Pure User Guide – SETTING UP CENTRES OR GROUPS AND AFFILIATING PERSONS AND THEIR RESEARCH OUTPUTS TO THEM

Permission requirements: Editor of Organisations, Editor of Persons
(You need both of these permissions to be able affiliate people to Centres or Groups.)

This guide refers to Centres. The same instructions refer to Groups.

Setting up a new Centre

1. Click on the Master Data tab at the top of your Pure home page. (If you don’t have one, you don’t have suitable permissions for this – contact Pure Support on pure-support@lancaster.ac.uk)
2. Click on the + button next to the Organisations in the left navigation bar
3. You will see this screen:
4. The fields with red asterisks are mandatory. Select the type from the drop-down menu, enter the organisation name and a short name. The short name is mandatory, you must enter something here even if it is a duplicate of the full name. There is one further mandatory field which is lower down this editing screen – you must enter a start date.

5. Although it is not marked as mandatory, you must enter a sort name or the Centre will not sort properly in the alphabetical lists on the portal. Make sure that the sort name starts with the word which you think most people will look for in an alphabetical list of Centres. See the ‘Departments and Centres’ page on the portal for examples: http://www.research.lancs.ac.uk/portal/en/organisations/search.html

6. Enter any further details you wish to. Please enter some descriptive text under Organisational profile. Text in this box can be formatted.

7. BE SURE TO CLICK ON THE BLUE ‘SAVE’ BUTTON AT THE FOOT OF THE SCREEN BEFORE EXITING.

Points to note
- Centres can be affiliated to one or more parent organisations in Pure but this isn’t mandatory.
- One of the parent organisations can be designated as primary but this isn’t mandatory.
- Anyone with editing permissions on organisations can set up a Centre – it doesn’t have to be done through HR.

Affiliating persons to a Centre and linking their Research Outputs (ROs) to the Centre at the same time

1. Once the Centre record is set up, open the record and click on ‘persons’ in the left navigation bar.
2. Click on ‘add persons and their content’.
3. Search for persons to affiliate. Only pick 3 or 4 persons to add at this time, because otherwise the next stages can become very slow, and if there is a failure it’s very tedious to start again.
4. Click on ‘next’ and in the next screen, edit the start date and the ‘employed as’ fields as appropriate. The screen shows the start date of each person so you can work out whether the start date of their affiliation should be the start date of the Centre or the start date of the person. Click on next.
5. The next screen shows a listing of all the Research Outputs (ROs) associated with all the persons you have picked (this is why you should only pick a few persons at a time) and at this point some of the outputs can be un-checked if they are irrelevant to the Centre in question. However if it is not known which of the ROs should be linked to the Centre, a decision will need to be made whether to import all ROs at this stage and un-link irrelevant ones later (this will have to be done one RO at a time) or to import none of the ROs and link any required ones later (this will also have to be done one RO at a time).
6. The next screen shows a warning about how many people and how many ROs will be affiliated to the Centre, and pointing out that if any ROs are added wrongly at this stage, they will need to be removed manually at a later stage. This ‘bulk add’ function does not have a matched ‘bulk remove’ function.
7. Press the ‘I accept’ button to start the bulk upload.
8. At the end of the process there is an option to print out a report before finishing.

Unlinking an individual Research Output (RO) from a Centre.

1. You will need editing rights on the relevant RO. (The original author should be able to do this but if not, it will need to be done by someone who does have editing permissions or it could be done by sending a request through to the library validation team via the ‘History and Comments’ section of the record, explaining what needs to happen.)
2. Open the Centre record.
3. Click on ‘relations’ in the left hand navigation column.
4. Open an RO record that needs to be unlinked from this Centre.
5. Look in the list of authors for all authors that include an affiliation to this Centre under their names.
6. Manually remove the affiliation to this Centre from EVERY author name under which it appears in the RO record by clicking on the ‘-’ sign at the right hand side of the window.
7. Click on 'Save' at the bottom of the screen.

**Note:** This action does not delete anything except the relation between that RO and that Centre. However if you have mistakenly affiliated a person who has a substantial number of ROs and bulk added all their ROs to a particular Centre, it is very tedious to have to go into every RO record and delete the link to the Centre.

### Linking an individual Research Output (RO) to a Centre

1. You will need editing rights on the relevant RO. (The original author should be able to do this but if not, it will need to be done by someone who does have editing permissions or it could be done by sending a request through to the library validation team via the ‘History and Comments’ section of the record, explaining what needs to happen.)
2. Open the RO record.
3. Scroll down to the Authors, Organisation, and Placement section.
4. Find the first author in the authors’ list who is affiliated to the Centre. (There may be other authors who are not affiliated to the Centre.)
5. Click on edit on the right hand side of the screen. A small editing window should appear with more details about that author.
6. Under the author’s name there should be an unchecked box next to the name of the Centre to which you want to link this RO. **Check this box and click on the blue ‘UPDATE’ button** at the bottom of the editing window – this should return you to the main RO screen.
7. Repeat these steps for every author who is affiliated to the Centre in question. If you are not sure whether each author is affiliated or not, click on the edit button to see whether the Centre appears under their name.
8. When you have finished, **BE SURE TO CLICK ON THE BLUE ‘SAVE’ BUTTON AT THE FOOT OF THE SCREEN** before exiting the RO record.

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*This User Guide is in addition to the videos, as well as the detailed help sections, that are located in Pure. If you find any wrong or incomplete information in this guide do alert us so that we can update it.*

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