

Edit an Organisational Unit Profile

This feature is only available to certain Pure Editors.

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This editor guide explains the minimum information you should add to your organisational unit profile in Pure, *where the information exists*.

How are new units created?

You never need to create an organisational unit of any kind in Pure.

We will need to delete any unit manually added to Pure by users outside the Research Office.

Departments and faculties

- Imported from the official organisational hierarchy on the HR system. If a department or faculty is missing, contact HR.


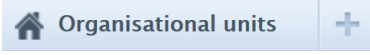

Research centres and research institutes

- Manually created by a **system administrator** in the RO, **only** following University Research & Innovation Committee approval.
- We will use the details supplied by the Committee to set up the unit.


Research groups

- Manually created by a system administrator in the RO, **only** on request from the parent department's Head of Department or senior administrator because the Department decides [whether the new research group is appropriate](#).
- We will need the following details to set up a new research group for you:
 - Group name
 - Director name(s) to input as *contact person*
 - Date approved by HoD. This will be used as the group start date.
 - Parent department (one only even if the group is cross-departmental)

Find your unit

- Go to  along the top of the screen.
- Go to  down the left-hand side.
- You will see all units for which you have edit rights.
- You can toggle between list view and hierarchical view using 
- Select the unit in question to open the editor window.

Update the unit's details

- Some fields for departments and faculties can only be edited by HR in the HR system because these units have been imported from there.
- Research groups, centres and institutes have been manually created so all fields are *editable*, but you will see in this guide which ones **you must never edit** because it can have consequences elsewhere in the system.
- If you see  at the bottom of the window, **never click it!**
 - It will delete the entire unit from Pure. This cannot be undone.
 - Deleting a unit will cause problems throughout the system.
 - If a unit is no longer needed, [contact us](#) instead.

Always click  or  or  where you see them before you close a window or section, or your changes will not be saved.

Type

- **Never** edit this field.



Names

- **Organisational unit name** i.e. the official name.
 - Research **centres** and research **institutes**: **never edit it**. A system administrator in the RO will do this following [University Research & Innovation Committee approval](#).
 - Research **groups**: you **can edit** it as appropriate.
- **Short name** e.g. an acronym. Not publicly visible but adding one allows users to use it when searching for the unit both on the portal and in the backend.
- Sort name – **never** edit this field.
- **Web name** overrides the name displayed on the portal.
 - **Use with caution**: it will change the unit profile URL on the portal, breaking any existing links already in use.

Contact person

- Use this field to record the current Head of Department or Director, so we know who to contact if we need to.
- Especially useful for research groups, centres and institutes, because directors are not formally recorded anywhere else.
- You can add more than one contact, but you can only select people with Pure profiles (not support staff).
- This field is not publicly visible, it is only for internal use.

Organisation profile

- The narrative part of the profile.
- Because a general departmental profile exists on the EHU website, you can use the Pure profile to focus on research, or simply duplicate the website profile in Pure.
- You should also link through to the website to help visitors move between the two (see *Web address*, below).
- You can write and format the text like you would in Word.
- If pasting text from another source such as a webpage, it can contain invisible code that causes display problems on the portal. To avoid that you can use:
 - *Paste as Plain Text*  to paste without any formatting at all, or
 - *Paste from Word*  to paste it while keeping intended formatting such as hyperlinks and text formatting.
- Research content created by academics using Pure is [already related to the unit through the individual content records](#) (activities, outputs, projects, etc.), so you do not need to detail them in this text.

- However, you could still include links in the text to a couple of specific, key Pure records the unit wants to highlight to visitors.
- **Research groups/centres/institutes:** as [people are not directly linked to research units in Pure](#), you could use the profile text to direct visitors to the activities section to see members who have created a membership activity record.

Photo

- Click and select *Hero image* as the *type*.
- No other *type* will display on the portal.
- Upload an appropriate photo to represent the unit e.g. a building or signature research activity.
- The hero image displays as a background at the top of your unit profile on the portal.

Hero image dimensions

- The image window is 1920 pixels wide and 300 pixels high so you may need to try a few images before you find a suitable one:
 - You can customise an image to fit (e.g. using Photoshop), or
 - You can choose one that is bigger than 1920 x 300 but which shows the right part of the image in the window when uploaded.

You cannot reposition the image within Pure, only upload or delete it, so the part of the image shown on the portal is entirely dependent on your image choice.

- Keep the file size low (e.g. not much more than 1MB) because a large image file can increase page load times for some users.

Physical address

- allows you to enter the physical address of the unit using one or both of:
 - The *Geo location* co-ordinates of the building available from Google Maps or similar e.g. 53.438934, -2.966276
 - **At the time of writing:**
 - Even if you use co-ordinates, you should also add a address **but** the address elements display in a certain order so you may need to adjust how the information is entered to make it display as intended on the portal.
 - addresses do not display on the portal.
 - If co-ordinates and/or either kind of address are added in the backend, the portal will present an *Address* heading and, if selected, the country, even if the address itself does not show.
 - Entering co-ordinates or an address will add a Google Map with a pin in the specified location on the portal.

Electronic addresses

- if desirable.
- for enquiries to the department. Be aware that adding an e-mail will expose the e-mail address to the internet, so possibly to spammers and bots.

Web address

- Use to add relevant links to pages outside the portal.
- As a minimum you should link to the relevant departmental web page on the Edge Hill website. Remember to link back from the web page to the portal page so visitors can see your unit's research.
- You can add more than one link so you can link to other relevant sites too.

Embedded videos

- If your unit has a YouTube or Vimeo video (e.g. introducing the unit to the world), you can embed it in your unit profile:
 - Click .
 - Select *Portal Multimedia* as the link type.
 - Paste the link to the video from YouTube/Vimeo. Short links might not work for this.

Life cycle of the organisational unit

- **Never** edit this section.
- **Department** and **faculty** start dates of 01/01/1900 are intentional.
 - If a department or faculty needs to close someone from that area should contact HR to update the organisational hierarchy. The changes will be imported to Pure.
- **Research centres & institutes**: a system administrator may have already entered an end date. This is the scheduled closing date unless a [renewal is approved by the University Research & Innovation Committee](#).
- **Research groups**: [contact us](#) if an end date needs to be added to a research group. As with creation, this should already have been cleared by the Head of Department.

Place in hierarchy

- **Never** edit this field.

Visibility

- **Never** edit this field.
- All organisational units in Pure are subject to periodic review so the RO system administrators may need to hide any research groups, centres or institutes that do not have a complete enough profile or appear otherwise unsuitable for public display.

Fingerprint

- You can review the unit's fingerprint and, if necessary, omit certain concepts from it.
- The fingerprint is automatically generated from content related to the unit. It will evolve as Pure mines the text from new content, so you should review it periodically if you intend to curate it.




How people are assigned to units

Departments & faculties

- People appear in departments according to their posts imported from the HR system.
- They appear in faculties according to where their departments are based in the organisational unit hierarchy imported from the HR system.
- Management lines have no bearing on where people sit in Pure.
- If someone appears in the wrong department, contact HR to have the staff record updated and the changes will import to Pure.

Research groups, centres & institutes

- These units do not exist in the University hierarchy, nobody is based within them.
- No direct person-to-unit affiliations will be added to Pure for research units.
- Instead, researchers should create direct content-to-unit affiliations **as appropriate**, which will indirectly affiliate the person to the unit through a content record (e.g. an output, etc.). They do this by:
 - [Adding an affiliation to the research unit](#) against their name when creating or editing content that should be related to that unit.

 Staff Test, PI Internal person	Edit
 zz Test Department Organisational unit: Department	–
 zz Test Research Group Organisational unit: Research group	–

- Creating an [activity](#) representing their membership of the research unit, allowing visitors to find the membership activity on the portal through the person, their department/faculty and the research unit and its parent units.