

Pure User Guide: Research Centres and Groups

Before you begin:

In order to create or edit Research Centres/Groups in Pure users will require specific roles in Pure (Editor of Organisations and Editor of Persons). If a user requires these roles, please contact RSO Systems (<u>rso-systems@lancaster.ac.uk</u>).

If you are creating a Centre/Group you will need to know which members of staff / students need to be affiliated, along with which Research Outputs, Activities and projects also need to be affiliated.

Centres/Groups need to be created before people/research outputs can be affiliated.

Creating a new Centre/Group

Click on "Master data" - if you cannot see "Master Data" please see above about "roles".



Click on the "+" next to Organisational Units.





	organisational unit
EDIT	Туре
Metadata Persons Automated search	Type * Select type
OVERVIEW Relations Display	Organisational unit information Organisational unit name*
HISTORY AND COMMENTS History and comments	Sort name
	Web name Organisation profile B I U Are ≡ ≡ ≡ Ξ !Ξ !Ξ !Ξ !Ξ !Ξ !Ξ !Ξ !Ξ
	Ids Add source Id Photo Add file
	Physical address @ Addresses Add Address
	Electronic addresses

This will open the "Organisational Unit" wizard:

Please ensure that all of the mandatory fields (marked with a *) are completed.

Select the "Type" either Group or Centre.



Complete Organisational unit name, Short name and Sort name. Sort name field that the research portal will use to organize the centres/groups in your department.

2



Organisational profile will appear online as the homepage for your centre/group, this can be pasted from another source e.g. Word.

When entering the Start date, be aware that you can only affiliate content that is valid during the lifecycle of the centre/group.

Associating staff and their content

Open the organisation record via Master data > organisations and on the menu on the left hand side go to "persons"

ld: 38726920	Babybel Organisation: Group		
EDIT	Staff		
Metadata	All 2 Past 1 Active 1 Future 0		
Persons	Jessica Abrahams 9/09/09 10/10/13 Academic and Related	Edit -	
OVERVIEW	L Sarah Brown	Edit -	
Relations	9/09/09 → present		
Display	Add persons and their content		
HISTORY AND COMMENTS			
History and comments			
	Students		
	All 0 Past 0 Active 0 Future 0		
	There are currently no associations		
	Add student		

Click on "Add persons and their content".

The filter is defaulted to show staff who are currently affiliated to the Centre/Group's parent organisation e.g. Physics.

Bulk edit step 1 of 4: Add persons to the organisational unit: "Centre for Consumption Insights"				
Select persons	Selected persons No persons have been selected. Please select one or more persons to continue.			
Only persons not associated with "Centre for Consumption Insights" can be selected.				

Type the name of the person to be affiliated, a list of names matching the search term will appear.

Click on the correct person to select them, you can select as many persons as required. *Please note that the next stage will take longer the more persons are added.*

3



Once all the relevant persons have been selected please click "Next" in the bottom right corner of the screen.

Please *set the start date* that each person has with the research group and the *appropriate* "*employed as*" *category* (this will be "Academic and Related" for Academics and researchers – *please use the "apply to all" button if relevant*) and click next.

<u>Note:</u> that either the start date of the research group, or the start date of the person's contract with the university (whichever is most recent) is automatically populated, so this may not need to be changed.

Start date *	Employed as	Staff type
01/10/2018	Academic and Related Apply to all	Academic Apply to all

Associate the relevant content that each person has produced that needs to be linked to the research group. For each person, all publications/projects/activities will be selected however some can be removed if needed by "un-ticking" them.



Once all the relevant content has been associated, click "Next" in the bottom right hand corner. Check the summary that is provided of all the information that has been selected to associate to the research group.



Click "I understand - apply the changes" – please note there is not "undo" function after this. We advise you to download the log file of changes made as none of this can easily be undone.

4



Finally, click on the blue "Save" button to close the organisation and to save all the associations that have been made.

ld: 38726920	babybel Organisation: Group		
EDIT	Staff		
Metadata	All 5 Past 1 Active 4 Future 0		
Persons	Jessica Abrahams 9/09/09 - 10/10/13 Academic and Related	Edit	-
Relations	Sarah Brown 9,09/09 - present Academic and Related	Edit	-
Display	Robert Lauder 9/09/09 - present Academic and Related	Edit	-
History and comments	Muhammad Rashid 9/09/09 - present Academic and Related	Edit	-
	Alison Sharman 9/09/09 - present Academic and Related	Edit	-
	Add persons and their content		
	Students		
	All 1 Past 0 Active 1 Future 0 1/10/10 - present PhD	Edit	-
Last saved: 26/09/13 14:14	Add student		

Editing persons records - setting the job title

To ensure that the relevant academics are listed on the "Academic Staff" list on the research groups' University webpage, the "Job title" for each person record needs to be set. Although this does not come through onto the Departmental group webpage at the moment, this is very important to undertake so that the University's main research group webpages are accurate and presentable.

To set the job title, open the organisation record and click on the person tab on the left hand side.



Open the person's record by clicking "edit" next to their name and select the appropriate "Job Title" and then click update.

Undertake this for each person affiliated to the research group and then click "Save" on the organisation record to save all the changes made.

Associating Students

This process is the same as for staff but initiated by clicking "Add students".

ld: 38726920	Babybel Organisation: Group		
EDIT	Staff		
Metadata	All 2 Past 1 Active 1 Future 0		
Persons	👤 Jessica Abrahams	Edit	_
OVERVIEW Relations Display	9/09/09 - 10/10/13 Academic and Related Sarah Brown 9/09/09 - present Academic and Related	Edit	-
HISTODY AND COMMENTS	Add persons and their content		
History and comments	Students		
	All 0 Past 0 Active 0 Future 0 There are currently no associations Add student		

This user guide is in addition to the videos and detailed help sections on Pure Support.

If you find any wrong or incomplete information in this guide do alert us so that we can update it. Please contact <u>rso-systems@lancs.ac.uk</u>.