Pure Personal User Overview Guide v1.0 – January 2019

This guide provides descriptions and instructions for use for each component in the new personal user overview. This guide is written from the perspective of the administrator providing information to their users. Images used in the guide can be downloaded separately (in .png format), and file names are clearly labelled beneath each image.

Contents

Goal of the new overview

The new Personal User Overview is a substantive improvement to how you, as a personal user, can access, work, explore and add content within Pure. The new overview is tightly integrated with your Pure and PlumX data at the research output, project and researcher level. This includes coverage of content added by yourself and your institution, and includes PlumX mentions, usage, captures, social media and citation data for each research output where available. Most importantly, you will not lose access to any functionality or utility.

The new overview is in a cleaner, simplified style, with improvements to fonts and color selection for accessibility. It continues the design changes that are occurring across Pure.

The components found in the new overview, and in this guide, include:

- Researcher profile
- Research output inventory
- Project timeline
- Supervision and teaching overview
- Assessment snapshot
- Collaboration map

It is important to note that:

- the new overview is available only to yourself and users with viewing rights, which includes Pure administrators, support staff, and trusted users
- it is not publicly visible
- it is not your portal profile

The new Personal User Overview page from Pure

Layout of all components

[image file: Personal_overview_complete.png]

Components

Researcher Profile

[image file: Personal_overview_profile.png]

Your primary information is presented in this section. This includes access (where granted by administrators) to your:

1. Public profile (Pure Portal Profile or custom equivalent)
2. CVs created, and option to create a CV
3. FAAR report (if available), downloadable in .docx or .pdf format
4. ORCID ID and option to authenticate your ID
5. Options to edit your profile

Once in your profile editor, by clicking 'Edit profile' all options to add Scopus IDs, add profile photo, links and information, academic qualifications and fields of research, are available as before.

Overview toggle

If you feel more comfortable using the old overview, simply switch the toggle and you will be taken back to the old overview. It should be noted that the old overview will only be available until **[insert date]**.
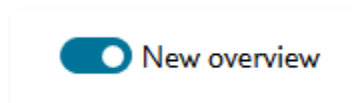
[image file: Personal_overview_toggle.png]

PlumX metrics

This section shows summaries of all your research output with associated PlumX metrics. If there are changes in the metrics between logins, the changes will be shown above the total for each metric.

[image file: Personal_overview_plumx.png]

For more information on each of the PlumX metrics, you can click on the (1) PlumX link which will direct to https://plumanalytics.com/learn/about-metrics/.

As an example, in the screenshot, for the **(2)** 127 of your research outputs with associated PlumX metrics (out of a total of **(3)** 167), since your last login, the usage metric total has increased by 21 to a new total of 102. There have also been 7 new citations to one or more of the 127 research outputs, with a new total count of citations of 66.

You can view research output with associated PlumX metrics in Pure or your total research output corpus by clicking on the count links **(2 & 3)**.

Important note: Metrics from Plum are currently limited to what is indexed in Plum. As more content is indexed by Plum, coverage will increase. Updates to most metrics are processed by Plum on a weekly basis. Therefore, if you login more than once in a week, changes will not be shown until you login the following week.

For more information on indexing and coverage, see: https://plumanalytics.com/learn/about-metrics/citation-metrics/

PlumX metrics filters

You can filter your research output to find those with PlumX metrics in the overview editor as shown here.
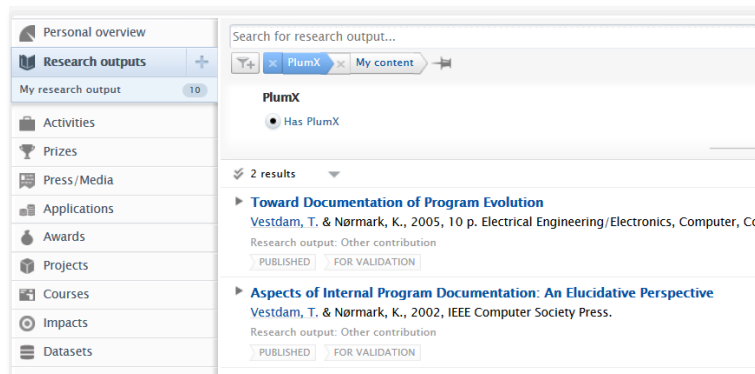
[image file: Personal_overview_plumx_filters.png]

PlumX metrics per research output

You can examine PlumX metric counts per research output, by clicking on the research output in the overview editor and navigate to the **Metrics** menu tab on the research output editor as shown below.
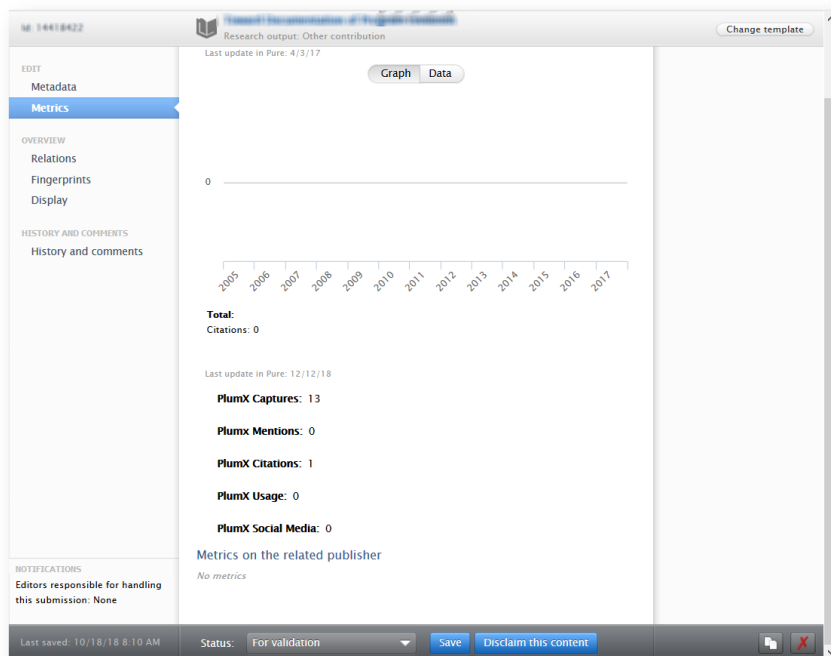
[image file: Personal_overview_plumx_RO.png]

Content inventory

The content inventory is a summary of all your content in Pure. Content types are ordered by the count of each sub-type. When clicked, each type and sub-type will be opened in the overview editor, with the appropriate filter activated.
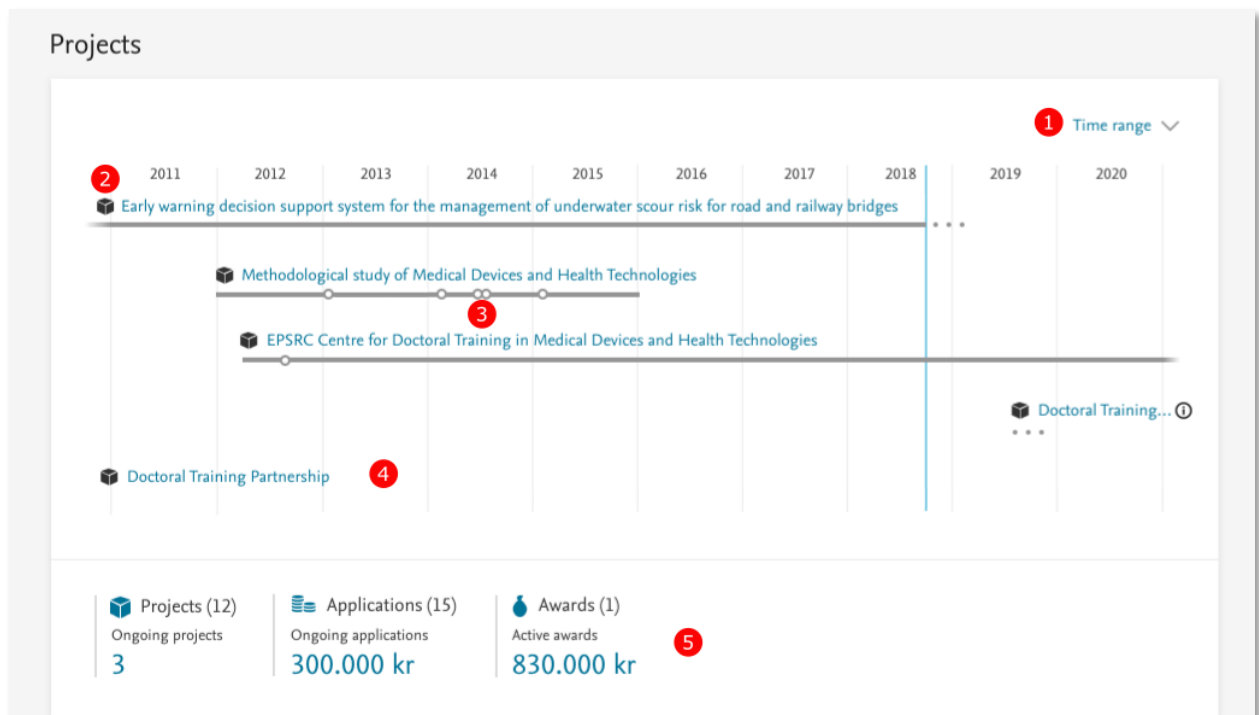

[image file: Personal_overview_content_inv.png]

Project overview

[For users with project add/edit permissions]

The project overview is a visual summary and exploration of your projects and associated outputs. You can quickly determine if your projects and their associated content are complete and correct.

Project timeline

[image file: Personal_overview_project1.png]

You can select the **(1)** time range you would like to view the timeline, **(2)** click though to specific project overviews (more details on the Individual project overview screens can be found below), with PlumX metrics shown for your projects and individual research outputs. The project overview displays output related to a project within the specific project's timeline **(3)** for easier estimations of output volume and publication year.

Projects are sorted by their start date, with the earliest projects at the top. Projects that have no end dates are shown with an ellipsis (…), and **(4)** projects with no start or end date only display the project title.

Project related metrics such as count of ongoing projects, and applications and awards counts and amounts are shown in the project inventory **(5)**. Clicking on any of the metrics will open the appropriate editor window.

A scroll bar will appear within the project timeline window when there are 7 or more projects.

Individual projects

When you click on an individual project in the project overview, a modal box will display the individual project in a timeline.
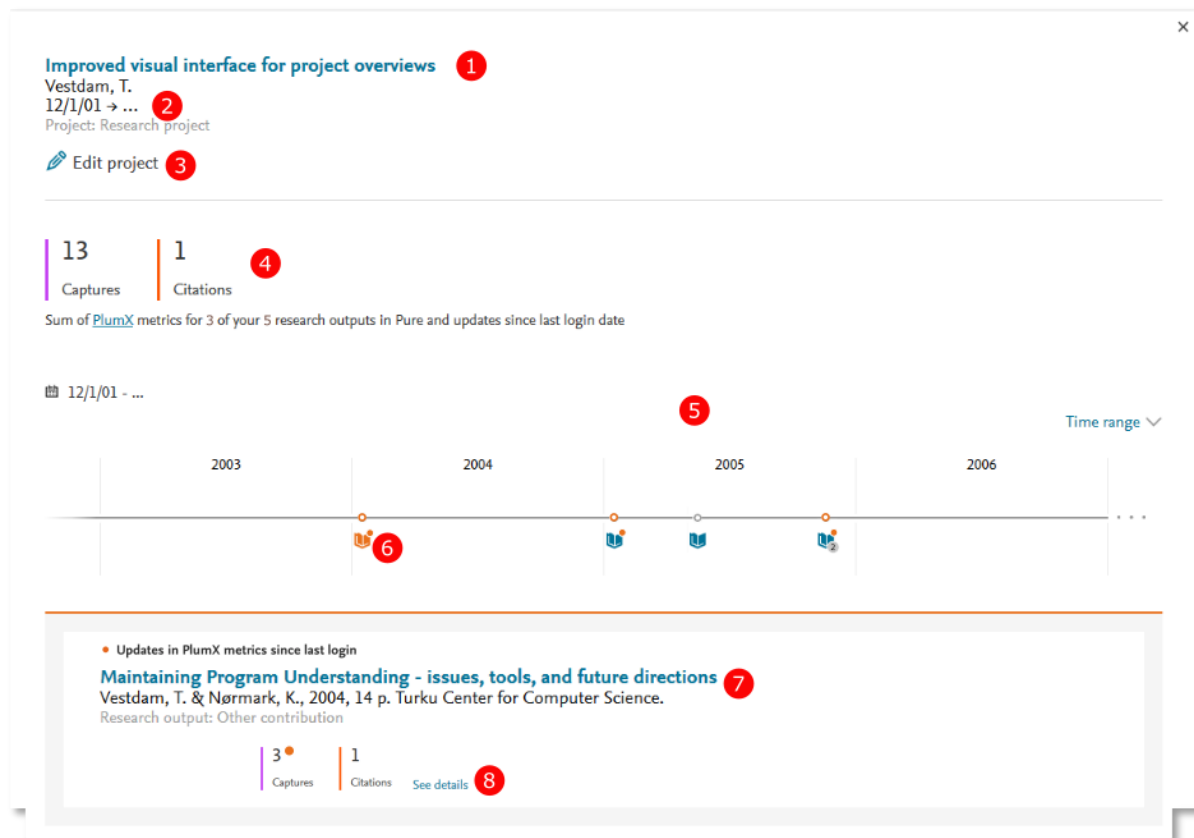
[image file: Personal_overview_project2.png]

This box contains **(1)** the title of the project, **(2)** the period the project is active, **(3)** an option to edit the project via the project editor. Also shown are **(4)** the PlumX metric(s) associated with the research output of the project, **(5)** the project timeline, including a time range selection option, and your research outputs related to the project, oriented by publication date on the timeline, and distinguished by type icon. The individual outputs are grouped if they have very close publication dates, with counts displayed below the icon if there are more than one output.

Outputs with updated PlumX data are shown with **(6)** an orange ring icon on the timeline and a circular orange badge on the icon. Users may click on the icon to bring up the list of research output(s). The **(7)** title link, if clicked, will open the research output editor window.

If available, the **(8)** associated PlumX metrics are shown below the output. A circular orange badge is displayed next to the updated metric, and to view Plum's summary page for that specific research output, click on the 'See details' link.
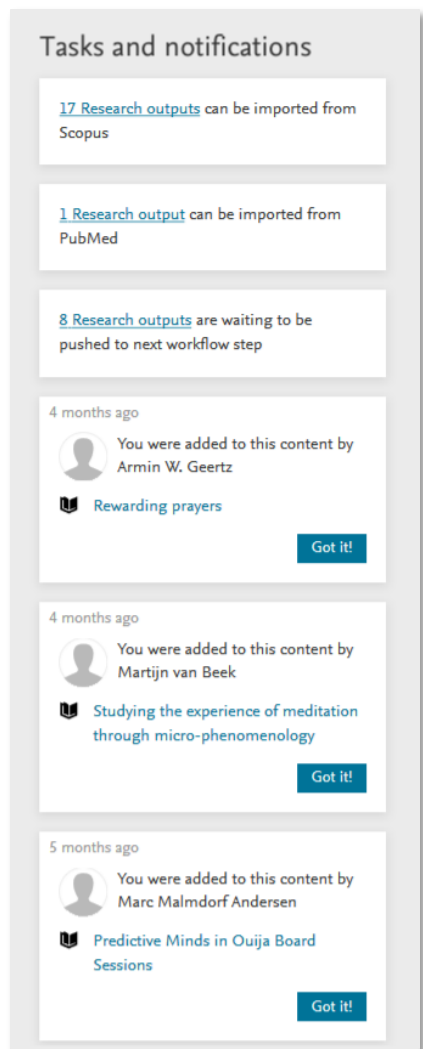
Adding new content

You can add content in exactly the same way as before. The 'Add new content' button will open the standard window to use a template to create or import new content.
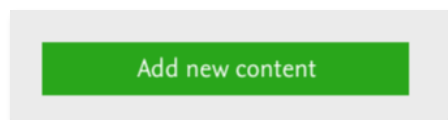
[image file: Personal_overview_addnew.png]

Tasks and Notifications

Tasks and notifications have undergone slight design changes, but overall functionality remains the same. You will still be notified of potential research output matches, workflow push requests, and general notifications. You can click on links within tasks and notifications and the appropriate windows will open for further action if necessary. If you have a large number of tasks and/or notifications, you can load more by addressing or dismissing current tasks or notifications. Messages older than 6 months will be automatically removed.
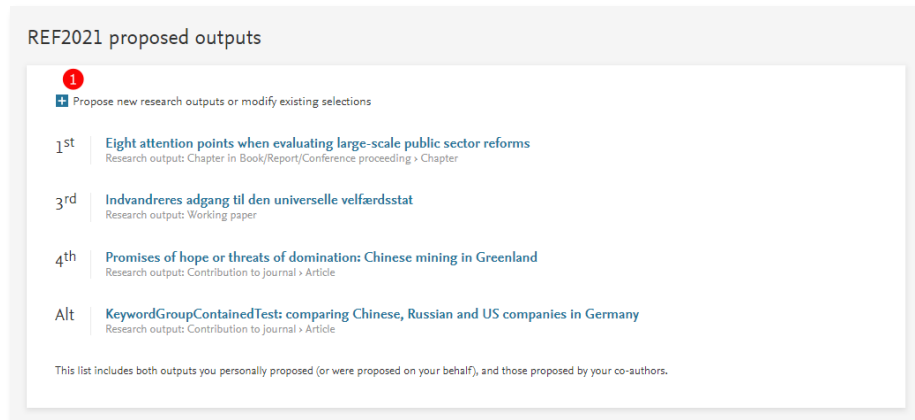
[image file: Personal_overview_tasks.png]

Assessment overview

[Currently only for UK customers]

For the upcoming REF2021, a REF-specific overview is available.

[image file: Personal_overview_REF.png]

You are provided with an overview of your ranked research output selected for submission and may (when allowed) **(1)** propose new research outputs or modify existing selections by clicking on the button. The list includes outputs proposed by either the personal user (and/or on behalf of the personal user) and/or co-authors.

Teaching and Supervision Overview

For users who teach or supervise, the new overview provides a summary of your **(1)** current and former students, with information such as **(2)** student name, **(3)** project title, **(4)** your percentage share of supervision, and the **(5)** supervision period. Output, submissions and courses related to your teaching and supervision activities are presented in the **(6)** inventory at the bottom of the section and you can click through to the appropriate overview via the links in the inventory.
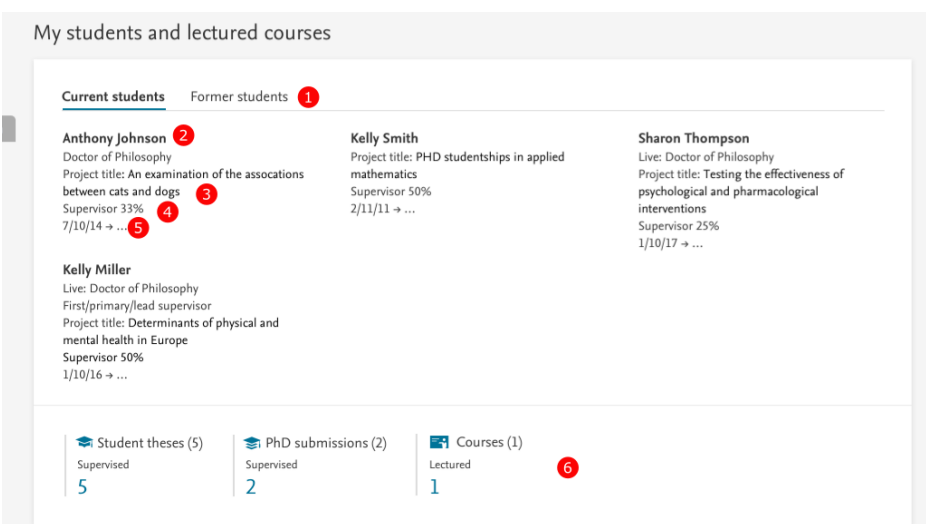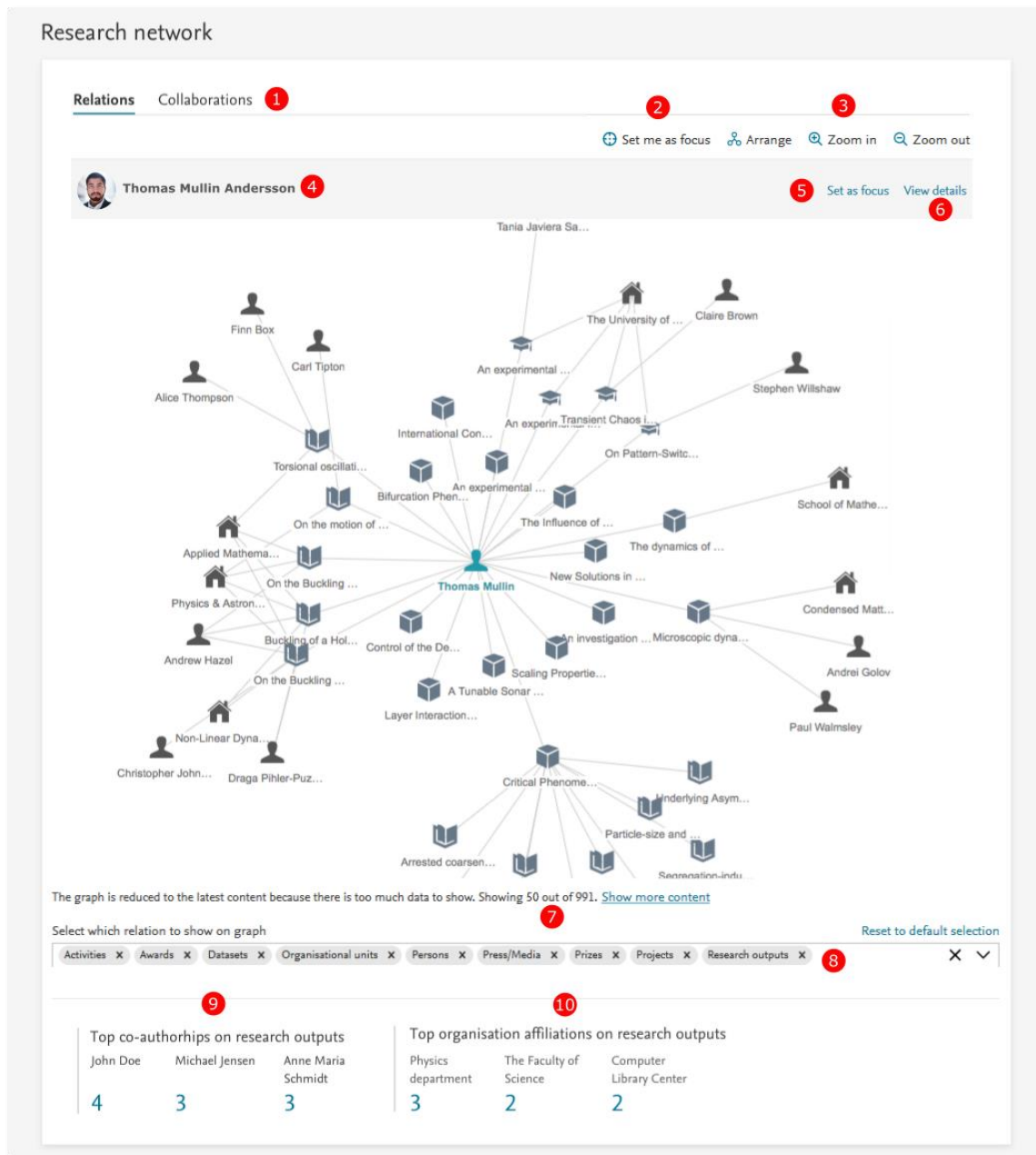

[image file: Personal_overview_teaching.png]

Research relation and collaboration overview

The new overview features an improved research relation and collaboration network map. The map is a useful way for you to interact with, and explore, your relationships with your research output, activities, coauthors and affiliations.

[image file: Personal_overview_network.png]

You can **(1)** switch between showing all content relations in your network or co-authorships, **(2)** set yourself as the focus point within the network, **(3)** arrange the network map for optimal viewing and zoom in or out of the network.

If an entity has been selected in the network, it is shown **(4)** at the top of the network, with the option to **(5)** set the entity as focus point or **(6)** examine the details of the entity via the appropriate editor window.

To help speed up load times, a maximum of **(7)** 50 top linked relations (and 100 top collaborations) are shown. You can of course show more content using the link, but this may have a detrimental effect on performance. Relation types can be filtered using the **(8)** drop down filter tool bar.

The network inventory highlights your **(9)** top collaborating individuals, and **(10)** your most frequent affiliations listed in the research outputs. If you click on either metric, you will be presented with the overview editor of all your research outputs related to those collaborators or institutions.