to further develop SEP / KUOZ reporting in the old reporting module</p> <p>As we develop the new reporting module, we will take these issues forward for consideration</p>		<div style="border: 1px solid orange; padding: 5px; margin-bottom: 5px;">  PURES UPPORT- 31162 - Data cannot be retrieved due to an unexpected error. </div> <div style="border: 1px solid orange; padding: 5px; margin-bottom: 5px;">  PURES UPPORT- 24745 - Data cannot be retrieved due to an unexpected error. </div> <div style="border: 1px solid orange; padding: 5px;">  PURES UPPORT- 19823 - Data cannot be retrieved due to an unexpected error. </div>	<div style="border: 1px solid orange; padding: 2px 5px; display: inline-block;">ONGOING</div>

						<div style="border: 1px solid orange; padding: 5px; margin-bottom: 10px;">  PURED EV-880 - Data cannot be retrieved due to an unexpected error. </div> <div style="border: 1px solid orange; padding: 5px;">  PURED EV-881 - Data cannot be retrieved due to an unexpected error. </div>
2	SEP Table D3b : Do not split out 'Other' outputs					<div style="border: 1px solid orange; padding: 5px;">  PURES UPPORT- 47871 - Data cannot be retrieved due to an unexpected error. </div>
3	SEP / KUOZ : Grouping options for tables		LARGE	<p>As can be done in Reporting, customers would like to be able to select a hierarchy of organisations (e.g. to see in one view the total output numbers for the parent (de-duplicated), and the output numbers for the individual children)</p> <p>Additionally, customers would like to be able to group the tables using classified keywords</p> <p>Note that we intend for the new Reporting module to be able to reproduce the summary screens currently available in the SEP / KUOZ module. In the new Reporting module, a number of grouping options will be available such as hierarchical reporting, and keyword grouping.</p>	<p>Marijke: suggestion to wait for new reporting module possibilities</p>	

4	SEP : Table D1 : Output indicators Tagging of content		<div style="border: 1px solid orange; border-radius: 5px; padding: 2px; display: inline-block; color: orange; font-weight: bold;">VERY LARGE</div> Need further specification	Support for Table D1 : Output indicators <ul style="list-style-type: none"> • What form would this take? Some form of tagging to appropriately classify content, and then support a standard report for displaying the required content? 	Marijke: NEED FURTHER SPECIFICATION !! Update 28-2-2018: We started working on a specification for this.	 PURES UPPORT- 34986 - Data cannot be retrieved due to an unexpected error.	
5	SEP / KUOZ : Export options for tables		<div style="border: 1px solid orange; border-radius: 5px; padding: 2px; display: inline-block; color: orange; font-weight: bold;">LARGE</div>	Enable the export of the SEP / KUOZ tables to excel and pdf, directly from the summary screen. Note that we intend for the new Reporting module to be able to reproduce the summary screens currently available in the SEP / KUOZ module. In the new Reporting module, a number of export options will be supported.	Marijke: suggestion to wait for new reporting module		
6	SEP : Tables Switch axes		<div style="border: 1px solid orange; border-radius: 5px; padding: 2px; display: inline-block; color: orange; font-weight: bold;">VERY LARGE</div>	Switch the axes of the reports such that Years appear as the rows, and the content (e.g. SEP staff type, SEP output type) appear as columns Given this is not the stated format of the tables, should this be a configurable option? See comments at SEP-KUOZ - Module configuration	Marijke: suggestion to wait for new reporting module	 PUREP ROD-6584 - Data cannot be retrieved due to an unexpected error.	

7



UPPORT-
63740 - Data
cannot be
retrieved due
to an
unexpected
error.



UPPORT-
64868 - Data
cannot be
retrieved due
to an
unexpected
error.

Delivered SEP / KUOZ functionality

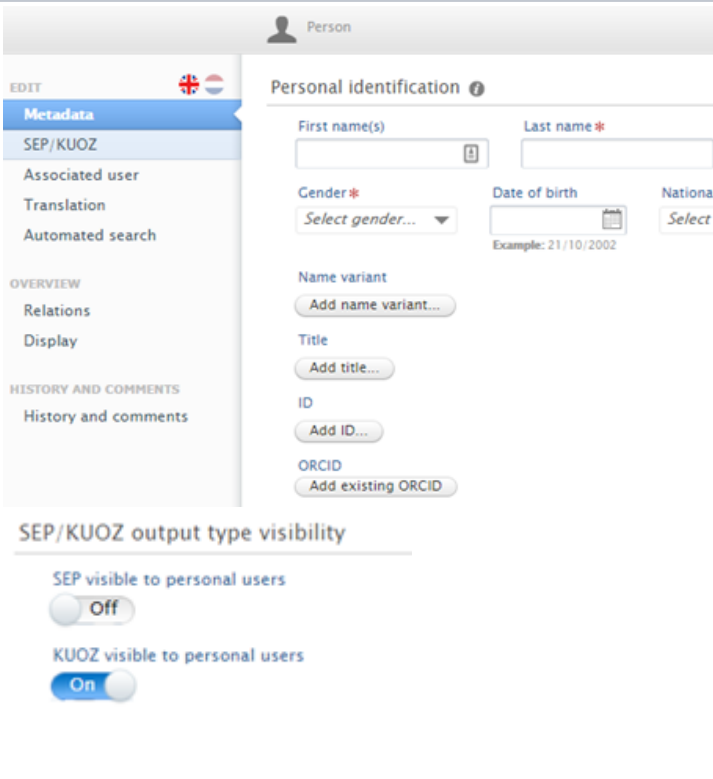
Below is a summary of delivered SEP / KUOZ functionality (beyond initial delivery of the SEP module)

Item	Release	Notes	Additional information
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1	KUOZ : Format C : Research Output Add Datasets	<div style="border: 1px solid red; padding: 2px; display: inline-block; color: red; font-weight: bold;">RELEASED 5.14.0</div>	Enable the inclusion of Datasets in KUOZ Format C and SEP Table D3b	SEP-KUOZ - Datasets
2	SEP : Tables D3a and D3c : FTE and Funding Update Person FTE and Funding import to enable specificat ion of job title and employ ment type	<div style="border: 1px solid red; padding: 2px; display: inline-block; color: red; font-weight: bold;">RELEASED 5.13.0</div>	<p>We currently support the following functionality when performing the Research Staff And Funding Import job:</p> <ul style="list-style-type: none"> • No identification of organisation affiliation <ul style="list-style-type: none"> ◦ If the Person has only one organisational affiliation in the defined year, the content is automatically assigned to that one organisation, in full ◦ If the Person has multiple organisational affiliations in the defined year, the content is automatically evenly split across those organisations • Organisation unit is identified <ul style="list-style-type: none"> ◦ If the Person has multiple organisational affiliations in the defined year, the content will be associated with the named org units, as defined in the import file ◦ Note that if an individual has multiple affiliations with different SEP staff types in the same org unit in the defined year, the content is automatically split evenly across the different SEP staff types) <p>Feedback from the User Group indicates that they would find it useful to not just be able to specify the SEP organisation, but also the job title <code>[/dk/atira/pure/person/jobtitles]</code> and employment type <code>[/dk/atira/pure/person/employmenttypes]</code> to be included as identifying fields for the SEP-fte bulk import file. When an identifying field is left empty fte should be split in case of multiple affiliations</p> <p>This would enable institutions to more accurately identify the Organisation affiliation to which to assign the SEP FTE and funding source in the import file, where individuals have multiple SEP staff types associated with a single Org unit in any one calendar year (currently, in such a scenario, the FTE is split evenly across the different SEP staff types, and a warning / error is generated in the log).</p>	

3	<p>SEP : Tables D3a and D3c : FTE and Funding</p> <p>Warnings to ensure SEP FTEs are not lost if period of org affiliation is updated</p>	<p>RELEASED 5.13.0</p>	<p>Currently, the SEP FTE is deleted if the period of an organisation-affiliation is edited such that the year of the SEP FTE is no longer valid.</p> <p>This form of data loss without warning or logging of lost data is not acceptable in our opinion and we would urge you to find a solution in any form.</p> <p>Ultimately, this is expected behaviour. If we kept the FTE on the record (even if hidden from view), it would get counted in the SEP tables, resulting in inaccurate values (there is internal validation that does not permit a SEP FTE to be captured where no affiliation exists). I don't think we should not allow affiliation periods to be shortened, as for a number of customers, these values will be synchronised from external systems (e.g. HR systems) and could therefore cause problems with these synchronisations.</p> <p>Suggestions:</p> <ul style="list-style-type: none"> • When manually inputting, the user is given a warning to advise that by shortening the affiliation period, SEP FTE values will be lost • If synchronised from HR system (where changed in affiliation periods might lead to inadvertent loss of SEP FTE data), make a configurable option in the Person sync job to allow / not the update of an affiliation period if this would result in a loss of SEP FTE. 	
4	<p>SEP Tables D3a and D3c : FTE and Funding</p> <p>Allow other IDs other than just Pure ID</p>	<p>RELEASED 5.13.0</p>	<p>In the import file, allow a choice of IDs (currently, only able to use Pure ID for the Person)</p>	
5	<p>SEP : SEP tab on Person</p> <p>Display improve ments</p>	<p>RELEASED 5.13.0</p>	<ul style="list-style-type: none"> • Display not only Organisational unit name, but also type • Ensure that the order of organisations in the SEP screen reflects the order in the main Person editor • By default 'hide' (collapse) any org affiliations with no SEP FTE data 	

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6	<p>SEP / KUOZ : Visibility configuration</p> <p>Expand current visibility configuration to include visibility of SEP tab on Persons</p>	<p>RELEASED 5.13.0</p>	<p>Expand the current visibility configuration to include the visibility of the SEP tab on Persons</p>	
7	<p>SEP / KUOZ : User roles</p> <p>Create Organisational SEP Reporter role</p>	<p>RELEASED 5.13.0</p>	<p>Create an Organisational SEP Reporter role, with the following read-only rights:</p> <ul style="list-style-type: none"> • SEP tab • Persons (with ability to view SEP tab) • Outputs (with ability to view SEP output type) 	

8	SEP / KUOZ : Remove limits on tables	RELEASED 5.13.0	Remove limits (6 years for SEP and 3 years for KUOZ) on tables. Default will remain 6 years for SEP and 3 years for KUOZ, but user can then expand to more years if they want (but display will not be optimal). Will include messaging to inform the user that if they expand the range, the table display will not be optimal.	
9	SEP / KUOZ : Not eligible mappings	RELEASED 5.12.1		

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10

KUOZ Table C : Update to 'Academic' category

RELEASED 5.12.1

We have a discrepancy between KUOZ Tables C and D - C uses category 'Scientific', but D uses category 'Academic'. The user group agreed that it should be 'Academic', so we should update the logic of the table and how the filters work.

Users will want to be able to simply re-name their existing 'Scientific' category on Research Outputs to 'Academic' - we'll need to support editing the classification url.

The screenshot shows the 'KUOZ C: Research output' page in the Pure system. It features a table with the following data:

KUOZ output type	2015				2016			
	Scientific	Professional	Popular	Other	Scientific	Professional	Popular	Other
A: 'Refereed' journal article	5374	-	-	-	4186	-	-	-
B: 'Non-refereed' article	162	341	29	228	104	198	59	129
C: Book (authored)	100	41	2	0	56	36	2	0
D: Book chapter	615	133	19	0	443	143	26	0
E1: Dissertation 1 (DIP)	504	-	-	-	539	-	-	-
F: Refereed conference publication	177	-	-	-	96	-	-	-
G: Non-refereed conference publication	76	5	-	-	25	8	-	-
H: Case note	-	125	-	-	-	91	-	-
J: Report	-	114	-	-	-	21	-	-
I: Book review	0	0	0	109	0	0	0	80
N: Other conference contribution (abstract, poster)	0	0	0	538	0	0	0	348
P: Database	0	0	0	4	0	0	0	0

RELEASED 5.11.2

KUOZ includes the return of counts of activities, per calendar year:

Short name	Description (provided by VSNU)	Proposed default source of content from Pure
Edit / reviewing	Book or Journal Editing, Peer review publications	Activity > Publication peer-review and editorial work
Media	Media performance (TV, radio, or other public medium)	Press / Media (Media contribution type only)
Presenting	Conference participation	Activity > Participating in or organising an event
		Activity > Talk or presentation > Invited talk
Exchange	External appointment	Activity > Consultancy
Organizing	Organizing & contributing to an event	Activity > Participating in or organising an event
Awards	Prizes & (intern) national distinctions	Prizes
Memberships	Membership due to research expertise	Activity > Membership
Teaching	Teaching & courses for external stakeholders	Activity > Examination
Advising	Advising, Public Relations	Activity > Consultancy
Collaborating	External collaboration & partnerships	Activity > Visiting an external institution
		Activity > Hosting a visitor

This would require:

- creation of a new classification scheme
- updates to the editor
- implementation of an additional mapping for Activities, Prizes, and Press / Media (via a locally editable xml mapping file (like we have for other SEP / KUOZ content)
- delivery of an additional summary screen



KUOZ Format D : Research activities

The screenshot shows the Pure system interface for 'The University of X'. The user is logged in as 'Administrator'. The main menu includes 'Editor', 'Master data', 'SEP / KUOZ', 'Dashboard', 'Award management', and 'Administrator'. The current view is 'Format D: Research activities' for the year range 2013 to 2015. A table displays the counts for various KUOZ types across the years 2013 and 2014, categorized by Academic, Professional, and Popular.

KUOZ Type	2013			2014			Academic
	Academic	Professional	Popular	Academic	Professional	Popular	
Book or Journal Editing, Peer review publications	2	2	2	2	2	2	2
Media performance (TV, radio, or other public medium)	3	3	2	2	2	3	2
Conference participation	2	3	2				
External appointment							
Organizing & contributing to an event		3	3	2	2	2	3
Prizes & (intern)national distinctions	3	3	2	2	2	3	2
Membership due to research expertise	1					1	
Teaching & courses for external stakeholders	1	1	1	1	1	1	1
Advising - Public Relations			2	3	2		
External collaboration & partnerships							2
Total research activities	3	3	3	3	4	4	2

12	SEP / KUOZ : Tables Filter content so SEP Editors only view content affiliated with the Organisations to which they have access	<div style="border: 1px solid red; padding: 2px; color: red; text-align: center;">RELEASED 5.10</div>	<p>Currently, when a SEP Editor opens any of the SEP / KUOZ tables, the tables show the figures for the entire institution, and must then be filtered down for the user to see only the Organisational unit(s) they are interested in / have access to.</p> <p>If possible, this should be updated to operate like elsewhere in Pure, where a user is by default only presented content they have access to.</p> <p>In the meantime, users can use the 'pinned filter' functionality to filter the tables to show only those Organisational unit(s) they are interested in / have access to.</p>																
13	KUOZ / SEP : Persons table Update SEP classifications	<div style="border: 1px solid red; padding: 2px; color: red; text-align: center;">RELEASED 5.10</div>	<p>As there is significant overlap between the SEP and KUOZ staff types (with the KUOZ staff types being just slightly more granular), customers have requested that we employ the KUOZ staff types for both assessments:</p> <table border="1" data-bbox="461 1012 769 1333"> <thead> <tr> <th>Current SEP staff types</th> <th>Proposed new staff types</th> </tr> </thead> <tbody> <tr> <td rowspan="3">Scientific staff</td> <td>Full professor</td> </tr> <tr> <td>Associate professor</td> </tr> <tr> <td>Assistant professor</td> </tr> <tr> <td>Post-docs</td> <td>Post-doc</td> </tr> <tr> <td rowspan="2">PhD students</td> <td>PhD employed</td> </tr> <tr> <td>PhD contract</td> </tr> <tr> <td>Support staff</td> <td>Support staff</td> </tr> <tr> <td>Visiting fellows</td> <td>Visiting fellows</td> </tr> </tbody> </table> <p>Updating this would therefore require updating:</p> <ul style="list-style-type: none"> SEP staff type classification Acceptable values in SEP employment mapping file SEP Table D3a SEP tab on Person? 	Current SEP staff types	Proposed new staff types	Scientific staff	Full professor	Associate professor	Assistant professor	Post-docs	Post-doc	PhD students	PhD employed	PhD contract	Support staff	Support staff	Visiting fellows	Visiting fellows	
Current SEP staff types	Proposed new staff types																		
Scientific staff	Full professor																		
	Associate professor																		
	Assistant professor																		
Post-docs	Post-doc																		
PhD students	PhD employed																		
	PhD contract																		
Support staff	Support staff																		
Visiting fellows	Visiting fellows																		

14	KUOZ : Persons Table Create new 'KUOZ A : Research input : Employees with research tasks' table	<div style="border: 1px solid red; padding: 2px; color: red; text-align: center;">RELEASED 5.10</div>	<p>Create new 'KUOZ A : Research input : University employees with research tasks' table, accessible in the Persons tab in the SEP module.</p> <p>The table should cite FTEs and headcounts, as per the SEP values on the Person.</p> <p>The Staff type should be as per the SEP Employment mapping</p> <p>The WP (source of funding) values should be as per the SEP values held / imported, just classed a bit differently (mapping confirmed by Jules van Rooij June 2016):</p> <ul style="list-style-type: none"> • WP1 = Direct Funding in SEP Table D3c • WP2 = Research Grants in SEP Table D3c • WP3 = Contract research + Other in SEP Table D3c 	<h3>Format A : Research Input : University employees with research tasks</h3>
15	SEP / KUOZ : New filter for outputs	<div style="border: 1px solid red; padding: 2px; color: red; text-align: center;">RELEASED 5.10</div>	<p>Introduce new filter on Research outputs, and SEP and KUOZ output tables to enable filtering by SEP Staff Type (in order to enable customers to distinguish between outputs of unpaid employees from other outputs)</p> <p>Potential issues:</p> <ul style="list-style-type: none"> • We don't currently restrict the outputs counted for SEP based on association with SEP staff? So, any such filter would need to include a value for 'No SEP Staff associated with this output' or something like that • How to deal with multiple authors of different SEP Staff Types, or a single author with multiple SEP Staff Type associations? Filter would return all outputs where the author(s) have the selected SEP Staff Type(s). So, if an output has a Full Professor and a Visiting fellow, and the user filters for Visiting fellows, this output would be listed. <ul style="list-style-type: none"> ◦ ANSWER : If at least one of the authors is paid, then the output is counted. If no author is paid, the output is not counted. ◦ Same answer for multiple affiliations - if at least one of the affiliations is paid, then the output would be counted as paid <p>Our plan is therefore to implement the following filter options, based on the logic that unpaid staff = Visiting fellows:</p> <ul style="list-style-type: none"> • Show all outputs associated with paid staff only (would show those outputs where at least one of the authors was any other staff type than Visiting fellow) • Show all outputs associated with unpaid staff only (would show only those outputs wholly associated only with Visiting fellows) 	<p>24 August 2017: Manya raised an issue to Marijke. The logic of this filter on SEP Staff Type turns out to be complex paid/unpaid, using the definition unpaid for sep staff type "visiting fellows" and paid for all the others.</p> <p>30 August 2017: Marijke confirmed that filtering on paid/unpaid seems an acceptable solution; to be shared with the three bullets to the previous column (starting with "Same answer...").</p>
16	SEP / KUOZ : Bulk actions	<div style="border: 1px solid red; padding: 2px; color: red; text-align: center;">RELEASED 5.10</div>	<p>Enable the bulk editing of SEP output type and KUOZ output type (separate bulk actions)</p> <p>Notes:</p> <ul style="list-style-type: none"> • Only permit within limits of mapping file (e.g. if mapping file says Book maps to Book, then the only bulk action available would be to bulk move to either Book or Not eligible) 	

17	KUOZ : Table display	<p style="color: red; border: 1px solid red; padding: 2px; display: inline-block;">RELEASED 5.10</p>	<p>When the number of years selected for display is >3 (ish, depending on screen size / resolution), the table runs over the screen.</p> <p>This is being resolved by limiting the amount of content possible to 3 years.</p>	
18	SEP : Tables Select and report on all underlying organisations	<p style="color: red; border: 1px solid red; padding: 2px; display: inline-block;">RELEASED 5.8</p>	<div style="text-align: center;">  <p>CUSTPURE-1966 -</p> <p>Data cannot be retrieved due to an unexpected error.</p> </div>	
19	KUOZ Add KUOZ functionality to SEP module	<p style="color: red; border: 1px solid red; padding: 2px; display: inline-block;">RELEASED 5.9</p>	<ul style="list-style-type: none"> • Re-name module SEP / KUOZ 	
20	KUOZ : Output table Introduce KUOZ classification	<p style="color: red; border: 1px solid red; padding: 2px; display: inline-block;">RELEASED 5.9</p>	<p>Introduce an additional classification for KUOZ Output type.</p> <p>Ensure that the classification scheme is editable, to permit future changes to be managed locally.</p> <p>Note that the KUOZ return requires the identification of KUOZ Output and Sub-output types. The sub-output types represent the target audience and are currently the same as Pure's Publication categories, therefore it is suggested that customers combine the KUOZ Output type with the Publication category to get the required counts. We will not introduce a separate KUOZ sub-output type.</p>	
21	KUOZ : Output table Introduce KUOZ mapping	<p style="color: red; border: 1px solid red; padding: 2px; display: inline-block;">RELEASED 5.9</p>	<p>Introduce separate KUOZ output types</p> <ul style="list-style-type: none"> • Update current SEP mapping functionality to include KUOZ mapping, for example <pre style="background-color: #f0f0f0; padding: 5px; border: 1px solid #ccc;"> <ResearchOutputMappingRule> <!-- input --> <researchOutputTypeUri>/dk/atira/pure/researchoutput/researchoutputtypes/contributiontojournal</pre>	<p>SEP + KUOZ Mapping file </p>

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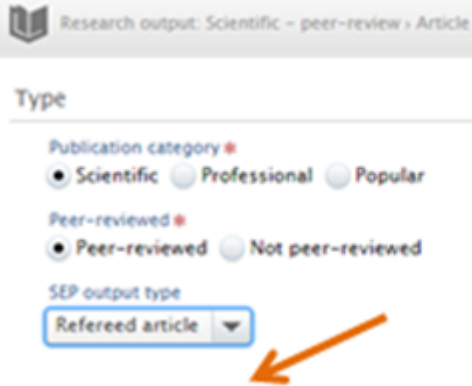
Create default KUOZ mapping file, as per the attached

- Ensure that the mapping file supports updates to the KUOZ output type classification scheme
- Use the same logic for SEP and KUOZ mappings (if an output type is not listed in the mapping file, map it to 'Not eligible')
- If it is significantly less development resource to undertake this as a separate KUOZ mapping file, this will be done instead
- Note that this work also requires some updates to which Categories can be selected for different output types, and enabling peer reviewed / not for Conference contribution

22 KUOZ : Output table
Update Research Output editor to show KUOZ output type

RELEASED 5.9

Update the Research Output editor to display the KUOZ output type, along with the facility to edit the type (to 'Not eligible', or as per any 1:many mapping rule) (same functionality as currently available for SEP)



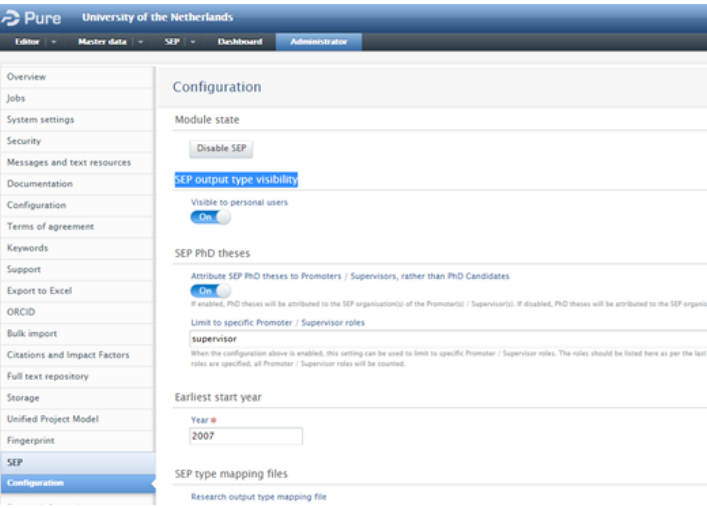
23 KUOZ : Output table
Create new 'KUOZ C : Research output' table

RELEASED 5.9


The request from customers is to update the current SEP Table D3b screen to enable viewing output counts by KUOZ Output type, using a 'toggle'. Unfortunately, this won't be possible in the time available, therefore, it will be delivered as a separate KUOZ C : Research output screen (accessible via the Research Output navigation in the SEP tab)

Format C : Research output

KUOZ output type	2010			2011			2012			2013			2014		
	Academic	Professional	Popular	Academic	Professional	Popular	Academic	Professional	Popular	Academic	Professional	Popular	Academic	Professional	Popular
A. Refereed journal article	20	-	23	-	-	21	-	-	23	-	-	21	-	-	21
B. Non-refereed journal article	5	5	0	5	0	5	0	5	5	3	0	5	2	0	0
C. Book (authored)	10	10	2	10	10	10	5	10	10	3	10	10	4	10	10
D. Book chapter	10	5	2	5	5	5	5	5	5	3	5	5	4	5	5
E1. Dissertation 1	5	-	-	5	-	-	2	-	-	1	-	-	2	-	-
E2. Dissertation 2	5	-	-	5	-	-	2	-	-	1	-	-	2	-	-
E3. Dissertation 3	5	-	-	5	-	-	2	-	-	1	-	-	2	-	-
E4. Dissertation 4	5	-	-	5	-	-	2	-	-	1	-	-	2	-	-
F. Refereed conference publication	5	-	-	5	-	-	2	-	-	1	-	-	2	-	-
G. Non-refereed conference publication	5	5	-	5	5	-	2	2	-	1	1	-	2	2	-
H. Case note	-	10	-	10	-	-	5	-	-	3	-	-	4	-	-
I. Preprint	-	0	-	0	-	-	5	-	-	3	-	-	4	-	-
J. Report	-	10	-	10	-	-	5	-	-	3	-	-	4	-	-
K. Patent (not priority application)	-	10	-	10	-	-	5	-	-	3	-	-	4	-	-
L. Book review	5	5	5	5	5	5	2	5	5	3	5	5	2	5	5
M. Invited lecture	-	-	5	-	-	5	-	-	5	-	-	5	-	-	5
N. Other conference contribution (Abstract, Poster)	20	10	10	20	10	10	20	10	10	20	10	10	20	10	10
O. Design	-	10	-	10	-	-	5	-	-	3	-	-	4	-	-
P. Database	0	5	0	5	0	0	0	5	0	1	5	0	2	0	0
Q. Digital or virtual product	5	5	0	5	0	5	0	0	5	1	0	5	2	0	0
R. Performance / reception	5	5	0	5	0	5	0	0	5	1	0	5	2	0	0
S. Software	5	5	0	5	0	5	0	0	5	1	0	5	2	0	0
T. Web publication	5	5	0	5	0	5	0	0	5	1	0	5	2	0	0
U. Other	5	5	0	5	0	5	0	0	5	1	0	5	2	0	0
Total publications	50	50	50	50	50	50	50	50	50	50	50	50	50	50	50

24	KUOZ : Configuration Expand current "SEP output type visibility" configuration to include KUOZ output and activity types	<div style="border: 1px solid red; padding: 2px; color: red; text-align: center;">RELEASED 5.9</div>	Expand the current "SEP output type visibility" configuration to include KUOZ output and activity types (once delivered - see below)	
25	SEP : SEP tab on Person Ensure current year is the final column (automatic)	<div style="border: 1px solid red; padding: 2px; color: red; text-align: center;">RELEASED</div>		

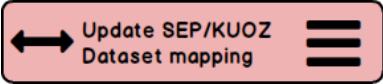
Below is a summary of de-scoped / unresolvable issues

Item	JIRA
SEP : SEP tab on Person Have to save upon inputting new Org affiliation before it appears in SEP tab	<div style="border: 2px solid orange; padding: 10px; text-align: center;">  PURESUPPORT-19873 - Data cannot be retrieved due to an unexpected error. </div>

SEP-KUOZ - Datasets

RELEASED : 5.14.0

The SEP / KUOZ module supports the inclusion of Datasets in **SEP D3b : Main categories of research output** and **KUOZ C : Research output**



SEP D3b: Research Output Overview

SEP output type	2016	2017	2018
Refereed articles	0	0	2
Non-refereed articles	2	0	0
Books	0	1	0
Professional publications	0	1	0
Other research output (Dataset)	0	0	1
Total	2	2	3

KUOZ C: Research output

KUOZ output type	2016				2017				2018			
	Academic	Professional	Popular	Other	Academic	Professional	Popular	Other	Academic	Professional	Popular	Other
A 'Refereed' journal article	0	-	-	-	0	-	-	-	2	-	-	-
B 'Non-refereed' article	2	0	0	-	0	1	0	-	0	0	0	-
C Book (authored)	0	0	0	0	1	0	0	0	0	0	0	0
F Database	-	-	-	-	-	-	-	-	2	-	-	-
U Other research output	0	0	0	1	0	0	0	0	0	0	0	0
total	2	0	0	1	1	1	0	0	4	0	0	0

Notes on including Datasets in SEP / KUOZ tables

1	For an item to be counted in the SEP / KUOZ tables, it must have an internal organisational affiliation
2	<p>Apportionment of activities to SEP units</p> <ul style="list-style-type: none"> Each contributor claims the full item count, except where those contributors are in the same Organisational unit (in which case the item is counted only once for the Organisational unit) Pure looks to the affiliated Organisation(s) on the Dataset record in order to determine the appropriate SEP / KUOZ count
3	<p>Categories</p> <p>Categories are not supported on the Datasets content type in Pure.</p> <p>For KUOZ Table D, all Datasets are captured as 'Academic'</p>
4	<p>Navigation</p> <ul style="list-style-type: none"> As SEP D3b : Main categories of research output and KUOZ C : Research output tables now include two different Pure content types (Research Outputs and Datasets), we've had to introduce some navigation rules to ensure a functioning user experience. Namely: <ul style="list-style-type: none"> In SEP D3b : Main categories of research output "Other research output (Dataset)" will always navigate to Datasets content In KUOZ C : Research output "P: Database" will always navigate to Datasets content
5	<p>Filters</p> <ul style="list-style-type: none"> As SEP D3b : Main categories of research output and KUOZ C : Research output tables can now contain multiple Pure content types (Research Outputs and Datasets), the filters available do not work across all content types <ul style="list-style-type: none"> The Managing organisation filter applies to both content types The Year range filter applies to both content types The SEP Output type and KUOZ Output type filters apply to both content types All other filters only work on Research outputs
6	<p>Period</p> <ul style="list-style-type: none"> Each Dataset is listed in the year(s) in which it is active (using the "Date made available" year)

SEP-KUOZ - Update Dataset type mapping


RELEASED : 5.14.0



In order to capture the Pure Datasets content type in the **SEP D3b : Main categories of research output** and **KUOZ C : Research output tables**, mappings must be defined that map the Pure Datasets the SEP / KUOZ Output types (i.e. "Other research output (Dataset)" (SEP) and "P: Database" (KUOZ)).


The default mapping is as follows:

- SEP : All Dataset sub-types mapped to "Other research output (Dataset)"
- KUOZ : All Dataset sub-types mapped to "P: Database"

Pure is initially populated with this default mapping, but you may wish to apply greater granularity in your mapping. If this is the case, you will need to upload an updated mapping and ensure the **SEP/KUOZ : Update mapping of SEP/KUOZ research output categories** job is run (normally initiates automatically upon upload of a new mapping file).

 **SEP / KUOZ Dataset type mapping templates**

- [SEP : Dataset type mapping template](#) 
- [KUOZ : Dataset type mapping template](#) 

 **Pure Research Output types mapped to SEP / KUOZ Datasets**

If, prior to 5.14, you mapped Pure Research Outputs types (e.g. Non-textual form > Data set / Database) to KUOZ "P: Database" or SEP "Other: Dataset / Database", these mappings will no longer function within this updated framework as only the Datasets content type can now be mapped to KUOZ "P: Database" or SEP "Other: Dataset / Database", (as agreed with the Dutch User Group). You may therefore need to first migrate any Datasets you continue to have captured as Research Outputs over to the Datasets content type, then update your SEP and KUOZ Output mapping files to update your mappings.

Update the mapping files - starting out

To update the mappings, download the templates above and make the required edits (note that these are XML files - if you need any assistance in editing the file, please contact your IT support, or Pure support).

There is one mapping file for each of **SEP D3b : Main categories of research output** and **KUOZ C : Research output**

Restrictions	In order to ensure the navigation in SEP Table D3b and KUOZ Table C functions as expected, restrictions on the mappings are enforced as follows:			
	Pure content type		SEP Output type	KUOZ Output type
	Dataset	can only be mapped to	Other	Database
	Outputs	can only be mapped to	All others (including 'Other')	All others
Sub-types	<ul style="list-style-type: none"> • If you employ sub-types for Datasets: <ul style="list-style-type: none"> ◦ Many:1 Pure type to KUOZ Output type relationships are supported for Datasets. ◦ Unlike other SEP / KUOZ mapping files, there is no 'fallback rule' in the XML mapping files; any Dataset sub-type not included in the mapping file will be captured as 'Not eligible' for SEP and KUOZ. 			

Once the files are ready, they should be uploaded via the Administrator > SEP / KUOZ tab. Any existing SEP or KUOZ Dataset type mapping file should be replaced with your local mapping files.


SEP/KUOZ employment type mapping file

SEP/KUOZ Employment type mapping file


SEP_personmapping_rules.xml
 10 KB, application/xml
 Remove

SEP/KUOZ output type mapping files

SEP Research Output type mapping file


SEP_outputmapping_rules.xml
 6 KB, application/xml
 Remove

KUOZ Research Output type mapping file



KUOZ_outputmapping_rules.xml
 15 KB, application/xml
 Remove

SEP/KUOZ Dataset type mapping files

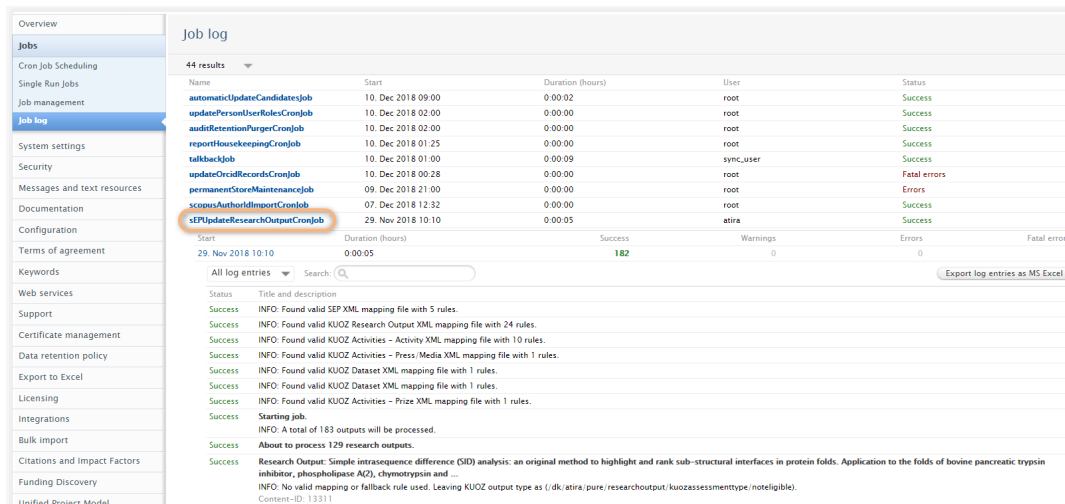
KUOZ Dataset type mapping file


KUOZ_dataset_outputmapping_rules.xml
 382 bytes, application/xml
 Remove

SEP Dataset type mapping file


SEP_dataset_outputmapping_rules.xml
 360 bytes, application/xml
 Remove

Once you select 'Save' at the bottom of the page, the **sEPUpdateResearchOutputCronJob** job will be initiated automatically. You can follow the progress of this job via the Administrator > Jobs > Job log.



The screenshot shows the 'Job log' interface with a sidebar on the left containing navigation options like Overview, Jobs, Cron Job Scheduling, etc. The main area displays a table of 44 job results. The job **sEPUpdateResearchOutputCronJob** is highlighted with a red circle. Below the table, there is a search bar and a summary of the selected job's execution details.

Name	Start	Duration (hours)	User	Status
automaticUpdateCandidatesJob	10. Dec 2018 09:00	0.00:02	root	Success
updatePersonUserRolesCronJob	10. Dec 2018 02:00	0.00:00	root	Success
auditRetentionPurgerCronJob	10. Dec 2018 02:00	0.00:00	root	Success
reportHousekeepingCronJob	10. Dec 2018 01:25	0.00:00	root	Success
talkbackJob	10. Dec 2018 01:00	0.00:09	sync_user	Success
updateOxidRecordsCronJob	10. Dec 2018 00:28	0.00:00	root	Fatal errors
permanentStoreMaintenanceJob	09. Dec 2018 21:00	0.00:00	root	Errors
scopesAuthordImportCronJob	07. Dec 2018 12:32	0.00:00	root	Success
sEPUpdateResearchOutputCronJob	29. Nov 2018 10:10	0.00:05	atria	Success

Summary for **sEPUpdateResearchOutputCronJob** (29. Nov 2018 10:10):
 Start: 29. Nov 2018 10:10 | Duration (hours): 0.00:05 | Success: 182 | Warnings: 0 | Errors: 0 | Fatal errors: 0

Log entries include:
 - Success: INFO: Found valid SEP XML mapping file with 5 rules.
 - Success: INFO: Found valid KUOZ Research Output XML mapping file with 24 rules.
 - Success: INFO: Found valid KUOZ Activities - Activity XML mapping file with 10 rules.
 - Success: INFO: Found valid KUOZ Activities - Press/Media XML mapping file with 1 rules.
 - Success: INFO: Found valid KUOZ Dataset XML mapping file with 1 rules.
 - Success: INFO: Found valid KUOZ Dataset XML mapping file with 1 rules.
 - Success: INFO: Found valid KUOZ Activities - Prize XML mapping file with 1 rules.
 - Success: Starting job.
 - Success: INFO: A total of 183 outputs will be processed.
 - Success: About to process 129 research outputs.
 - Success: Research Output: Simple intrasequence difference (SID) analysis: an original method to highlight and rank sub-structural interfaces in protein folds. Application to the folds of bovine pancreatic trypsin inhibitor, phospholipase A2, chymotrypsin and ...
 - INFO: No valid mapping or fallback rule used. Leaving KUOZ output type as (i:/dk:/atria:/pure:/researchoutput:/kuoassessmenttype:/noteligible).
 Content-ID: 13311

Update the mapping files - already in use

It is recommended that you try to keep the mapping files constant over time (therefore some thought must be put into the mapping from the outset, to ensure that it will work for all Units and Dataset types). However, if in the future you need to update the mapping file, you should first download the mapping file from Pure (to ensure you are working off of the existing mapping). The mapping files can be downloaded from Pure via Master Data > File Handle:

- SEP Datasets mapping
- KUOZ Datasets mapping

test Pure The Pure University

Editor Master data SEP/KUOZ Dashboard FAAR Award management Funding discovery Administrator Usage analytics

Master data overview

Users

Persons

Organisational units

External persons

External organisations

Author collaborations

Journals

Publishers

Classification schemes

File handles +

Editable 17

My content

17 results

- SEP Datasets mapping
File handle: File handles > SEP type mapping file
- KUOZ Datasets mapping
File handle: File handles > KUOZ type mapping file
- KUOZ Activities – Prize mapping
File handle: File handles > KUOZ Activities type mapping file
- KUOZ Activities – Press/Media mapping
File handle: File handles > KUOZ Activities type mapping file
- KUOZ Activities – Activity mapping
File handle: File handles > KUOZ Activities type mapping file
- SEP employment mapping
File handle: File handles > SEP type mapping file

To change the file, **DO NOT** simply change the existing file in the File Handle! Follow the instructions above for uploading the file via the SEP / KUOZ configuration tab.

SEP Datasets mapping
File handle: File handles > SEP type mapping file

File handle ⓘ

Usage
SEP type mapping file

Description *
SEP Datasets mapping

File *
SEP_dataset_output_mapping_rules.xml Show file -
SEP_dataset_outputmapping_rules.xml, 360 bytes, application/xml

Change file...

Visibility *
Public – No restriction