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This guide provides specific information and step-by-step instructions for the Editors of organisational units. The PMU PURE Researcher Guide covers essential Pure knowledge, including how to search in Pure, import Research Outputs, fill in information about an Application, etc. Feel free to use the Researcher guide.

Important
Editors and Reporters are provided with special roles. Check if all of these **roles** are related to your Pure profile. If any role is missing, please contact the Research Management at pure@pmu.ac.at. (You can check your roles by clicking on your username and then selecting the *Profile* tab).

As **Editor**, you need the following roles assigned to your profile:

Roles

Editor of Activities, Editor of Press/Media, Reporter of Press/Media, Editor of Curriculum Vitae, Editor of Facilities/Equipment, Reporter of Facilities/Equipment, Reporter of Ethical reviews, Reporter of Organisations, Personal user (staff), Editor of Persons, Reporter of Person, Editor of Prizes, Editor of Research Output, Reporter of Research Output, Editor of Research Performance Indicators, Editor of Applications, Reporter of Applications, Editor of Awards, Reporter of Awards, Editor of Projects, Reporter of Projects

As **Reporter**, you need following the roles assigned to your profile:

Roles

Reporter of Press/Media, Reporter of Facilities/Equipment, Reporter of Ethical reviews, Reporter of Organisations, Personal user (staff), Reporter of Person, Reporter of Research Output, Reporter of Applications, Reporter of Awards, Reporter of Projects

1.   Check on the content related to your organisation

As an Editor, you have the access to the data of your organisation(s). This means that you can view, edit, delete (and, if you have a Reporter role, also report) the data of your organisation.

The *My content* filter enables you to show the records belonging to your organisation.
For example, if you wish to check on the Research outputs created by the Researchers of your organisation, you only need to follow these basic steps:

> 1. Click on Editor in the header, then select Research outputs. (Don't delete the My content filter):
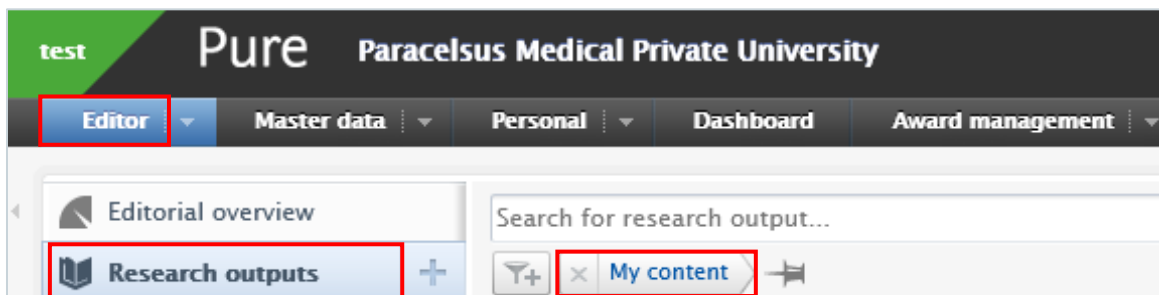
> 2. Now, you can view the list of Research outputs related to your organisation.

By following this method, you can check on the records of various content types, including Activities, Prizes, Press/Media, Applications, Awards, Project Facilities/Equipment, and CV. The records about the *Persons* you will find under Master data.

Tip
If you are a Researcher as well, you can check on your own records by selecting the *My research output* option:

Refer to the PMU PURE Researcher Guide for options on searching, filtering, viewing, and exporting the various content types.

2.   Create the content related to your organisation

As an Editor you have to authority to check on the contents of your organisation. If you realise that some important records are missing, you can create them yourself.

2.1. Basic data types

You can create following content types related to your organisation:

- Research outputs
- Activities
- Events
- Prizes
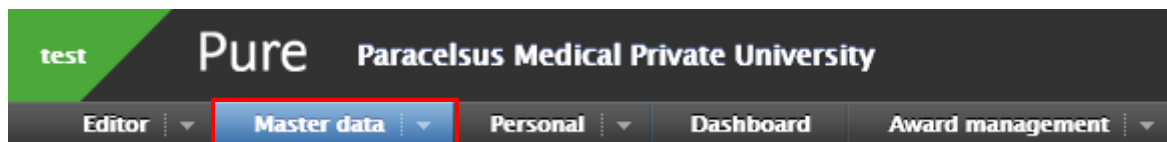- Applications, Awards, Projects (Award Management)

For the exact steps of creating this content types, see the Create your content section in PMU PURE Researcher Guide.

2.2. Persons

When a new employee starts to work at your organisation, they need to be registered in Pure.

<u>To create a new Person:</u>

1. Click on *Master data* in the header:

2. Select *Persons,* and then click on the ✛ button:
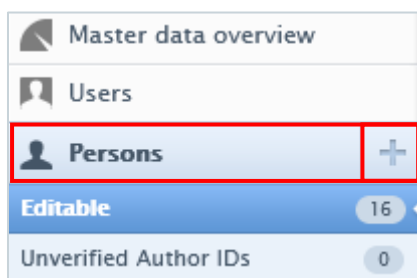
3. In the Person *editor* window, you need to enter the relevant information about the person:

    1. First name(s) and Last Name: Fill in the first name(s) and the last name.

    2. Gender: Select the gender from the list.

    3. Organisations: Click on the Add organisational affiliations to register to internal organisational affiliation(s) of the person. Fill in the start date at the institution.
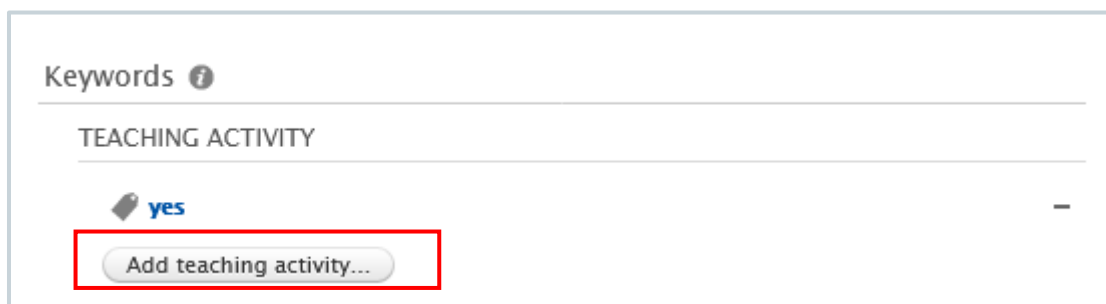
4. Teaching activity: Click on the *Add teaching activity* button and select either yes or no.


4. Click on *Save*.

In the next step, the Research Management receives a notification about the registration of the new person, and they will create a user account for them. Once, the user account has been created, the new employee receives their Pure username and password via email. After that, the person can edit their profile, for example, register education/qualification data, positions outside of the institution, etc.
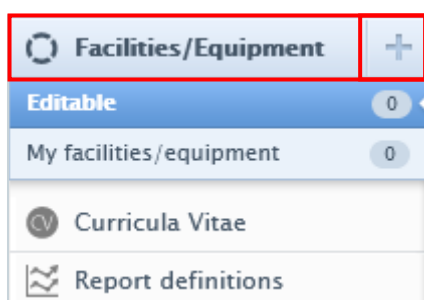
2.3. Facilities/Equipment

Editors have the authority to register facilities, which are used for research purposes, for example laboratories, or fill in information about equipment of the facilities, such as fMRI machine.

To create a Facility/Equipment:

1. Click on *Editor* in the header:
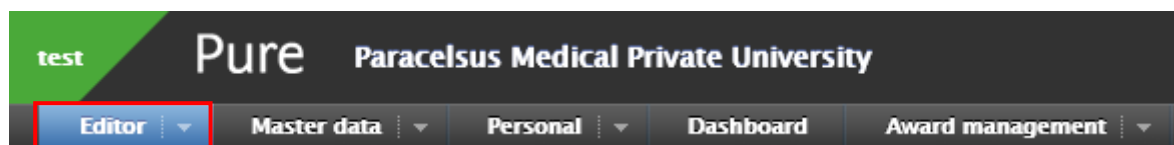
2. Select *Facilities/Equipment,* and then click on the ➕ button:

3. Select either facility or equipment.

4. In the Facility/Equipment window, you need to enter the relevant information about the facility or equipment. The required fields are marked with a red star and filling them in is mandatory. Filling in the other fields is optional.

    1. Type: Select the type of the record.

    2. Title: Fill in the title of the facility/equipment:

3. Managing organisational unit: Select the internal organisational unit, which is responsible for managing the Facility or Equipment.
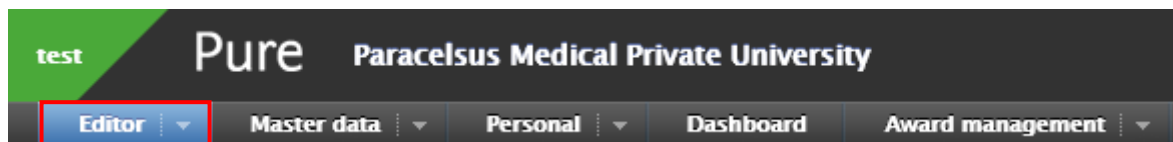
5. Click on *Save*.

In the next step, the record undergoes validation by the Research Management.
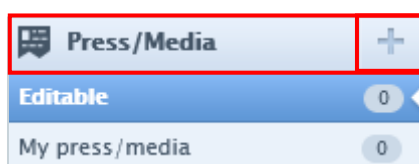
2.4. Press/Media

Editors have the authority to register Press/Media contents, such as articles or interviews.

To create a Press/Media content:

1. Click on *Editor* in the header:

2. Select *Press/Media,* and then click on the ➕ button:

3. In the Press/Media editor window, you need to enter the relevant information about the content. The required fields are marked with a red star and filling them in is mandatory. Filling in the other fields is optional.

    1. Title of theme/story: Fill in the title of the record.

    2. Media contribution/media coverage:

        By clicking on the *Add media contribution or media coverage* button, an editor window will appears In this window, you need to fill in information regarding:

        1. Type: Select the record type.

        2. Title: Fill in the title.

        3. Persons and organisations: Add associated persons and organisations.

        4. Date: Enter the record date.

3. Managing organisational unit: Select the internal organisational unit, which is responsible for managing the Press/Media record.

4. Click on *Save*.

3.   Workflows

3.1. Workflows of basic data types

Editors have the **same authority in the workflow processes as Researchers**. This means that the workflow steps marked with Researcher (see in the Pure PMU Wiki Pure for Researchers) can also be done by Editors. For example, in Research outputs an Editor can be associated with following two workflow steps:

1. Entry in progress.
2. For validation.

The 3. Step (validated) will be done be the Research Management, regardless of if the creator is a Researcher or an Editor.

Important
By default, the *Editors* can also carry out certain workflow steps for Research outputs, Applications, Awards, Projects in Pure. In order to keep our workflow steps as simple as possible and maintain data quality, Research Management is responsible for validating and approving Research outputs, Applications, Awards, and Projects. As a result, we have deactivated some notifications assigned to the Editors' profiles. Please **do not change any notification settings for emails, notifications, and tasks connected to the workflows (in the Editorial tasks category) of Research Output, Application, Award, Project, Facility/Equipment, and Person.**

Here is an example, please **don't change this kind of notifications:**

3.2. Workflows of Facilities/Equipment

The content type Facilities/Equipment has a 2-step workflow.

1. For Validation: The Facility/Equipment is awaiting validation by the Research Management.

2. Validated: The Facility/Equipment has been validated by the Research Management.

Once the Facility/Equipment record has undergone the validation process, the Editor cannot edit anything, but read the record.
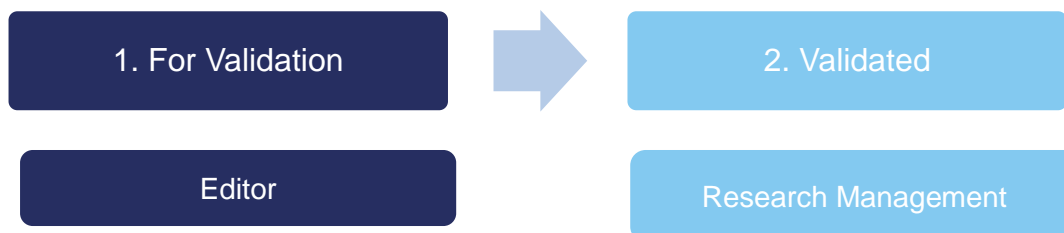
4.   Reporting

Pure enables users with special roles to report data directly. The Research Management has begun to create useful templates for reporting goals, which will be available later. For a comprehensive understanding of how reporting works and additional details, you'll find more information in the training sessions.