

# Pure User Guide: Research Centres and Groups

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## 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 ([rso-systems@lancaster.ac.uk](mailto:rso-systems@lancaster.ac.uk)).

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.

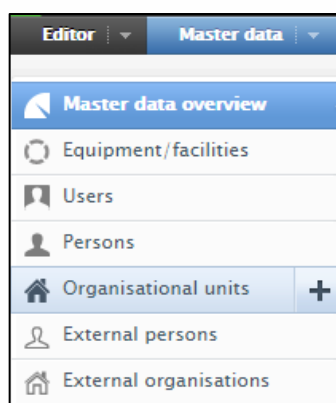
Centres/Groups need to be created before people/research outputs can be affiliated.

## Creating a new Centre/Group

Click on “Master data” – if you cannot see “Master Data” please see above about “roles”.



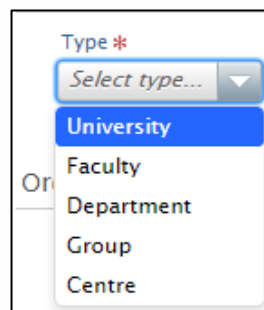
Click on the “+” next to Organisational Units.



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.



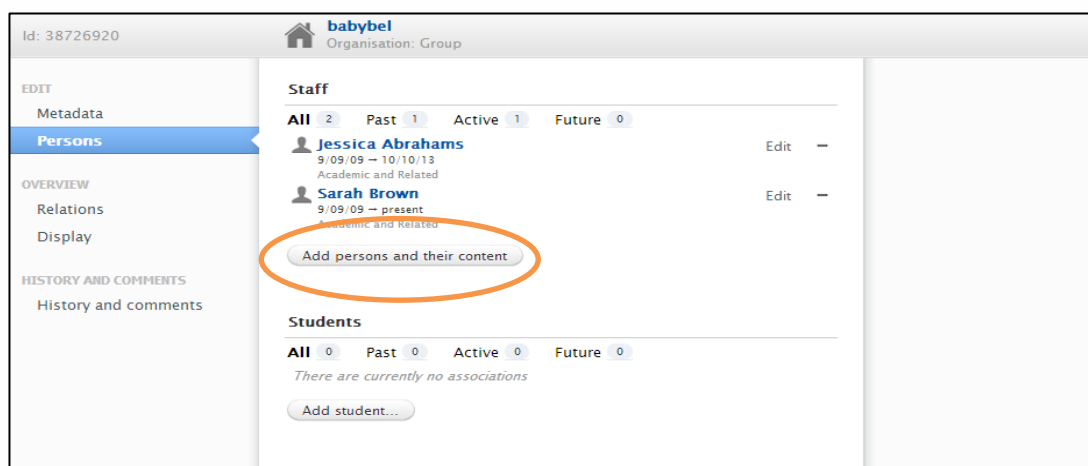
Complete Organisational unit name, Short name and Sort name. Sort name field that the research portal will use to organize the centres/groups in your department.

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.

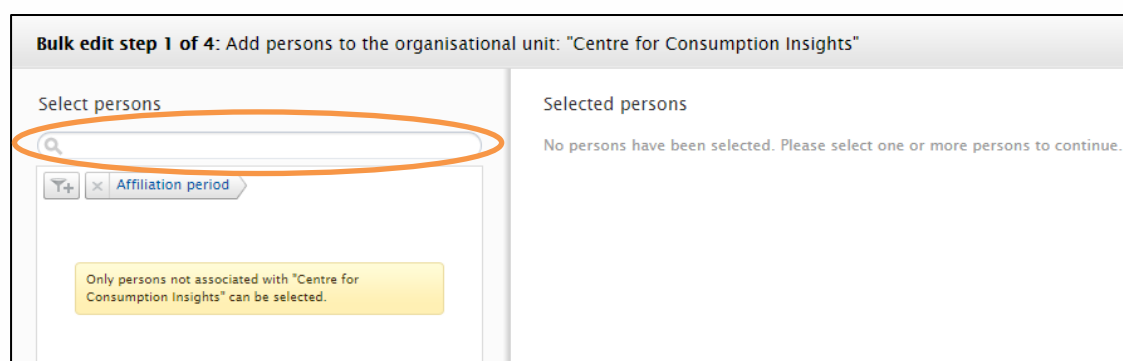
## Associating staff and their content

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



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.



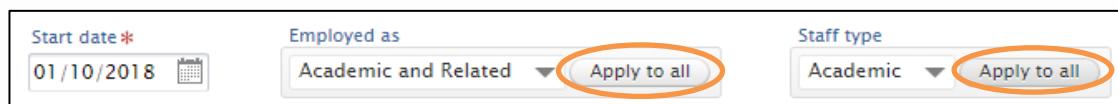
Type the name of the person to be affiliated, a list of names matching the search term will appear.

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.*

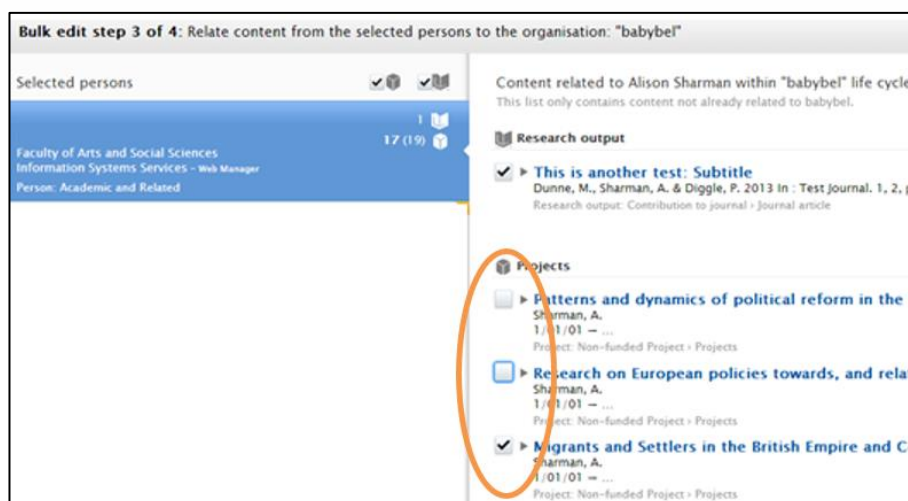
Once all the relevant persons have been selected please click “Next” in the bottom right corner of the screen.

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.

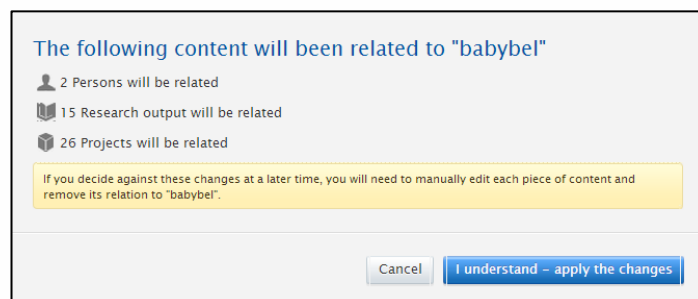
*Note:* that either the start date of the research group, or the start date of the person’s contract with the university (whichever is most recent) is automatically populated, so this may not need to be changed.



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.

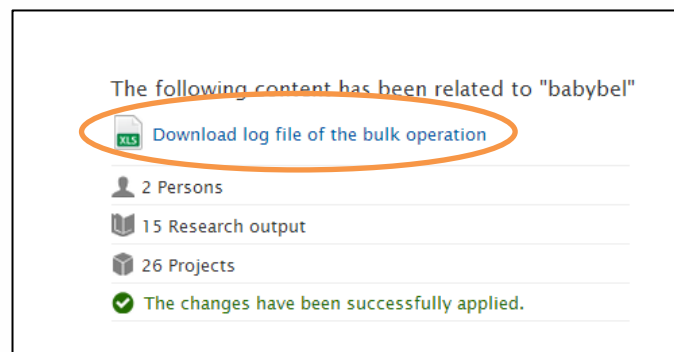


Once all the relevant content has been associated, click “Next” in the bottom right hand corner. Check the summary that is provided of all the information that has been selected to associate to the research group.

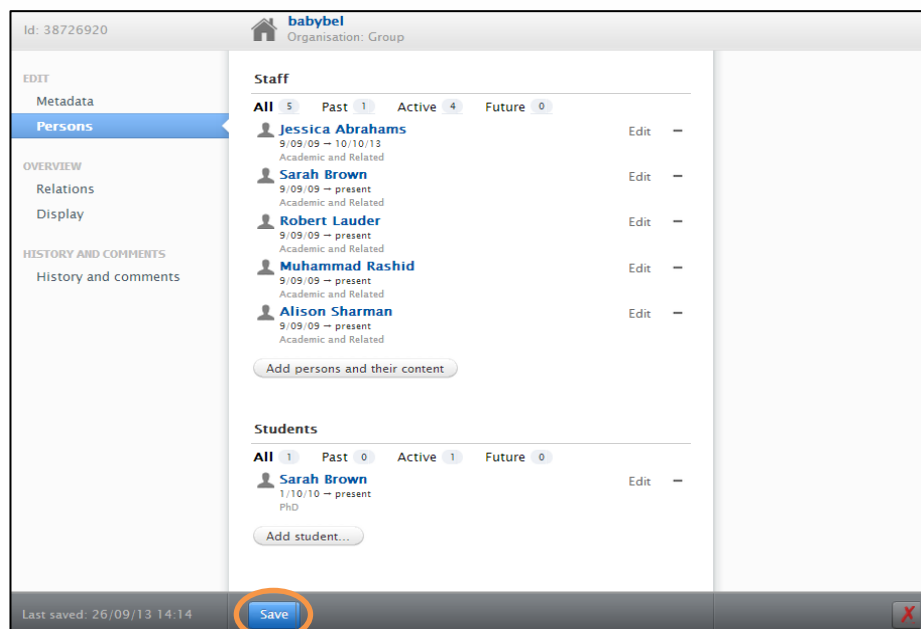


Click “I understand - apply the changes” – please note there is not “undo” function after this.

We advise you to download the log file of changes made as none of this can easily be undone.



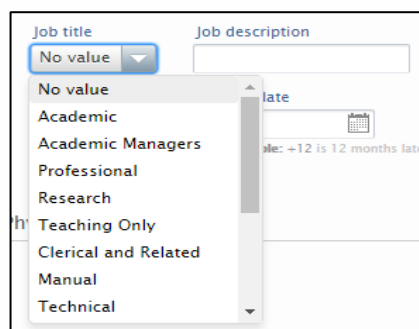
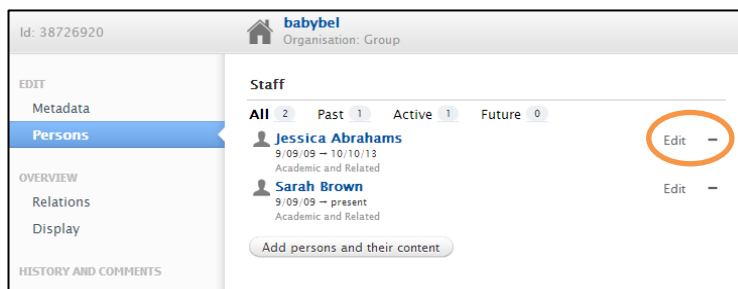
**Finally**, click on the blue “Save” button to close the organisation and to save all the associations that have been made.



### 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.

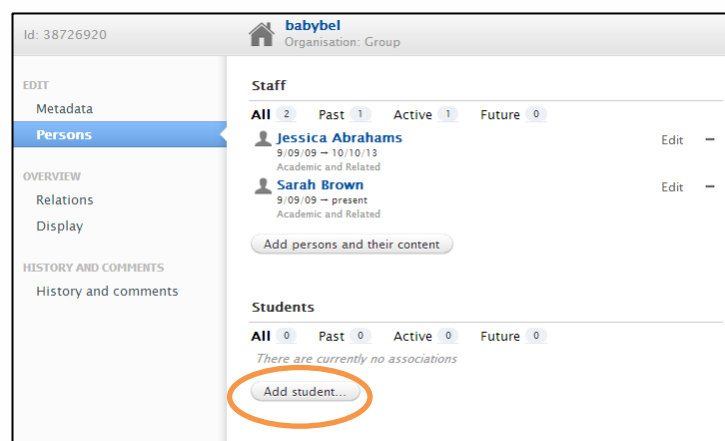


Open the person’s record by clicking “edit” next to their name and select the appropriate “Job Title” and then click update.

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”.



*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 [rso-systems@lancs.ac.uk](mailto:rso-systems@lancs.ac.uk).*