

# Manual for Pure Editors

This handbook is intended for the Pure Editors of the organisational units of PMU, SALK, and Klinikum Nuremberg. It provides specific information and step-by-step instructions tailored to the needs of Editors responsible for maintaining and verifying research information within their units.

The Pure Handbook for Researchers covers essential Pure knowledge, including how to search in Pure, import research outputs, and enter information about applications, among other core functionalities. Feel free to use the Pure Handbook for Researchers as a complementary resource for general Pure guidance, while this handbook focuses on Editor-specific tasks and responsibilities.

- [1. The Editor-Role](#)
  - [1.1. Check the Editor-Roles](#)
  - [1.2. Important for PURE-Editors](#)
  
- [2. Check on the Content Related to Your Organisational Unit\(s\)](#)
  - [2.1. Check on the Content Related to Your Organisational Unit\(s\)](#)
  
- [3. Create the Content Related to Your Organizational Unit\(s\)](#)
  - [3.1. Basic Data Types](#)
    - [3.1.1. Addition to Applications, Awards, and Projects](#)
  - [3.2. Persons](#)
  
- [4. Workflows](#)
  - [4.1. Workflows of Research Outputs](#)
  - [4.2. Workflows of Projects – New Role: Validator for Projects](#)
  
- [5. Habilitation-list \(German Habilauszug\) for researchers of your organisations unit](#)
  - [5.1. Habilitation-list for researchers](#)

# 1. The Editor-Role

## 1. The Editor-Role

# 1.1. Check the Editor-Roles

Editors are provided with special roles. Check if all these **roles** are related to your PURE profile. If any role is missing, please contact the Research Management (RM) at [pure@pmu.ac.at](mailto:pure@pmu.ac.at).

You can check your roles by clicking on your username and then selecting *User settings* option:

### Role(s)

Editor of Activities, Reporter 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, Editor of Organisations, Reporter of Organisations, Personal User, Editor of Persons, Reporter of Person, Editor of Prizes, Reporter 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, Validator of Projects

## 1. The Editor-Role

# 1.2. Important for PURE-Editors

As an editor you have the authority the **view, create, edit, and delete** records for your organisational unit. As an editor you are also **responsible for the completeness of the data** (e.g., research outputs, applications, etc.) **for your organisational unit**.

To keep our workflow steps as simple as possible and maintain data quality, **RM is responsible for validating and approving research outputs, and awards**.

When creating a new research output, or award for your organisational unit in PURE, always set the **workflow** status to **Entry in Progress** or **For validation** or **For approval**, never select Validated or Approved. Once a record has undergone the validation process, don't make any changes to it. If you need modifications (e.g. because of incorrect data), you can write a comment on the record (under the History and comments tab). If you make any modifications to a record after the validation process, the RM will not take responsibility for the correctness of the data.

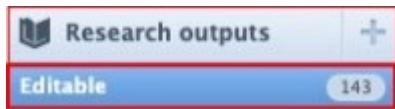
## 2. Check on the Content Related to Your Organisational Unit(s)

2. Check on the Content Related to Your Organisational Unit(s)

## 2.1. Check on the Content Related to Your Organisational Unit(s)

As an Editor, you have the access to the data of your organisational unit(s).

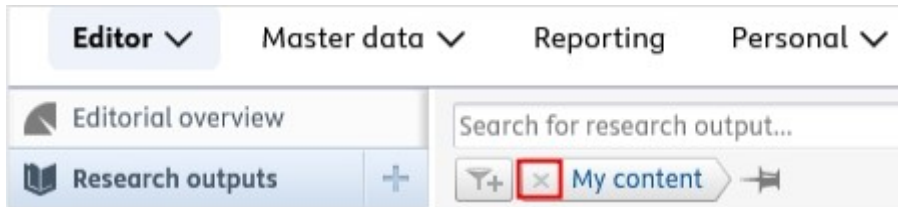
The *Editable* category in content types, such as the content type research outputs, includes only those research outputs where the organisations unit (of the editor) the **managing organizational unit** is:





You have two options to reach every research output of your organisational unit:

1. option:

1. Go on Editor in the header and select *Research outputs*.
2. Remove the *My content* filter:



3. Click on the Add filter  icon.
4. Select *Organisations* and fill in the name your organisational unit(s).
5. Click on the pin icon .
6. Add a name to the new filter.
7. Save the filter.



Now you can view, filter and download (at the bottom of the window) all research outputs of your organisational unit(s).

2. option:

1. Go on *Master Data* in the header and select *Organisational units*.
2. Select your organisational unit and click on the name of it.
3. Go on *Relations* tab.
4. Select *Research outputs*.



Now you can view and filter all research outputs of your organisational unit. Please note, that downloading the data from this window is not possible.

You can use these three abovementioned methods for other content types, such as activities, prizes.

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

Research outputs		+
Editable	377	
<b>My research output</b>	<b>35</b>	
Organisations with import candidates	0	
Persons with import candidates	0	
Research outputs with electronic versions	268	

Refer to the chapter [Check Your Content](#) in the PURE Handbook for Researcher for options on searching, filtering, viewing, and exporting the various content types.

# 3. Create the Content Related to Your Organizational Unit(s)

3. Create the Content Related to Your Organizational Unit(s)

## 3.1. Basic Data Types

You can create following basic content types related to your organisation:

- Research outputs
- Activities
- Events
- Prizes
- CVs
- Datasets
- Applications, Awards, Projects

For the exact steps of creating this content types, see the *Create Your Content* sections in [PURE Handbook for Researcher](#).

### 3. Create the Content Related to Your Organizational Unit(s)

## 3.1.1. Addition to Applications, Awards, and Projects

Only Editors have the authority to carry out certain workflow steps for Applications, such as “Submit: funder” and “Reply received from funder”.

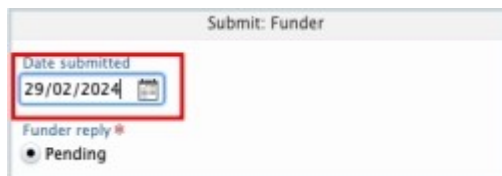
**Popup blockers** can block the new editor windows; therefore, it is recommended to (temporarily) **disable** your pop-up blocker.

If you (or a researcher from your organisational unit) has **submitted** the application to the funder, you need to

1. Select “Submitted” in the workflow at the bottom:

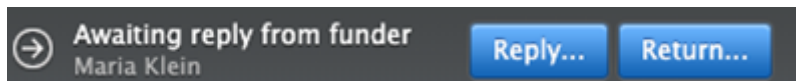


2. Fill in the field “Date submitted”:

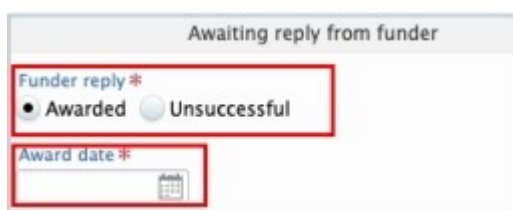
A screenshot of the "Submit: Funder" form. The "Date submitted" field is highlighted with a red box and contains the date "29/02/2024". Below it, the "Funder reply" section has a radio button selected for "Pending".

If you (or a researcher from your organisational unit) has **received** a reply from a funder, you also need to:

1. Select “Reply..” in the workflow at the bottom:

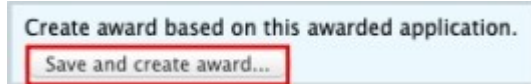


2. Select the type of the reply, and if relevant, fill in the “Award date” field:

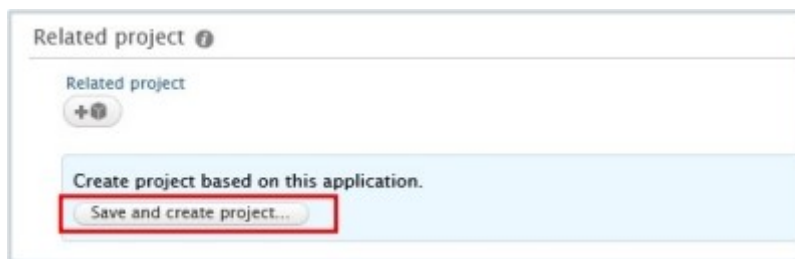
A screenshot of the "Awaiting reply from funder" form. The "Funder reply" section has two radio buttons: "Awarded" (selected) and "Unsuccessful". Below it, the "Award date" field is highlighted with a red box and contains a calendar icon.

In case of a **positive answer from the funder (awarded application)**, please:

1. **Contact RM** at [pure@pmu.ac.at](mailto:pure@pmu.ac.at).
2. An **award** need to be created. The easiest way to do it is to open the application and use this shortcut. For the details of projects see section [Awards - Details](#)






3. **Create a project** based on the awarded application by opening the Application and clicking on the "Save and create project" button. For the details of projects see section [Projects - Details](#)).



4. Click on Save.

In summary, in case of a **funded project**, you need to create three data types: an **application**, an **award**, and a **project**. These data types need to be linked to each other:

Award	IDs	Nature of activity	Funder	Awarded	Spend	Funded period	Award date	Applications	Project	Acronym	↓
<b>PMU test for trainings</b> Ebner, P. Award date: 17/02/24 Award: EU > Award			FWF - der Wissenschaftsfonds Österreich	20.00 EUR	0.00 EUR	Mar 2024 - Jun 2024	17/02/24				

In case of **rejection from the funder**, the process ends, and you don't need to create either an award or a project.

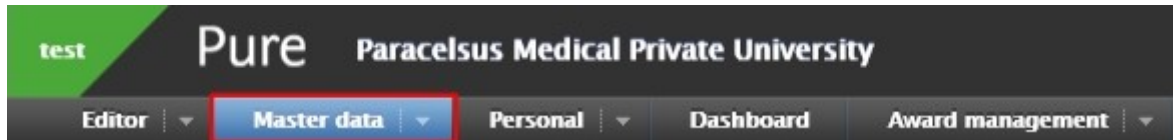
3. Create the Content Related to Your Organizational Unit(s)

## 3.2. Persons

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

### To create a new Person:

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 and register the **e-mail address** of the new employee.

## Personal identification

First name(s)

Mária

Last name \*

Klein

Gender \*

Female ▼

Date of birth

Example: 21/10/2002

Nationality

Select nationality... ▼

Name variants

Add name variant...

Title

Add title...

ID

Add ID...

ORCID

Add existing ORCID...

Profile photos

Add image...

Links

Add link...

Entry date university

Example: 21/10/2002

Retirement date

Example: 21/10/2002

## Research description

Profile information

Add profile information...

## Organisational affiliations

Organisations \*

STAFF

**Research Management at Paracelsus Medical University**

Set primary

Edit



2/11/23 → present

maria.klein@pmu.ac.at

Add organisational affiliation...

Start date at institution

Example: 21/10/2002

End date at institution

Example: 21/10/2002

FTE (as of today)

0.00

4. Click on Save.

In the next step, please notify RM by writing a short **comment** on the record **or** via **e-mail** [pure@pmu.ac.at](mailto:pure@pmu.ac.at) with a request to create a user for the person.

Here is an example of writing a comment:

Comments

*There are no comments for this content*

Write a comment about the content

Please create a user for this person.

Send this comment as a message to:

All administrators of this content

Christian Resch  Konstantin Thiel  Mia Hartge  Mária Klein

All global administrators

Barbara Ruder  Christian Resch  Dorothea Kölblinger

Konstantin Thiel  Lena Fischer  Mia Hartge  Mária Klein

Patricia Ebner  Patricia Linortner  Sophie Herzig

Please make sure to **check the boxes next to the names of the admins**, and don't forget to click **Save** at the bottom of the window.

Once the user account has been created, a new employee with a **@pmu.ac.at** email address registered in their personal profile can log in to PURE via <https://my.pmu.ac.at/> by clicking on the PURE icon.

Employees with **@salk.at**, **@klinikum-nuernberg.de** **e-mail addresses** receive their username and password via email and can log in via the following link:

<https://PURE.pmu.ac.at/admin/login.xhtml>.

After that, the person can edit their profile—for example, by adding education/qualification details, positions outside the institution, and more.

### **Active vs not active persons:**

To directly check the **active** versus **not active persons** of your organisational unit, please refer to “Persons” tab:

The screenshot shows the 'Pure' system interface for Paracelsus Medical University. The top navigation bar includes 'Pure Paracelsus Medical University' and 'Research Management at Paracelsus Medical University'. The left sidebar contains a menu with 'Master data' selected, and 'Organisational units' and 'Persons' highlighted. The main content area shows the 'Persons' section with filters for 'All', 'Past', 'Active', and 'Future'. A specific staff member, Patricia Ebner, is shown with her details.

**To update data (such as the end date at the organisational unit) to a Person's profile:**

1. Search for the Person.
2. Modify their data in the Editor window. For example, fill in the End date at the organisation unit:

The screenshot shows the 'Affiliation' form in the Pure system. The form is for 'Research Management at Paracelsus Medical University' and includes fields for 'Staff type', 'Employed as', 'Start date', 'End date', 'FTE', 'Contract type', 'Job title', and 'Job description'. The 'End date' field is highlighted with a red box.

To change the e-mail address of a Person required for PURE login or to add another internal organisation unit affiliation to the Person's profile, please contact RM at [pure@pmu.ac.at](mailto:pure@pmu.ac.at).

# 4. Workflows

#### 4. Workflows

# 4.1. Workflows of Research Outputs

PURE editors have the **same authority in the workflow of research outputs processes as researchers.**

Please **never set** the workflow status of research outputs to **“Validated”** as a PURE Editor. At PMU, RM is responsible for validating research outputs. For details, refer to **R-30 - Evaluation of Scientific Publications.**

#### 4. Workflows

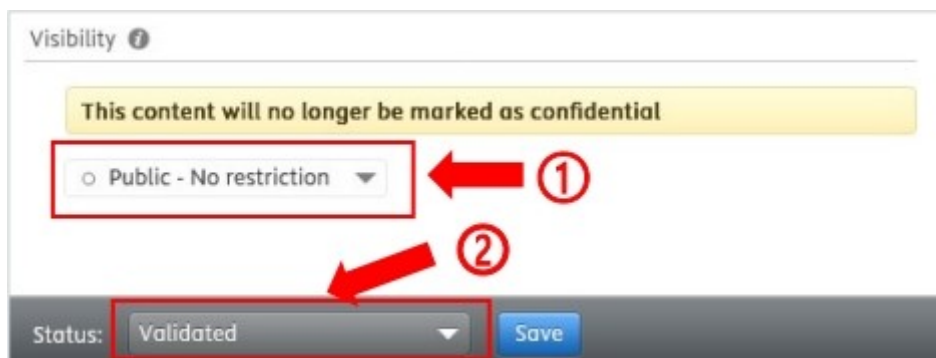
## 4.2. Workflows of Projects – New Role: Validator for Projects

**NEW:** The role **'Validator for projects'** has been activated in the profiles of PURE editors.

**RM does not validate projects;** therefore, it is important that you keep an eye on the projects associated with your organisational unit(s) (you can find them in the category *Editable* under projects).

This role allows you to set the **workflow** status of projects to **'Validated'**. **Projects labelled as 'Public' ?** (please note: visibility must be **actively** set to 'Public') **AND validated ?** will appear immediately in the [PURE portal](#) and on the [PMU website](#) the following day.

The visibility and workflow status can be found at the bottom of the project dialogue window in PURE:



Ein Bild, das Text, Screenshot, Software enthält. KI-generierte Inhalte können fehlerhaft sein.

This role **also** authorises you to **update or correct projects that have already been validated** (e.g. adjust the duration, add participants, etc.).

After opening the record, click on the **pencil** icon to update or correct the project data:



**Budget information** is generally **never displayed** in the [PURE Portal](#) or on the [PMU website](#), only information on the project participants, the duration, the related internal and external organizational unit(s), labels (so-called fingerprints) generated based on the underlying awards/grants, and a link to the project website.

You can only set projects to 'Validated' or subsequently edit already validated projects **for which your organisational unit is** noted as the **managing organisational unit**.

**Short Checklist, which you must check and correct if necessary before setting the project to 'Validated':**

ü Project type

ü Title

ü Participants

Desired order of related project participants:

- PI

- Co-PI

- Other contributors

→ For several people in the same role: sort alphabetically

ü Managing organisational unit: Order: PI > Co-PI > other contributors

If you wish to correct the managing organisational unit but are unable to select the correct one, please write a comment on the record or contact RM at [pure@pmu.ac.at](mailto:pure@pmu.ac.at).

ü Collaborative partners

- Select 'Yes' if the project is a cooperation between an organisational unit (OU) of the PMU/SALK/Nuremberg Hospital and one or more external organisations.

- Select 'No' if only internal OUs of the PMU/SALK/Nuremberg Hospital are involved (no external organisations).

ü Life cycle (start and end date)

ü Visibility: Visibility is set to 'Confidential' by default. Set this to 'Public' if the project is to be displayed in the PURE portal and on the PMU website.

If available:

ü Delete budget information if it is specified in the fields of the 'Identification' category.

The budget information in the **associated 'Application/Award'** record **must remain!** (Those categories will not be displayed in the portal).

Note: This does not affect the linked funding applications or awards - these remain unaffected.

ü Remove uploaded documents.

*Optional data:* In addition to the abovementioned information, **please feel free to fill in the optional fields as well**, such as the project description, keywords, or links to related research outputs.

### Examples for correct and incorrect project records

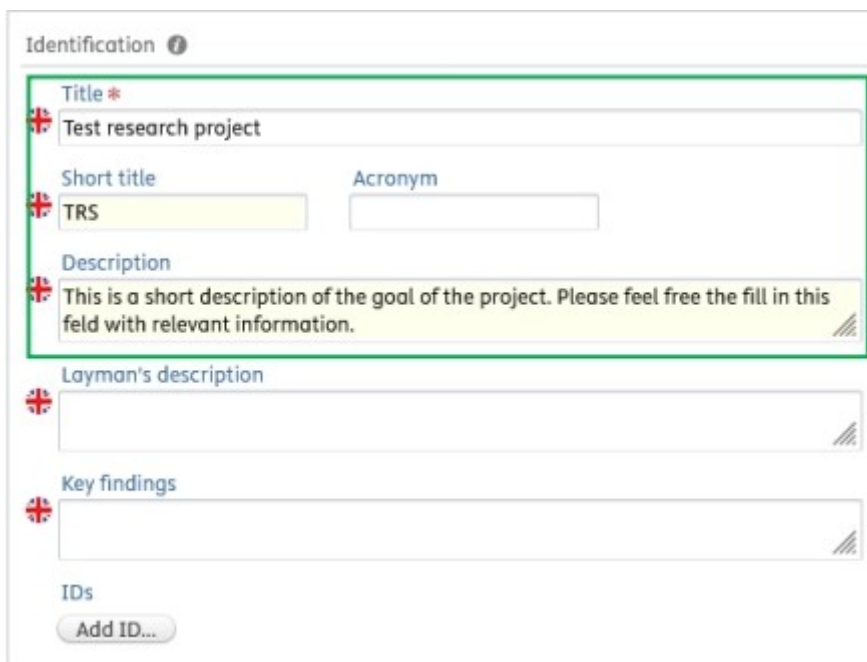
CORRECT example 1:

ü title is filled in

ü short title\* is filled in

ü description\* is filled in

ü none of the fields under “identifications” contain budget information



The image shows a form titled "Identification" with a help icon. The form contains several fields: "Title \*" (required), "Short title" (optional), "Acronym", "Description" (optional), "Layman's description", "Key findings", and "IDs" with an "Add ID..." button. A green rectangular box highlights the "Title", "Short title", "Acronym", and "Description" fields. The "Title" field contains "Test research project". The "Short title" field contains "TRS". The "Description" field contains the text: "This is a short description of the goal of the project. Please feel free the fill in this feld with relevant information." The "Layman's description" and "Key findings" fields are empty.

\*: optional field

INCORRECT example 1:

! description contains budget information → please remove immediately:

TRS

Description

~~This project is funded with €100,000.~~

Layman's description

Key findings

IDs

Add ID...

CORRECT example 2:

ü the order of the participants follows the desired order, and persons with the same role are sorted alphabetically:

Participants ⓘ

Related project participants \* +

<p><b>Maria Klein, PI</b> Internal person</p> <p><b>Research Management at Paracelsus Medical University Salzburg</b> Organisational unit: Research Management Salzburg</p>	Edit	+	-
<p><b>Christian Resch, CoPI</b> Internal person</p> <p><b>Research Management at Paracelsus Medical University Salzburg</b> Organisational unit: Research Management Salzburg</p>	Edit	+	-
<p><b>Konstantin Thiel, CoPI</b> Internal person</p> <p><b>Research Management at Paracelsus Medical University Salzburg</b> Organisational unit: Research Management Salzburg</p>	Edit	+	-
<p><b>Patricia Ebner, Further contributor</b> Internal person</p> <p><b>Research Management at Paracelsus Medical University Salzburg</b> Organisational unit: Research Management Salzburg</p>	Edit	+	-

Add person... Add organisational unit...

INCORRECT example 2:

! the roles of the participants do not follow the desired order, and individuals with the same role are not sorted alphabetically → please correct the order by clicking on the arrows:

Participants ⓘ

Related project participants \* + 👤

<b>Konstantin Thiel, CoPI</b> Internal person	Edit	+	-
<b>Research Management at Paracelsus Medical University Salzburg</b> Organisational unit: Research Management Salzburg			-
<b>Christian Resch, CoPI</b> Internal person	Edit	↓	↑
<b>Research Management at Paracelsus Medical University Salzburg</b> Organisational unit: Research Management Salzburg			-
<b>Maria Klein, PI</b> Internal person	Edit	↓	↑
<b>Research Management at Paracelsus Medical University Salzburg</b> Organisational unit: Research Management Salzburg			-
<b>Patricia Ebner, Further contributor</b> Internal person	Edit	↑	-
<b>Research Management at Paracelsus Medical University Salzburg</b> Organisational unit: Research Management Salzburg			-

Add person... Add organisational unit...

### CORRECT example 3:

ü both the start and end date fields are filled in:

Life cycle ⓘ



Start date 01/03/2025	End date 06/06/2025
Example: 21/10/2002	Example: +12 is 12 months later

Curtailed

### INCORRECT example 3:

! none of the lifecycle fields are filled in – please make sure to enter at least the start date. If the end date is not yet known, please provide an estimated end date:

Life cycle ⓘ

Start date        End date  

Example: 21/10/2002      Example: +12 is 12 months later

Curtailed

You can update the period at any time by opening the record and clicking the pencil icon.


CORRECT example 4:

ü a link\* has been added, but no document has been uploaded:

Files and links ⓘ

Documents

Links

 <https://www.pmu.ac.at/>      Show    Edit    -


\*: optional field

INCORRECT example 4:

! a project document (PDF, Word, etc.) has been uploaded → please remove it immediately by clicking on the minus:

Files and links ⓘ

Documents

 **project\_description**      Show    Edit    -

project\_description.pdf, 1.51 MB

Public - No restriction

Links

CORRECT example 5:

ü there is an associated application and award linked to the record:

Related applications and awards ⓘ

test titel AWARDED  
Klein, M. (Project Applicant)  
FWF - der Wissenschaftsfonds Österreich: €0.00  
Application: Research Councils › Additional Funding

test titel  
Klein, M. (Project Applicant)  
FWF - der Wissenschaftsfonds Österreich: €10.00  
Award date: 22/03/24  
Award: Research Councils › Award

+n | +p

The budget information in the **associated 'Application/Award'** record **must remain!** (Those categories will not be displayed in the portal).

### INCORRECT example 5:

! no associated application and/or award linked to the record:

In this case, you either removed the related application and/or award, or you did not relate the project to an application and/or an award. Both are incorrect, as each project must be linked to the appropriate budget-related categories. Non-competitive projects must be linked to an award, while competitive projects must be linked to both an application and an award. For more details, please refer to [Chapter 3.1.1 Addition to Applications, Awards and Projects](#).

Related applications and awards ⓘ

+n | +p

5. Habilitation-list (German Habilauszug) for researchers of your organisations unit

5. Habilitation-list (German Habilauszug) for researchers of your organisations unit

# 5.1. Habilitation-list for researchers

As a Pure-editor, you have the right to generate a habilitation-list for researchers of your organisational unit.

For the details, please refer [FAQ 2](#).

If you don't see your question answered here, or have suggestions for additional questions/answers, please contact pure support at [pure@pmu.ac.at](mailto:pure@pmu.ac.at).