Guide to PURE usage
for GHTM-IHMT-NOVA researchers with PURE User accounts

PURE (NOVA's Scientific Information Management System) is the unique and preferred entry point for NOVA's scientific production.

Registration on this platform is essential for:
- Scientific information management and reporting at NOVA and GHTM-IHMT
- Presentation on public NOVA Research Portal (https://novaresearch.unl.pt/)
- Export of content to ORCID and Ciência Vitae
- Automatic creation of each investigator's CV for individual use

According to the [Política de Gestão de Informação Científica da Universidade NOVA de Lisboa](), February 2020:

- *The types of mandatory categories in Pure are as follows:*
Research outputs: *Article; Letter; Review article; Book/Film/Article review; Conference Article; Conference contribution; Book; Chapter*
Activities: *Editorial activity*

These are the categories monitored by Reitoria da NOVA.

- *Publications from 2009 onwards are mandatory to load on Pure. However, to allow researchers to manage their entire scientific production history at Pure (for example, for the purpose of creating CVs), and in order to enrich the information presented to the public on the Portal, the Organic Units must insert and validate the publication history of their researchers, according to the availability of their local teams.*

PURE access policy in GHTM-IHMT-NOVA

- PURE **"Personal user"** accounts are attributed to researchers with a contractual relationship with IHMT of at least 36 months, with regular scientific production; these users will have credentials to access the platform and manage their profile.

- all other researchers that have publications with IHMT affiliation can also be included in the Pure system, benefiting from an individual profile ("**Person**") and the possibility of presenting their data on the NOVA Research Portal. In these cases, the data is loaded by the team of local PURE editors.

Detailed support manuals can be found here:
https://www.unl.pt/investigacao/pure-gestao-de-informacao-cientifica

1. Access to PURE

To create your profile, contact the local administrator (Sofia Santos - sofiasantos@ihmt.unl.pt).

To access with your credentials: https://research.unl.pt/admin/open/wayf.xhtml

Enter the credentials you normally use to access the services of your organic unit. In "Username", enter only the starting segment of the email address (Example: investigador@unl.pt).

2. Update the researcher profile

In the "Personal overview" tab, select "Edit profile".

In the "Edit" side menu select "Metadata".
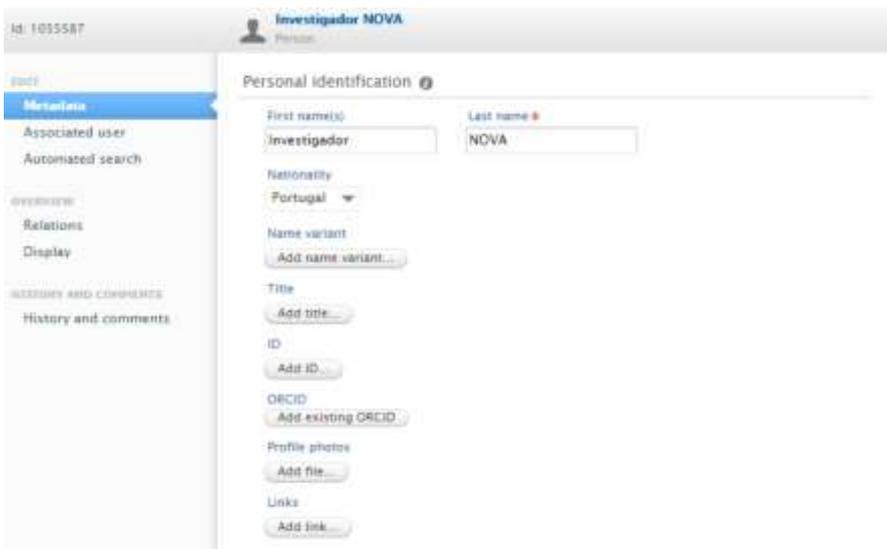
- The **full name** should be placed on the first line, placing all names in the "First name (s)" field, except the last one that is inserted in the "Last name" field.

- All variants of the **names with which you usually publish** are placed in "Name variant"; the main variant should be "Default publishing name".

- If you select **"Known as name"** in **"Type"** it will change your name in the system. This name will appear in the public NOVA portal. It is preferable to keep the complete name for disambiguation.
- If you want the search on the public portal to be carried out under a different name than the one on the default system, select the option "Portal sort name" in "Type".
- If you want to enter more variants, you can do it in "Automated search" in the "Edit" side menu (see section 3 "Activating notifications of new publications in online databases").

- Add or correct all of your available identifiers, especially **Scopus Author ID** and **Ciência ID**.

- You can add **photos** and links to **personal pages**.

- To update your **affiliation** and **professional category**, contact your local Administrator.

3. Activating notifications of new publications in online databases

It is convenient to activate this feature in order to receive notice, by e-mail, of new publications found in the weekly search of the **Scopus** database. You can then import those publications using your account.

In the "Personal overview" tab, select "Edit profile". In the "Edit" side menu, select "Automated search".

Activate the options "Inform me by e-mail when candidates are found" and put the automatic search on Scopus in "On".

Set up automated search for publications in online sources

The initial automated search will search for publications in the last 730 days. The consecutive searches will take place every 7 day. You can see your candidates on your overview page in the right column under your personal tasks and you can choose to have an e-mail when Pure finds candidates.

☑ Inform me by e-mail when candidates are found (email@unl.pt)

Enable automated search

Scopus   On

Name variant
Add name...

In this setup you can add your name in different variations.
Pure has initially suggested that you use these variants: I NOVA, Investigador NOVA, Inv. NOVA
You can edit these or add additional name variants if needed.
Add suggested names

Preview candidates

Add name variants to those that have already been entered in your profile ("Default publishing name" and "Former name"), by selecting the Name variant option.
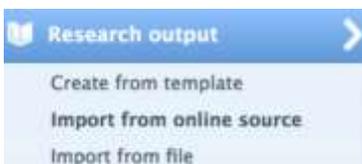
Click on "Save".

4. Add Research outputs

4.1. Click on the "Add new" button in the upper right corner.

Add new

4.2. Research outputs can be imported through: filling out a template, online databases or files (BibTex or RIS formats).

📖 **Research output**   >

Create from template
Import from online source
Import from file

4.2.1. Create a new record using the **"Create from template"** option.

4.2.2. Import through online databases (option **"Import from online source")**: publications should be imported through **Scopus**. If they are not indexed in Scopus, they should be imported through Web of Science, PubMed or CrossRef. Avoid importing through ORCID as it has little metadata (does not import the co-authors, for example).
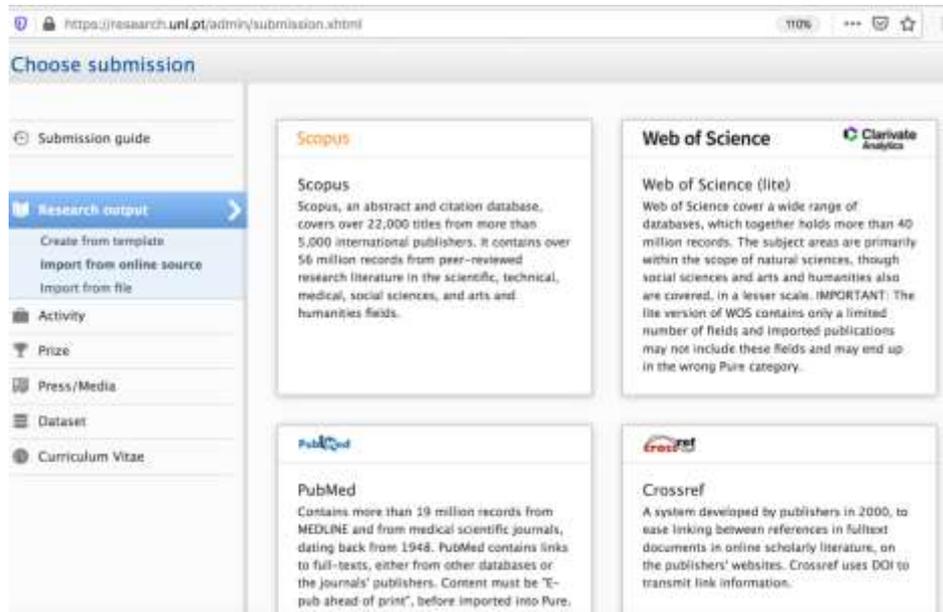
If you have your scientific production updated on the ORCID platform, with a Scopus author ID and a Researcher ID associated with your ORCID (there cannot be duplicate IDs), you can do the search using your ORCID ID in the respective field and import your production to Pure through Scopus.

Alternatively, you can search by title, name, affiliation and publication ID in Scopus. You can restrict it to the desired time period.

4.2.3. Import through files with formatted references (option **"Import from file"**): the references of publications that are not in Scopus, WOS or Pubmed, can be converted into BibTex format (for example using https://anystyle.io/) or RIS format and imported through this option.
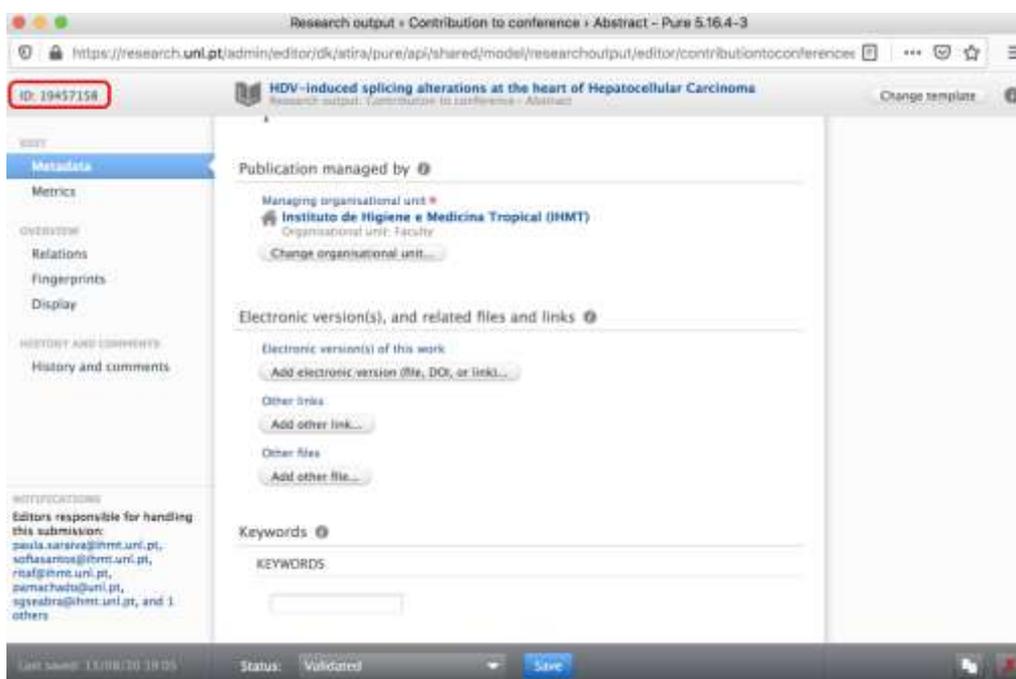
4.3. Import process

The records found will appear below. To import each record, click on Import or on the option Import & match (important to be able to validate the authors and affiliations).

If the publication to be imported is **already inserted in Pure**, the message will appear: "This publication has already been imported". In these cases, it will not be necessary to import the record into your account and you should not delete them in the "Remove" option.

If the existing record is incomplete, you can choose to update the existing one OR import the publication again through Scopus (preferably) in order to enrich the existing information. In either case, send the **Pure ID** of the record (found at the left top of the record window; see figure below) to the local Administrator who will do the correction.

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4.4. Verification after import

When importing a record, a window with the suggestion of authors and affiliations appears and the user should **check and correct them** if they are wrong.

If the name is incorrectly assigned, you can expand the list of available options and select the correct name or create a new name ("No match").

If the affiliation is incorrectly assigned, add the correct one.

- In the example below, the author is correctly indicated as internal (gray person symbol) and Instituto de Higiene e Medicina Tropical (IHMT) is correctly assigned as internal organization ("Organisational unit" and gray house symbol) ; however, the GHTM center is incorrect because it appears as external ("External organization" and symbol without filling):

The external GHMT should be eliminated (button ⊖ on the side) and added correctly as an internal organization (button +🏠 below), if the publication is later than 2015, when the Center was created:

- The respective group can also be added:
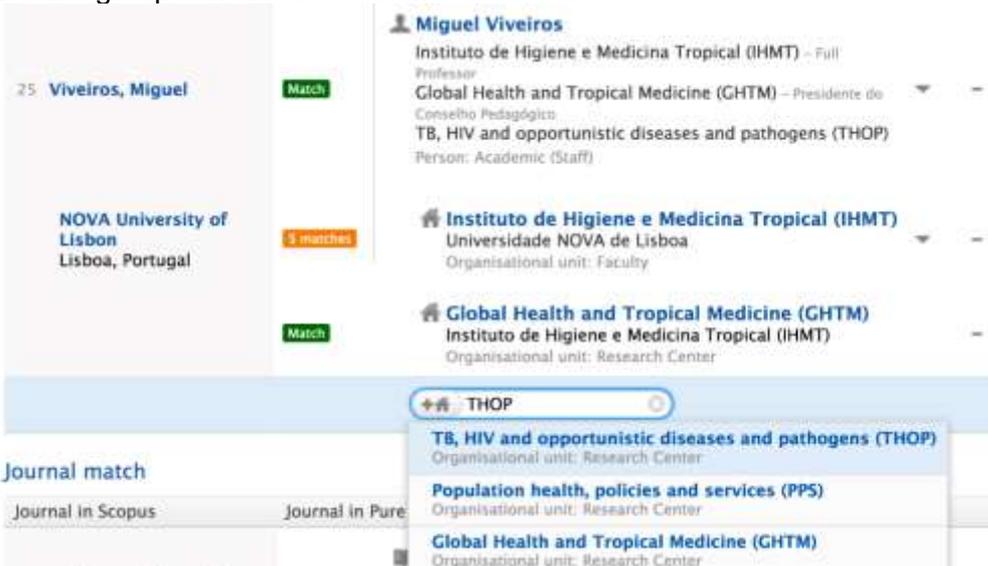
After this initial check, select "Import & review" at the bottom of this window. A new window will appear where you can review the pre-filled fields and add missing data.
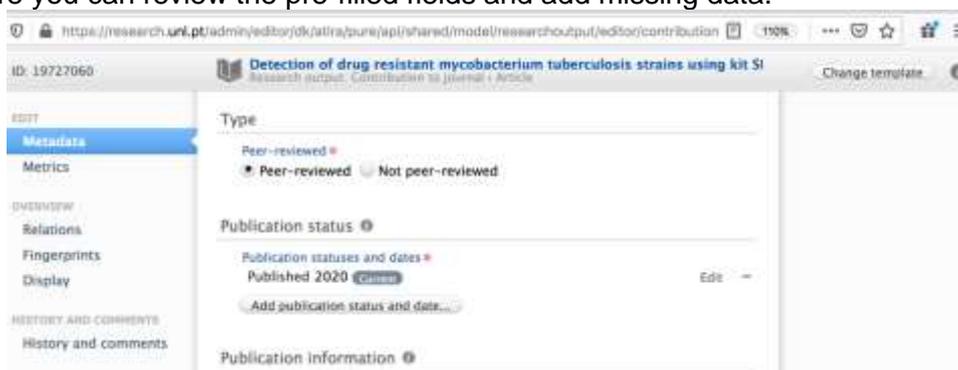
The following fields should be verified:

- Template (change in "Change template" in the upper right corner)
- Peer reviewed / not Peer-reviewed
- Authors (especially check if the internal authors are well identified)
- Affiliations
- "Managing organisational unit" - if there is more than one internal author affiliated with different internal organizations, it should be that of the corresponding author; or it should be decided between the internal authors.
- "External publication IDs" - If a publication indexed in Scopus has been imported in another way, add in the field "External publication IDs" the Scopus ID (or WOS ID, if Scopus ID does not exist) because only with these identifiers publications will be accounted for.
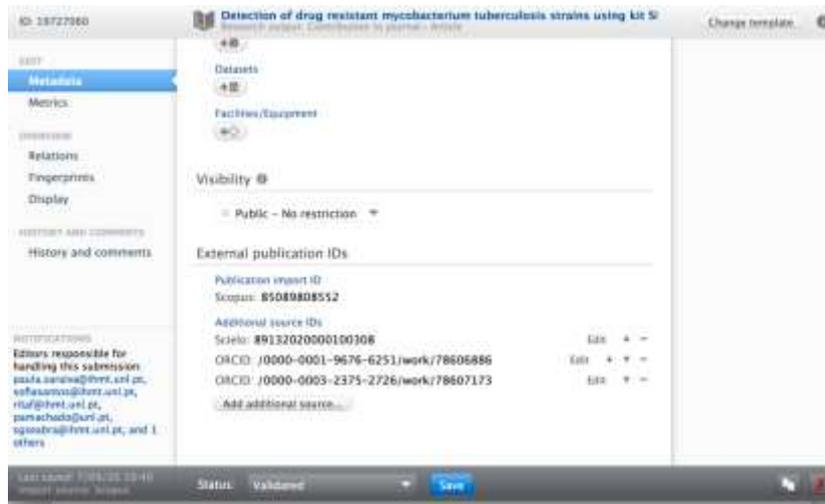
The Scopus ID is found on the Scopus website https://www.scopus.com/ through a Premium user account (Scopus account must be created on a NOVA IP - on the IHMT network, for example). Search for the title of the publication and the Scopus code will appear at the http address (see figure below).


In order to enrich the information, it is convenient to add for each record:
- Institutions of co-authors
- "Scopus subject areas" and "UN Sustainable Development Goals (SDGs)"
- Related projects, if any, in the Relations field
- Associated activities, for example as a speaker at a congress presentation

- "Visibility" - All content in Pure is made available online on the public portal by default "Public-No restriction". If you do not want a scientific production record to be made available online, select other of the available options.
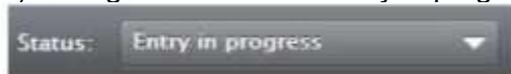- "Status":
a) Keep the status "For approval" at the bottom of the page, if you want to send the registration for validation by the local administrator (you will no longer be able to edit the registration after clicking "Save")
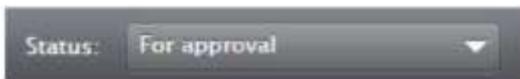
b) Change the status to "Entry in progress", if you want to continue editing the record later

Click the button ![Save] to save the record

4.5. Validation

Conference presentations and theses will only be validated if there is an associated supporting document. It may be a link to the pdf of the thesis, to the congress page with the title / abstract of the communication or a pdf of the thesis or book of abstracts, or a certificate of participation in the congress.

4.6. Outputs external to NOVA

For the purposes of preparing the CV, Pure users will also be able to add their external publications to NOVA. These publications will not be counted or visible on NOVA's public portal. In these cases, when importing, confirm that your current internal institution has not been incorrectly assigned. These records do not require validation by the local Administrator. When adding these records, they will have no "Status" and you should simply click the button "Save".

5. Export PURE publications to ORCID

5.1. Users who do not have an ORCID or this is not connected to Pure
- Select the option "Create or Connect your ORCID ID" in your individual profile (Edit profile ..."). A window will inform you that an external link will be established with the ORCID, and you must complete the requested information.

5.2. Users who have already entered their ORCID in Pure
- To export content to ORCID, you must select the option "Authorize export of content to ORCID" on the "Personal overview" screen or on the individual profile ("Edit profile ..."):
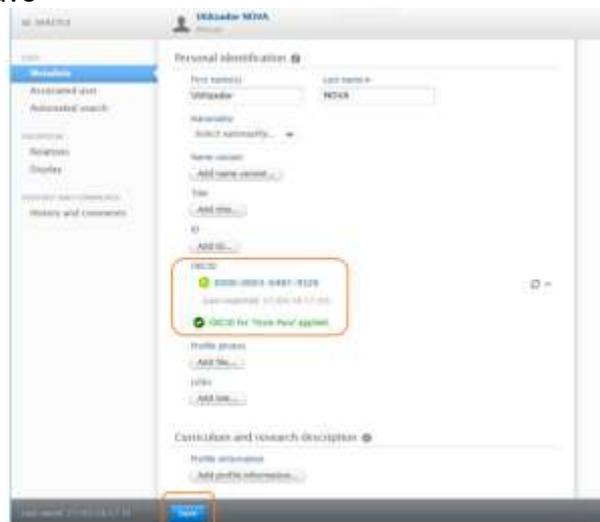

A window will appear informing you that an external link will be established with the ORCID and which content will be exported. Only validated Pure content will be exported, as well as the NOVA Research Explorer portal URL.
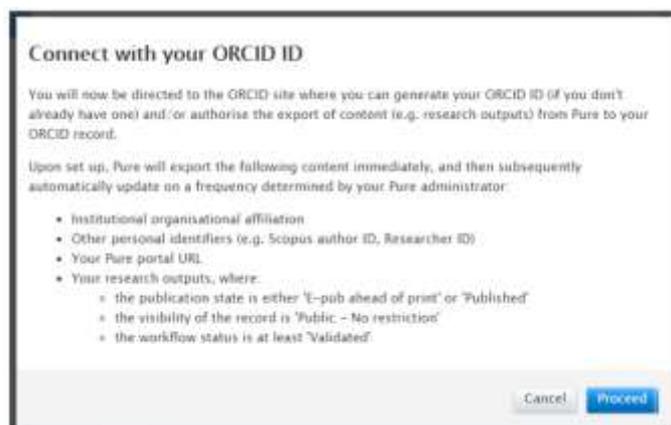
After selecting "Proceed", the ORCID authorization screen will be displayed.

Authorize and click on "Save"

5.3. Export to ORCID after the first synchronization

- After the first Pure - ORCID synchronization, the user can start a manual export of content to ORCID, from the individual profile:

5.4. Automatic export to ORCID - Automatic exports will also be made by Pure to ORCID. There is a daily Pure automation, which will guarantee synchronization between the two platforms. This automatic export will only export new or modified content since the last synchronization

5.5. Important information
A user can change the privacy settings in the ORCID settings. If these are changed directly in ORCID, they will be respected and maintained for subsequent exports from Pure.

When a duplicate is exported (a record that had previously been loaded into ORCID, but which has the same identifier - DOI, Researcher ID, Scopus ID or Pure Source ID), ORCID will group them together, so that the ORCID record only presents one of the records (the source to be displayed is chosen by the user). Records from the same source with the same identifier are not added to ORCID (duplicate records in Pure will also not be exported).

Records that have already been created manually in ORCID without any identifier (DOI, Researcher ID or Scopus ID), will not be recognized and grouped and Pure will create a duplicate. These records without an identifier will have to be deleted manually in the ORCID.

Exporting to ORCID only includes records with Visibility "Public" in Pure.

Whenever a user deletes a record directly in ORCID, the next time the individual content is exported from Pure, the record will appear again. The only way for a user to delete content in ORCID that is exported from Pure is to restrict its visibility directly in ORCID.

A user can delete identifiers in ORCID (for example a Scopus ID) exported from Pure. However, the next time the individual content is exported from Pure, the deleted ID will reappear.
If there are several profiles in Scopus for the same author, you should request to Scopus to merge the profiles (if you need support, contact the local Pure support team), in order to avoid the co-existence of multiple "Scopus author IDs" in the individual profile in Pure, and consequently, in ORCID.

6. Activities, Prizes and Press/Media

These categories are visible in the public NOVA Research Portal but are not monitored by Reitoria da NOVA, except the Editorial Activity within "Activities". They may be filled by the users and do not require validation by the local Administrator.

7. Projects and Awards

The records for these categories are inserted by the local Administrator and are only visible in the user profile. Any change should be requested to the local Administrator. They will also be visible in the public NOVA Research Portal on a later stage.