https://www.elsevier.com/solutions/pure/releases/roadmap

Pure Product Roadmap

The Pure Product Management team
October 10, 2017
Pure Product Roadmap 2018 (by team)

• Looking back to 5.10
• Recap of where we’re headed
• Integrations - Alex
• Portals & Fingerprinting - Doug
• Data Model – Henrik for Brian
• Reporting & Assessment - Manya
• Award Management & Funding Discovery - Davina
• Technical Documentation & text resources - Kristy
• Questions & Answers (for all)
Looking back to 5.10
Highlights – what we released in 5.10

Unification of Research Outputs
• Aligning our Research Output model across all customers
• Accelerate future development across Pure
• More efficient testing prior to a release

Pure Portal - added more flexibility. It is now possible to do configuration on a personal level:
• Metrics (H-Index and Citations)
• Manage Affiliations
• Personal Page highlighted content (Research Outputs, Activities, etc.)
• Collaboration Map (Configured for entire Organization only)

Updates to Award Management
• It is now possible to filter and report on more details of the collaborative engagement
• Updates for ease of on tabular over view screens for applications
• Added researcher commitment on awards and applications
• Added revalidations on projects

The new Reporting Module

SEP / KUOZ + ERA2018 Assessment Module updates

Documentation updates
How many users logged in to Pure last month?

A: 11,476  
B: 142,912

How often do users give up and don’t submit a form?

A: 11,476  
B: 142,912

How is the usage of Pure at your institution compared to peers?
Introducing Pure Usage Analytics as of 5.10

We need to generate valuable insights on how Pure is actually used:

- For you
- For us

To generate these insights, we will:

- Expand TalkBack
- Introduce Adobe Analytics

We take privacy very seriously

- Fully compliant with relevant privacy regulations
- Aggregated, fully anonymized
- No collection of actual content
- Ability to opt out

Phase-in approach:

- 5:10 – usage tracking starts
- 5.11 – dashboards introduced
Recap of where we’re headed
Recap: We’re building toward our vision

All research institutions use Pure to help unlock their full research potential

System-of-Record

A. Create a tool that is **simple to implement** and use

B. Make data import, capture, curation and linking **smarter**

C. Proactively **promote insights** into research activity and outcomes

D. Optimize the institutional **research processes**

E. Leverage the **network** of research
But before I hand over to the product managers…
GDPR

General Data Protection Regulation

Explicit consent
The right to be forgotten
Privacy by design
Our plans with Pure 4 vs Pure 5

Up to today

• Vast majority of Pure clients already on Pure 5
• Pure 4 maintained
• Major new modules only available on Pure 5

Going forward

• Goal is to move all clients to Pure 5
• Pure 4 still maintained, but will be phased out
• All new modules & major new functionalities will only available on Pure 5, including:
  • New Reporting Module
  • Pure Portal
  • New Award Management Module
  • All New Assessment Module updates
  • Plum metrics
  • SaaS hosting
  • Community Module
Pure Roadmap

Integrations
Integrations

Who are we?
- Alex Kujath (Product Manager)
- Mads Trier (Technical Team Lead) + awesome development team

Which parts of Pure?
- Integrations
- Masterlist, Synchronizations & bulk imports
- Web Service API

What are we working towards?
- Make it easier to get data into Pure and to reuse it
What are we planning for 5.11 development cycle

- Add XML synchronisation and bulk import support for the unified **equipment** content type
- Add SSRN as online import source
- Add a feedback loop to the **Newsflo** integrations, so academics and editors can disclaim content

Make data import, capture, curation and linking smarter
5.12 development cycle & long term goals

Make data import, capture, curation and linking smarter

- **Widen** the support for synchronisations and bulk imports
- Make integrations with local system **easier** more **flexible** and **less expensive**
- **Reduce** the manual effort needed to bring data into Pure, especially for third party sources
Areas of continued focus

- Improving the Master list functionality
- Implement changes and new developments taking place
  - In Pure and within Elsevier
  - Also around the world (third parties)
- Make more content sources available to you
...and one more thing...

Leverage the Network of Research
Learning from the Community

Build a Research Community
The Pure Community Module

- The Pure Community Module will enable
- A joint reporting over all content
- Discover
- Unlock
- Compare
- And a Community Portal
- Share
- Present
- Showcase
The Pure Community Module

• The Pure Community Module consists of a special Pure environment with a harvesting service

• Data from Pure instances of the community is retrieved via the Pure Web Service API

• Optional module, It will be available to new and existing Pure 5 clients

• Institutions not having Pure can also participate in the community
The Pure Community Module

- You can decide what data is shared within the community and thus is available for reporting and on the Community Portal.
- You will still have full control over your local Pure and a local Pure Portal.
- Based on pilot projects done in the Netherlands and in the US.
The Pure Community Module

available in spring 2018
Portals & Fingerprinting
Pure Portals

Who are we?

- Doug Picadio (Product Manager)
- Anders S. Elkjær (Engineering Team Lead) + (Even More Awesome)
- Development Team/UX
- Asger Ågård Haslund (Custom Portal Manager)

Which parts of Pure?

- Portals (Pure Portal, Advanced/Custom Portals and Standard Portal)
  - Design, updates, enhancements and maintenance
  - Search
  - Fingerprinting

What are we working towards?

- To ensure that Pure is fully leveraged for public-facing research information
- Showcasing, Networking and Discovery
What are we planning for 5.11

**C** Proactively Promote Insights into Research Activity and Outcomes

- More Accurate Fingerprinting in the Portal

**E** Leverage the Network of Research

- Revised Pure Community Portal (AMS-5)
What we want to solve: How to best profile the expertise of a unit (person, school)

The chart below outlines the general areas identified for improvement within the fingerprinting process.

1. How to best reflect the area of expertise in a fingerprint
   1.a. Which signals do we process in the fingerprint engine, and how
   1.b. How do we allow a person/unit to adjust his/her fingerprint
   1.c. How do we aggregate fingerprints up (school, university)

2. How to best use fingerprints to find experts (ranking, etc)
   2.a. How do we ensure credibility of the fingerprint
   2.b. How do we rank different fingerprints
   2.c. How do we identify similar profiles

3. Do we maintain and use multiple fingerprints for an entity?
4. How do we experiment with machine learning processes to improve fingerprints?

Goal is to be able to algorithmically generate the most accurate profiles at scale. Need quality signals (trust-worthy, enough descriptive text)
5.11-Updating Fingerprinting

• Add new signals (suggested starting point below)
  - Prizes
  - Activities
  - Courses
  - Education
  - Datasets
  - Student Supervision
  - Press / Media
  - Other Signals? TBD
• Weighting/Normalization of Signals
• Highlight Concepts
• Concepts added to Search
5.11 “Community Portal"
What are we planning for 5.12 & beyond

- Implement key features from Advanced Portals
- Portal Page Redesigns (Research Output, Projects, Related Content)
- Increase Portal Configurability
- More Accurate Fingerprint
- Optimize Search

Proactively Promote Insights into Research Activity and Outcomes

Leverage the Network of Research

- Continue to build out “Networking”/Community
- Enable Social Media sharing
A final note on legacy portals

• The Standard/Generic Portal
  - Not supported anymore; no new improvements; only bug fixing
  - Will be completely retired by 2020

• Advanced/Custom Portals
  - Being phased out over 5 years
    - Maintenance until end 2021
    - Bug fixing only until end 2022

• Legacy portals being replaced by either…
  - Pure Portal, or
  - Web Services
Pure Roadmap

Data Models
Data Models

Who are we?
- Brian Kirkegaard Lunn (product manager)
- Henrik Kragh-Hansen (engineering team lead) + tremendous development team

Which parts of Pure?
- Overall data model design, updates and maintenance
- Core workflows in Pure (e.g. templates, roles & rights, admin functionality)

What are we working towards?
- To ensure Pure is the best, most comprehensive system-of-record for university research information, delivering universities one trusted source of all relevant research data
Data Models – planning for 5.11

- Advanced deduplication functionality (for Pure Community Module)
- Equipment unification – the last remaining content type to be unified
  - Hyper-authorship on e.g. ATLAS or CMS collaborations
Data Models – What are we planning for 5.12 & beyond

Ease the burden for users
- Improve import of research outputs
- Improve automated search for research outputs
- Suggest potential relations between content (e.g. research outputs and awarded grants)

A
Create a tool that is simple to start using

B
Make data capture … and linking smarter
- Add additional metrics in Pure, amongst them Plum metrics
- Start to look into capturing Intellectual Property as a distinct content type
Data Models – What are we planning for 5.12 & beyond

Ease the burden for users

- Improve import of research outputs
- Improve automated search for research outputs
- Suggest potential relations between content (e.g. research outputs and awarded grants)

Start to look into capturing Intellectual Property as a distinct content type

Create a tool that is simple to start using

Make data capture ... and linking smarter

- Add additional metrics in Pure, amongst them Plum metrics
- Start to look into capturing Intellectual Property as a distinct content type
Add new research output

Search in online sources

10.2147/PPA.S112931

Next
Ease the burden for users

Improve and simplify automated search for research outputs

• Do the scan based on IDs (e.g. Scopus ID and ORCID)
• When user IDs are disambiguated we can make the automated search much more precise
• Will be built on top of the improved import and will search in multiple online sources
Reporting & assessments
Reporting + Assessment

Who are we?

• Manya Buchan (Product Manager)
• Nicolaj Lock (Technical Team Lead) + the best development team

Which parts of Pure?

• Reporting module
• Assessment modules (REF, ERA, SEP / KUOZ, BFI)
• CVs
• FAAR

What are we working towards?

• Delivering functionality that enables you to leverage the breadth and depth of content in Pure
What are we planning for 5.11 development cycle

- Continued development of new Reporting module
  - Split content
  - “Re-define driver”
- ERA2018 Phase 4
- KUOZ Phase 3
- CCCV improvements
- REF2021 : New UoA structure (tbc)

Proactively promote insights into research activity and outcomes
## 5.11 Reporting: Re-define driver

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5.12 and beyond

Proactively promote insights into research activity and outcomes

- New Reporting module
  - Visualisations
  - Sharing
- REF2021
- SEP / KUOZ improvements
- ERA2018 : be prepared for any final changes given expected late publication of final submission requirements
Reporting : Near-term (next 12 months)

• Enable you to make full use of the new reporting module and replace use of old module
  - All content types, all values
  - Enhanced filtering
  - Visualisations
  - Sharing

• Facilitate gaining and sharing insights into your research activity, outcomes, and performance
Reporting: Near-term
Assessment

- REF2021
  - As submission requirements become known, continue significant development of REF module
    - Staff selection
    - Output selection
    - REF3b case study template moving to web-form
    - REF5 template moving to web-form

- SEP / KUOZ
  - As per priorities identified by User Group

- ERA2018
  - Any ‘submission critical’ elements that come to light once the final requirements are published
    - ERA2021

- BFI
Award Management & Funding Discovery
Awards Management & Funding Discovery

**Who are we?**
- Davina Erasmus (product manager)
- Nicolaj Lock (engineering team lead) + *humble* development team

**Which parts of Pure?**
- Award Management Module – Managing research in progress
- Funding Discovery Module

**What are we working towards?**
- To help researchers and research administrators make the research process more efficient and productive
Foundations for Award Management & Funding Discovery
Foundations for Award Management & Funding Discovery

Research Institution

Reporting

Process & Milestone management

Collaborating

Research Management Office

Researcher

Funding

Document management

Integration

Resource

Overviews
What are we planning for 5.11

**Strengthening foundations:**

- Improving ability to manage research collaboratively
- Strengthen the overview of the research process
Strengthening ability to manage research collaboratively

• Allow the approver or checker of a workflow step to make changes
  - E.g. in the approval process of the application, you may want an approver to be able to fix a typo or other small errors

• Allow a read-only user to add comments to an item
  - This adds to the audit trail of the item
  - E.g. The head of the faculty may want to leave an instruction for the processing of an award while he or she may not have access to the full content
Strengthen the overview of the research process

- Provide PIs with a full read-only view of entities in validated state
  - This provides them with the ability to view all details of projects, awards and applications, also after these items may have been validated

- Provision of a read-only reporter role with possibility to access confidential data
  - Provides management functions who are not Editors or Administrators in Pure to be able to report on the progress
Strengthen Collaboration and Overview

• Integration with tools in the environment is a basic requirement in Award management for:
  - Providing insight into sub-processes that require specialist tools
  - Maintaining an accurate overview of the research process
  - Enabling collaboration with different internal and external stakeholders

• We are working standard integration paths for the main sub-processes

• First phase:
  - Integration for full economic costing (Blackdackel)
  - Integration for ethics review (Infonetica)
What are we planning for 5.12 & beyond

Focus on the Research process

- Improving ability to model and manage your processes
- From funding discovery to award management
Improving the ability to model and manage your processes

• Updates to workflow to facilitate management of the research process
  - Ability to maintain the overview and manage the process over divergent sub-processes
  - More flexibility in the awards workflow
  - Adding more parameters for triggering workflow steps:
    o Milestone updates, document updates etc.

• Ability to add codes to emails
  - For personalized emails → improve efficiency of email communication to PIs and other stakeholders
Beyond: From funding discovery to award management

• Recognize that funding discovery and opportunity management is part of the same enabling flow as Award Management
  - Retire Funding Discovery Module – Q4 2018
  - Feature set becomes embedded in Award Management
  - Focus on value add of curating and connecting funding opportunities with surfacing research needs

• Feature updates:
  - Integration with latest Funding Discovery services (Improved scope of international funders and data quality)
  - Funding data provider agnostic
  - Ability to add and manage internal fund opportunities the same way as external funding
Technical Documentation & text resources
**Docs & Text**

**Who are we?**
- Kristy James (Technical writer and product manager)
- Nicolaj Lock and Henrik Kragh-Hansen (engineering team leads)

**Which parts of Pure?**
- Coordinating translating the Pure interface (into 10+ languages)
- Documentation within Pure

**What are we working towards?**
- Seamless experience in *your* language
- Make finding and using help easy
Why documentation and translations?

• User advocate
• Empower you to get the most out of Pure:
  - Uncover the functionality available
  - Give guidance through common but difficult tasks
  - Investigate innovative ways of providing (personalized) help
• Lobby for all changes that improve the ease of using Pure

Present information most relevant to the current user in one place when it is needed.
Continuous improvement in text and translations

- Continuous review process across areas of the user interface
  - For consistent and simpler explanations
  - Focus on new features and re-approaching old areas
  - Reduce your support burden for local users

- Improving translation processes
  - Incorporating your feedback, review mechanisms (pilot)
  - For better context (e.g. screenshots)
  - Changing feedback mechanisms (spreadsheet export vs. JIRA)
Transformation in documentation presentation

• Moved to new HTML5 output
• Adapt to user’s role and available modules
• Interactive and searchable

• Ongoing migration/review of old content
• Plans include integrating content with Pure Academy
Wrap-up and Q&A
Recap: We’re building toward our vision

All research institutions use Pure to help unlock their full research potential

A. Create a tool that is **simple to implement** and use

B. Make data import, capture, curation and linking smarter

C. Proactively promote *insights* into research activity and outcomes

D. Optimize the institutional *research processes*

E. Leverage the *network* of research
Questions?
Helping institutions unlock their full research potential
Pure
Helping institutions unlock their full research potential

See you at the conference dinner: Patron at 19:00