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# 1. Introduction

The aim of the PubMan user manual is to support users in working with the PubMan software. It describes the operation of the individual functions. Screenshots supplement the description.

Particularly important information is marked with the  $\Delta$  symbol.

Notes for users of PubMan instance MPG.PuRe of the Max Planck Society are marked with the

🔊 symbol.

This is version 12.7 (as of April 11th, 2024) of the PubMan user manual.

You can also download the PubMan user manual as PDF.

More information regarding PuRe can be found here: MPG.PuRe Help

# 2. Homepage

On the homepage of PubMan, various functions and information are displayed. The individual areas of the homepage are described below.

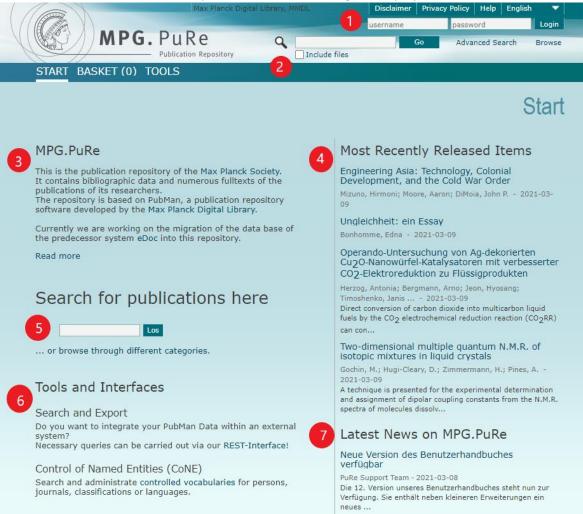
No. 1: Header: The header combines the "Login", "Disclaimer", "Privacy Policy", "Help", and "Language Selection" functions. The "Help" function redirects you to <u>MPG.PuRE Help</u>, where you can find, for instance, the PuRe-Support contact details, the user manual, and the FAQ. No. 2: Search Section: Here, you have access to the "Simple Search", the "Advanced Search," and "Browse".

No. 3: Information Section: Here, you can find more detailed information about MPG.PuRe. No. 4: Recently shared publications: Newly released publications are displayed here.

No. 5: Search for publications: Here, you can search for publications in the simple search.

No. 6: PubMan tools and interfaces: Here, you can find links and descriptions to the interfaces available in PubMan.

No. 7: News from PubMan: Latest posts from the PuRe blog are displayed here.



# 2.1 Open homepage

To open the PubMan homepage, proceed as follows:

- Open a web browser. An empty browser window opens.
- Enter the URL of your PubMan instance in the URL line of the browser.

# Note for users of the Max Planck Society: the URL of the repository instance of the Max Planck Society is: <u>http://pure.mpdl.mpg.de</u>.

• Click the "Enter" key. The home page opens. For more information on the homepage, see chapter 2.

Caution: Work in only one tab at a time in a browser. If you are working in two tabs, data accidentally could be overwritten when saving. You can use two different browser windows and thus avoid overwriting.

# 2.2 Login

Logging in with a user account is required for most of PubMan's functionalities. Without logging in, only the search function is available. If you do not have a user account, please contact your administrator.

Note for users of the Max Planck Society: In order to obtain a user account as a scientist, please contact your library.

To log in to PubMan, proceed as follows:

- Open the PubMan homepage. The login area is located at the top right.
- Enter your user name and password in the entry fields.



• Click the "Login" button. After logging in, you are still on the homepage.

	Max Planck Digita	l Library, I	MMDL	Disclaimer	Priv	acy Policy	Help	Englis	h 🔻
						Stefanie	Anderga	ssen	Logout
( CERS )	MPG. PuRe	Q			Go	Adva	nced Sea	rch	Browse
	Publication Repository		Include files			Admi	nistrative	Searc	h
START M	Y ITEMS WORKSPACES SUBMIS	SION	BASKET (0)	TOOLS					

The username is below the header, and next to it the "Log out" button.

The areas corresponding to the user role are arranged in the navigation menu.

Attention: If you get the message "Error during registration. Check the username and password. If you have any further problems, please contact PuRe Support .", The login was not successful. Then either the user name or the password is wrong. In this case, enter the correct information.

You have 10 attempts to log in to PubMan. After that, your account will be locked for 30 minutes.

In case you forgot your login-credentials, please contact the <u>Support-Team</u>. Users can't reset the account or password on their own.

Note for users of the Max Planck Society: If you do not yet have a user ID, please contact your library or the PubMan support team.

# 2.3 Change password

In case you forgot your login-credentials, please contact the <u>Support-Team</u> or if applicable the Local Admin at your MPI. Users can't reset the password on their own.

A You have 10 attempts to log in to PubMan. After that, your account will be locked for 30 minutes.

#### 1. Password change after reset/account creation

After **password reset** or after creating a **new account** PuRe prompts to change the password. This password change works as follows:

- 1. Log in with the password provided by the support team.
- 2. A link will appear, please click on it.

START BASKET (0) TOOLS	
	Start
Please change your password once here to be able to log in again.	
MPG.PuRe	Most Recently Released Items
This is the publication repository of the Max Planck Society. It contains bibliographic data and numerous fulltexts of the publications of its researchers. The repository is based on PubMan, a publication repository	Control design for inhomogeneous broadening compensation in single-photon transducers Mishra, Sattwik Deb; Trivedi, Rahul; Safavi-Naeini, Amir H.; Vučković, Jelena - 2021-09-10
software developed by the Max Planck Digital Library. Currently we are working on the migration of the data base of the predecessor system eDoc into this repository.	A transducer of single photons between microwave and optical frequencies can be used to realize quantum communication over optical fiber links betwee

3. You will be directed to an entry mask. Here you enter your user name, the current password and twice the desired new password.

	Start / User Account Information
	User Account Information
Overview over the user account	
Change password	
Login name	boosen
Current password	•••••
New password	
Repeat password	
	change password

4. After clicking on "Change password" the new data is applied and you can log in with it from now on.

5. After changing the password you are <u>not</u> logged in yet. Therefore, please log in with the new password.

The password must comply with the **MPG password policy** and meet the following criteria:

- The password must consist of at least 8 characters
- It must contain at least one uppercase letter
- It must contain at least one lowercase letter
- It must contain at least one special character
- It must contain at least one number
- It must not contain a space

#### 2. Voluntary password change

If you want to change your password voluntarily, first log in to PubMan. The homepage opens and the name of the logged-in user appears.

• Click on the username.



• The field for changing the password appears. Enter the new password in the "New Password" field. Repeat the password in the "Repeat password" field.

	Start / User Account Information
Overview over the user account	
Change Password	
New password	
Repeat password	
	change password

• Click on the "Change Password" button. You will receive the system message "Password has been changed!".

Changing the password in MPG.PuRe will automatically change the password of **CoNE**.



The "Help" function redirects you to <u>MPG.PuRE Help</u>, where you can find, for instance, the PuRe-Support contact details, the user manual, and the FAQ.

#### MPG.PuRe Help



#### Contact Us / Kontakt [edit]

MPG.PuRe is developed and maintained by the Max Planck Digital Library (MPDL)@.

- For any questions or issues concerning the usage of MPG.PuRe, please contact the PuRe Support Teams of the MPDL.
- For questions regarding access to certain publications or content-related errors, please contact the (library of the) Max Planck Institute directly, which has created the data set in
- Members of the Max Planck Society can subscribe to the PuRe Users List i?. The mailing list is an open forum for all Max Planck Society internal users of MPG.PuRe, sharing ideas and comments on current and future development. Please post in German ;-)

MPG.PuRe wird betrieben und weiterentwickelt von der Max Planck Digital Library (MPDL)

Bei jeglichen Fragen oder Problemen bezüglich der Benutzung von MPG.PuRe wenden Sie sich bitte an das PuRe Support Team & der MPDL.
 Wenn Sie Zugriff auf bestimmte Publikationen haben möchten oder inhaltliche Fehler/Unstimmigkeiten bei der Erfassung entdeckt haben, dann wenden Sie sich bitte direkt an da wenden Sie sich bitte zunächst ebenfalls an den MPG.PuRe Support.

Mitarbeiter der Max-Planck-Gesellschaft können sich auf der Mailingliste PuRe Userste? eintragen. Diese Liste ist ein Forum für die MPG-internen Nutzer von PuRe und bietet die Möglichkeit, Ideen und Anregungen zur aktuellen Verwendung und künftigen Weiterentwicklung auszr

#### User Manual / Benutzerhandbuch [edit]

FAQ [edit]

• FAQ (deutsch) 삶

#### MPG.PuRe Blog [edit]

https://blog.pure.mpg.de/& News on releases, related events or general information (in german language) Neuigkeiten zu Software-Releases und Veranstaltungen oder allgemeine Hinweise (auf Deutsch)

# 2.5 Disclaimer and Privacy Policy

Note for users of the Max Planck Society: The "Disclaimer" page is implemented in the PubMan instance of the Max Planck Society. The "Disclaimer" contains the provider identification, the name of the editor in charge and the privacy policy.

On the privacy policy page you will learn more about which types of data are collected and processed, and for which purposes they are used.

	Max Planck Digit	al Library, M	IMDL	Disclaime	r Priva	cy Policy	Help	English		
				username		passw	ord		Login	
MPG.	PuRe	Q			Go	Adva	nced Se	arch	Browse	
	Publication Repository	•	Include files							
START BASKET (0) T	OOLS									

Visit the disclaimer and privacy policy page by clicking on the "Disclaimer" or "Privacy Policy" buttons in the header.

### 2.6 Change language

PubMan is available in German, English and Japanese. To change your preferred language, please proceed as follows:

• Click on the language or the arrow next to language.

Max Planck Digital Library, MMDL		Impressum	Datenschutzhinwe	s Hilfe De	utsch 💌
		username	passwor	d	Einloggen
MPG. PuRe	9		Los	Detailsuche	Browse
Publication Repository	C	Volltexte einbeziehe	en		
START ABLAGE (0) WERKZEUGE					

#### The drop-down menu opens.



• Choose your preferred language. The PubMan interface appears in the selected language.

Warning: The selected language remains active for the current session only. The pre-selected language depends on your browser settings and can be changed there if necessary.

# 3. Search

To find already existing items in PubMan, use the search function. The search box is located on each page, on the right side of the header section. There is a simple search, an advanced search, an administrative search and a browsing function.

Attention: Items are only indexed after they have been released for simple and advanced search. Items with the status " saved" and "submit" can be found by using the administrative search.

# 3.1 Simple search

The simple search function is useful to search for individual terms. All metadata fields are searchable with the exception of the fields "Description", "Copyright Information", "Genre", "Name of the Collection", "Visibility", "Review type", "License" and "Copyright date".

To perform a simple search, proceed as follows:

• Enter the search term you are looking for in the search box. Several search terms are automatically linked with the Boolean operator "and". Only results that contain all of the entered search terms are displayed.



- Click on the "Full Texts" checkbox if you want to include full texts in your search. The search term is then also searched within publicly available full texts.
- To start the search, click on the "Go"-button or press "Enter" on your keyboard to start (browser dependent).
- A hit list with search results is displayed. Further information on the hit list can be found in chapter 4. In the "expand all" display, the search hits are shown in full text and the search terms are marked in blue.
- By placing the search phrase in quotation marks a **search by phrase** is possible as well.

Note for users of the Max Planck Society: Certain terms such as "and", "or" and articles are ignored as search terms. An up-to-date deny list is available on request from the PubMan support team.

# 3.2 Open advanced search

The advanced search enables **complex search queries** with multiple search criteria. For that, an extensive search mask is available. Open the advanced search as follows:

• In the top right corner of the header, click on "Advanced Search".



#### The search mask of the advanced search opens.

			Advanced Search
1 Search terms			
	(Title 🔻		$\oplus \ominus$
	AND 🔻		
	Person 🔻	Person 🔻	$\oplus \Theta$
	AND 🔻		
			$\oplus \ominus$
	Organization 🔻	Include history	
	AND 🔻	_	
	Date Trom:	YYYY-MM-DD	$\oplus \ominus$
	To:	YYYY-MM-DD	00
2 Genre	Check all		
	Book	Book Chapter	Book Review
	Case Note	Case Study	Collected Edition
	Commentary	Conference Paper	Conference Report
	Contribution to Collected Edition	Contribution to Commentary	Contribution to Encyclopedia
	Contribution to Festschrift	Contribution to Handbook	Editorial
	Encyclopedia	Festschrift	🗌 Film
	- Handbook	Issue Issue	🗌 Journal
	🗌 Journal Article	Manual 🗌	Manuscript
	Meeting Abstract	Monograph	Multi-Volume
	Newspaper	Newspaper Article	Opinion
	Other	Paper	Patent
	Poster	Proceedings	Report
	Series	🗌 Talk	Teaching
	Thesis		
	Bachelor Diploma Habilit	ation Magister Master PhD	Staatsexamen
<sup>3</sup> Publication Status	Not specified	Submitted	Accepted / In Press
	Published online	Published in print	
4 Files	with File(a)	Contrast antegoni	
Theo I	with File(s)	Content category Supplementary material	
		Postprint	
	Visibility restricted	Copyright transfer agreement	
	public	Correspondence	
	private	Preprint	
		Abstract	
	Embargo Date From: YYYY-MM-DD	Any fulltext	
	To: YYYY-MM-DD	Publisher version	
		Table of contents	
5 Locators	with Locator(s)	Content category	
	- 🔻	Supplementary material	
		Postprint Copyright transfer agreement	
		Copyright transfer agreement	
		Preprint	
		Abstract	
		Any fulltext	
		Publisher version	

The search mask is divided into the following sections:

- 1. "Search terms",
- 2. "Genre",
- 3. "Publication status",
- 4. "files" and
- 5. "locators"

### 3.3 Search fields

In the "Search terms" section, three search fields are available in the advanced search as default. If more search fields are needed, proceed as follows:

• Click on the "+"-icon to the right side of the search box, where the additional search field should be inserted.

Search terms	( Title 🗨		$\oplus \ominus$
	AND 🔻		
	( Person  AND	Person 🔻	$\oplus \ominus$
	( Organization 🗨		$\oplus \ominus$
	AND 🔻	Include history	
	( Date 🗸	From: YYYY-MM-DD	$\oplus \ominus$
		To: YYYY-MM-DD	

#### **Delete search fields**

• To delete a search field, click on the "-"icon to the right side of the field you want to remove.

#### Select search fields

In the advanced search, almost all metadata fields are searchable. They can be selected via a drop-down menu in the search fields. To do so, proceed as follows:

		Start / Advanced Search
Search terms ( Title Title Free keywords		$\oplus \ominus$
Classification ( Any Field Fulltext Person	Person 💌	$\oplus \ominus$
ORCID ID Organization Date Date	Include history	$\oplus \ominus$
published in print published online accepted submitted modified	From: YYYY-MM-DD To: YYYY-MM-DD	$\oplus \ominus$
Genre Created		
Event start of event end of event ▼ Collected Edition	Book Case Note Commentary	<ul> <li>Book Chapter</li> <li>Case Study</li> <li>Conference Paper</li> </ul>

- Open the drop-down menu of a search field by clicking on the arrow symbol to the right of the field. The drop-down menu opens.
- Please select the required search field from the drop-down menu by clicking on it. The selection is going to be displayed in the search field.
- Enter the search term to the right of the search field.

### 3.4 Search any field

You can either search any field in the simple search function (see<u>chapter "Simple</u> <u>search"</u>) or the advanced search function. For the second option, proceed as follows:

- Select "any field" in the drop-down menu.
- Enter the search term in the field to the right and start the search.

Search terms	Any Field		$\oplus \ominus$
	( Person 💌	Person 💌	$\oplus \ominus$
	AND ( Organization	Include history	$\oplus \ominus$
	AND V ( Date V	From: YYYY-MM-DD To: YYYY-MM-DD	$\oplus \ominus$

### 3.5 Search attached files

In PubMan, attached files like full texts are searchable. To do so, proceed as follows:

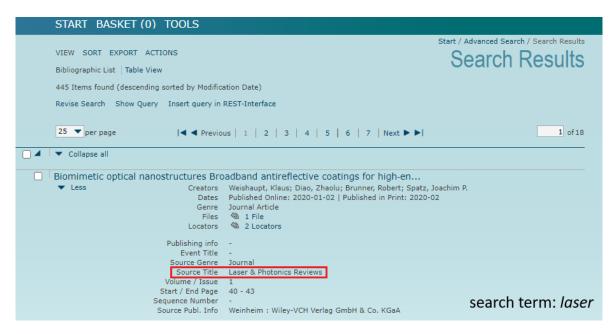
- Select the search field "Fulltext"
- Enter your search term and start the search.
- To see the results in the full texts, click the "expand all"-button in the header of your search results. The expanded list view opens, with the search hits in full texts displayed.
- Click on the file name in bold to view the full text.



### 3.6 Search source titles

To search for the source's title in PubMan, proceed as follows:

• Select "Source" in the search field (see <u>chapter "Search fields"</u>), enter the title you are looking for in the search box, and start the search.



# 3.7 Search journal titles

Journal titles are managed in our controlled vocabulary CoNE - to ensure the journal titles in PubMan are displayed in a standardized form. These journal titles are available in the advanced search through an autosuggest list. If you want to search for the title of a journal, which is recorded in CoNE, proceed as follows:

- Select the search field "-Journal" in the drop-down menu. (see <u>chapter "Search fields"</u>)
- After entering at least two letters of the journal you are looking for in the search box, an autosuggest list appears. Add more letters to reduce the autosuggest-hits.

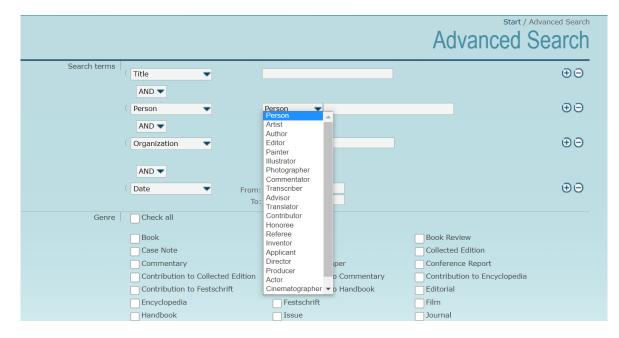
START BASKET (0) TOOLS	
	Start / Advanced Search
	Advanced Search
Search terms	
- Journal	Berichte der ANL / Hrsg.: Baverische Akademie für Naturschutz und Landschaftspflege (ANL); Baveris
AND 🔽	Anliegen Natur : Zeitschrift für Naturschutz und angewandte Landschaftsökologie; Bayerische Akademie für
	Bulletin de la Société Mathématique de France: La Société. Paris
( Person 🔹	Die Praxis des Familienrechts: Stämpfli, Bern
AND 🔻	FamPra.ch; Stämpfli, Bern
	La prassi del diritto di famiglia ; Stämpfli, Bern
( Organization 🗨	La pratique du droit de la famille ; Stämpfli, Bern
	Frontiers in Language Sciences; Frontiers Research Foundation, Lausanne
AND 🔻	Journal of Laser Applications; Laser Institute of America, Orlando, FL, USA
	J. Laser Appl.; Laser Institute of America, Orlando, FL, USA
( Date Trom:	Labour: Review of Labour Economics and Industrial Relations; Fondazione Giacomo Brodolini, Roma
To:	La Houille Blanche: Revue Internationale de L'Eau; Association pour la diffusion de la documentation
Genre Check all	Landbauforschung Volkenrode; Forschungsanstalt für Landwirtschaft Braunschweig-Völkenrode, Bra
	Landbauforsch. Volk.; Forschungsanstalt für Landwirtschaft Braunschweig-Völkenrode, Braunschweig Landschaftspflege und Naturschutz in Thüringen; Thüringer Landesanstalt für Umwelt und Geologie,
Book	Latin American Journal of International Trade Law: National Autonomous University of Mexico, Mexico
Case Note	Revista Latinoamericano de Derecho Comercial Internacional: National Autonomous University of Mexico. 1
Commentary	Les Cahiers de droit; Faculté de droit de l'Université Laval, Laval
	Mitteilungen des Baverischen Notarvereins, der Notarkasse und der Landesnotarkammer Bavern ; Lar
Contribution to Collected Edition	MittBayNot ; Landesnotarkammer Bayern, München
Contribution to Festschrift	Mitteilungen Landesmuseum Joanneum Zoologie; Landesmuseum Joanneum, Zoologie, Graz
Encyclopedia	Nouvelle Revue d'Entomologie; Laboratoire de zoologie de la Faculté des sciences, Toulouse, France

- Select the preferred journal title in the autosuggest list, start the search, and as result, you will get all publications related to the journal.
- In case you want to search for a journal title, which is not recorded in CoNE, enter the journal title manually in thesearch box.

### 3.8 Search person

The search field "Person" is supported by an autosuggest list. To search for a person, proceed as follows:

- Select the search field "Person". Two search fields will appear.
- In the first search field, you can select the person's "role" via a dropdown-menu.



- Enter the first few letters of a person's name in the search field on the right. If the author has a CoNE entry, the autosuggest list opens. For more information on the CoNE service, see <u>chapter "Tools CoNE"</u>.
- The autosuggest list displays all entries and existing forms of names. If a person in CoNE is affiliated to several OUs (organizational units), a separate name form is displayed for each OU.

START BASKET (0) TOOLS			
		Start /	Advanced Search
		Advanced	Search
Search terms			
( Title			$\oplus \ominus$
AND 🔻			
( Person 👻 Pers	son 👻	an	$\oplus \ominus$
AND 💌		An, Baifeng (Tsinghua University, Key Laboratory of Advanc	,
		An, B. (Tsinghua University, Key Laboratory of Advanced Mate	
( Organization 🗨		An, Dayong (Microscopy and Diffraction, Microstructure Phy	· · · ·
	Include histor		
AND 💌		An, Seong Ryul (Criminology, Max Planck Institute for Foreig	
AND		An, Xinghai (International Max Planck Research School (IMP	
( Date 🔹 From: YYY	Y-MM-DD	An, X. (International Max Planck Research School (IMPRS), M An, Xinghai (Physical and Chemical Foundations of Process	
To: YYY	Y-MM-DD	An, Xinghai (Physical and Chemical Foundations of Process An, X. (Physical and Chemical Foundations of Process Engine	
		An, Z. H. (Grenzflächen, Max Planck Institute of Colloids and	01
Genre Check all		An, Bo (External, Max Planck Institute for the History of Scie	,
Book	Book Chapt	An, Bo (Max Planck Research Group Epistemes of Modern A	coustics, Max Planck In
Case Note	Case Study	An, Cunbin (Dept. Müllen: Synthetic Chemistry, MPI for Poly	mer Research, Max Plan
		An, C. (Dept. Müllen: Synthetic Chemistry, MPI for Polymer Re	esearch, Max Pl <b>an</b> ck Soci
Commentary	Conference	An, C. B. (Dept. Müllen: Synthetic Chemistry, MPI for Polymer	Research, Max Planck Se
Contribution to Collected Edition	Contributio	An, H. (Dept. of Plant Developmental Biology (George Couple	and), MPI for Plant Bree
Contribution to Festschrift	Contributio	An, Ke (Spallation Neutron Source, Oak Ridge National Labo	••••••
Encyclopedia	Festschrift	An, K. (Spallation Neutron Source, Oak Ridge National Labora	
		Abraham, Anna (Department Cognitive Neurology, MPI for H	uman Cognitive and Bra

• Please select the preferred name with its affiliation to add it to the search field. The search query automatically includes all forms of names available in CoNE, regardless of the selected form.

( Person	Person ▼An, Dayong (Microscopy and Diffraction, ×☆?=	$\oplus \ominus$
AND 🔻		
( Organization 🗨		$\oplus \ominus$

If you have selected the wrong person and want to delete the entry, click on the "x"-icon next to the person field. As soon as the "Person" field is blank, you can add another person.
 This icon indicates, that the selected person is connected to its CoNE-entry and will be queried that way. If no CoNE-entry is available, you can also add names manually. But in this case, the search queries for the spelling entered; there is no distinction between different authors.

AND 🔻		
( Person 🗨	Person 🔻 An, Dayong	$\oplus \ominus$
AND 🔻		
( Organization 🗨		$\oplus \ominus$
	Include history	

• If an ORCID ID is connected to the searched for person in CoNE, you can find that person by their ID and select them in the autosuggest list.

(Person 👻	Person 👻	http://orcid.org/0000-0002-2661-8242	Đ
AND 🔽		Franke, Michael (Collections, Max Plan	nck Digital Library, Max Planck Society)

Alternatively, you can use the search field "ORCID ID" to search for a person. If you select the "ORCID ID" field and enter a valid ORCID ID you will search for that person in the metadata of each publication entry. There will be no matching with the CoNE database here.

Search terms				
	( ORCID ID	-	http://orcid.org/0000-0002-2661-8242	$\oplus \ominus$

# 3.9 Search dates

To search for dates, please proceed as follows:

• If you want to search all dates, select the "Date" search field. To search for a specific date, select it from the drop-down menu (see <u>chapter "Search fields"</u>)

			Advanced Search
Search terms (	Date Title Free keywords Classification	From: YYYY-MM-DD To: YYYY-MM-DD	$\oplus \Theta$
(	Any Field Fulltext Person Organization	Person 🗨	⊕⊝
(	Date Date published in print published online accepted submitted	Include history	$\odot \ominus$
(	modified created Event	From: YYYY-MM-DD To: YYYY-MM-DD	$\oplus \Theta$
Genre	Event start of event end of event Invited	Book Chapter	Book Review Collected Edition

• Enter the start date of the period in the "From" field and the end date in the "To" field. You can also search by start or end date only. You can find further information on the format of the date in <u>chapter "Add a date"</u>.

# 3.10 Search organizations

An implemented autosuggest list supports the search for organizations. To query publications of specific organizations, please proceed as follows:

- Select the "Organization" search field.
- Enter the first few letters of the organization or group name you are looking for in the Organization field. After typing in the second letter, the autosuggest list appears. You can shorten the autosuggest list by adding significant keywords from the organization's name. It includes all organizations listed in the OU structure. More information regarding the OU-Structure can be found in <u>chapter "Organizational Units (OUs)"</u>.

		Start / Advanced Search
		Advanced Search
Search terms		
	organization	MaxSynBio Group Wegner: Light-controlled Systems, MPI for Polymer Research, Max Planck Society
		Max Planck Sciences Po Center on Coping with Instability in Market Societies (MaxPo). MPI for the Study of
	AND 🔽	Max Planck Research Group Molecular Physiology, Center of Advanced European Studies and Research (ca
		Max Planck Research Group Neural Circuits, Center of Advanced European Studies and Research (caesar),
	Person 💌	Max Planck Institute for Biological Cybernetics. Max Planck Society
	AND 🔻	Max Planck Research Group Neuroimmunology, Center of Advanced European Studies and Research (caes
		Max Planck Society
	Organization 🔷	Max Planck Research Group Neurocognition of Decision Making, Max Planck Institute for Human Developme
		Max Planck Research Group Auditory Cognition, MPI for Human Cognitive and Brain Sciences, Max Planck
	AND 💌	Max Planck Research Group Neurotypology, MPI for Human Cognitive and Brain Sciences, Max Planck Soci
	AND V	Max Planck Fellow Research Group Attention and Awareness, MPI for Human Cognitive and Brain Sciences.
	( Date  From:	Max Planck Institute for Empirical Aesthetics, Max Planck Society
	То	
		Max Planck Fellow Chemical Biology, Center of Advanced European Studies and Research (caesar), Max Pl
Genre	Check all	Max Planck Research Group Neural Systems Analysis, Center of Advanced European Studies and Research
		Max Planck Research Group Neural Mechanisms of Human Communication, MPI for Human Cognitive and E
	Book	Max Planck Research Group Neurocognition of Prosody, MPI for Human Cognitive and Brain Sciences, Max
	Case Note	Max Planck Research Group Neurocognition of Music, MPI for Human Cognitive and Brain Sciences, Max Pl
	Commentary	Max-Planck Research Group Systems Infection Biology, Max Planck Institute for Infection Biology, Max Plance
	Contribution to Collected Edition	Max Planck Research Group Body and Self, MPI for Human Cognitive and Brain Sciences, Max Planck Social
		Max Planck Institute for Solid State Research, Max Planck Society
	Contribution to Festschrift	Max Planck Institute for Demographic Research, Max Planck Society
	Encyclopedia	May Dianak Institute for Malaculus Diamadising, May Dianak Costaty

• Select the organization by clicking on the entry. The entry will be displayed in the field.

### 3.11 Select a genre

You will find a section to search for specific publication genres in the center of the search mask.

Attention: When opening the search mask, no genre is selected by default. That means the search will query all genres.

See the chapters about the full submission to find an <u>overview of all genres</u> available in PubMan.

### 3.11.1 Select individual genres

To select individual genres, proceed as follows:

Click on the genres you are looking for individually. A checkmark will indicate them.

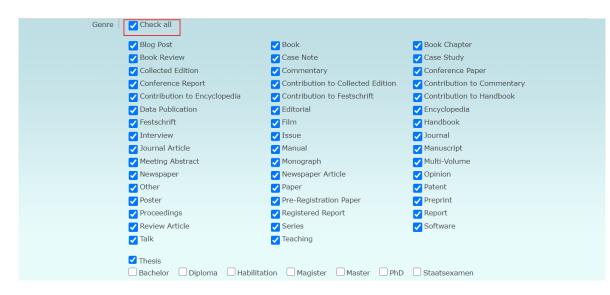
Genre Check all			
Blog Post	Book	Book	Chapter
Book Review	Case Note	Case	Study
Collected Edition	Commentary	Confe	erence Paper
Conference Repo	rt 📃 Contribution to	o Collected Edition 👘 🗌 Contr	ibution to Commentary
Contribution to E	ncyclopedia 📃 Contribution to	o Festschrift 📃 Contr	ibution to Handbook
Data Publication	🗌 Editorial	Encyc	clopedia
Estschrift	🗌 Film	🗌 Hand	book
Interview	Ssue 🗌 Issue	Journ	al
🗸 Journal Article	🗌 Manual	🗌 Manu	script
Meeting Abstract	Monograph	Multi-	Volume
Newspaper	Newspaper Ar	ticle 📃 Opini	on
Other	Paper	Pater	t
Poster	🗸 Pre-Registratio	on Paper 🔽 Prepr	int
Proceedings	🗸 Registered Rej	port Repo	rt
🗸 Review Article	Series	Softw	vare
🗌 Talk	Teaching		
Thesis			
Bachelor Dip	loma 🗌 Habilitation 🗌 Magister	Master PhD Staat	sexamen

In PubMan, you can distinguish the genre "thesis" by the type of degree. To do so, select the "thesis" genre in the lower area of the genre selection. The degree types are no highlighted in grey and can be chosen. Select the degree types you are looking for. A checkmark will indicate them.

Newspaper	Newspaper Article	Opinion
Other	Paper	Patent
Poster	Pre-Registration Paper	✓ Preprint
Proceedings	🗸 Registered Report	Report
✓ Review Article	Series	Software
Talk	Teaching	
✔ Thesis □ Bachelor □ Diploma □ Ha	abilitation 🗌 Magister 🗌 Master 🗹 Ph	D 🗌 Staatsexamen

### 3.11.2 Select all genres

Check the box "check all" if you want to query all types of genres in the search.



Remove the checkmark from "Select all" to untick all checkboxes.

# 3.12 Search for the publication status

Publication status in the search mask	Data entry fields	Publication status of the record	Dates
Not specified	Date created	e.g. created	Created: xxxx
Submitted	Submitted	Submitted	Submitted: xxxx
Accepted/in press	Date accepted	Accepted	Accepted: xxxx
Published online	Date published online	Published online	Published online: xxxx
Issued	Date issued	Issued	Issued: xxxx

The publication status results from the entered year.

If several dates are entered, the publication status results from the highest-ranked entry. For example, if the date for "Submitted" and "Published online" are entered, the data record has the publication status "Published online".

In the advanced search, you have the option to search for the publication status of a record. To do so, please proceed as follows:

• Select the needed status of the publication in the "publication status" section.

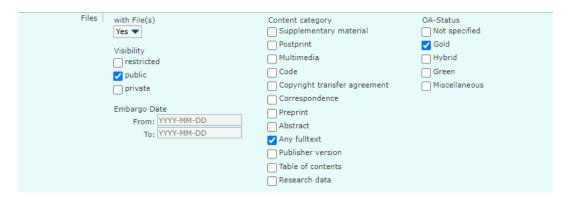
Publication Status Not specified Published online	Submitted	Accepted / In Press
---	-----------	---------------------

• If you select the status "Not specified", items without a date are searched.

### 3.13 Search for records with attached files

In the "with File(s)" field, select whether the records you are looking for should have attached files or not. If you don't select an option, records with and without attached files are displayed.

- In the field with File(s) you can select the **visibility** of the attached files. To do so, click on the desired visibility.
- Additionally, you can search for the "**Embargo Date**" of a record. Enter the date in the field "from" or "to". Or fill out both fields if you want to search for a particular period.
- You can select which "content category(s)" the files you are looking for should correspond to. The chosen content categories are marked with a checkmark.
- On the right you can clarify the **Open-Access-status** of the file(s). Find more information on OA-status in the <u>chapter "Submission Open Access Overview"</u>.



### 3.14 Search for records with locators

In the "Locators" section, you can choose in the dropdown menu whether the data records you are looking for should contain external references or not.

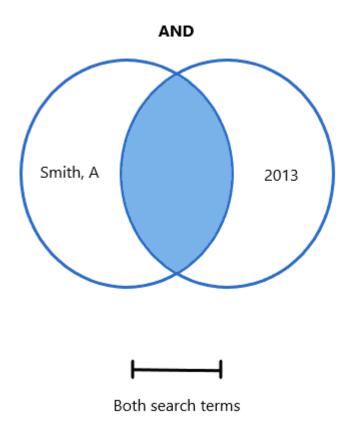
- You can select which "content category(s)" the locators/external reference you are looking for should correspond to. The chosen content categories are marked with a checkmark.
- On the right you can clarify the **Open-Access-status** of the locator/external reference. Find more information on OA-status in the <u>chapter "Submission - Open Access Overview"</u>.

Locators with Locator(s)	Content category	OA-Status Not specified
Tes V	Supplementary material	Not specified
	Postprint	🔽 Gold
	Multimedia	Hybrid
	Code	🗸 Green
	Copyright transfer agreement	Miscellaneous
	Correspondence	
	Preprint	
	Abstract	
	Any fulltext	
	🗸 Publisher version	
	Table of contents	
	Research data	

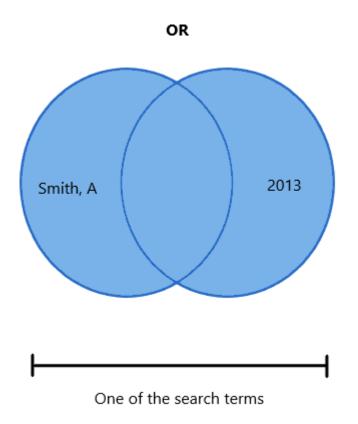
### 3.15 Link search terms

To link single search terms, the Boolean operators "and", "or" and "not" are available.

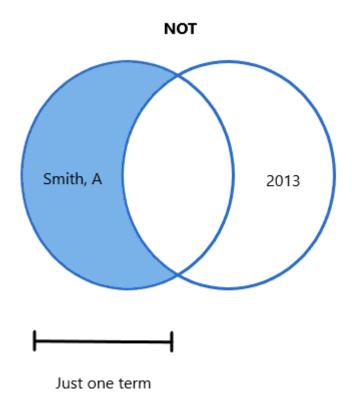
With the operator "**and**", you can combine two search terms that should both match the data records you are looking for. For example, if you are looking for records by the author "Smith, A." from the year "2013", combine these two search terms with "and".



With the operator "**or**" you can combine two search terms if you want to receive results for both search terms. For example, if you're going to search for records by the authors "Smith, A." and "Meyer, B.", you can combine these two search terms with "or". The results show records from Smith, A, and Meyer, B., and results that contain both search terms.



You can use the operator "**not**" to exclude specific search terms from the search. For example, if you want to search for all data records with the keyword "laser", but want to avoid getting data records from the author "Meyer, B.", combine these two search terms with "not".



Attention: Please note that the search term above always represents the "total quantity" and the search term below the "exclusion criterion".

To link search terms, proceed as follows:

- Select multiple search fields and enter search terms.
- Link the search fields using the Boolean operators, which are available as a drop-down list between the individual search fields.

				Advanced	t / Advanced Search
Search terms	( Person	•	Person	▼ Smith, A. (International Max Planck Rese × ☆☆=	$\oplus \ominus$
	AND AND ( C OR NOT	•	From: 2013 To: 2013		⊕⊖

# 3.16 Complex search queries using brackets

To link search terms in complex search queries flexibly, the "bracket function" is available.

By default, the search terms are linked from top to bottom.

Search terms	Person	-	Author 💌 Smith,	A. (International Max Planck Rese	×☆∩≘	$\oplus \ominus$
	NOT 🔻					
	Person	-	Editor  Smith,	A. (International Max Planck Rese	×☆°≡	$\oplus \ominus$
	AND 🔻					
	Date					$\oplus \ominus$
		To:	2013			
	AND 🔻	_				2.2
	Date		YYYY-MM-DD YYYY-MM-DD			$\oplus \ominus$
		10:				

The search query shown above says: author NOT publisher AND 2013.

This means: This search queries all journal articles that contain the author "Smith", but not the editor "Smith", and were published in 2013.

With the help of the bracket's function, this query can be linked in such a way that all journal articles are searched that contain the author "Smith", but neither include the publisher "Smith" and were published in 2013.

To do so, please proceed as follows:

- Enter the search query into the advanced search.
- Click the bracket to the left of the "person: editor" search box.

Search terms	Person	•	Author	▼ Smith, A. (International Max Planck Rese × ☆☆=	⊕⊝
[	NOT  Person	•	Editor	▼ Smith, A. (International Max Planck Rese × ☆႙.=	⊕⊝
	AND 🗸		2013		⊕⊖

The search mask suggests closing brackets.

An "x" appears to the right of the open bracket.

Search terms		
	Person 🔻	Author ▼ Smith, A. (International Max Planck Rese × ☆⊖=
	NOT 🔻	
	( <sub>x</sub>	
	Person 💌	Editor ▼ Smith, A. (International Max Planck Rese × ☆?=
	D	
	AND 🔻	
	Date 🗨	From: 2013
		To: 2013
	D	

• Click on the "x" if you want to break the manual linking. The original search query will be restored.

• Click on one of the suggested closing brackets to complete the linking of the search terms. To exclude the publisher and publication date from the query, we added the bracket on the bottom, as shown in the example.

Search terms	Person	Author	▼ Smith, A. (International Max Planck Rese × ☆?=	$\oplus \ominus$
	NOT 🔻			
	( <sub>x</sub>			$\oplus \ominus$
	(Person	Editor	▼ Smith, A. (International Max Planck Rese × ☆☆ ₹	$\oplus \ominus$
	AND 🔻			
	( Date 🔻	From: 2013 To: 2013		$\oplus \ominus$
	$\mathcal{Y}_{\times}$	10. 2010		$\oplus \ominus$

• To break the link between the search terms, click on one of the x-icons to the brackets' right. This will restore the original link.

This search queries journal articles of the author "Smith, A". Search excludes journal articles of the publisher "Smith, A." and journal articles from the year 2013.

### 3.17 Truncate search queries

In most advanced search fields, a query with the truncation of search terms is possible: In that case wildcards can be used.

Truncation can enhance the search , e.g. other spellings or grammatical forms can be included. In PuRe, the wildcard asterisk \*, without spaces before and after, is used for truncation.

The asterisk stands for none, one, or any number of characters.

As soon as you use the truncation symbol \*, PuRe searches over the field's entire content as a phrase: You would theoretically have to enter the entire field content to find the corresponding data record.

Attention: When searching with truncation, you will notice that the query can generally take much longer. For this reason, we would like to urge you **not to use truncation in automated queries**.

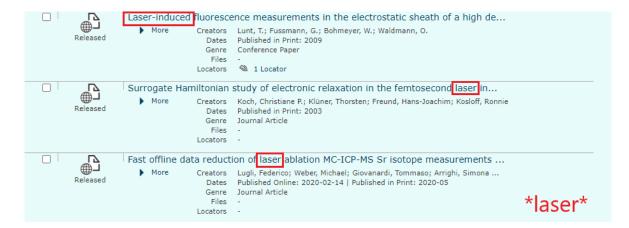
Example:

A search for **laser \*** will only find titles that begin laser, e.g. "Laser-induced fluorescence measurements in the electrostatic sheath of a high de...", but not

"Free-electron laser data for multiple-particle fluctuation scattering analysis".

Released	Laser-induced fluoresce More Creators Dates Genre Files Locators	nce measurements in the electrostatic sheath of a high de Lunt, T.; Fussmann, G.; Bohmeyer, W.; Waldmann, O. Published in Print: 2009 Conference Paper 3 1 Locator	
Released	Laser temperature jump More Creators Dates Genre Files Locators	experiments with micrometre space resolution using Rhodam Holzwarth, Josef F.; Couderc, Sabine; Beeby, Andrew; Parker, Anthony W Published in Print: 2003-09 Book Chapter	
Released	Laser spectroscopy of p More Creators Dates Genre Files Locators	ionic helium atoms Hori, Masaki; Aghai-Khozani, Hossein; Soter, Anna; Dax, Andreas Submitted: 2019-09-25   Accepted: 2020-03-10   Published Online: 2020-05-06   Published in Print: 2020-05-07 Journal Article 1 File	laser*

If you are not sure whether there could be additional values in front of and/or after the term you are looking for, you should (additionally) truncate left and right: \*laser\*



You can also set the actual truncation within a word. Such as with the search query

#### \*ma\*nahme\*.

In this case, the spellings "Maßnahme" and "Massnahme" are found, as well as the respective plural variants ("Maßnahmen").

These different forms can be placed at the beginning or any other position within the title.



Here is another search example, this time with triple truncation:

#### \*laser\*induced\*

In this case, all publications containing the term "laser induced" (with spaces or hyphen) are searched. However, search will also query publications containing both terms at any distance from one another.



#### 3.18 Clear search mask

To clear the filled out search mask, proceed as follows:

- Scroll to the end of the webpage
- Click on "Clear All"

Locators with Locator(s)	Content category Supplementary material
	Postprint
	Copyright transfer agreement
	Correspondence
	Preprint
	Abstract
	Any fulltext
	Publisher version
	Table of contents
_Clear All	Start Search

### 3.19 Perform advanced search

• Click on the "Start Search" button to start the search. The button is located at the bottom right of the search mask. The hits of the search are displayed as a list.

Embargo Date From: [YYYY-MM-DD To: [YYYY-MM-DD	Abstract Any fulltext Publisher version Table of contents
Locators with Locator(s)	Content category Supplementary material Postprint Copyright transfer agreement Correspondence Preprint Abstract Any fulltext Publisher version Table of contents
Clear All	Start Search

# 3.20 Refine advanced search

On the search results page, you can use the "Revise Search" function to refine the search query. New search criteria can be added.

 ${
m 
m }$  Attention: This function is only available in the advanced search.

To refine your search, please proceed as follows:

- Perform a search query. The list view with the results is displayed.
- Click on the "Revise Search" button.

START MY ITEMS WORKSPACES SUBMISSION BASKET (0) TOOLS	
VIEW SORT EXPORT ACTIONS Bibliographic List   Table View	Start / Advanced Search / Search Results
3301 Items found (descending sorted by Modification Date) Revise Search Show Query Insert query in REST-Interface	
25 ▼ per page	1 of 133

The advanced search mask with the search query appears.

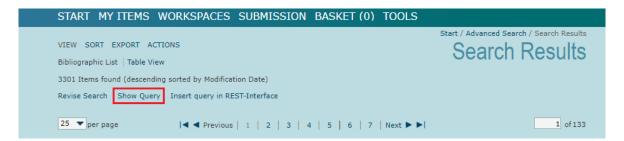
- You can now edit the search query.
- Click on the "Start Search" button to perform the search query again. The list with the results appears.

# 3.21 Show advanced search query

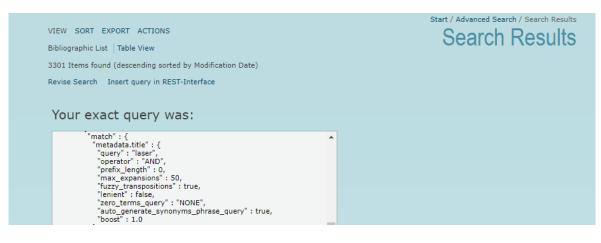
With the function "Show query" the search query can be displayed as an elastic search query.

Attention: This function is only available in the advanced search.

- Perform a search. The list view with the results is displayed.
- Click on "Show Query".



• The search query is displayed as an elastic search query. Incorrect search queries, e.g. incorrect linking of the individual search criteria, can be identified.



### 3.22 Insert query in REST-Interface

You can transfer a search query from PuRe directly to the REST interface. This is especially relevant if records are supposed to be reused on other websites.

Attention: This function is only available in the advanced search.

- Perform a search. The list view with the results is displayed.
- Click on "Insert query in REST-Interface".

START MY ITEMS WORKSPACES SUBMISSION BASKET (0) TOOLS	
	Start / Advanced Search / Search Results
VIEW SORT EXPORT ACTIONS	Search Results
Bibliographic List   Table View	
3301 Items found (descending sorted by Modification Date)	
Revise Search Show Query Insert query in REST-Interface	
25 ▼ per page	1 of 133

#### The REST-Interface with the search query opens.

			Search And Export
Search Query Form	*Elastic Search Query	{ "bool" : { "must" : [ { "term" : { "publicState" : { "value" : "RELEASED", "boost" : 1.0	-
	Sorting	List of allowed sorting keys Sorting Key metadata.title.keyword	Sorting Order ascending
	*Record Span	Offset 0	Maximum Records (max. 5000) 5000
	*Export Options	EndNote (UTF-8)	
			Download Exportfile Download Curl Command

Further information about the REST-Interface is available in the chapter "REST-Interface"

# 3.23 Perform administrative search

The administrative search allows, in addition to the search criteria of the advanced search, to search by **context** and **item status**.

It is only available for logged-in users.

### 3.23.1 Open administrative search

Log in to PuRe and open the administrative search in the top right corner of the header by clicking on "Administrative Search".



#### The search mask opens.

In addition to the advanced search criteria, you can also search by **context** and **item status.** 

START MY I	TEMS WORKSPACES S	SUBMISSION BASKET (0)	TOOLS
			Start / Administrative Search
Search terms	( Title  AND		$\oplus \ominus$
	( Person	Person 💌	$\oplus \Theta$
	AND ( Organization	Include history	⊕ ⊖
	AND V ( Date V	rom: YYYY-MM-DD To: YYYY-MM-DD	$\oplus \ominus$
My Contexts	<ul> <li>External Publications of the M</li> <li>Import Context of the Max Plane</li> </ul>		✔ Publications of the Max Planck Dig
Item Status	<ul> <li>✓ Pending</li> <li>✓ Released</li> </ul>	✓ Submitted ☐ Discarded	🗹 In Rework
Genre	Check all		
	Book	Book Chapter	Book Review

### 3.23.2 Search by context

During data entry, each item gets assigned to a context. In the administrative search, you can search for items that belong to a specific context.

Attention: In the section "My Contexts", only those contexts, which the logged-in user has permission for, are available for search.

To perform a search by context, please proceed as follows:

- Open the admin search.
- All contexts, which the logged-in user has permission for, are preselected. If you want to search for items related to a specific context, remove all other checkmarks.

My Contexts	External Publications of the Max F	PubMan Test Collection	Publications of the Max Planck Dig
	Import Context of the Max Planck		

### 3.23.3 Search by item status

Items can have different kinds of status. To search for data sets that have a certain status, proceed as follows:

- Open the admin search.
- The item statuses "Pending", "Submitted", "In Rework" and "Released" are preselected.

Item Status	✓ Pending	✓ Submitted	🗸 In Rework
	Released	Discarded	

If you want to limit the search to one status, remove the unnecessary checkmarks. If you also want to search for items with the status "discarded", tick the checkbox by clicking on it.

# 3.24 Browse by category

In PuRe, you can browse by the categories "Organizations", "Person", "Classification" and "Year". "Classification" includes "ddc", "MPI PKS", "MPI RG", "MPIS groups", "MPIS projects" and the language codes according to ISO 639-3. To browse by category, proceed as follows:

• Click on the "Browse" button in the header.



The overview with the available categories opens.

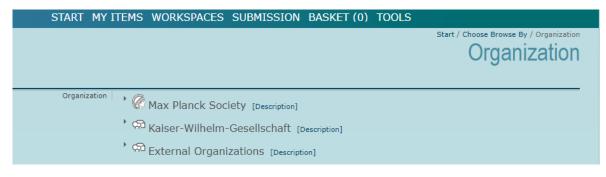
• Click on the category you want to browse. You will get an overview of the available subcategories or the letters of the alphabet.

		Start / Choose Browse By Choose Browse By
Organizati	ons	
Browse by orga	nizational unit names and view the corresponding items.	
Persons		
Browse by pers	on names and view the corresponding items.	
Classificat	on	
iso639-3 ddc mpipks mpirg mpis-groups mpis-projects mpico-projects mpimp mpiwg-projects jel	Language Codes Dewey Decimal Classification MPI PKS Classification MPI RG Classification MPIS Groups MPIS Projects	
Year		
Browse by year	and view the corresponding items.	

### 3.24.1 Browse by organization

The organizations are generated from the "Organizational Units" structure in the PuRe backend.

To create an organization in PuRe please contact the support. More information can be found in the <u>chapter "Organization Units (OUs)"</u>.



#### 3.24.2 Browse by person

When browsing the "Person" category, an intermediate view with the letters of the alphabet appears.

Click on a letter to get an overview. The list of persons - in different spellings - is generated from CoNE.

START M	MY ITEMS WORKSPACES SUBMISSION BASKET (0) TOOLS
	Start / Choose Browse By / Browse
	Persons
	A B C D E F G H I J K L M N O P O R S T U V W X Y Z Ä Ö Ü
	ABCDEFGHIJKEMNOPQKSTOVWATZAOO
	Aalam, Giw (Databases and Information Systems, MPI for Informatics, Max Planck Society) 🏟 🖛
	Aalam, G. (Databases and Information Systems, MPI for Informatics, Max Planck Society) 🛱 ₹
	Aalders, Ellen (Center for Language Studies , External Organizations) 🏞 🚍
	Aalders, Ellen (International Max Planck Research School for Language Sciences, MPI for Psycholinguistics, Max Planck Society) 차유클

Next to the person name you will find the  $2^{R}$  -link to the researcher portfolio. (see below) Click on an entry on the overview page. A list with all publications belonging to the entry/person is displayed.

START MY ITEMS	WORKSPACES	SUBMISSION	BASKET (0)	TOOLS	
VIEW SORT EXPORT AG Bibliographic List   Table Vi 8 Items found (descending 25  per page	iew sorted by Modificatio  ◀ ◀ Previou	n Date) s   1   Next ▶ ▶		Choose Browse By / Browse Search I	
State Expan	ing the interaction pre Creators Dates		likkanen, Lauri; Fitz	Sfer with mitochondria :patrick, Duncan; Vainonen, Julia P	
Released Ascorba		Metabolic Modula Rosado-Souza, L.; Fer Published in Print: 202 Journal Article - @ 1 Locator	nie, A. R.; Aarabi, F	climation Responses	

#### Open researcher portfolio

For each CoNE entry, there is a researcher portfolio where contact information and a photo can be stored. All publications linked to the CoNE entry are displayed here. To open the researcher portfolio, proceed as follows:

- Open the "Person" category and select a letter. All person entries for this letter are displayed.
- Click on the <sup>★</sup><sup>∩</sup> = -icon.
- The researcher portfolio opens.

		Researcher P	ortfolio
	Franke, Michael		B
Researcher Profile	Position	Max Planck Digital Library, Max Planck Society	
	Additional IDs	ORCID: http://orcid.org/0000-0002-2661-8242 ResearcherID: A-9633-2011	
	Researcher ID	https://pure.mpg.de/cone/persons/resource/persons96314	
	Subject	004-Data processing & computer science 005-Computer programming, programs & data	
External references	WorldCat	Search for Franke, Michael	
	Google Scholar	Search for Franke, Michael	
Publications			
		Franke, M. (2020). Forschungsdatenmanagement. doi:10.17617/2.3223902. [PubMan]	
		Franke, M. (2020). Forschungsdatenmanagement. doi:10.17617/2.3262517. [PubMan]	

# 3.25 Identify the ID of an OU

To determine the ID of an organizational unit, proceed as follows:

Browse for the organizational unit you are looking for. For more information on browsing, see the <u>chapter "Browse by category"</u>.

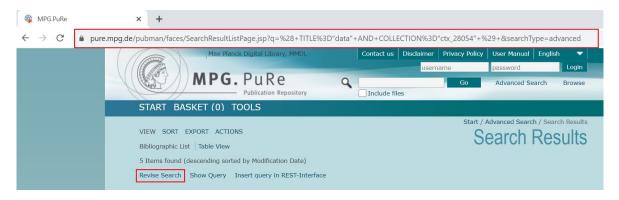
Open the description of an Organizational Unit (as described in the chapter <u>chapter</u> <u>"Organizational Units (OUs)"</u>) and you will find the ID in the URL line.



### 3.26 Save and send search query

You can save a search as a link to continue later or use it to share the search with someone else.

To generate such a link, perform a search. Then copy the link of the web page with the search results and save it somewhere else or bookmark the link. It will redirect you or others to the current results page.



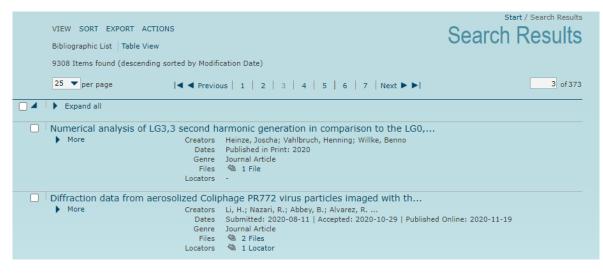
It is possible to revise the search query. By clicking on "Revise Search", you will be redirected to the search mask.

You can use the link on this page to save the completed search mask or share it with

others. If you make changes, perform the search again and go back to "Refine search" to save or share the revised search mask.

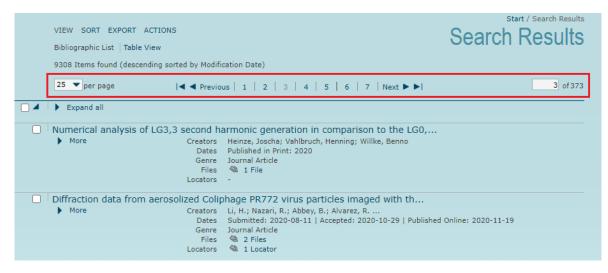
# 4. List view

At various places in PuRe, records are displayed in a list view. This applies to the "My records" area, the QA area, the filing system and the search hit list. By default, records are displayed in the short view with title, author, date, genre, attached file and external reference.



### 4.1 Navigate through the list view

The navigation for all lists in PuRe is designed identically and can be found above the search results.



On the left, you can select the number of displayed search results per page. The page navigation is located in the center. On the right, you can jump directly to any page.

To navigate through a list, proceed as follows:

• Select how many search results should be displayed per page by opening the drop-down menu of the "per page" field with a click on the vicon. The drop-down menu appears.

VIEW SORT EXPORT ACTIONS Bibliographic List   Table View	Start / Search Results
9308 Items found (descending sorted by Modification Date)	
25 ▼ per page	3 of 373
25       and all         100       250         250       ical analysis of LG3,3 second harmonic generation in comparison to the LG0,         More       Creators         Heinze, Joscha; Vahlbruch, Henning; Willke, Benno         Published in Print: 2020         Genre         Journal Article         Files         Locators	
Diffraction data from aerosolized Coliphage PR772 virus particles imaged with th	
<ul> <li>More</li> <li>Creators</li> <li>Li, H.; Nazari, R.; Abbey, B.; Alvarez, R</li> <li>Dates</li> <li>Submitted: 2020-08-11   Accepted: 2020-10-29   Published O</li> <li>Genre</li> <li>Journal Article</li> <li>Files</li> <li>2 Files</li> <li>Locator</li> <li>1 Locator</li> </ul>	nline: 2020-11-19

Please select the desired number by clicking on it. PuRe will rebuild the list.

• Scroll through the pages of the list by clicking the page number in the center navigation bar.

25 V per page	◀ ◀ Previous   1   2   <mark>3</mark>   4   5   6   7   Next ► ►	3 of 373
Click the 🗖 o • Go directly to	At" and " Previous" or the icons ◀ and ▶ to jump or ♥ icon to jump to the first or last page of the list v a specific page by entering the page number in the the enter key. The selected page will be opened.	view.
25 🔻 per page	◀ ◀ Previous   1   2   3   4   5   6   7   Next ▶ ▶	<b>3</b> of 373

# 4.2 Browse through lists

There is the possibility of browsing through items within lists with the previous/next buttons. To do so, proceed as follows:

- Open a list in PuRe. This can be a list in "My Items", the QA workspace or a result list.
- Open an item by clicking on the title. Above the metadata you will see buttons for the navigation.

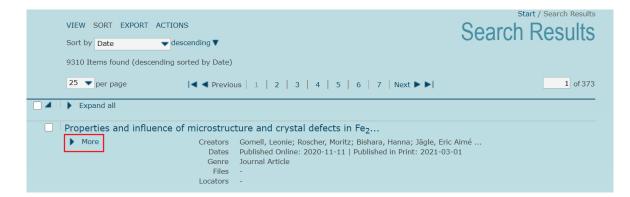
		Summary	Details R	elease History	Statistics	Local Tags
	◀ ◀ Previous Next ►►					2 of 9309
2	spin-down limit: Const c young pulsar PSR J0	-	itational	waves	Releas	
D., Abraham, S., et al. (in	poration, The Virgo Collaboration preparation). Diving below the young pulsar PSR J0537-6910.		· ·	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		

Attention: When opening the first item in the list, only the "Next" buttons are displayed. The "Previous" buttons are only available from the second item onwards.

To open the next item in the list, click on the button. The next item will open.
 To open the previous item in the list, click on the button. The previous item will open.
 To open the last item in the list, click on the button. The last item in the list will open.
 To open the first item in the list, click on the button. The first item of the list will open.

### 4.2.1 Display more item information

The items are displayed in the results list in the short display with selected metadata. To see more metadata, click on the arrow below the title or "More".



Additional metadata of the item is displayed. By clicking on "Less" you return to the short display.



To view details of all titles in the results list, click on the "Expand All" button.



You can undo the detailed view by clicking on the "Collapse All" button. The items will be displayed in the short view again.

#### 4.3 Change the list view

You can choose between the "Bibliographic" and the "Table" list view. The bibliographic view is set as default.

To change the view in the detailed view, proceed as follows: Click on the "View" menu item. The selected view is highlighted in gray. Click on the format in blue to change the view.

E	VIEW SORT EXPORT ACTIONS Bibliographic List   Table View 9311 Items found (descending sorted by Modification Da	te)		Searc	h Results
[	25 ▼ per page I	2   3   4   5	6   7   Next 🕨 🌢	I	1 of 373
	Title	Creator	Genre	Date	Files
	Recent Progress on dispersion interferometers for nuc	Akiyama, T.; Van Zeeland, M. A.; Carlstrom, T. N.; Boivin, R. L	Journal Article	2020, Published Online	<ul><li>2 Files</li><li>1 Locator</li></ul>
	Stretching and heating cells with light-nonlinear phot	Huster, Constantin; Rekhade, Devavrat; Hausch, Adina; Ahmed, Saeed	Journal Article	2020-08-12, Published Online	🚳 1 File

### 4.4 Sort lists

In PuRe, you can sort lists according to different criteria. These criteria are:

"Relevance", "Modification Date", "Creation Date",	
"Title",	
"Genre",	
"Date",	
"Creator",	
"Publishing Info",	
"Event Title",	
"Source Title" and	
"Review Method".	
VIEW SORT EXPORT ACTIONS	Coareb Degult

VIEW SORT EXPORT AC	TIONS	Search Results
Sort by Modification Date	descending 🔻	oouron noouno
Relevance	и 	
9311 Ite Modification Date	g sorted by Modification Date)	
Creation Date		
25 🔻 Title	I         Previous         1         2         3         4         5         6         7         Next ► ►	1 of 373
Genre		
Date		
Publishing Info	enter interference for modern forten and low terms	
Recent Event Title	persion interferometers for nuclear fusion and low-tempera	
Mor Source Title	Creators Akiyama, T.; Van Zeeland, M. A.; Carlstrom, T. N.; Boivi	n, R. L
Review Method	Dates Published Online: 2020	
	Genre Journal Article	
	Files 🚳 2 Files	
	Locators 🚳 1 Locator	

To sort the list, proceed as follows:

Click on the "Sort" button and a selection menu appears with the available criteria. The currently selected criterion is highlighted in blue.

To re-sort the results list according to a different criterion, click on the desired one. The results list will be rebuilt.

You can choose whether the list should be sorted in ascending or descending order. To do so, click on the "Ascending" or "Descending" button. The list will be rebuilt accordingly.

VIEW SO	RT EXPORT	ACTIONS
Sort by D	ate	▼ descending ▼
9311 Item	s found (desc	ending sorted by Da

### 4.5 Export items from lists

In PuRe, you can export records from lists. Proceed as follows:

• Click the "Export" button.

START BASKET (0)	TOOLS	
VIEW SORT EXPORT ACTIO Bibliographic List   Table View 9311 Items found (descending		Search Results
25 v per page	◀ ◀ Previous   1   2   3   4   5   6   7   Next ▶ ▶	<b>1</b> of 373

#### The export mask opens.

START BASKET (0	TOOLS	
VIEW SORT EXPORT AG	TIONS Download E-Mail	Search Results
9311 Items found (descend	ng sorted by Date)	
25 🔹 per page	◀ ◀ Previous   1   2   3   4   5   6   7   Ne	xt ▶ ▶ 1 of 373

• Select the items you want to export by clicking the checkbox to the left of the title.

VIEW SORT EXPORT ACTIONS Bibliographic List   Table View 9311 Items found (descending sorted by Date)		Search Results
	us   1   2   3   4   5   6   7   Next ►►	1 of 373
<ul> <li>Expand all</li> <li>Properties and influence of microstruc</li> </ul>	ture and crystal defects in Fea	
More Creators Dates Genre Files Locators	Gomell, Leonie; Roscher, Moritz; Bishara, Hanna; Jägle, Eric Published Online: 2020-11-11   Published in Print: 2021-03- Journal Article	
A novel method to measure T1-relaxa	tion times of macromolecules and quantificati	
More Creators Dates Genre Files Locators		
In vivo characterization of downfield p	peaks at 9.4 T: T 2 relaxation times, quan	
More Creators Dates Genre		

In the export mask, select the desired export format using the drop-down menu.

VIEW SORT EXPORT ACTIONS	
MarcXML   Down	nload E-Mail
Export formats without citatio	n
EndNote (UTF-8)	by Date)
BibTeX	
JSON	Previous
eSciDoc XML	
MarcXML	
Export formats with citation pdf	
docx (MS Word, Open Office)	crostructure
html (plain)	Creators Gom
html (linked)	Dates Publi
JSON Snippet	Genre Jour
eSciDoc Snippet	Files -
	Lesser

• When selecting an "Export format(s) with citation", another window appears for selecting the citation.

VIEW SORT EXPORT	AC	TIONS	
pdf	-	APA 🔷 Downloa	d E-Mail
9312 Items found (desc	endi	APA APA (ChinJapKorean) AJP	te)
25 🔻 per page		JUS CSL	2   3   4   5
State Ex	pan	d all	

• To download the items in the selected format, click on the "Download" button.

VIEW SORT E	XPORT ACTIONS				
pdf	- APA	- Dov	wnload	E-Mail	
9311 Items foun	d (descending sorted b	y Date)			

The download manager opens:

- Select the software with which the download should be opened. The export will open in the selected software.
- If the file should be saved directly, select the "Save file" option in the Download Manager. PuRe downloads the file to the download folder that is specified in the browser.

VIEW SORT EXPORT ACTIONS

pdf
APA
Download
E-Mail

9311 Items found (descending sorted by Date)

25
per page
I
2
3
4
5

Alternatively, you can send the data by e-mail. To do so, click on the "E-Mail" button.

### The following entry mask will appear:

	Start / Search Results / Export E-Mail Export
To CC Subject Export Items: eSciDoc_Export_pdf_2021-12-0_7646181484414544088.pdf	
You can find the selected items in the attachment. Thank you for using MPG.PuRe, Your PuRe Team. Reply to E-Mail Address Back	Send

In the "To" field, enter the e-mail address PuRe will send the export. In the "CC" field, you can enter another e-mail address to which the export should be sent. In the "Reply to e-mail address" field, you can specify an address to which the recipient can reply. Click on the "Send" button to send the e-mail with the exported records.

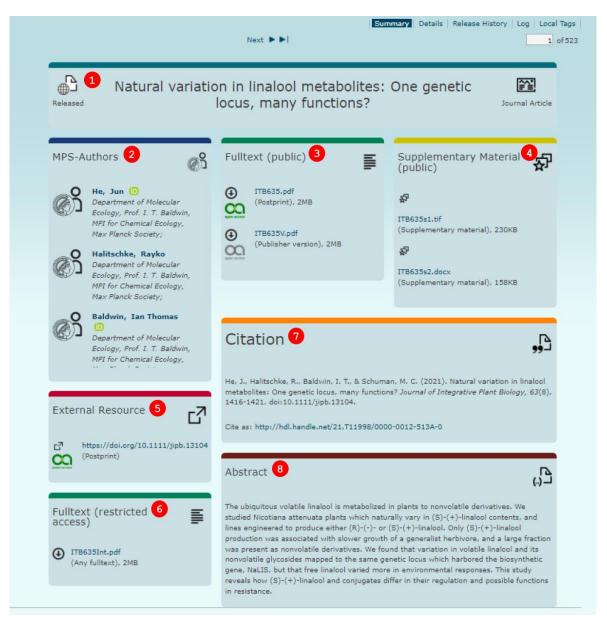
## 4.6 Add items to basket

For more information on this function, see the chapter "Basket - Add items to the basket" .

# 5. Summary view

Not logged in users, such as users coming from web search engines like Google, get directed to the summary view, when opening an item. The summary view gives a structured overview of the most important metadata of a publication.

- **1 Title**: Here the item title is displayed. The icon to the left of the title indicates the item status, and the icon to the right the type of genre.
- 2 MPS-Authors: This field displays the authors of the Max Planck Society who contributed to the publication. The -symbol is displayed for all MPS-Authors, whose ORCID-ID is connected to the data set.
- **3 Full text (public)**: All publicly available full texts are shown in this field and can also be accessed from here. Files of the types "any full text", "publisher version", "preprint", and "postprint" can be displayed. The icon below the download button indicates the Open Access (OA) status of the file.
- **4 Supplementary Material**: Publicly available supplementary material is shown in this field. Files of the types "supplementary material", "multimedia", "research data" and "code" can be displayed.
- **5 External Resource**: External resources of the publication are displayed in this field. The icon below the reference button shows the OA status of the resource.
- 6 Full text (restricted access): In this field, full texts are only shown if they are available for your IP range. Files of the types "any full text", "publisher version", "preprint" and "postprint" can be displayed.
- **7 Citation**: This field displays the APA citation of the publication. The reference link to it is also displayed. The APA citation style in this area only displays up to six creators.
- **8 Abstract**: In this field, if provided for the data set, the summary is displayed.



To open the summary page as a logged-in user:

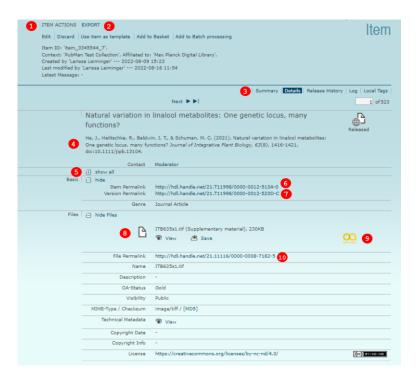
- First open a data set. The item details are displayed.
- Click on the "Summary" tab.

	Summary	Details	Release History	Statistics Log Local Tags
Generosity and Cooperation Across the Li Study	fe Span:	A Lab	-in-the-Field	Released

# 6. Detailed view

All available metadata of a publication is displayed in the detailed view ("Details"), which is structured as follows:

- **1 Item Actions:** Depending on the assigned user role, different item actions are available. For example: "Add to Basket" and "Use item as template".
- **2 Export**: The item can be exported from the detailed view.
- **3 Information about the item**: The navigation bar provides various information about the item like the Release History, the Log and Local Tags.
- **4 Citation:** This area displays the APA citation of the record. The APA citation style used here only indicates a maximum of six authors.
- **5 show all/hide information**: At various points within the full view, you can show or hide certain sections.
- 6 Item-Permalink: The permalink for released items is placed here.
- **7** Version-Permalink : The permalink for the corresponding version of the released items is placed here.
- 8 File: If files have been attached to the item, they are displayed in the detailed view.
- **9 Open Access Symbol:** This symbol shows the OA status of the attached file. More information about the different OA status types can be found in the <u>chapter "Open Access Overview"</u>.
- **10 File-Permalink** : The permalink for the attached full text is displayed here.



### 6.1 Open detailed view

When logged in, you can open the detailed view from the search results list, "My Items", the "Import Workspace", the "QA Workspace", and the "Basket". The items are initially displayed as a list.

Attention: When opening the detailed view, always the latest version of an item is opened.

To open the detailed view, click on the item title in bold letters.

25 🔻 per page	e  ◀ ◀ Previous   1   2   3   4   5   6   7   Next ▶ ▶   1 of 378
State	Expand all
	Backside-processed III-V-on-silicon discrete mode laser
Released	<ul> <li>More Creators Thiessen, Torrey; Fonseca, Jérémy Da; Mak, Jason C. C.; Zammar, Georgio El Dates Published Online: 2019-05-05 Genre Conference Paper Files 1 File Locators 1 Locator</li> </ul>

The detailed view opens.

		Summary Details Release History Statistic	s   Log   Local Tags
	Backside-processed	IIII-V-on-silicon discrete mode laser	<sup>¶</sup> ⊐
		Mak, J. C. C., Zammar, G. E., Jany, C., Szelag, B., et al. (2019). Backside- iscrete mode laser. In <i>CLEO: Science and Innovations 2019.</i> .JTh5A.1.	Released
	Contact	Moderator	
	🕀 show all		
Basic	🖃 hide		
	Item Permalink	http://hdl.handle.net/21.11116/0000-0008-2274-F	
	Version Permalink	http://hdl.handle.net/21.11116/0000-0008-2275-E	
	Genre	Conference Paper	
Files	😑 hide Files		

Alternatively, you can open an item via the URL. Enter the URL of your PubMan instance ( <u>http://pure.mpdl.mpg.de/</u>) with item ID and item version in your browser's address line. If you do not enter a version number, the latest item version will be opened. You can find more information about item versions in the <u>chapter "Item versions"</u>.

# 6.2 Open attached files

You can open attached files in the "Files" section of the detailed view.

To open an attached file, proceed as follows:

Open the detailed view. The name of the attached file is displayed in the files section. You can choose whether to open the file or save it on your computer.

Attention: There are different levels of file visibility. For more information, see the <u>chapter</u> <u>"Submission - Enter metadata for full texts"</u>.

		Summary	Details Release History Local Tags
	Entity-fishing for S	cholarly Publishing: Challenges and Recomm	endations 🔼
			L@
		ias, J., Ekanger, A., & Thoden, K. (2018). Entity-fishing for Schol	
	Publishing: Challenges and	Recommendations. Zenodo, November 1, 2018. doi:10.5281/zer	nodo.1476475.
	Contact	Moderator	
	🕀 show all		
Basic	🖃 hide		
	Item Permalink	http://hdl.handle.net/21.11116/0000-0008-3BA5-C	
	Version Permalink	http://hdl.handle.net/21.T11998/0000-0012-5139-1	
		Dete D. Martine	
	Genre	Data Publication	
Files	hide Files		
		entity-fishing workshop report.pdf (Any fulltext), 556KB	
	6	🐨 View 📥 Save	m
		🐿 View 🎽 Save	
	File Permalink	http://hdl.handle.net/21.11116/0000-0008-3BA7-A	
	Name	entity-fishing workshop report.pdf	
		encey naming workshop reportion	
	Description	-	
	OA-Status	Gold	
	OA-Status	Gold	
	Visibility	Public	
	MIME-Type / Checksum	application/pdf / [MD5]	
	MIME-Type / Checksum	application/pdf / [MDD]	
	Technical Metadata	To View	
	Copyright Date	-	
	Copyright Info	-	
		https://creativecommons.org/licenses/by/4.0/legalcode	17-N
	License	https://creativecommons.org/licenses/by/4.0/legalcode	(cc)) BY

When clicking on "View", another browser tab with the file opens up.

When clicking on "Save", the file will be downloaded to your computer.

## 6.3 View technical metadata of full texts

You can view the technical metadata of attached files in PubMan. These are different metadata generated when the file is created, for example, the date of creation or the program with which the file was created.

		Summary Details Release History Local Tags
	Entity-fishing for So	cholarly Publishing: Challenges and Recommendations
		ias, J., Ekanger, A., & Thoden, K. (2018). Entity-fishing for Scholarly Released Recommendations. <i>Zenodo, November 1, 2018</i> . doi:10.5281/zenodo.1476475.
	Contact	Moderator
	🕀 show all	
Basic	🖃 hide	
	Item Permalink	http://hdl.handle.net/21.11116/0000-0008-3BA5-C
	Version Permalink	http://hdl.handle.net/21.T11998/0000-0012-5139-1
	Genre	Data Publication
Files	📄 hide Files	
	_	
	<b>P</b>	entity-fishing workshop report.pdf (Any fulltext), 556KB
		🐨 View 📩 Save
	File Permalink	http://hdl.handle.net/21.11116/0000-0008-3BA7-A
	Name	entity-fishing workshop report.pdf
	Description	·
	OA-Status	Gold
	Visibility	Public
	MIME-Type / Checksum	application/pdf / [MD5]
	Technical Metadata	To View
	Copyright Date	-
	Copyright Info	•
	License	https://creativecommons.org/licenses/by/4.0/legalcode ((a)) EY

To view the technical metadata, proceed as follows:

- Open an item with a full text attached.
- Click the "View" button in the technical metadata field.
- The technical metadata opens in a new browser tab.

```
date: 2018-05-04T00:33:48Z
pdf:unmappedUnicodeCharsPerPage: 4
pdf:PDFVersion: 1.5
pdf:docinfo:title:
xmp:CreatorTool: LaTeX with hyperref package
Keywords:
access_permission:modify_annotations: true
access_permission:can_print_degraded: true
subject:
dcterms:created: 2018-05-04T00:33:48Z
Last-Modified: 2018-05-04T00:33:48Z
```

## 6.4 Creator Metadata

In the detail view, some metadata of the creators of a record is displayed.

Creators can be persons as well as organizations. In addition, they can have different roles. The name of the person or organization is displayed first, followed by the role of the creator, separated by a comma. The superscripts indicate the affiliation of a person to an organization. These are indicated as "Affiliations" below the list of creators.



When you hover your mouse over a person and that person is linked to an organization, the corresponding organization is visually highlighted in the "Affiliations" section. The

visual highlighting of the link between person and organization, is also possible when you move your mouse over an organization.

Additional information about the creators is displayed by symbols.

Creators 📄 hide	
Creators	Franke, Michael <sup>1</sup> , Author 🕺 🗐
	Boosen, Martin <sup>2</sup> , Author ☆☆ 1.
	Leiminger, Larissa <sup>3</sup> , Author
	Altmann, Erik <sup>4</sup> , Author $\star ? = 0$ 2.
	Kleinfercher, Friederike <sup>5</sup> , Author
	Geschuhn, Kai Karin <sup>4</sup> , Author * 🗘 🖛 🔟
	Frank, Wilhelm², Author 🏟 🖛
Affiliations	1 Max Planck Digital Library, Max Planck Society, ou_persistent25 💭≡ 3.
	2 Collections, Max Planck Digital Library, Max Planck Society, ou_1753285
	3 University of Augsburg, ou_persistent22 _ ♀️ ➡
	4 Information, Max Planck Digital Library, Max Planck Society, ou_21004 💭 🖛
	5 Digital Labs, Max Planck Digital Library, Max Planck Society, ou_persistent1 (유고루

1. The ★☆ =-symbol indicates that a person has a CoNE-entry and it is linked to the given data record. Clicking the symbol opens the person's "Researcher Portfolio" in a new tab. This contains all the information stored in PubMan for this person.

2. The **S**-symbol indicates that the CoNE-entry of a person contains an ORCID ID and it is linked to the metadata of the given data record. When you click the **S**-symbol, you are redirected to the person's ORCID web page.

3. The Set is displayed behind all organizations in the "Affiliations" section. This refers to the linked <u>"Organization Unit" (OU)</u> in the organization structure. An overview of the organization structure can be found in the <u>Browse - Organizations area</u>. The OU ID of an organization is displayed after its name in the "Affiliations" section (underlined in red). Clicking the icon opens a new window with organization details.

Attention: Organizations displayed with the OU ID "ou\_persistent22" belong to the group of "External organizations". These are therefore organizations outside of the MPG. Other external organizations that have their own OU ID are specifically listed in the organizational structure under "External organizations".

# 6.5 Hide/Show sections

You can enhance the detailed view by hiding or showing information.

		Summary Details Release History Statistics							
	Superthermal photo distributions	on bunching in terms of simple probability							
	Lettau, T., Leymann, H. A. M., Melcher, B., & Wiersig, J. (2018). Superthermal photon bunching in terms of simple probability distributions. <i>Physical Review A, 97</i> (5): 053835. doi:10.1103/PhysRevA.97.053835.								
	Contact	Moderator							
	🖃 hide all								
Basic	🖃 hide								
	Item Permalink	http://hdl.handle.net/21.11116/0000-0001-BA05-8							
	Version Permalink	http://hdl.handle.net/21.11116/0000-0003-04D1-C							
	Genre	Journal Article							
Files	🕀 show Files								
Locators	📄 hide								
	Locator	https://journals.aps.org/pra/abstract/10.1103/PhysRevA.97.053835 (Publisher version)							
	Description	-							

Besides, you can hide (and show) all sections at once.

# 6.6 Perform item actions

Various items actions are available in the detailed view. These depend on the workflow, the user role and the item status.

The following actions are possible:

"Edit", "Submit", "Release", "Send back for rework", "Accept", "Discard", "Use item as template", "Add to Basket", "Add to Batch processing" and "create DOI".



When an action is performed, the status of the item changes, which can be as follows:

Status	Description	Simple Workflow	Standard Workflow
Pending	The depositor saved the item after entry or import. Only a minor validation is performed.	x	x
Submitted	The depositor submitted the item. It is only visible to the moderator.	-	x
Released	The item has been released by the moderator. It is publicly visible and searchable.	x	x
In Rework	The item has been sent back to the depositor for rework by the moderator.	-	x
Discarded	The item was discarded after release. It is no longer findable through the search, but can be found via the filter "discarded" in the "QA Workspace" or "My Items".	x	x

## 6.7 Export data from detailed view

You can export items from the detailed view by clicking on "Export". This can be done either when logged in or logged out from PubMan and is as well possible in the summary view.

START BASK	KET (0) TOOLS		
ITEM ACTIONS	XPORT	Start / Item Summary	
	Summary Details Release History	/   Statistics   Local Tags	
Released	Bottom-up assembly of biomedical relevant fully synthetic extracellular vesicles	Journal Article	

To find more information about the export function, see the <u>chapter "List view - Export items</u> <u>from lists"</u>.

# 6.8 View the log

The log, or editing history, provides information about when a published item was created and what changes were made to certain item versions. To view the log, click on "Log" above the title. You need to be logged in to PubMan.

			Summary	Details	Release History	Statistics	Log	Local Tags
	Forschungsdatenm	anagement					ے 1	Released
Version 2	Released on	2015-07-08 10:43						
	Description:	Release during adding DOI						
	Submitted on	2015-07-08 10:43						
	Description:	Submission during adding DOI						
	Updated on	2015-07-08 10:43						
	Description:	Item updated						
Version 1	Released on	2015-07-08 09:50						
Rollback to this version	Description:							
	Submitted on	2015-07-08 09:49						

Status and version changes are listed with the date and a short description.

### 6.9 Restore a previous item version

In PubMan, you can restore a previous version of a record. This means a new version will be created using the metadata of an earlier version. To do so, proceed as follows:

- Log in to PubMan and open the "log". The different item versions are displayed.
- To restore the needed version, click on "Rollback to this version" below the version's name.
- A message appears saying, "Do you wish to replace the current version with this version?". Confirm the message by clicking on the "OK" button.

			Summary	Details	Release History	Statistics	Log Local Tags
	Forschungsdatenma	anagement					Released
Version 2	Released on	2020-05-06 13:06					
	Description:	Release during adding DOI					
	Updated on	2020-05-06 13:06					
	Description:	Item updated					
Version 1	Released on	2020-05-06 13:05					
Rollback to this version	Description:						
	Updated on	2020-05-06 13:05					
	Description:	Item updated					
	Submitted on	2020-05-06 13:04					
	Description:						
	Created on	2020-05-06 13:04					
	Description:						

## 6.10 View the release history of an item

The release history shows the date of the release(s) of an item.

🗥 Attention: The "Release history" is only available if the item has already been released.

To view the release history, open an item and click on "Release history" above the title. The release history is also visible if you are not logged in to PubMan.

		Summary Details Release History	Statistics   Local Tags
	Pension Maps: Visu in Europe	alising the Institutional Structure of Old Age Security	Released
Version 10	Release date:	2021-03-17 08:48	
	Comment		
Version 9	Release date:	2021-03-17 08:47	
	Comment		

## 6.11 View local tags

Local tags are freely assignable subject headings that can be added after an item has been released. They are findable via the "Local Tag" field in the "Search terms" section of the advanced search.

			Start / Advanced Search
Search terms	Local Tag	Open Access	$\oplus \Theta$
	Organization	Include history	$\oplus$ $\ominus$

Attention: Editing of local tags is only allowed for users with "Moderator" rights.

To view local tags, proceed as follows:

- Open an item.
- Go to "Local Tags" above the title.

	Summary     Details     Release History     Statistics     Local Tags       Next     >>
	itivity during hedonic overeating can be reinstated by 2 receptors (Gal2R) in the lateral hypothalamus Released
sensitivity during hedonic o	chev, A. V., Pissioti, A., Gassen, N. C., Kimura, M., et al. (2020). Blunted leptin vereating can be reinstated by activating galanin 2 receptors (Gal2R) in the I <i>PHYSIOLOGICA, 228</i> (2): e13345. doi:10.1111/apha.13345.

### 6.12 Add and edit local tags

To add or edit local tags, proceed as follows:

- Open an item.
- Go to "Local Tags" above the title.

Summary Details Release History Statistics	Log Local Tags 1 of 206
Blunted leptin sensitivity during hedonic overeating can be reinstated by activating galanin 2 receptors (Gal2R) in the lateral hypothalamus	Released
Leidmaa, E., Gazea, M., Patchev, A. V., Pissioti, A., Gassen, N. C., Kimura, M., et al. (2020). Blunted leptin sensitivity during hedonic overeating can be reinstated by activating galanin 2 receptors (Gal2R) in the lateral hypothalamus. <i>ACTA PHYSIOLOGICA, 228</i> (2): e13345. doi:10.1111/apha.13345.	

Already assigned tags will be displayed.

• Click on "Edit Local Tags" to make changes to the tags.

	Summary   Details   Release History   St	atistics   Log   Local Tags
	Blunted leptin sensitivity during hedonic overeating can be reinstated b activating galanin 2 receptors (Gal2R) in the lateral hypothalamus	y Released
Local Tags	Name of Tag multiple_import	
	Name of Tag Testimport_Psych_2020 2021-02-24 11:12	
	E	dit Local Tags

The entry mask opens.

- You can edit already saved local tags and remove them by clicking on the minus-icon or deleting the local tag field. Add new local tags by clicking on the plus-icon.
- To save the local tag, click on the "Save" button at the bottom right.

		Summary Details Release History Statis	stics Log Local Tags
	· · · · · · · · · · · · · · · · · · ·	ivity during hedonic overeating can be reinstated by receptors (Gal2R) in the lateral hypothalamus	
Local Tags	Name of Tag	multiple_import	Θ
	Name of Tag	Testimport_Psych_2020 2021-02-24 11:12	$\oplus \ominus$
	Cancel		Save

### 6.13 Use item as template

If you want to add an already existing item to your context, then it is recommended to use the "Use item as template" function. The function is available in the summary and advanced view for logged-in users with depositor rights.

	St	art / My Items / View item
ITEM ACTIONS	EXPORT	Itom
Edit   Discard	Use item as template Add to Basket Add to Batch processing	цеш
Item ID: 'item_0	3261074_1'.	
Context: 'PubMa	n Test Collection', Affiliated to: 'Max Planck Digital Library'.	
Created by 'Stef	anie Andergassen' 2021-02-24 11:13	
Last modified by	' 'Stefanie Andergassen' 2021-02-24 11:26	
Latest Message:	Batch (submit and) release from import Testimport_Psych_2020	
	Summary Details Release History Sta	tistics   Log   Local Tags
	Next <b>&gt;</b>	1 of 206
	Blunted leptin sensitivity during hedonic overeating can be reinstated by	
	activating galanin 2 receptors (Gal2R) in the lateral hypothalamus	Released
	Leidmaa, E., Gazea, M., Patchev, A. V., Pissioti, A., Gassen, N. C., Kimura, M., et al. (2020). Blunted lepti sensitivity during hedonic overeating can be reinstated by activating galanin 2 receptors (Gal2R) in the lateral hypothalamus. ACTA PHYSIOLOGICA, 228(2): e13345. doi:10.1111/apha.13345.	n

With the "Use item as template" function, most of the metadata of the item is applied to the advanced entry mask. But attached files, external references/file locators, and local tags are not transferred. You can add this information manually. You can make further changes and then save, submit or release the new item.

Note for users of the Max Planck Society: It is allowed to create duplicates in PuRe. This way ensures that lists created from the contexts of an institute are complete.

# 7. Item versions

Each time an item is changed, a new item version will be created. You can find the version number of the displayed item in the URL line of the browser. It is separated by an underscore "\_", after the item ID. For example: item\_1414658\_4



# 7.1 Open different item versions

To view different versions of an item, proceed as follows:

- Open an item.
- Check the URL in your browser.



• Replace the current version number with an earlier one.



The earlier version of the item will be displayed.

It also works the other way round: by counting up the version numbers, you can view newer versions of an item.

# 7.2 Open current item version

To see the most current version of an item:

- You will see a warning above the title if a newer item version exists.
- To open the current version, click on the link in the warning message.



# 8. "My Items"

The "My items" area displays all the items that the logged-in user has entered as a depositor. In "My Items", you can view, filter, sort, export, and add the items to the basket. From there, you can also go to the advanced view of the items.

 ${
m 
m 
m A}$  Attention: The "My items" area is only available with the "Depositor" user role.

### 8.1 Open "My Items"

Log in to PubMan.

• Click on "My Items" in the navigation menu or the homepage.

STAR	T MY ITEMS WORKSPACES SUBMISSION BASKET	(0) TOOLS
		Start
wha TOD/ 수	COME TO MPG.PuRe - T DO YOU WANT TO WORK ON AY? Submission There are several ways to enter new publications into PubMan. You can	Most Recently Released Items Subcortical Atlas of the Rhesus Macaque (SARM) for Magnetic Resonance Imaging Hartig, R; Glen, D; Jung, B; Logothetis, NK 2021-03-22 Digitized neuroanatomical atlases are crucial for localizing brain structures and analyzing functional networks identified by magnetic resonance imag Inference and search on graph-structured spaces
	metadata of a publication. • use the Full Submission. Here you can enter the complete metadata of a publication. • use the Fetch. Here you can fetch single items from external repositories like arXiv or BioMed Central. • use the Import. Here you can upload multiple items out of various formats. My Items	Wu, CM; Schulz, E; Gershman, SJ - 2021-03-22 How do people learn functions on structured spaces? And how do they use this knowledge to guide their search for rewards in situations where the numb Planning when to say: Dissociating cue use in utterance initiation using cross-validation Brehm, Laurel; Meyer, Antje S 2021-03-22
∞	Do you want to manage your own items? • Then you can use the section My Items. Here you will find all publications entered by yourself. QA Workspace Do you want to manage items belonging to your	In conversation, turns follow each other with minimal gaps. To achieve this, speakers must launch their utterances shortly before the predicted end o A Comparison of "Pruning" During Multi-Step Planning in Depressed and Healthy Individuals Faulkner, P; Huys, QJM; Renz, D; Eshel, N 2021-03-22 Background Real-life decisions are often Background Real-life
$\otimes$	context?	decisions are often complex because they involve making

The "My Items" area opens with all datasets entered by the logged-in user. The filter function is set by default.

START MY	ITEMS WORKSPACES SUBMISSION BASKET (0) TOOLS	
		Start / My Items
VIEW FILTER	SORT EXPORT ACTIONS	My Items
State	All (except discarded) 💌	my normo
Import Name	•	
459 Items (desc	ending sorted by Modification Date)	
25 💌 per pag	e  ◀ ◀ Previous   1   2   3   4   5   6   7   Next ▶ ▶	1 of 19
	<ul> <li>Encodell</li> </ul>	
State	Expand all	
	Neural dynamics, oscillatory synchronization, and odour codes	
Pending	More Creators Stopfer, M.; Wehr, M.; MacLeod, K.; Laurent, G.	
Pending	Dates Published in Print: 1999 Genre Book Chapter	
	Files -	
	Locators -	
	Support neurophysiologique de l'orientation a point de depart visuel chez le gri	
Pending	More Creators Richard, D.; Preteur, V.; Laurent, G.; Campan, R.	
rending	Dates Published in Print: 1984 Genre Book Chapter	
	Files -	
	Locators -	

# 8.2 Navigate in "My Items"

To find more information about navigating in the lists of the "My Items" area, see the <u>chapter "List view - Navigate through the list view"</u>.

# 8.3 View items of "My Items"

For more information on how to view items, see the <u>chapter "Detailed view - Open detailed view"</u>

# 8.4 Filter items in "My Items"

In the "My Items" area, you can filter items by status and import-name. When opening "My Items" all items will be displayed by default, except discarded ones.

Attention: Filtering by import name is only possible if a user has both the "Depositor" and "Moderator" user roles.

• For filtering go to the "My Items" area and open the dropdown-menu of the state field.

START MY ITEMS WORKSPACES SUBMISSION BASKET (0) TOOLS	
VIEW FILTER SORT EXPORT ACTIONS	Start / My Items
State All (except discarded)  Import Name Pending	My norms
459 Items (desde Released Discussion of Date)	
25         per page         In Rework           In Rework         State         Expand all	1 of 19

- Click on the required status. The page will be rebuilt, and only the records with the selected status will be displayed.
- To filter items by import name, proceed in the same way.

### 8.5 Sort items in "My Items"

You can sort your items in the "My Items" area by the following criteria: Relevance, Modification Date, Creation Date, Title, Genre, Date, Creator, Publishing Info, Event Title, Source Title, Review Method, State, Context, Collection and Name of the Owner.

To sort the items, proceed as follows:

• Click on "Sort".

START MY ITEMS WORKSPACES SUBMISSION BASKET (0) TOOLS	
VIEW FILTER SORT EXPORT ACTIONS Sort by Relevance	My Items
459 Items (descending sorted by Relevance)          25       per page       I       Previous       1       2       3       4       5       6       7       Next       >	1 of 19
State Expand all	

Sorting by modification date is preset as default. A dropdown menu with the different sorting criteria is displayed.

• Select a criterion, and the items will be sorted accordingly.

START MY	TITEMS WORKSPACES SUBMISSION BASKET (0) TOOLS	
VIEW FILTER	SORT EXPORT ACTIONS	Start / My Items
Sort by	Modification Date   Relevance	My norms
459 Items (des	ce Modification Date cation Date) Creation Date	
25 💌 per pa	Genre	1 of 19
State	Date Creator Publishing Info	
<u>کر</u>	Event Title oscillatory synchronization, and odour codes	
Pending	Review Method State Dates Published in Print: 1999 Context Garre Book Chapter	
	Context Genre Book Chapter Files -	

You can modify the sorting and choose if the item list should appear in descending or ascending order.

VIEW FILTER SORT EXP	ORT ACTIONS	Start / My Items
Sort by Modificati	on Date 🔟 descending 🔻	IVIY ILETIIS
459 Items (descending sort	ed by Modification Date)	
25 🔻 per page	◀ ◀ Previous   1   2   3   4   5   6   7   Next ► ►	1 of 19

## 8.6 Export items from "My Items"

To find more information about exporting items from the "My Items" area, see the <u>chapter "List</u> <u>view - Export items from lists"</u>.

# 8.7 Add items from "My Items" to the basket

How to add your items to the basket is also described in the <u>chapter "Basket - Add items to the</u> <u>basket"</u>.

# 9. Workspaces

START MY ITEMS WORKSPACES SUBMISSION BASKET (0) TOOLS	
QA WORKSPACE IMPORT WORKSPACE BATCH PROCESSING	Start / My Items / Workspaces
Please choose a workspace to edit the items.	
QA Workspace         In this area, moderators can view and work on all of their institute's publications. You have the opportunity to modify items, to send them back to the depositor for rework or to release them. Publications in status "pending" or "discarded" are not available at this point.         Import Workspace         Here you can review and maintain your multiple imports into PubMan. The items included in each import can be deleted or released via batch operations.	
Batch Processing (0) Here you can edit multiple publications at once	

# 9.1 QA Workspace

The QA Workspace is available to review and manage the submitted items.

Note for users of the Max Planck Society: Within the MPG, data are entered in the standard workflow either by the scientists or by the administration offices' staff (as depositor). The library staff is responsible for the review and management of the data (as moderator).

Attention: The QA workspace is only available if the logged-in user has the user role "Moderator" assigned.

## 9.1.1 Open the QA Workspace

To open the QA Workspace, proceed as follows:

- Log in to PubMan.
- Click on "Workspaces" in the navigation menu. An overview of the available workspaces will be displayed.

START MY ITEMS WORKSPACES SUBMISSION BASKET (0) TOOLS	
QA WORKSPACE IMPORT WORKSPACE BATCH PROCESSING	Start / Workspaces
Please choose a workspace to edit the items. QA Workspace In this area, moderators can view and work on all of their institute's publications. You have the opportunity to modify items, to send them back to the depositor for rework or to release them. Publications in status "pending" or "discarded" are not available at this point.	
Import Workspace Here you can review and maintain your multiple imports into PubMan. The items included in each import can be deleted or released via batch operations.	
Batch Processing (0) Here you can edit multiple publications at once	

• Then c lick on "QA Workspace" in the overview or the navigation menu.

START MY	ITEMS WORK	SPACES	5 SUBMISSION BASKET (0) TOOLS	
				Start / QA Workspace
QA WORKSPACE	IMPORT WORKSPA	CE BATCH	PROCESSING	QA Workspace
VIEW FILTER	SORT EXPORT AC	TIONS		Grimopuoo
State	All (except pending	g 🚽 🛛 Con	text -	
Org. Unit	-		▼	
Import Name	-		<b>•</b>	
1125 Items (des	cending sorted by Mo	odification	Date)	
25 🔻 per pag		- Drawiev	us   1   2   3   4   5   6   7   Next ▶ ▶	1 of 45
20 + per pag		Previo	15 1 2 3 4 5 6 7 NEXL	1 0145
State	Expand all			
P	Blogeintrag: Ko	ontinuită	t am Bundesverfassungsgericht?	
Submitted	More	Creators		
Submitted		Dates Genre	Published Online: 2020-05-13 Blog Post	
		Files	- <sup>1</sup>	
		Locators	1 Locator	
P	PubMan JSON T	Template	- Preprint	
Beleased	More	Creators		
Neleased		Dates	Created: 2018-05-01   Modified: 2018-05-01   Submitted: 20 2018-05-01   Published Online: 2018   Published in Print: 201	
		Genre	Preprint	
		Files Locators	-	

### 9.1.2 Filter items in the QA Workspace

You can filter the available items by various criteria.

• Open the drop-down menu of the desired filter criterion.

START MY	ITEMS WORKSPACES SUBMISSION BASKET (0) TOOLS	5
QA WORKSPACE	IMPORT WORKSPACE BATCH PROCESSING	Search Results / Workspaces / QA Workspace
	SORT EXPORT ACTIONS	Q, i i oncopació
State	All (except pending Context -	
Org. Unit	All (except pending and discarded) Submitted	
Import Name	Released	
739 Items (desce	In Dowerk	
25 🔻 per page	◀ ◀ Previous   1   2   3   4   5   6   7   Next ►	▶ 1 of 30
State	Expand all	

- Select the desired criterion from the drop-down menu by mouse click. The results list will be rebuilt accordingly.
- If you want to filter by several criteria at the same time, select them simultaneously. They are automatically linked with the Boolean operator "AND".

### 9.1.3 Sort items in the QA Workspace

For more information about sorting items, see the <u>chapter "List view - Sort lists"</u>.

# 9.1.4 Export items from the QA Workspace

To find more information about exporting items from the QA Workspace, see the <u>chapter "List</u> <u>view - Export items from lists"</u>.

# 9.1.5 Add items from the QA Workspace to the

### basket

How to add items to the basket is also described in the chapter "Basket - Add items to the basket" .

## 9.2 Import Workspace

The import area is intended for the management and further editing of imports.

### 9.2.1 Open Import Workspace

Log in to PubMan.

• Click on "Workspaces" in the navigation menu. An overview of the available workspaces will be displayed.

START MY ITEMS WORKSPACES SUBMISSION BASKET (0) TOOLS	
QA WORKSPACE IMPORT WORKSPACE BATCH PROCESSING	start / Workspaces
Please choose a workspace to edit the items.	
QA Workspace In this area, moderators can view and work on all of their institute's publications. You have the opportunity to modify items, to send them back to the depositor for rework or to release them. Publications in status "pending" or "discarded" are not available at this point.	
Import Workspace Here you can review and maintain your multiple imports into PubMan. The items included in each import can be deleted or released via batch operations.	
Batch Processing (0)	
Here you can edit multiple publications at once	

Then click on "Import Workspace" in the overview or the navigation menu.

	START	MY ITEMS W	ORKSPACES	SUBMISSION	BASK	ET (0)	TOOLS		
	QA WORKS	PACE IMPORT WO	RKSPACE BATCH PR	ROCESSING				· · · · · · · · · · · · · · · · · · ·	ces / Import Workspace
State	us	Import	Format	Started	•	Finished		Details	Actions

After an import, the import workspace opens up automatically.

### 9.2.2 Review imports

After performing an import, it is necessary to verify that the import was performed successfully and all data sets are transferred into the correct fields.

In the import workspace, you get an overview of the performed imports. The imports are arranged chronologically, with the most recent import at the top.

START	MY ITEMS WO	RKSPACES	SUBMISSION B	BASKET (0) TOC	OLS	
					Start / Wor	kspaces / Import Workspace
QA WORK	SPACE IMPORT WORK	SPACE BATCH P	ROCESSING		Import	Workspace
1 Status	2 Import	Format	4 Started	5 Finished	6 Details	7 Actions
FINISHED	BookChapters_Br	EndNote	2021-03-17 15	:38 2021-03-17 15:	38 View details	Remove Delete Release
FINISHED	Testimport_WoS	WOS	2021-03-01 15	:38 2021-03-01 15:	38 View details	Remove Delete Release
FINISHED	Testimport_Psych_2	0 EndNote	2021-03-01 15	:14 2021-03-01 15:	16 View details	Remove
FINISHED	Test_MPIKG	BibTeX	2021-02-26 08	:57 2021-02-26 08:	57 View details	Remove

• 1-Status: The status of the imports is displayed in the "Status" column.

While an import is still in progress, it has the status "**Pending**". At the same time, the progress of the import is shown as a percentage.



A completed import has the status "Finished". This status can be distinguished in 3 further types:



The import is finished. The down arrow indicates that the import was completed successfully without any errors.



The symbol with the "X" means that the finished import has errors.



The symbol with the exclamation mark indicates that the import was released.

- **2-Import:** In this column, the name of the import is displayed. The user can specify it at the beginning of the import process. For more information, please see the <u>chapter</u> <u>"Submission Import Specify settings for import"</u>.
- **3-Format:** In this column, you can find more information about the import format, for example, Web of Science (WoS), Endnote, RIS, etc.
- **4-Started/5-Finished:** The start and end times of an import are displayed in the "Started" and "Finished" columns.
- **6-Details:** Via the "Show details" button, you can review the individual steps of an import. For further information, please see the next <u>chapter "Review import steps"</u>.
- **7-Actions:** This column shows the available actions "Release", "Delete"and/or "Remove".

### 9.2.3 Review import steps

To review the individual import steps first log in to PubMan.

					import	Workspac
Status	Import	Format	Started 🔻	Finished	Details	Actions
	Testimport_Psych	WOS	2021-02-25 10:03	2021-02-25 10:04	View details	Remove Delete Release
FINISHED	Import process star	ted	2021-02-25 10:03	2021-02-25 10:03	Details	FINE
INISHED	Initializing		2021-02-25 10:03	2021-02-25 10:03	Details	FINE
INISHED	Validating item		2021-02-25 10:03	2021-02-25 10:03	Details	FINE
INISHED	Starting import		2021-02-25 10:03	2021-02-25 10:03	Details	FINE
INISHED	Importing item		2021-02-25 10:03	2021-02-25 10:03	Details	WARNING
INISHED	Importing item		2021-02-25 10:03	2021-02-25 10:03	Details	FINE
INISHED	Importing item		2021-02-25 10:03	2021-02-25 10:03	Details	FINE
INISHED	Importing item		2021-02-25 10:03	2021-02-25 10:03	Details	WARNING
INISHED	Importing item		2021-02-25 10:03	2021-02-25 10:03	Details	FINE
INISHED	Importing item		2021-02-25 10:03	2021-02-25 10:03	Details	FINE
FINISHED	Importing item		2021-02-25 10:03	2021-02-25 10:03	Details	WARNING

• Then click on "Details" in the Details column.

- The individual steps are listed in the "Import" column. In the "Importing item" step, one data set is imported at a time. To view it, directly click on "Importing item" highlighted in blue. The detailed view of the item opens.
- In the column "Status", you can see the status of each step.
- In the "Actions" column, you can see whether the step was performed successfully. The status "FINE" indicates a successful import without any errors. The status "PROBLEM" and "ERROR" are displayed if the import step was not successful and the item was not imported. The "WARNING" status is displayed if the dataset was imported, but problems with the validation occurred. In this case, a required metadata field is usually missing.

• You can find more information about the individual import steps by clicking on "Details". A window will appear.

FINISHED	Importing item	2021-02-25 10:03 2021-02-25 10:03 Details FINE		
FINISHED	Importing item	2021-02-25 10:03 2021-02-25 10:03 Details WARNING		
FINISHED	Importing item	2021-02-25 10:03 2021-02-25 10:03 Details FINE		
FINISHED	Importing item	2021-02-25 10:03 2021-02-25 10:03 Details FINE		
FINISHED	Importing item	2021-02-25 10:03 2021-02-25 10:03 Details WARNING		
FINISHED	Importing item	2021-02-25 10:03 2021-02-25 10:03 Details FINE		
FINISHED	Importing item	2021-02-25 10:03 2021-02-25 10:03 Details FINE		
FINISHED	Importing item	2021-02-25	×	۰.
FINISHED	Importing item	2021-02-25 Details		
FINISHED	Importing item	2021-02-25 Declaris		
FINISHED	Importing item	2021-02-25 FINISHED FINE 2021-02-25 10:03 Import data found		
FINISHED	Importing item	2021-02-25		
FINISHED	Importing item	2021-02-25 FINISHED FINE 2021-02-25 10:03 ???FN Clarivate Analytics Web of Science		
FINISHED	Importing item	2021-02-25 VR 1.0 PT J		
FINISHED	Importing item	2021-02-25 AU Samann, PG		
FINISHED	Importing item	2021-02-25 Iglesias, JE		
FINISHED	Importing item	2021-02-25 Gutman, B		
FINISHED	Importing item	2021-02-25 Grotegerd, D		
FINISHED	Importing item	2021-02-25 Leenings, R		
FINISHED	Importing item	2021-02-25 Flint, C		
FINISHED	Importing item	2021-02-25 Dannlowski, U		
FINISHED	Importing item	2021-02-25 Clarke-Rubright, EK 2021-02-25 Morey, RA		
FINISHED	Importing item	2021-02-25 van Erp, TGM		
FINISHED	Importing item	2021-02-25 Whelan, CD		
FINISHED	Importing item	2021-02-25 Han, LKM		
FINISHED	Importing item	2021-02-25 van Velzen, LS		
FINISHED	Importing item	2021-02-25 Cao, B		
FINISHED	Importing item	2021-02-25 Augustinack, JC		
FINISHED	Importing item	2021-02-25 Local College Colle		
FINISHED	Importing item	2021-02-25 10:03 2021-02-25 10:03 Details FINE		

• The second line displays the imported item in the output format.

Details	5		>	×
FINISHED	FINE	2021-02-25 10:03	Import data found	
FINISHED	FINE	2021-02-25 10:03	???FN Clarivate Analytics Web of Science VR 1.0 PT J AU Samann, PG Iglesias, JE Gutman, B Grotegerd, D Leenings, R Flint, C Dannlowski, U Clarke-Rubright, EK Morey, RA van Erp, TGM Whelan, CD Han, LKM van Velzen, LS Cao, B Augustinack, JC Thompson, PM	

• After the output format, the XML-version of the item and its description are shown. The XML-Version is generated by PubMan.

			ER
			???
FINISHED	FINE	2021-02-25 10:03	Transforming item to PubMan format
FINISHED	FINE	2021-02-25 10:03	<pre>???<?xml version="1.0" encoding="UTF-8"?> </pre>

• The last import steps of the item can provide information about the errors that caused a failed import.

			  <ec:components xmlns:ec="http://www.escidoc.de/schem ???</ec:components 
FINISHED	FINE	2021-02-25 10:03	Transformation done
FINISHED	FINE	2021-02-25 10:03	Validating item (default rules)
FINISHED	FINE	2021-02-25 10:03	Validation (default rules) was successful
FINISHED	FINE	2021-02-25 10:03	Validating item (release rules)
FINISHED	WARNING	2021-02-25 10:03	Validation (release rules) failed
FINISHED	WARNING	2021-02-25 10:03	If genre is not equal to "Series" or "Journal" or "Other" or "Manuscript" at least one date has to be provided.
FINISHED	FINE	2021-02-25 10:03	Generating PubMan item
FINISHED	FINE	2021-02-25 10:03	<pre>???Local Tag: Testimport_Psych 2021-02- 25 10:03???</pre>
FINISHED	FINE	2021-02-25 10:03	Saving item in repository
FINISHED	FINE	2021-02-25 10:03	Item imported

• You can close the window at the very top by clicking on the X.

### 9.2.4 View imported items

In the import workspace, you can view the individual items of an import by clicking on the import name.

START	MY ITEMS WO	RKSPACES SUB	MISSION BASK	(ET (0) TOOLS		
QA WORKSPACE IMPORT WORKSPACE BATCH PROCESSING IMPORT WORKSPACE BATCH PROCESSING						
Status	Import	Format	Started <b>V</b>	Finished	Details	Actions
FINISHED	Testimport_Psych	WOS	2021-02-25 10:03	2021-02-25 10:04	View details	Remove Delete Release
FINISHED	WoS	WOS	2020-12-02 13:07	2021-02-24 14:08	View details	Remove

The "My Items" area will open, and all imported items displayed. For more information on navigating in the "My Items" area, see the <u>chapter "My Items - Navigate in My Items"</u>.

START MY ITEMS WORKSPACES SU	JBMISSION BASKET (0) TOOLS	
VIEW FILTER SORT EXPORT ACTIONS State All (except discarded) Import Name Testimport_Psych 2021-02-25 10:00 226 Items (descending sorted by Modification Date)		start / My Items
25 ▼ per page     I ◀ ◀ Previous     1       State     ▶ Expand all	L 2 3 4 5 6 7 Next <b>&gt;</b>	1 of 10
Pending Methodological challenges in More Creators Hulsb Dates Public	o constructing DNA methylation risk scores berg, Marcel; Czamara, Darina shed in Print: 2020 nal Article	
Pending More Creators Leidn Dates Public	ring hedonic overeating can be reinstated by act naa, Este; Gazea, Mary; Patchev, Alexandre V.; Pissioti, Anna shed Online: 2020 nal Article	

Attention: The filter in "My Items" is set to show the clicked import items by default. If you select another name in the drop-down menu of the "Import Name" field, the items of this import will be displayed.

### 9.2.5 Release imported items

After the import into PubMan, the items initially have the status "pending". To release the items after verification, proceed as follows:

- Open the import workspace.
- Click on "Release" in the "Actions"-column.

Status	Import	Format	Started	•	Finished	Details	Actions	
<b>(</b> *1	Endnote	EndNote	2021-04-06 11:45		2021-04-06 11:48	View details	Remove Release	Delete
FINISHED								

The import status temporarily changes to "Pending". The release progress is displayed in percent. The actions are temporarily not displayed.

QA WORKS	PACE IMPORT WORKS	PACE BATCH PROCES	SING		· · · ·	ms / Import Workspace
Status	Import	Format	Started <b>V</b>	Finished	Details	Actions
14% - PENDING	Endnote	EndNote	2021-04-06 11:45		View details	

After release, the actions are displayed, and the status is set to "Finished" again. The exclamation mark indicates that the import was released.

s	itatus	Import	Format	Started	V	Finished	Details	Actions	
	FINISHED	Endnote	EndNote	2021-04-06 11:45		2021-04-08 09:23	View details	Remove Delete Release	

Attention: The items are only indexed after they have been released. Indexing is a requirement for the items to be retrievable via search.

### 9.2.6 Delete imported items

If you do not want to transfer the imported into PubMan, you can delete them:

- Open the Import Workspace.
- Click on "Delete" in the "Actions"-column.

1 You can only delete imported items as long they are not released.

<u>QA WORK</u>	SPACE IMPORT WORK	SPACE BATCH PROCES	SING			Norkspace
Status	Import	Format	Started 🔻	Finished	Details	Actions
FINISHED	Endnote_Test	EndNote	2021-04-08 11:13	2021-04-08 11:13	View details	Remove Delete Release

The import status temporarily changes to "Pending". The actions are temporarily not displayed.

QA WORKS	PACE IMPORT WORKS		1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 -	orkspace		
Status	Import	Format	Started	Finished	Details	Actions
14% - PENDING	Endnote	EndNote	2021-04-06 11:45		View details	

After all items have been deleted, the only possible action left is "Remove". The import status is again set to "Finished".

<b>[</b> *]	WoS	WOS	2020-12-02 13:07	2021-02-24 14:08	View details	Remove
FINISHED						

Attention: After deleting, please check whether all items have been completely deleted. To do so, view them in the "My Items" area using the filter. For further information, please refer to the <u>chapter "My Items - Filter items in My Items"</u>.

### 9.2.7 Remove import

Removing the import from the import workspace is the last step in reviewing and processing an import. After that, the import no longer appears in the Import area, and releasing, editing, and deleting the import is only possible by opening the individual items. Also, the import no longer appears in the drop-down menu of the "Import" filter in my "My Items".

When removing an import, the imported items are retained if they were not previously removed via "Delete". To remove an import from the Import area after it has been reviewed and processed, follow these steps:

- Open the Import Workspace.
- Click on "Remove" in the "Actions"-column. The import will be removed from the import area.



# 9.3 Batch Processing

Batch processing allows you to process many items at the same time - in one batch.

The possible actions can be divided into different categories, such as deleting items, assigning tags or changing the context, etc. The function is generally available to all PubMan accounts with "Moderator" permissions. Users only can edit items if their account has the corresponding permissions.

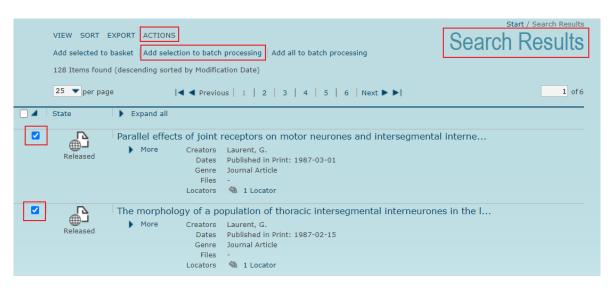
START MY ITEMS	WORKSPACES SUBMISSION BASKET	(0) TOOLS
VIEW SORT EXPORT AC	TIONS PROTOCOL	My Items / Workspaces / Batch processing
The selected action will be e	xecuted on all publications currently stored in the worksp	ace.
Most actions are associated	with a regular "save" operation. Please note, that the stat	te of each item will change accordingly.
Change item s	tate	
Delete	The items will be deleted, if their current state all	lows it
Submit	The items will be submitted if, their current state	and the selected worflow allow it
Send bac rework	k to The items will be sent back to rework, if their cur	rent state and the selected worflow allow it
Release	The items will be released, if their current state a	nd the selected worflow allow it
Withdraw	The items will be discarded, if their current state	allows it
Change contex	kt	
Change c		f their genre is admitted there, too anck Digital Library STANDARD × anck Digital Library STANDARD ×

### 9.3.1 Add to Batch Processing

There are multiple ways to add items to the batch processing. In general, items can be added from the list view (1.) and the detailed view (2.). The batch processing function can be found in the header under "Actions". The previous function "Add to basket" is also available there.

#### (1.) List view

• You can select the needed items with a checkmark on all search result pages and then add them to the batch processing.



• Alternatively, you can add the entire search result with one click (regardless of the maximum number of matches per page displayed).

Add selected to	KPORT ACTIONS         asket   Add selection to batch processing         Add all to batch         (descending sorted by Modification Date)         a           < Previous   1   2   3   4	
State	Expand all	
Released	Parallel effects of joint receptors on motor ne More Creators Laurent, G. Dates Published in Print: 1987-0: Genre Journal Article Files - Locators 🎕 1 Locator	-
Released	The morphology of a population of thoracic in More Creators Laurent, G. Dates Published in Print: 1987-0: Genre Journal Article Files - Locators 🌯 1 Locator	2

• In the other lists ("My Items", "QA Workspace") the function mentioned above, "Add all," is not available. Here, only individual items can be selected by a checkmark.

Add selecte	TER SORT EXPORT ACTI ad to basket   <u>Add selection</u> (descending sorted by Modif	to batch processing	Workspaces / Batch processing / My Items My Items
25 💌 pe	er page 🛛 🖂 🖣	Previous   1   2   3   4   5   Next ▶ ▶	<b>1</b> of 5
State	Expand all		
Release	d More C	f joint receptors on motor neurones and intersed reators Laurent, G. Dates Published in Print: 1987-03-01 Genre Journal Article Files - ocators 🎕 1 Locator	gmental interne
Release	d More C	of a population of thoracic intersegmental intern reators Laurent, G. Dates Published in Print: 1987-02-15 Genre Journal Article Files - ocators 🚳 1 Locator	neurones in the I

#### (2.) Detailed view

Also in the detailed view ("Overview" or "Details"), publications can be selected or removed from batch processing. The "Add to batch processing" function can be found in the header.

ITEM /	CTIONS EXPORT				Search Results / View item /	Item Summary
Edit	Discard Use item as ter	nplate Add to Basket	Add to Batch processing			пет
Conte: Create Last n	: 'item_3264738_1'. :: 'PubMan Test Collectio I by 'Stefanie Andergass dified by '' 2021-04- dessage: Batch (submit	en' 2021-04-06 11:4 06 11:48	5			
			Sur	nmary Details	Release History   Statistics   Log	Local Tags
Relea			t receptors on l interneurones			_
MPS	-Authors	Fullt	ext (public)		pplementary Material ublic)	챂

The amount of selected items for the batch processing will be displayed. (See <u>chapter "Batch</u> <u>Processing Workspace"</u>)

In general, all selected items are transferred to the batch processing. The account permissions and other requirements are only specifically checked when batch operations are performed.

Exception: Items that are not allowed to be seen/edited by the current user in their most recent version are not transferred. In this case, you will receive a message from the system.

The maximum number of items in the batch processing workspace is 2800 items.

### 9.3.2 Batch Processing Workspace

You can access the "Batch processing" area under "Workspaces" in the header. The number of items currently selected for batch processing is displayed in parentheses.

START MY	ITEMS WORKSPACES SUBMISSION BASKET (0)	TOOLS
QA WORKSPACE	IMPORT WORKSPACE BATCH PROCESSING	Advanced Search / Search Results / Workspaces
Please choose a	workspace to edit the items.	
	QA Workspace In this area, moderators can view and work on all of their institute's publications. You have the opportunity to modify items, to send them bar to the depositor for rework or to release them. Publications in status "pending" or "discarded" are not available at this point.	ck
	Import Workspace Here you can review and maintain your multiple imports into PubMan. Th items included in each import can be deleted or released via batch operations. Batch Processing (81) Here you can edit multiple publications at once	le

After opening the batch processing workspace, all selected items for batch processing are displayed as a list. By unticking individual checkmarks, you can remove them from the list again. Note: This list exists only for the duration of the current user session: If you log out or the session expires after several hours without activity, the list will be empty again.



### 9.3.3 Actions

In the navigation bar under "Actions", the possible batch processing actions are available.

These include: (1) Change record status (2) Change context (3) Add or replace local tags

- (4) Change genre
- (5) Change metadata

Only one action can be performed per step. The actions are executed for all listed items in the batch area (regardless of any checkmarks), as long as permissions and basic requirements allow this.

To execute an action, first set the desired parameters on the right and then click on the particular title of the action on the left (see Fig.)

VIEW SORT EXPORT	ACTIONS PROTOCOL		My Items / Workspaces / Batch processing Batch processing
The selected action will	be executed on all publicat	ions currently stored in the workspace.	
Most actions are associa	ated with a regular "save" o	operation. Please note, that the state of each ite	em will change accordingly.
Change iter	n state		
Delet	te The items will I	be deleted, if their current state allows it	
Subr	nit The items will I	be submitted if, their current state and the sele	cted worflow allow it
Send		be sent back to rework, if their current state an	d the selected worflow allow it
Relea	ase The items will I	be released, if their current state and the select	ted worflow allow it
With	draw The items will I	be discarded, if their current state allows it	
Change cor	ntext		
Action  Chan	ge context The items will I Previous contex New context	be connected with a new context, if their genre xt Publications of the Max Planck Digital I PubMan Test Collection STANDARD	

All actions lead to a "saving" of the data. The status of the items changes accordingly. There is an exception when changing the item state, here the specified target state will be applied.

Attention: After clicking on the relevant action, it will be executed **without further verification** through a pop-up window. The actions performed are **irreversible**.

For all actions that specifically change the item state, a version comment with reference to the batch operation and timestamp is automatically set.

A local tag with reference to the batch operation and timestamp is automatically set for all other actions.

### 9.3.3.1 Change item state

Possible actions when changing the item state in the batch processing:

- Delete
- Submit
- Send back to rework
- Release
- Withdraw

Chang	e item state	
	Delete	The items will be deleted, if their current state allows it
	Submit	The items will be submitted if, their current state and the selected worflow allow it
	Send back to rework	The items will be sent back to rework, if their current state and the selected worflow allow it
	Release	The items will be released, if their current state and the selected worflow allow it
	Withdraw	The items will be discarded, if their current state allows it

All actions lead to a "saving" of the data. After clicking on the relevant action, it will be executed **without further verification** through a pop-up window. The actions performed are **irreversible**.

### 9.3.3.2 Change context

To change the context of items in the batch processing, select the previous context (all items selected for batch processing have in common) and then the desired context. By clicking on "Change context", the action will be executed. The suggested contexts depend on your moderator permissions.

Change of	context		
- Change e	JUITCAL		
C	hange context. The items will be conn	ected with a new context, if their genre is admitted there, too	
	Previous context	Publications of the Max Planck Digital Library STANDARD	~
	New context	PubMan Test Collection STANDARD	~

All actions lead to a "saving" of the data. After clicking on the relevant action, it will be executed **without further verification** through a pop-up window. The actions performed are **irreversible**.

### 9.3.3.3 Manage local tags

Here you can either:

- Add one or more ("+" button) local tags in addition to any tags that may be assigned already.
- Or **replace** already assigned tags: in this case, you must specify the tag to be replaced and the desired new value. The old value must precisely match the values in the publications: Upper/lower case, special characters, umlauts must match exactly. Truncation is not possible. If you leave the "Target" field empty, you can also **delete** certain tags.

Local	tags		
	Add	The following tags will be added to all items open access ①	
	Replace	Certain tags will be replaced within the items Tag to replace Replacing Tag	

### 9.3.3.4 Change genre

The previous and the desired new publication type must be selected.

The drop-down menus contain all existing genres: Therefore, error messages may occur during the action if the corresponding target genre is not activated in the respective context.

Add	The following tags will be a	added to all items		$\oplus$
Replace	Certain tags will be replace Tag to replace Replacing Tag	ed within the items		
Change Genre				
Change genre	The items will be transform Please note that all met automatically!			ew genre will be deleted
	Genre to be replaced	Preprint	~	
	Replacing genre	Review Article	~	
	Degree type	- 🗸		
Metadata				
Files				

When changing the genre to "Thesis", additionally the type of degree must be defined. In PubMan, each genre has a set of metadata assigned. Please note that all metadata fields that are not enabled for the respective new genre will automatically be deleted!

Attention: Please also note that it will cause problems if you change an item that currently has **no source** to a publication type that must have a source: e.g., a paper (without source) to a journal article. Depending on the initial status of the respective item, either an error message will be displayed, or the genre will be changed, but you will then no longer be able to set, release, etc., this item through batch processing. In these cases, sources (at least one title and the genre of the source) need to be added manually to all affected items.

### 9.3.3.5 Change metadata

#### Files

**Visibility**: The previous and the desired new visibility must be set. If the value is changed to "restricted", the corresponding IP range is automatically defined based on the IP of the currently accessing user. If this IP does not match any institute on the list, the field remains empty. In both cases, the IP range can be specified in a further step (see below).

**Content Category**: The previous and the desired new content category must be set. All files for which the old value applies will be changed accordingly.

**IP ranges**: All files with the visibility "restricted" get one or more new IP range(s) assigned. All previously assigned values will be overwritten. Multiple ranges can be selected ("+" button).

Metadal	a	
	/isibility The visibility of files will be changed as follows Visibility to be replaced Privat ✓ Replacing visibility Eingeschränkt ✓	
	Content The content category of files will be changed as follows Content category to be replaced Preprint Replacing content category Postprint Po	
L	P ranges All files with the visibility "restricted" will be assigned to the following IP Range(s) Replacing IP Range Max Planck Digital Library, MMDL	~

#### **External References**

**Content categoy**: The previous and the desired new content category must be set. All files for which the old value applies will be changed accordingly.

Exte	rnal Reference	5			
	Content category	The content category of file locate Content category to be replaced Replacing content category	Preprint Postprint	follows	
ORCID ID					
ORCID ID	overwritte https://or	D ID stored in CoNE for the se n. cid.org/0000-0002-2661-8243 iichael (Max Planck Digital Libra	2		. Any existing values will be
ORCID ID					
ORCID ID	overwritter	DID stored in CoNE for the se n. chael (Max Planck Digital Libr			s. Any existing values will be ★ ☆☆ま©

**ORCID ID:** You can add an ORCID ID stored in CoNE for individual persosn in the selected records. To do this, search for the desired person and select them in the autosuggest list. The D-symbol indicates whether an ORCID ID is stored in CoNE for this person. Alternatively, you can search for the ORCID ID and select the correct person in the autosuggest list.

#### Publication

Publication		
Review type	The review type in all items will b	ne channed as follows
nerer cype	Review types to be replaced Replacing review type	Keine Begutachtung V Expertenbegutachtung V
Add keywords	New keywords will be added to a	
Add Reywords	Additional keywords anthro	
Replace		the items. You can select between the complete overwriting of all previous
keywords	contents and the targeted replac	
		ECIFIC VALUE V
		logy
	Replacing keyword(s) na	nobiology

**Review type**: The previous and the desired new type of review type must be set. All items for which the old value applies are changed accordingly.

Add keywords: New keywords will be added to all items. If values are already assigned, the new keywords are added additionally.

#### **Replace keywords :**

• *All keywords* : All existing values, if any, will be overwritten with the desired new value(s). Deletion of all keywords by an empty entry field is possible.

• *Single keywords:* Single values of already existing keywords can be replaced individually. The previous value need to match the values in the publications. This includes upper/lower case, special characters and umlauts.Truncation is not possible. This means: Only complete terms can be replaced, which are recognizable as single values by separators (comma, semicolon) within the keyword field. Multi-word groups must be entirely entered in the field for the previous value and can only be replaced as a whole. Deletiion of a previous value by an empty entry field is possible.

#### Source

Source	
Change genre	The genre of existing sources will be changed within the items Genre to be replaced
Adjust Edition	???BatchWorkspace_IblActions_changeMetadata_source_editionDesc???     Ist or 2nd sources?     Replacing value
Add identifier	New Identifiers will be added in the existing sources 1st or 2nd sources? Type of the ID Value of additional ID
Replace identifier	The values of specific identifiers will be replaced within the sources       1st or 2nd sources?     1 •       Type of the ID     •       Value of ID to be replaced     •

**Change genre**: For all publications with a source, the genre of the first source will be changed from one defined value to another.

**Adjust Edition**: A new value will be entered in all publications that have a source and for which the "Edition" field is permitted for the genre. Any existing values will be overwritten. It must be specified whether the changes should be applied to the first or the second source. Deletion of all previous values by an empty target field is possible.

Source	
Change genre	The genre of existing sources will be changed within the items Genre to be replaced
Adjust Edition	???BatchWorkspace_blActions_changeMetadata_source_editionDesc??? 1st or 2nd sources?
Add identifier	New Identifiers will be added in the existing sources 1st or 2nd sources? Type of the ID Value of additional ID
Replace identifier	The values of specific identifiers will be replaced within the sources          1st or 2nd sources?       1 •         Type of the ID       -         Value of ID to be replaced       •         Value of replacing ID       •

Add identifier: An additional ID is added to all publications with a source. Type and value of the new ID must be specified. It must be specified whether the changes should be made in the first or the second source.

**Replace identifier:** For all publications with a source, a specific ID is replaced by a new value. The type and value of the previous ID, as well as the desired new value of the ID must be specified. The old value must precisely match the values in the publications: Upper/lower case, special characters, umlauts must match exactly. Truncation is not possible. It must be specified whether the changes should be made in the first or the second source. Deleting IDs by an empty target field is possible.

### 9.3.4 Protocol

The "Protocol" button appears in the navigation menu next to "Actions" once a batch processing action has been completed.

The header displays the number of successfully adjusted items and, if applicable, also the number of items that were not adjusted due to error messages.

Information about the last completed action is always displayed here.

Fill batch	ORT EXPORT ACTIONS PROTOCOL with all items from the log   Fill batch with errors only	Start / Workspaces / Batch processing Batch processing
Protocol		
Status	Title	Message
SUCCESS	A population of ascending intersegmental interneurones in the locust with mechanosensory inputs from a hind leg	Publication was adjusted successfully.
SUCCESS	Parallel effects of joint receptors on motor neurones and intersegmental interneurones in the locust	Publication was adjusted successfully.
SUCCESS	Proprioceptive inputs to nonspiking local interneurons contribute to local reflexes of a locust hindleg	Publication was adjusted successfully.
SUCCESS	The morphology of a population of thoracic intersegmental interneurones in the locust	Publication was adjusted successfully.

Listed are all items with:

- Status ("Success" or "Error"),
- Title of the publication (clickable)
- a message about the action (an error message, if applicable).

	ORT EXPORT ACTIONS PROTOCOL with all items from the log   Fill batch with errors only	Batch processing
Status	Title	Message
ERROR	A population of ascending intersegmental interneurones in the locust with mechanosensory inputs from a hind leg	The given initial value does not match the value in the publication metadata.
ERROR	Parallel effects of joint receptors on motor neurones and intersegmental interneurones in the locust	The given initial value does not match the value in the publication metadata.
ERROR	Proprioceptive inputs to nonspiking local interneurons contribute to local reflexes of a locust hindleg	The given initial value does not match the value in the publication metadata.
ERROR	The morphology of a population of thoracic intersegmental interneurones in the locust	The given initial value does not match the value in the publication metadata.

This list is retained regardless of a user session and can be viewed again at the next login. Only when a new action has been completed the protocol will be overwritten with the new values.

	EXPORT ACTIONS PROTOCOL all items from the log Fill batch with errors only	Batch processing
Status	Title	Message
ERROR	A population of ascending intersegmental interneurones in the locust with mechanosensory inputs from a hind leg	The given initial value does not match the value in the publication metadata.
ERROR	Parallel effects of joint receptors on motor neurones and intersegmental interneurones in the locust	The given initial value does not match the value in the publication metadata.
ERROR	Proprioceptive inputs to nonspiking local interneurons contribute to local reflexes of a locust hindleg	The given initial value does not match the value in the publication metadata.
ERROR	The morphology of a population of thoracic intersegmental interneurones in the locust	The given initial value does not match the value in the publication metadata.

Via buttons in the header either...

- All items of the last action, or
- only the items that have not been changed due to an error message

... can be reloaded into the list of the batch processing.

All items that may have already been newly selected for the batch area are not on the list.

# 9.4 Yearbook Area

Note for users of the Max Planck Society: As of April 2020, the yearbook is no longer generated via the yearbook area. All released items are automatically exported to the MPG website for the yearbook lists.

# 10. Submission

Publications can be entered manually or imported from other systems.

START MY	ITEMS WORKSPACES SUBMISSION BASKET (0)	TOOLS
EASY FULL FE	TCH IMPORT	Start / Start submission Submission Method
	EASY Using the simple submission one can enter stepwise information on a publication. At the end of the wizard one can save the item or switch to the full submission mask to add more details.	
	FULL The full submission offers a genre specific entry mask for entering reference data. Additionally one or more full texts can be uploaded and information on externally stored data (e.g. Supplementary Material) can be specified.	
	FETCH This method allows you to fetch metadata and full text(s) from other systems like arXiv or Crossref.	
	IMPORT This method allows you to import multiple items in a structured format (e.g. EndNote, BibTex).	

# 10.1 Open Access Overview

In PubMan, it is possible to assign an Open Acces (OA) status to every publicly accessible file and every external reference. This assignment is particularly relevant in the case of journal articles. When making a determination for an assignment, it is generally necessary to refer to the respective OA status at the time of input.

In this section, the different OA status symbols are explained. For more information on entering Open Access details, see the <u>chapter "Enter metadata for full text"</u> and "<u>Add file</u> <u>locators</u>".

1. Open Access gold:



Scholarly works and content immediately available to the public from the publisher's - or other website at the time of publication. These are for example articles in a journal listed in the Directory of Open Access Journals (DOAJ) as well as monographs, collective works, conference proceedings, etc., or contributions to these. This category can also be used to provide more detailed information by adding local tags, such as "OA diamond" or "OA S2O" (subscribe to open).

#### 2. Open Access hybrid:



The Open-Access-article in a subscription-based journal is usually immediately available from the publisher's website. This also applies to monographs, collected works,

conference proceedings, etc., or articles in closed-access publications that are publicly accessible on the publisher's site or other website upon charge-based activation.

#### 3. Open Access green:



The publication (e.g., secondary publication/open access archiving/selfarchiving) of a version of a scholarly work is available (e.g., after an embargo) on a repository/website/etc. This includes preprints and postprints of scholarly articles, as well as, e.g., monographs, edited volumes, research reports, conference proceedings, or contributions to them. Publication can take place in advance, at the same time as, or after.

#### 4. Open Access miscellaneous:



All forms of open access publications that cannot be clearly assigned to the other categories can be classified here. This category can also be used to provide more detailed information by adding <u>local tags</u>, such as "OA bronze".

#### 5. Open Access not specified:



The Open Access status of a document is unknown. Aditionally, this is the default entry for all added public files and external references.

#### 6. Closed Access:

Input relevant only for external references: The linked document is not freely accessible and is typically behind a paywall.

Attention: All files and external refernces entered into PubMan before the introduction of the OA feature are automatically marked with the "Open Access not specified" status as long as this is not manually adjusted.

## 10.2 Genre overview

Genre	German Genre Name	Description
Blog Post	Blogbeitrag	A contribution or an article posted on a weblog or a similar website.
Book	Buch	Either an authored or edited book. A book is defined as already published or intended to be published (publication data already available).
Book Chapter	Buchkapitel	A part of a book.
Book Review	Rezension	A book review is a documented and published form of criticism. The contents of scientific findings are described, analyzed and evaluated. A book review includes bibliographic information, a brief summary of the content and an evaluation/recommendation of the reviewer.
Case Note	Entscheidungsanmerkung	Annotation to a court decision.

Case Study	Fallbesprechung	The case study is an important instrument in judicial education and is often provided in form of special courses. In addition case studies can occur as publications containing explanations of the application of the law by the means of an authentic case. The targeted audience mostly consists of students.
Collected Edition	Sammelwerk	A collected edition is a textbook edited by a publisher. Multiple authors deliver articles about a certain topic. In case of extensive topics, the collected edition can consist of multiple volumes. A special form of collected editions are encyclopedia or proceedings.
Commentary	Kommentar	Commentaries of a law can occur in form of extensive multiple-volume editions as well as in form of short- commentaries. Some commentaries, that have continually been published for years may become commonly known under the name of its original publisher/author. In this case it may be useful to also enter this publisher/author even though he is not in that function anymore.
Conference Paper	Konferenzbeitrag	Written composition of a presentation at a conference. It might be published within proceedings.
Conference Report	Konferenzbericht	Documentation of a conference, workshop, meeting or other kinds of event.
Contribution to Collected Edition	Beitrag in Sammelwerk	A collected edition is a textbook edited by a publisher. Multiple authors deliver articles about a certain topic. In case of extensive topics, the collected edition can consist of multiple volumes. A special form of collected editions are encyclopedia or proceedings.
Contribution to Commentary	Beitrag in Kommentar	Commentaries of a law can occur in form of extensive multiple-volume editions as well as in form of short- commentaries. Some commentaries, that have continually been published for years may become commonly known under the name of its original publisher/author. In this case, it may be useful to also enter this publisher/author even though he is not in that function anymore.
Contribution to Encyclopedia	Beitrag in Lexikon	An encyclopedia is a type of reference work, a compendium holding information from either all branches of knowledge or a particular branch of knowledge. It is divided into articles. Unlike a dictionary which is centered on linguistic, etymological and usage aspects of words, instead, each encyclopedia article's subject is a single concept.
Contribution to Festschrift	Beitrag in Festschrift	A Festschrift is a book honoring a respected academic and presented during his or her lifetime. The term, borrowed from German, could be translated as celebration publication or celebratory (piece of) writing. A comparable book presented posthumously is called a Gedenkschrift (memorial publication).
Contribution to Handbook	Beitrag in Handbuch	A handbook is a teamwork of several authors, which describes the matter of a science discipline or major subject area by reference to relevant literature in

		detail and coherently. Handbooks are often published in several volumes.
Data Publication	Datenpublikation	Closed research dataset published in a data journal or repository and assigned its own persistent identifier (e.g., DOI).
Editorial	Editorial	An editorial is an introductory article which is published at the beginning of a journal issue.
Encyclopedia	Lexikon	An encyclopedia is a type of reference work, a compendium holding information from either all branches of knowledge or a particular branch of knowledge. It is divided into articles. Unlike a dictionary which is centred on linguistic, etymological and usage aspects of words, instead, each encyclopedia article's subject is a single concept.
Festschrift	Festschrift	A Festschrift is a book honoring a respected academic and presented during his or her lifetime. The term, borrowed from German, could be translated as celebration publication or celebratory (piece of) writing. A comparable book presented posthumously is called a Gedenkschrift (memorial publication).
Film	Film	A film is a series of moving pictures.
Handbook	Handbuch	A handbook is a teamwork of several authors, which describes the matter of a science discipline or major subject area by reference to relevant literature in detail and coherently. Handbooks are often published in several volumes.
Interview	Interview	Structured conversation including questions and answers. May be available in printed form or an audio or video format.
Issue	Heft	An issue is a part of a journal.
Journal	Zeitschrift	A regularly published scientific resp. scholarly journal.
(Journal) Article	Zeitschriftenartikel	An intellectually closed text, which is published in or submitted to a print or e-journal, magazine, special issue or repository. All articles have passed or will pass some editorial review and/or have been peer- reviewed.
Magazine Article	Magazinartikel	Journal article that is not exclusively oriented towards scientific purposes and is designed for a broader readership.
Manual	Leitfaden	A manual is a guideline that aims to streamline particular processes. Guidelines are not binding and are not enforced.
Manuscript	Manuskript	A handwritten or typewritten manuscript.
Meeting Abstract	Meeting Abstract	A meeting abstract is a brief summary of a conference presentation.
Monograph	Monografie	A monograph is a comprehensive and complete scientific work on an individual object, i.e. a single

		work, a particular problem, or a single personality. A monograph is normally written by a single author.
Multi-Volume	Mehrbändiges Werk	A multi-volume work consists of a limited number of physically separate parts. These parts are arranged by numerical, alphabetical or alphanumeric descriptions, often initiated with a formal term e.g. volume, part or other language equivalents.
Newspaper	Zeitung	Newspapers are typically expected to meet four criteria: Publicity: Its contents are reasonably accessible to the public. Periodicity: It is published at regular intervals, at least on a weekly basis. Currency: Its information is up to date. Universality: It covers a range of topics.
Newspaper Article	Zeitungsartikel	Newspapers are typically expected to meet four criteria: Publicity: Its contents are reasonably accessible to the public. Periodicity: It is published at regular intervals, at least on a weekly basis. Currency: Its information is up to date. Universality: It covers a range of topics.
Opinion	Stellungname	The opinion is a written response to drafts of laws, directives, etc. and serves to answer questions that are asked in this regard by the authorities that have such laws, directives, etc. developed.
Other	Sonstige	This genre should be used for any resource you cannot assign to any existing genre type.
Paper	Forschungspapier	A paper reflects innovative concepts and ideas within a discipline in order to stimulate new research and challenges current theories in science. It does not necessarily have to be a concluded contribution based on scientific research. In comparison to an article, a paper does not have to meet the editorial standards for publishing and citing.
Patent	Patent	A patent is an official document about an invention or process protected by a sovereign state.
Poster	Poster	A visual stand-alone display of research results at a conference.
Preprint	Preprint	Version of a scholarly paper prior to formal peer- review and its publication in a journal. It often is publicly available before (and after) the paper is published in a journal.
Pre- Registration Paper		A research protocol document created prior to conducting the actual research. It may include the research hypotheses, analysis plan, methods, parameters, and further information on the planned research process. The document is made publicly available on a website in a non-modifiable way (including timestamps) before starting data collection.
Proceedings	Konferenzband	Collection of conference papers and talks, from a conference or a series of conferences.

Registered Report		Publication format used by journals. The two-stage publication process includes pre-registration of methods and analyses. These are then subjected to a peer-review process prior to research (data collection) being conducted.
Report	Bericht	A document which presents results and/or progress of development work. Reports are often published by the funding organisation or by the academic institution where the work has been carried out. Reports can be defined as grey/informal literature, because they are in most cases not published formally.
Review Article	Review Article	Special type of article that summarizes the current state of understanding on a topic. It <b>does not apply to</b> <b>a normal peer-reviewed article</b> . It may come in the form of a literature review or, more specifically, a systematic review. Some "Review Journals" specialize in this type of article.
Series	Reihe	A bundle of regularly published items.
Software	Software	Any information processed by computer systems.
Talk	Vortrag	A manuscript or recording of a presentation or talk. It is characterised by the event where it is held.
Teaching	Lehrmaterial	Any kind of material that is used in connection with teaching and education.
Thesis	Hochschulschrift	A text or aggregation of items to reach a certain degree, e.g. PhD, German Magister, Master, etc.

# 10.3 Simple submission

There are two ways of entering publications into PuRe: The **simple** and the **full** submission. In the simple submission, data is entered in three steps, each step combining several input fields. This way of data entry is aimed at scientists who enter their publications in PuRe themselves.

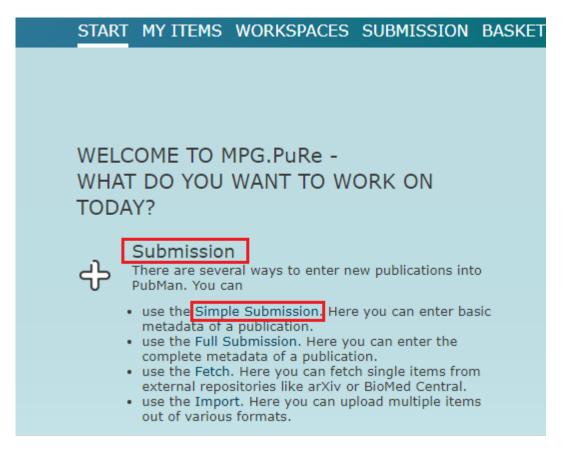
Attention: The data entry is only available if the user role "Depositor" has been assigned to the logged-in user.

## 10.3.1 Open the simple submission

There are two ways to open the simple submission:

#### 1. Through the home page:

- Log in to PuRe.
- After login the submission section appears.
- Click on the simple submission link.



#### 2. Through the submission button:

- Log in to PuRe.
- Click on the "submission" button in the navigation menu.
- The overview page of the different submission types opens. Select "easy".

START MY ITEMS WORKSPACES SUBMISSION BASKET (0)	
EASY FULL FETCH IMPORT	Submission Method
<b>EASY</b> Using the simple submission one can enter stepwise information on a publication. At the end of the wizard one can save the item or switch to the full submission mask to add more details.	
FULL The full submission offers a genre specific entry mask for entering reference data. Additionally one or more full texts can be uploaded and information on externally stored data (e.g. Supplementary Material) can be specified.	
FETCH This method allows you to fetch metadata and full text(s) from other systems like arXiv or Crossref.	
IMPORT	
This method allows you to import multiple items in a structured format (e.g. EndNote, BibTex).	

#### • Select the context in which the publication should be entered.

EASY FULL FETCH IMPORT	Start / Start submission
Please choose a context for your item.	
External Publications of the Max Planck Digital Library	
This context contains publications that have been submitted by MPDL staff members, but which are not directly affiliated to the MPDL.	
PubMan Test Collection Sandbox collection for test purposes within the productive server. Please do not release any of the items stored in this context!	
Publications of the Max Planck Digital Library	
Productive Context for the Publications of the MPDL	
Back	

• Then the input mask of the simple submission opens.

EASY FULL FET			Start / Start submission
	part of PubMan Test Collection		
Step 1	Step 2	Step 3	
Basic	*Genre	Journal Article 🔻	
	*Title		
File	Save file	+ Add File(s)	
		T Add Tile(3)	
		File URL	
			Upload from URL
File Locators	Save locator	URL	
			Save
* Mandatory field			
	Back Cancel		Next

#### 10.3.2 Data entry in the simple submission

The simple submission mask involves three successive steps.

**Step 1** combines the sections "Basic", "File" and "File Locators". How to enter data in the individual fields is explained in the chapters "Open full submission" and "Remove full texts".

EASY FULL FETCH	IMPORT		Simple Submission
This item will be part o	f PubMan Test Collection	n.	
Step 1	Step 2	Step 3	
Basic	*Genre *Title	Journal Article	
File	Save file	+ Add File(s)	
		File URL	Upload from URL
File Locators	Save locator	URL	Save
* Mandatory field Bac	Cancel		Next

Go to step 2 by clicking on "Next".

**Step 2** combines the sections "Persons & Organizations" and "Content". How to enter data in the individual fields is explained in the relating <u>"Full submission" chapters</u>.

EASY FULL FETCH IMPORT		Start / Start submission	
This item will be part of PubMan Test Collection	on.		
Step 1 🗸 Step 2	Step 3		·
Persons & Organizations			
Add multiple			
	Role Type Family name	Given name OrgNı ⊕⊖	
	Author 🔻 Person 💌		
	Organization	Address	
	1		
hidePersons & Organiz	rations		
Contont			
Free keywords			
Abstract			
* Mandatory field			
Back Cancel		Next	

Afterward, click on the "Next" button.

Step 3 of the simple submission appears. It combines the sections "Details" and "Source".

EASY FULL FETCH IMPORT			Simple Submissio				
This item will be part of PubMa	an Test Collection.						
Step 1 🗸	Ste	p2 🗸	Step 3				
Details	YYY Dati YYY Dati	e published in print Y-MM-DD e accepted Y-MM-DD e modified Y-MM-DD	Date published online YYYY-MM-DD Date submitted YYYY-MM-DD Date created YYYY-MM-DD				
Source	Genre - Title	•					
De	tails of Source Volu						
* Mandatory field Back Car		rt Page	Endpage	add more details now Save			

Attention: Before the next step of the submission, a validation of the mandatory fields takes place. If a mandatory field is blank, a dialog box appears.

# 10.3.3 Add more details in the simple submission

In the simple submission of PuRe, you can add further data which are not required in the entry mask. To do so, click on "add more details now" in step 3 at the bottom right of the simple submission.

EASY FULL FETCH IMPORT		Simple Submission
This item will be part of PubMan Test Co	llection.	
Step 1 🗸	Step 2 🗸	Step 3
Details	* Date published in print YYYY-MM-DD Date accepted YYYY-MM-DD Date modified YYYY-MM-DD	Date published online YYYY-MM-DD Date submitted YYYY-MM-DD Date created YYYY-MM-DD
	enre - 💌	
Details of So	urce Volume	
* Mandatory field Back Cancel	Start Page	Endpage add more details now Save

The entry mask of the full submission appears. In addition to the simple submission, it contains depending on the genre, for instance the fields "Details of Source", "Table of Content", "Review Type", "Identifier", as well as further details about the source. For information on how to navigate within the full submission input mask, see the <u>chapter</u> "Full submission".

## 10.4 Full submission

In the full submission, genre-specific input fields are available. For a better overview, the entry mask is divided into different sections. In comparison to the simple submission, the full submission is intended for data entry by library staff.

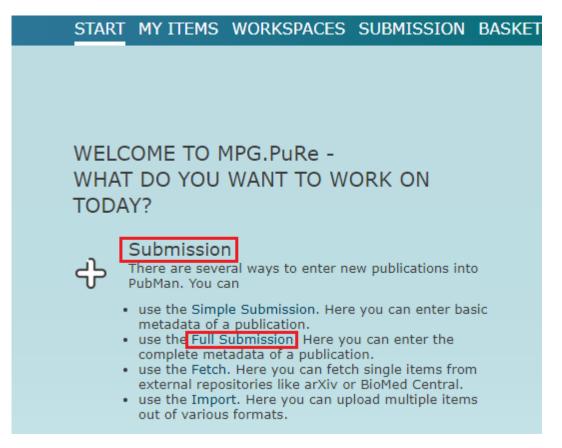
Attention: The data entry is only available if the user role "Depositor" has been assigned to the logged-in user.

## 10.4.1 Open the full submission

There are two ways to open the full submission:

#### 1. Through the home page:

- Log in to PuRe.
- After login the submission section appears.
- Click on the full submission link.



#### 2. Through the submission button:

- Log in to PuRe.
- Click on the "submission" button in the navigation menu.
- The overview page of the different submission types opens. Select "full".

START MY	ITEMS WORKSPACES SUBMISSION BASKET (0)	TOOLS
EASY FULL FE	ETCH IMPORT	Submission Method
	EASY Using the simple submission one can enter stepwise information on a publication. At the end of the wizard one can save the item or switch to the full submission mask to add more details. FULL The full submission offers a genre specific entry mask for entering reference data. Additionally one or more full texts can be uploaded and information on externally stored data (e.g. Supplementary Material) can be specified.	
	FETCH         This method allows you to fetch metadata and full text(s) from other systems like arXiv or Crossref.         IMPORT         This method allows you to import multiple items in a structured format (e.g. EndNote, BibTex).	

#### • Select the context in which the publication should be entered.

EASY FULL FETCH IMPORT	Start / Start submission
Please choose a context for your item.	
External Publications of the Max Planck Digital Library	
This context contains publications that have been submitted by MPDL staff members, but which are not directly affiliated to the MPDL.	
PubMan Test Collection	
Sandbox collection for test purposes within the productive server. Please do not release any of the items stored in this context!	
Publications of the Max Planck Digital Library	
Productive Context for the Publications of the MPDL	
Back	

• The input mask of the full submission opens. It is divided into sections. All fields in bold are mandatory fields.

				Mandatory fie	ds are printed bold
		File File	Locators   Persons & Org	anizations   Content	Details   Source
Basic 📄 hide	Genre Journal Artic	le 🖣	-		
					I
File 📄 hide Sa	ve file 🗕 🕂 Add Fi	le(s)			
	File URL			Up	load from URL
File Locators 🛛 📄 hide Save I	ocator URL			53	ve URL
Persons & Organizations Add multiple					
⊟ hide	Role The Author The F	/pe Family nan erson 🔻	ne Given name	OrgNr	$\oplus \ominus$
	Organizatio	n	Address		$\oplus \ominus$

Attention: In order to be able to save a data record, all mandatory fields must be entered.

## 10.4.2 Navigating in the full submission mask

For easier navigation within the input mask, various links to the respective sections of the mask are available in the upper right corner.

				Mai	ndatory fields are	e printed bold
		File	File Locators	Persons & Organizations	Content Deta	ils   Source
Basic 🖃 hide						
Ge	anre Journal Article		-			
1	Title					
					// ⊕	
File 🖃 hide						
Save	e file					
	+ Add File(	5)				

## 10.4.3 Select a genre

The mandatory field "genre" is located in the basic data section on the upper side of the input mask. To select a genre, proceed as follows:

• Click on the <sup>▼</sup>-icon in the genre field and a drop-down menu appears.

			Ма	ndatory fie	lds are pri	nted bold
	File	File Locators	Persons & Organizations	Content	Details	Source
Basic 📄 hide						
Genre	Journal Article	-				
Title	Journal Article Book Book Chapter Proceedings			// €	)	
File Dide Save file	Conference Paper Talk Conference Report Poster Teaching Thesis					
File Locators 📄 hide	Report Journal Issue			Uţ	load from	URL
Save locator	Series Other Editorial			Sa	ive URL	
Persons & Organizations Add multiple	Contribution to Handbook Contribution to Festschrift Contribution to Commenta Contribution to Collected R	iry				
	Author Verson Verson		Given name O	rgNr	⊕⊖	

• Click on the required genre in the drop-down menu. The selected genre will be applied.

Attention: The available genres are defined by the context. Depending on the selected genre, the fields of the input mask change, so that genre-specific fields are available.

Note for users of the Max Planck repository: To enable specific genres, please contact the PuRe support team.

## 10.4.4 Enter the title of a publication

The title of a publication is a mandatory field and is located in the basic data section of the input mask.

			Man	datory fiel	ds are pri	nted bold
	F	ile   File Locators   F	Persons & Organizations	Content	Details	Source
Basic 📄 hide						
Genre	Journal Article	-			_	
Title						
				_// 🕀		

• Enter the title of the publication in the title field. The title will be displayed.

## 10.4.5 Enter title with superscript and subscript letters

To **superscript** certain letters of the title, proceed as follows:

Enter the title. Enclose the characters you want to superscript with the <sup> and </sup> HTML tags.

Basic 📃 hide		
Genre	Journal Article	
Title	E=mc <sup>2</sup>	
		Ð
	· · · · · · · · · · · · · · · · · · ·	⊿ ♥

• After saving, the parenthesized characters are superscripted.

	Summary Details Log Local Tags	
E=mc <sup>2</sup> Test, T. (2021). E=mc <sup>2</sup> .	Pending	
Contact	Moderator	

To **subcript** certain letters of the title, proceed as follows:

• Enter the title. Enclose the characters you want to subscript with the <sub> and </sub> HTML tags.

Basic 📃 hide				
		Journal Article	<b>•</b>	
	Title	H <sub>2</sub> 0		
				// ⊕

• After saving, the parenthesized characters are subscripted.

	Summary Details Log Local Tags
H <sub>2</sub> O	<b>P</b>
Test, T. (2021). H <sub>2</sub> O.	Pending
Contact	oderator

## 10.4.6 Inserting titles with special characters

To insert titles with special characters, proceed as follows:

• Open the character map e.g. in Windows

퉬 Systemprogramme	
🕘 Aufgabenplanung	Hilfe und Support
💮 Computer	
📇 Datenträgerbereinigung	
ڬ Defragmentierung	
🌠 Editor für benutzerdefinierte Zeio	eic
🥔 Internet Explorer (ohne Add-Ons	ns
🚳 Ressourcenmonitor	
👰 Systeminformationen	
📴 Systemsteuerung	_
ॷ Systemwiederherstellung	=
🚳 Windows-EasyTransfer	
Windows-EasyTransfer-Berichte	e l
Zeichentabelle	
📗 Tablet PC	
鷆 Windows Powe Wählt spezielle Zeic	ichen aus und kopiert diese in Do
Zurück	
Programme/Dateien durchsuchen 🔎	Herunterfahren
Image: Construct of the second sec	ichen aus und kopiert diese in Do

• Select the needed special character by double-clicking on it. The character appears in the "Character selection" field.

27 Z	Zeicl	nent	abe	lle																	x
Sch	nrifta	art:	0	Arial													•		Hi	lfe	
	ε	G	н	j	К	L	đ	2	¢	ďz	ф	ď≱	ts	ţſ	tc	fŋ	ls	Þ	₩	8	•
	ч	પ	h	ĥ	j	r	٦	ł	в	w	У	'	"	6	2		3	c	?	٢	
	<	>	۸	۷	^	~	1	-	1	1		_			:	•	•	¢		•	
	•	-	Ĭ	-	۰	c	~	"	ı	×	¥	1	s	x	٢	1	1	4	4	J	
	L	F	-	=	33		•		>	•	•			~	:	ſ	U+0.	2E5:	Mo	difik	ations
		÷	`	ĺ	^	~	-	-	Ĭ	-		•	•	~	*			"	°	^	
	٤	,	¢	,			-		٦	3	c				_	,	· ·			•	
		د ا	٤		-	_	-	~	-	~	~	_	_	=	~	-	_	/	7		
			_	×	s	=	•	1	~	,	~		-	=		,	~	*	*		
		0	*	¢	•	×				3	•			*		~	-	_	~		-
	Zeichenauswahl:     I     Auswählen     Kopieren       Erweiterte Ansicht     U+02E5: Modifikationszeichen extra hohe Klanglinie																				

- Click "Copy" to copy the character to the clipboard. Right-click in the title field in PuRe and select the "Insert" option.
- Or use the copy & paste function.

The special character will be inserted into the title field.

	File   File Locators   Persons & Organizations   Content   Details   Source
Basic 📄 hide	
Genre Book	
Title	

• Alternatively, you can use a character table from the Internet such as <u>unicode-table.com</u>.

## 10.4.7 Add an alternative title

To add an alternative title to a publication title, proceed as follows:

• Open an additional title field by clicking on the +-icon to the right of the title field. The "Type" and "Title" fields are displayed.

			Mar	ndatory fields are printed bold
		File File Locators	Persons & Organizations	Content Details Source
Basic 📃 hide				
Genre	Journal Article	-		
Title	Test title			
				// ⊕
Alternative Title	Туре	Title		
	- Abbreviation Html			$\checkmark \oplus \Theta$
File 🛛 🔁 hide Save file	Latex MathML Subtitle Other			

 Then select the required "Type" of field. The alternative title types are "Short title", "HTML", "Latex", "MathML", "Subtitle" and "Other".

## 10.4.8 Upload full text from local computer

You can upload full texts from your computer in the "File" section. To do so, proceed as follows:

- Click on the "Upload file(s)" button. The explorer of your operating system opens.
- Select the file you want to upload.
- Click on the "Open" button.
- In the "File" section, various fields for metadata about the full text are displayed. For more information on entering metadata, see the <u>chapter "Enter metadata for full text"</u>.

Basic 🗌 hide	Genre	Journal Article	
	Title	Test	
			// ⊕
File 🕒 hide	Save file	+ Add File(s)	
	_	File URL	Upload from URL

Attention: The file name can <u>not</u> contain a space. URLs as file names are allowed.

Alternatively, you can **drag & drop** the file you would like to upload on the "Add file(s)" button. To do so, proceed as follows:

- Open the explorer of your operating system (e.g., Windows Explorer).
- Left-click on the required file and drag it to the "Add file(s)" button. The file will be uploaded, and the related metadata fields will open.

#### 10.4.9 Upload full text from URL

You can upload full texts from an URL in the file section through the "File URL" field.

Basic 📃 hide	
Genre	Journal Article 🔹
Title	Test
File 🖃 hide	
Save file	+ Add File(s)
	File URL Upload from URL

To do so, proceed as follows:

- Enter the URL (web address) in the "URL" field.
- Click the "Upload from URL" button.
- Various fields for the full text metadata are displayed in the "File" section. For more information about entering metadata, see the next chapter.

Attention: This function is intended to upload resources from the Internet from a specific URL but not to embed a URL. Therefore, the <u>URL ends with a file format</u>, such as .html or .pdf. If this is not the case, you will receive the error message "The file could not be downloaded. Reason: Invalid URL."

## 10.4.10 Enter metadata for full text

After the upload of a full text, several input fields appear for adding metadata to the full text.

File 📄 hide		
	APA PuRe.pdf	
Content category	- 💌	
Properties	Name	
	APA PuRe.pdf	
	Visibility	OA-Status
	Public 🔻	Not specified 💌
	Description	
		Mime type
	1	application/pdf
Rights		
Kights	Copyright Statement	
		Copyright Date
		YYYY-MM-DD
		Θ
	License-URL	
	Select CC License	

To specify the **content category**, click the **\***-icon in the content category field. The drop-down menu is displayed. For a definition of each content category, see the following URL: http://colab.mpdl.mpg.de/mediawiki/ESciDoc\_ContentCategories\_VES.

File 🖃 hide		
	APA PuRe.pdf	
Content category	- 🔻	
Properties	- Code	
	Publisher version	
	Supplementary material Correspondence	OA-Status
	Copyright transfer agreement Abstract	Not specified 🔻
	Postprint	
	Research data Multimedia	
	Preprint	Mime type application/pdf
	Any fulltext Table of contents	
Rights	Copyright Statement	

Click on the corresponding content category and it will be added to the field.

In the "Visibility" field, you can specify for whom the full text should be visible.

 "Public " full texts are visible to everyone who accesses the repository. Additionally, the Open Access (OA) status of the file can be added. An overview of the different OA types can be found in the<u>chapter "Open Access Overview"</u>.

File 📄 hide	APA PuRe.pdf
Content category	Any fulltext
Properties	Name APA PuRe.pdf
	Visibility Public Description OA-Status Not specified Gold Hybrid Green Miscellaneous
Rights	Copyright Statement Copyright Date YYYY-MM-DD
	Dicense-URL
	eselect CC License

- "Private " full texts are only visible to depositor and moderator.
- "Restricted" full texts are visible to certain selected user groups. If you choose "restricted," another drop-down box appears to specify the IP ranges that should have access to the full text. You can also enter an embargo date. The embargo date is informational only and won't be processed by the system.

File 📄 hide Content category Properties	export_pdf (2).pdf Any fulltext Name export_pdf (2).pdf		
	Visibility Restricted ▼ IP Ranges Max Planck Digital Library, MMDL	embargoed till 2021-02-01 ⊕	
Rights	Description	Mime type application/pdf	
Ngilta	Copyright Statement	Copyright Date YYYY-MM-DD	Θ
	License-URL Select CC License		

- Enter a description of the full text in the "Description " field.
- The system automatically fills the "Mime type " field. The mime type is a defined standard that classifies the type of data of the full text.
- The "**Copyright Information**" field is used to enter additional information about the copyright.
- In the "Copyright Date" field, you can enter the date of the copyright.
- In the **License-URL** field, enter the license that should apply to the full text. In PuRe, you can assign a Creative Commons license. You can find further information about licensing of uploaded full texts in the next chapter.

## 10.4.11 Full text licensing

To license full texts, the Creative Commons licenses are implemented in PuRe. To find more information about the Creative Commons licenses, see the following URL: http://do.groativecommons.org/. To add the licenses, presend as follows:

following URL: <u>http://de.creativecommons.org/</u>. To add the licenses, proceed as follows:

Click on the "select CC License" button

File 📄 hide	export_pdf (2).pdf		
Content category	Any fulltext		
Properties	Name export_pdf (2).pdf		
	Visibility Restricted T IP Ranges	embargoed till 2021-02-01 •	
	Max Planck Digital Library, MMDL	U U	
		Mime type application/pdf	
Rights	Copyright Statement		
		Copyright Date YYYY-MM-DD	
	License-URL	∂	
	Concer de livense		

• The Creative Commons license selection menu appears.

License-URL
X Allow Remixing
Prohibit Commercial Use
Require Share-Alike
Jurisdiction of your license: Unported
This work is licensed under a Creative Commons Attribution Unported 3.0 License.
apply

- Select the required attributes by clicking on the relevant checkbox.
- To assign jurisdiction to the license, click the **\***-icon in the "Jurisdiction" field of your license. The countries are displayed in the drop-down menu.

Unported	pixing
Argentina Australia	
Austria	
Belgium	
Brazil	ommercial Use
Bulgaria Canada	
Chile	
China Mainland	
Colombia	hare-Alike
Croatia	
Hungary	
Denmark Finland	
Finland	
Germany	
Israel	
India	nse:
Italy	
Unported	×
This work is license	d under a Creative Commons Attribution Unported 3.0
	License.

- Click on the country for whose jurisdiction the license is to apply.
- Click on the "Apply" button. The selected license will automatically be taken over into the "License" field. Click on the "Apply" button.

#### 10.4.12 Remove full texts

To remove a full text from a record, proceed as follows:

- Start by logging in to PuRe and locating the relevant record, for example, through search. It will be displayed as a search result.
- Click on the title of the record to open the detailed view.
- Then click on "edit", and the editing mask opens.

Attention: You can remove full texts only if you have editing rights, depending on the workflow, state of the record, and assigned user role.

Item ID: 'item_3 Context: 'PubMa Created by 'Stefa	EXPORT Delete Use item as template Add to Basket Add to Batch processing 258015_1'. n Test Collection', Affiliated to: 'Max Planck Digital Library'. anie Andergassen' 2021-01-25 17:01 'Stefanie Andergassen' 2021-01-26 16:36	Item
	Summary   Next ►►	Details Log Local Tags
	Miniature neurotransmission stabilizes synaptic function via tonic suppression of local dendritic protein synthesis	Pending
	Sutton, M. A., Ito, H. T., Cressy, P., Kempf, C., Woo, J. C., & Schuman, E. M. (2006). Miniature neurotransmission stabilizes synaptic function via tonic suppression of local dendritic protein synthesis. <i>Cell</i> , 125(4), 785-99. doi:10.1016/j.cell.2006.03.040.	

Click on the ⊖ minus button on the right of the file section.

	File File Locators Persons & Organizations Content Details Source
Basic 📄 hide	
Genre	Journal Article 🔹
Title	Miniature neurotransmission stabilizes synaptic function via tonic
	suppression of local dendritic protein synthesis
File 📄 hide	
Save file	+ Add File(s)
	File URL
	Upload from URL
File Locators 📋 hide	
_	https://www.ncbi.nlm.nih.gov/pubmed/16713568
Content category	Any fulltext
Properties	Name https://www.ncbi.nlm.nih.gov/pubmed/16713566
	https://www.https://infiningov/publicu/10/10000
	Description
	(H)

• The file will be removed.

	File   File Locators   Persons & Organizati	ons   Content   Details   Source
Basic 🖃 hide		
Genre	Journal Article 🔹	
Title	Miniature neurotransmission stabilizes synaptic function via tonic suppression of local dendritic protein synthesis	
		Đ
File 🖃 hide		
Save file	+ Add File(s)	
	File URL	
		Upload from URL
File Locators 🛛 🖃 hide		
Save locator	URL	
		Save URL

• Click "save" to save the changes or "submit" to (re)publish the record.

These changes created a new version of the record without the file. The file is still available in the old version and via the handle-file.

If you want to restrict access to a file, also in previous versions, change the file's visibility to "private". Only you will be able to open the file. The same file in previous versions is also not available for external users then.

#### 10.4.13 Add file locators

In the section "File Locators", you can add **external references** to an item. Any URL prefixed with the protocol "http/s" can be included as an external reference.

To do so, proceed as follows:

- Enter the URL of an external reference in the "File Locators" field.
- Click on "Save URL".

Attention: PuRe does not check the URL for validity. Make sure it is a valid URL before entering it.

File Locators	⊟ hide Save locator	URL https://www.ncbi.nlm.nih.gov/pubmed/16713568	Save URL
		nttps://www.ncbi.nim.nin.gov/pubmed/16/13568	Save UKL
Persons & Organizations	Add multiple		
	i⊐ hide		

#### Various fields for entering metadata are displayed.

File Locators 📔 🖯 hide	
	https://www.ncbi.nlm.nih.gov/pubmed/16713568
Content category	Any fulltext
Properties	Name
	https://www.ncbi.nlm.nih.gov/pubmed/16713568
	Description
	$\oplus \Theta$

• Select a **content category** in the drop-down menu. This field is mandatory.

File Locators 📄 hide			
	https://www.ncbi.nlm.nih.gov/pu	bmed/16713568	
Content category	-		
	-		
Properties	Publisher version		
	Supplementary material	bmed/16713568	
	Correspondence		
	Copyright transfer agreement		
	Preprint		
	Abstract		
	Any fulltext		$\oplus \oplus$
	Postprint		
Persons & Organizations	Table of contents		
Add multiple			
⊢ hide			

• Additionally, you can enter a description of the external reference.

To add another external reference, click the  $\oplus$ -sign to the right of the metadata. Another input field for the "URL" is displayed.

#### 10.4.14 Add person as creator

The persons involved in a publication are entered in the "Persons & Organizations" section. An autosuggest list from **CoNE** supports the entry.

Persons & Organizations		
Add multiple		
😑 hide		
	Role Type Family name Gi	ven name OrgNr
	Author 🔻 Person 🔻	$\bigcirc$
	Organization Ad	Idress
	1	$\oplus \ominus$
	11	h

To add a person as the author, proceed as follows:

• Select a role in the dropdown menu, and it will appear in the "role"-field.

🔁 hide	
Role Type Family name Given name OrgNr	
Author Verson V	$\oplus \ominus$
-	
Artist Address	
1 Author	$\oplus \ominus$
Editor	00
Painter 2	
Illustrator     Photographer	
Free keywords Commentator	
Transcriber	
Advisor	
Translator	
Classification Contributor Value	
Honoree	$\oplus \ominus$
Inventor	
Applicant	

- The type "person" is set as default. To add the type "organization" instead, use the dropdown menu. See more information about how to add an organization in the<u>chapter</u> <u>"Add an organization as affiliation of an creator"</u>.
- Add the last name. If you enter at least two letters, the autosuggest list appears.

A	dd mul	tiple							
Ξ	hide								
			Role	Т	Гуре	Family name	Given name	OrgNi	r
			Author	- <b>-</b> I	Person 🔻	Era	]		$\oplus \ominus$
						Adams, Frank (Max Pla	anck Research Group I	Micro, Na	no, and Molecular Systems, Max F
			Organi	zatio	on	Adams, F. (Max Planc	k Research Group Micro	o, Nano, a	nd Molecular Systems, Max Planck I
			1			Albert, Frank (MPI for I	Human Cognitive and I	Brain Scie	ences, Max Planck Society)
						Albert, Frank W. (MPI	for Human Cognitive ar	nd Brain S	ciences, Max Planck Society)
						Albert, Frank W. (Depa	rtment of Evolutionary	Genetics	, Max Planck Institute for Evolutic
Ξ	hide					Albert, F. (Departmen	t of Evolutionary Genetic	s, Max Pl	anck Institute for Evolutionary Anthrc
		Free keywords				Albert, Frank (Depart	ment of Evolutionary Ge	netics, Ma	x Planck Institute for Evolutionary Ar
						Albert, F. W. (Departm	nent of Evolutionary Gen	etics, Max	Planck Institute for Evolutionary An
						Albert, Frank W. (The L	eipzig School of Huma	an Origins	s (IMPRS), Max Planck Institute for

• If the person you are looking for is available in the autosuggest list, select it with a mouse click. The "Last name" and "First name" fields are filled automatically, as well the "Organization" field. The organizational data stored in CoNE is entered here.

Note: You can shorten the autosuggest list by adding the affiliation of the person you are looking for.

Persons & Organizations Add multiple		
🕀 hide		
	Role Type Family name	Given name OrgNr
	Author 🔻 Person 🔻 Franke	Michael × 1 *¦?≡ ⊕ ⊖
	Organization	Address
	1 Max Planck Digital Library, Max Planck	× ⇔= ⊕⊖
	Society	

- If you want to enter a **person who is not listed in the autosuggest list** and therefore not in CoNE:
  - Enter their name in the "Last Name" and "First Name" fields. Enter the author's organization in the "Organization" field. For more information, see<u>chapter "Add</u> an organization as affiliation of an creator".
  - Link the organization to the author by entering the digit in front of the "Organization" line in the "OrgNr" field.

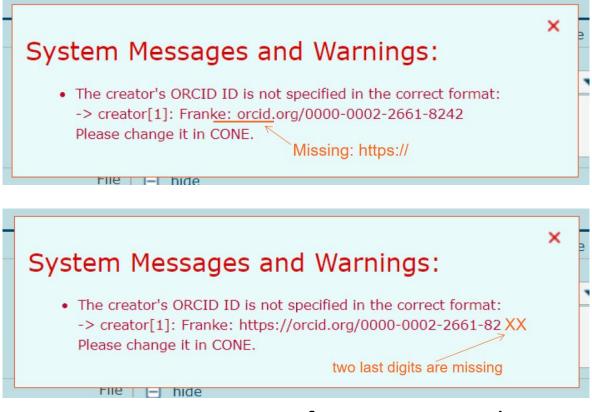
Attention: In order to save a record, at least one person needs to be linked to an organization. For all other persons, a link is not mandatory. Furthermore, it should be noted that a person is not automatically added to the autosuggest list by manual entry. For this purpose, the person needs a separate entry in CoNE. For more information about that topic, please see the <u>chapters</u> "Tools - CoNE".

Persons & Organizations Add multiple hide					
	Role Ty	ype Family name	Given name	0	)rgNr
	Author 🔻 P	Person 🔻 Franke	Michael	× 1	*8 <b>≡</b> ⊡ ⊕ ⊝
	Author 🔻 P	Person 🔻 Boosen	Martin	× 2	*°S≡ ⊕ ⊖
	Author 🔻 P	Person 🔻 Leiminger	Larissa		$\oplus \ominus$
	Organizatio	on	Address		
	1 Max Planck D Society	Digital Library, Max Planck	4	4	×¢∋≞⊕⊝
	2 Collections, N Planck Societ	Max Planck Digital Library, M ety	ax //		×⇔⊒≞⊕⊝

- The ☆パ= -icon appears on the right of the person line. Click on the icon to open the researcher portfolio. For more information about the researcher portfolio, see <u>chapter</u> <u>"Search Browse Browse by person"</u>.
- The organizations are automatically numbered, and the numbers are assigned to the respective authors in the "OrgNr" field. The -symbol appears behind the "Organization" field. Click on the icon to open the organization details. For persons, who are not supposed to have a CoNE entry, organizations can be manually added. The corresponding "OrgNr" than also has to be manually connected to the person. Persons can be connected to more than one organization. For more information about this topic, please see chapter "Link creators to multiple organizations".
- The D-symbol indicates that an ORCID ID has been stored for the person in CoNE and that the ID is now linked to the metadata of this data record. Clicking on the -symbol will take you to the person's ORCID webpage.

Attention: If an ORCID ID is stored incorrectly in CoNE, the data record cannot be submitted. An error message will be displayed. The ORCID ID must be corrected

separately in CoNE before the data record can finally be submitted. You can check wheter all the information is correct before submitting the data record by first validating it.



## 10.4.15 Remove person from entry mask

To remove a person from the entry mask, proceed as follows:

• Click on the x-icon to the right of the person's name.

Add multiple							
🖨 hide	Role	Туре	Family name	Given name		OrgN	Ir
		Person 🔻		M. A.			⊕⊕
	Author 🔻	Person 🔻	' Ito	н. т.			ĐΘ
	Author 🔻	Person 🔻	Cressy	Р.			$\oplus \Theta$
	Author 🔻	Person 🔻	Kempf	С.	×	1	*°≓ ⊕⊝
	Author 🔻	Person 🔻	Woo	J. C.			$\oplus \ominus$
	Author 🔻	Person 🔻	Schuman	E. M.	×	2	*°≓ ⊕⊝
	Organizat		ular Neurobiology,	Address			∞≡ ⊕⊖
			for Medical Research,			î	
			partment, Max rain Research, Max	÷		×	⇔⊒≡ ⊕⊖

• The fields "Family name" and "Given name" will be deleted, as well as the link to CoNE in the backend.

Persons & Organizations   Add multiple		
🖃 hide		
	Role Type Family name	Given name OrgNr
	Author 🔻 Person 🔻 Sutton	м. а. 🕀 🕀
	Author 🔻 Person 🔻 Ito	н. т. 🕀 🕀
	Author  Person  Cressy	P. 🕀 💬
	Author 🔻 Person 💌	1 ⊕⊖
	Author 🔻 Person 🔻 Woo	J. C. ⊕⊖
	Author 🔻 Person 🔻 Schuman	E. M. × 2 ☆☆ = ⊕ ⊖
	Organization	Address
	Department of Molecular Neurobiology, Max Planck Institute for Medical Research,	÷ ↔ ↔ ↔ ↔ ↔ ↔ ↔ ↔
	of hapers haddened beparementer have	÷ ⇔⊖ ⇒

• Also delete the Organisation number in the OrgNR-field.

• Now you can add another person or delete the blank entry field with the important minus-icon to the field's right.

## 10.4.16 Add multiple people as creators

For the entry of publications with many authors, the function "add multiple" simplifies the work. The function is available in the "Persons & Organizations" section.

Attention: No more than about 1500 authors per publication can be specified. If this limit is exceeded, saving or releasing the item is not possible and an error message is displayed. More about this topic can be found at the end of this chapter.

To use the "Add multiple"-function, proceed as follows:

Persons & Organizations	Add multiple		
		Role         Type         Family name         Given name         OrgNr           Author ▼         Person ▼	Э
		Organization Address	Θ

• After clicking on "Add multiple", an entry field appears.

Persons & Organizations	Add multiple	You can copy or write authors to this field which are then parsed and a automatically below after clicking the "Add" button.	
🗎 hid	e	Role Type Family name Given name O Author ▼ Person ▼	rgNr ⊕⊖
	1	Organization Address	$\oplus \ominus$

• Enter the author names in the form "Family name, Given name" or "Given name Family name". A semicolon ";" or line break separates the individual author names from each other. The author names can be added from different source throuch copy&paste.

Persons & Organizations	Add r	automatic Sutton, M	ally below at	fter clicking the "Add" T.; Cressy, P.; Kempf,		
	⊟ hide	Author Author Author Author	Type Person Person Person Person Person Person	Ito Cressy Kempf Woo	Given name M. A. H. T. P. C. J. C. E. M.	OrgNr ⊕ ⊖ ⊕ ⊖ ⊕ ⊖ ⊕ ⊖ ⊕ ⊖ ⊕ ⊖ ⊕ ⊖ ⊕ ⊖
		Organiza	tion		Address	$\oplus \ominus$

- If you want to overwrite previously entered author names, check the "overwrite old" box.
- Click on "add authors" to add the names, which will be displayed as a list.

Attention: The author names won't be automatically linked to an organisation and need to be linked manually.

#### Publications with more than 1500 authors:

In PubMan, no more than <u>approximately</u> 1500 authors can be specified per item. If this limit is exceeded, saving or releasing the item is not possible.

Alternatively, the following author specifications are possible:

- One specifies only the authors of the MPI,
- only the first authors,
- only the authors who are essential for the publication, including first author and last author (for journal articles usually responsible for submitting the publication) or
- one strikes a balance and indicates only the first authors, last authors, and the MPI authors.
- In addition, a complete list of authors can be stored as a PDF.

If the authors have already been added to the item, for example, by an import, they can be removed entirely in the function "Overwrite old":

- Leave the entry field at "Add many" empty, set the checkmark at "overwrite old" and click on "Add authors". The authors will be removed completely.
- Afterward, you can add the relevant authors.

Persons & Organizations		py or write authors to this fiel ally below after clicking the "A			Add authors
🖯 hide	Role	Type Family name	Given name	OrgNr	
		Person 💌 Burrows	М.	1	$\oplus \ominus$
	Author 🔻	Person 🔻 Laurent	G. J.	1	$\oplus \ominus$
	Author 🔻	Person 🔻 Field	L. H.	1	$\oplus \ominus$

#### 10.4.17 Add an organization as affiliation of an

#### creator

When you enter a person as author in PuRe, you can also **manually** add the organization the author is affiliated with. The entry is made in the "Organization" field and is supported by an autosuggest-list. The autosuggest-list contains all organizations for which an entry in PuRe exists.

Add multiple				
🖃 hide				
	Role Typ	e Family name	Given name	OrgNr
	Author 🔻 Per	son 🔻 Doe	J.	$\oplus \ominus$
	Organization		Address	
1	1			$\oplus \ominus$
				//

To add an organisation manually, proceed as follows:

• Enter the organizational name in the field "Organization". After the second entered letter, an autosuggest-list of organizations appears.

Persons & Organizations					
Add multiple					
🖃 hide					
	Role Type Family name Given name OrgNr				
	Author 🔻 Person 👻 Doe J. 🕀 🕤				
	Organization Address				
	Max Planck Research Group Molecular Physiology, Center of Advanced European Studies and Research (caesar), Max				
Content 📃 hide	Max Planck Research Group Neural Circuits, Center of Advanced European Studies and Research (caesar), Max Plan				
Free keywords	Max Planck Institute for Biological Cybernetics, Max Planck Society				
Thee Reywords	Max Planck Research Group Neuroimmunology, Center of Advanced European Studies and Research (caesar), Max P				
	Max Planck Society				
	Max Planck Research Group Neurocognition of Decision Making, Max Planck Institute for Human Development, Max F				
Classification	Max Planck Research Group Auditory Cognition, MPI for Human Cognitive and Brain Sciences, Max Planck Society				
	Max Planck Research Group Neurotypology, MPI for Human Cognitive and Brain Sciences, Max Planck Society				
	Max Planck Institute for Empirical Aesthetics, Max Planck Society				

• Select the required organization. The name of the organization and the address will be copied into the appropriate fields.

Attention: Please apply the entire OU name including the parent OUs.

• The number in front of the field is the organization number (OrgNr). This number is used to link the person and the organization; it always refers to the respective data record only. Enter the number for this in the "OrgNr" field at the end of the person line.

Persons & Organizations Add multiple		
🕀 hide		
	Role Type Family name Given name OrgNr	
	Author Verson Voe J. 1	
	Organization Address	
	1 Max Planck Digital Library, Max Planck Amalienstr. 33, 80799 × ∽ S = ⊕ ⊙ Society	
	Society // Munich, DE	

If you want to enter an organization that is not listed in the autosuggest list, enter it manually. Also, create a link using the organization number.

Attention:The System won't automatically integrate the manually entered organization into the autosuggest-list. If you would like to have an organization added to the autosuggest list, contact the <u>PuRe-Support</u>.

#### 10.4.18 Remove organization from entry mask

To remove an already added organization from the entry mask, proceed as follows:

• Click on the imes -icon next to the organization field.

Persons & Organizations		
Add multiple		
🖂 hide		
	Role Type Family name	Given name OrgNr
	Author 🔻 Person 👻 Leitch	в. <u>1</u> ⊕ ⊖
	Author 🔻 Person 👻 Laurent	G. 2 ⊕⊖
	Author 🔻 Person 🔻 Shepherd	D. 3 (+) (-)
	Organization	Address
	1 Max Planck Institute for Molecular Biomedicine, Max Planck Society	Röntgenstraße 20, 48149 Münster, DE
	2 Max Planck Institute for Brain Research, Max Planck Society	Max-von-Laue-Str.
	<sup>3</sup> Max Planck Institute for Biological Cybernetics, Max Planck Society	Spemannstrasse 38, 72076 Tübingen, DE

The "Organization" field will be cleared.

Persons & Organizations		
Add multiple		
🖃 hide		
	Role Type Family name (	Given name OrgNr
	Author Verson Verson E	в. 1 ⊕⊖
	Author Verson Vaurent	G. 2 ⊕ ⊖
	Author Verson Verson E	D. 3 ⊕⊖
	Organization A	Address
		Röntgenstraße 20, X ↔ 💬 ਵ 🕀 Θ
		Max-von-Laue-Str.
	3 Max Planck Institute for Biological	Spemannstrasse 38, 72076 Tübingen, DE
	· · · · · · · · · · · · · · · · · · ·	

• <u>Or</u> remove the entire field by clicking on the  $\Theta$ -icon.

Persons & Organizations Add multiple			
🖯 hide			
	Role Type Family name	Given name	OrgNr
	Author 🔻 Person 🔻 Leitch	в.	1 ⊕⊖
	Author 🔻 Person 👻 Laurent	G.	2 🕀 🕀
	Author 🔻 Person 🔻 Shepherd	D.	3 ⊕⊖
	Organization	Address	
	Max Planck Institute for Molecular Biomedicine, Max Planck Society	Röntgenstraße 20, / 48149 Münster, DE	×⇔≡⊕⊖
	Max Planck Institute for Brain Research, Ma Planck Society	x Max-von-Laue-Str.	× ශ∋≠ ⊕⊝
	3		ΦΘ

The line will be removed.

Persons & Organizations		
Add multiple		
	Role Type Family name	Given name OrgNr
	Author Verson Veitch	B. 1 ⊕⊖
	Author Verson Vaurent	G. 2 ⊕⊖
	Author 🔻 Person 🔻 Shepherd	D. ⊕ ⊖
	Organization	Address
	1 Max Planck Institute for Molecular Biomedicine, Max Planck Society	Röntgenstraße 20, × ♀ॊॖ ♥ ⊖ 48149 Münster, DE
	2 Max Planck Institute for Brain Research, Max Planck Society	Max-von-Laue-Str. 4, 60438 Frankfurt

#### 10.4.19 Link creators to multiple organizations

If you add an author to a record using the autosuggest-list, only one affiliation is added at a time. If you want to link multiple organizations to one author, proceed as follows:

- Enter an author into the entry mask. For more information, see <u>chapter "Add person as</u> <u>creator"</u>. Name and affiliation will be inserted automatically.
- Add another "Organization" field by clicking on the plus-button to the right of the "Organization" field.

Persons & Organizations Add multiple		
🖃 hide		
	Role Type Family name Given name OrgNr	
	Author Verson Voe J. 1 000	
	Organization Address	
	Max Planck Digital Library, Max Planck Amalienstr. 33, 80799 🗙 💬 🕀 \ominus	
	Society // Munich, DE //	

#### Another field will be added.

Persons & Organizations		
Add multiple		
🖯 hide		
	Role Type Family name	Given name OrgNr
	Author  Person  Doe	J. 1 🕀 🖯
	Organization	Address
	1 Max Planck Digital Library, Max Planck	Amalienstr. 33, 80799 × 💬≡ 🕀 ⊖
	Society	Munich, DE
	2	$\oplus \Theta$
L		

• Enter the first letters of the affiliation you want to link to the author into the field. The autosuggest-list appears.

Persons & Organizations						
Add multiple						
😑 hide						
	Role	Туре	Family name	Given name (	DrgNr	
	Author 🔻	Person 🔻	Doe	J. 1	L	$\oplus \ominus$
	Organizat	ion		Address		
1	Max Planck	< Digital Libi	ary, Max Planck	Amalienstr. 33, 80799	× ශ∋₌	⊕⊖
	Society			// Munich, DE //		
2	Max Planck	< Institute f	x l			⊕⊝
			-	12	11	
	Max Planc	k Institute fo	<b>r</b> Biogeochemistry, <b>Max</b>	Planck Society		
Content 🛛 🖯 hide	Max Planc	k Institute fo	r Physics, Max Planck	Society		
Free keywords	Max Planc	k Institute fo	r Human Development,	Max Planck Society		
The Rey Words	Max Planc	k Institute fo	r Software Systems, Ma	x Planck Society		
	Max Planc	k Institute fo	r Evolutionary Biology, I	Max Planck Society		
	Max Planc	k Institute fo	r Medical Research, Ma	x Planck Society		
Classification	Max Planc	k Institute fo	r Evolutionary Anthropo	logy, Max Planck Society		
	Max Planc	k Institute fo	r Experimental Endocrir	ology, Max Planck Society		
	Max Planc	k Institute fo	r terrestrial Microbiology	, Max Planck Society		
	Max Planc	k Institute fo	r Chemical Energy Con	version. Max Planck Societv		

- Select the affiliation. It will appear in the field.
- Create a link between the author and the affiliation by entering the number in front of the "Organization" field in the "OrgNr" field. Separate multiple organizations with commas.

Persons & Organizations   Add multiple		
i hide		
	Role Type Family name	Given name OrgNr
	Author Verson VDoe	J. 12 ⊕⊖
	Organization	Address
	1 Max Planck Digital Library, Max Planck	Amalienstr. 33, 80799 × 💬∓ 🕀 ⊖
	Society	/ Munich, DE //
	2 Max Planck Institute for the Science of	Kahlaische Str. 10, 🛛 🗙 💬 🖶 🕀 💬
	Human History, Max Planck Society	/ 07745 Jena, DE //

## 10.4.20 Add an organization as creator

In the "Persons & Organizations" section, you can also enter the organizations involved in a publication as authors. An autosuggest-list supports the data entry.

To add an organization as an author, proceed as follows:

• Click on the <sup>▼</sup>-icon in the "Role" field.

Persons & Organizations					
Add multiple					
🖃 hide					
	Role Type	Family name	Given name	OrgNr	
	Author 🔻 Person 🤜	<b>Z</b>			$\oplus \ominus$
	-				
	Artist		Address		
1	Author				⊕⊝
	Developer		1	//	• •
	Editor				
Content 📃 hide	- Painter Illustrator				
_	Photographer				
Free keywords	Commentator				
	Transcriber				
	Advisor			11	
Classification	Translator				
Classification	Contributor	Value			

- All entries in the drop-down menu are displayed. Select a role for the organization by clicking on the appropriate entry. The selected role will be highlighted in blue.
- Click on the  $\overline{\phantom{a}}$ -icon in the "Type" field to open the drop-down menu.

Persons & Organizations						
Add multiple						
🖯 hide						
	Role	Туре	Family name	Given name	OrgNr	
	Author 🔻	Person 🔻				$\oplus \ominus$
		Person				
	Organizat	Organizati	on	Address		
1						⊕⊝
				11		

• Select the type "Organization". The entry fields for last name and first name change to one single input field.

Persons & Organizations Add multiple						
😑 hide						
	Role	Туре	Family name	Given name	OrgNr	
	Author	<ul> <li>Organiz </li> </ul>				$\oplus \ominus$
	Organiza	tion		Address		
	1					$\oplus \ominus$
				11	11	

• Enter the name of the organization in the field. After entering two letters, the autosuggest-list appears.

Persons & Organizations							
Add multiple							
📄 hide							
		Role	Туре	Family name	Given name	OrgNr	
		Author 🔻	Organiz 🔻	Max <u>Pla</u>			$\oplus \ominus$
				Max Planck Fellow, N	Max Planck Institute of M	lolecular Physiolog	gy, <b>Max Pla</b> nc
		Organizat	ion	Max Planck Fellow, N	Max Planck Institute for C	Chemical Physics	of Solids, Max
	1			Max Planck Research	n Groups, <b>Max Pla</b> nck Ir	nstitute of Molecula	ar <b>Pla</b> nt Physi
				Max Planck Research	n Groups, <b>Max Pla</b> nck Ir	nstitute for Biology	of Ageing, M
				Max Planck Fellow G	roup, Max Planck Institu	ite for Molecular G	enetics, Max
Content 🛛 🔁 hide				Max Planck Society			
Free ke	vwords			Max Planck Fellow, N	Max Planck Institute for N	Aetabolism Resea	rch, Managin
	,			Max Planck Research	n Group Neural Circuits,	Center of Advance	ed European
				Max Planck Institute	for Biological Cybernetic	s, <b>Max Pla</b> nck So	ciety

• Click on the required organization to select it. The field will be auto-filled. No organization will be added.

Persons & Organizations Add multiple							
∃ hide							
	Role	Туре	Family name	Given name	OrgNr		
	Autho	r 🔻 Organiz 🔻	Max Planck Digita	l Library, Max Planck Societ	×	ಭಾ∎	$\oplus \ominus$
	Organ	ization		Address			
	1					Ð	$\Theta$

- The Definition appears behind the "Organization" field. Clicking on the icon opens the organization description.
- If you want to enter an organization that is not included in the autosuggest-list, enter the name in the entry field.

Attention: Entering an organization manually will not automatically add organizations to the autosuggest-list. The organization needs a separate entry in PuRe.

#### 10.4.21 Add metadata to the content section

In the content section, you can add metadata about the content of a publication.

Content 🛛 🖯 hide	
Free keyv	ords
Classific	tion Type Value -

Proceed as follows:

- You can enter free keywords in the "Free keywords" field.
- For classified keywords, select the preferred classification in the "Type" field. Currently, different classifications are available. Depending on which classifications are enabled for the chosen context, they will be displayed here. If you want to activate further classifications, please contact the PuRe-support.

Content 📄 hide				
_				
Free keywords				
				11
Classification	T	\/=  ··-		
Classification	Туре	Value		
	MPIS-GROUPS 🔻			⊕⊝
	-			00
	DDC			
	MPIPKS		-	-
	ISO639-3			
	PACS	1	$\oplus \ominus$	
	MPIS-GROUPS		00	
Details 📃 hide	MPIS-PROJECTS			
_	MPIRG			
Language of Publication				$\oplus \ominus$
	MPINP	1		00
Date	JEL	t Date published online	Date accepted	
	MPIWG-PROJECTS	· · · · · · · · · · · · · · · · · · ·		
		YYYY-MM-DD	YYYY-MM-DD	

• Enter the value of the classification in the "Value" field. After entering the first two letters, the autosuggest-list appears.

Content 🛛 🖯 hide					
	Free keywords				
				1,	
	Classification	Type DDC	Value Ph		⊕⊝
		Abstract	Phonology & phonetics - 414 Photography, photographs & computer art - 770		00
			Pharmacology & therapeutics - 615	•	
			Philosophy in other geographic areas - 199		
			Philosophy of British Isles - 192		

- Select the desired value. The specification will be applied to the field.
- Enter a summary of the content in the "Abstract field".
- Select the language of the abstract in the drop-down menu of the "Language" field. The languages are compliant with the ISO639-3 standard.

## 10.4.22 Add a language

You can add the language of the publication in the "Details" section.

Details 🕒 hide				
Language of Publication				$\oplus \ominus$
Date	Date published in print	Date published online YYYY-MM-DD	Date accepted YYYY-MM-DD	
	Date submitted YYYY-MM-DD	Date modified YYYY-MM-DD	Date created YYYY-MM-DD	
	Total no. of pages			
	Table of content			
	Review type			
Identifier	Type of identifier	Identifier value		⊕⊝

Proceed as follows:

• Enter the language in the "Language of publication" field. After entering the first two letters, the autosuggest-list opens. It contains language codes complying with the ISO standard 639-3. Each language is assigned a three-letter abbreviation.

Details 🛛 🖯 hide				
Language of Publication	en			$\oplus \ominus$
Date	enc - En	<b>.</b>		•••
Date	enf - Forest Enets	hed online	Date accepted	
	enh - Tundra Enets	D	YYYY-MM-DD	
	enm - Middle English (1100-1500)	ed	Date created	
	ena - Apali	D	YYYY-MM-DD	
	enb - Endo			
	end - Ende			
	eng - English			
	eni - Enim (deprecated)			
	enl - Enlhet			
	enn - Engenni			
	eno - Enggano			6
	enq - Enga			11
	enr - Emumu			
	enu - Enu			
Identifier	env - Enwan (Edu State)			
Identifier	enw - Enwan	alue		• •
	enx - Enxet			$\oplus \ominus$
	aev - <b>En</b> va			

• Select the appropriate language. The abbreviation appears in the field. The language is shown in full to the right of the field.

Details 📄 hide				
Language of Publication	eng	English		€⊝
Date	Date published in print	Date published online	Date accepted	

#### 10.4.23 Add a date

The date of a publication can be entered in the "Details" area. Publications go through different stages in the course of their publication. Therefore, corresponding fields for various dates are available.

The current status of a record within this publication cycle can be determined by whether date fields are filled or not.

PuRe-users can search for this information via automatically filled index fields. See the corresponding section in the <u>chapter "Search - Search dates"</u>.

The "acceptance date" is the determining date for theses (usually the oral exam date).

To enter a date, proceed as follows:

• Enter the date in the respective field. Overwrite the grayed-out placeholder. The date is always entered in the format "Year-Month-Day", for example, 2018-08-28. The system will also validate forms like "Year" only or "Year-Month".

Details 📄 hide				
Language of Publication				$\oplus \ominus$
Date	Date issued	Date published online	Date accepted	
	2023-10-24	YYYY-MM-DD	YYYY-MM-DD	
	Date submitted	Date modified	Date created	
	YYYY-MM-DD	YYYY-MM-DD	YYYY-MM-DD	
	Total no. of pages			

## 10.4.24 Add a review type

In the "Details" section, you can add information about the review process that scientific publications usually have to go through when they are published. In PuRe are three types of reviews available. You can select whether a publication has been **peer-reviewed** or whether an **internal review** has been undertaken. If the publication has not been reviewed, "**no peer review**" can be selected. The selection can be made in the dropdown menu.

Details   E Tilde				
Language of Publication	deu	German		$\oplus \ominus$
Date	Date published in print YYYY-MM-DD	Date published online 2020-05-13	Date accepted YYYY-MM-DD	
	Date submitted	Date modified	Date created	
	YYYY-MM-DD	YYYY-MM-DD	YYYY-MM-DD	
	Total no. of pages			
	Table of content			
				1
	Review type			<u></u>
Identifier	Internal No review Peer	Identifier value		⊕⊝

## 10.4.25 Add an identifier

In the "Details" section, you can add an identifier. It identifies the publication in other systems and on the Internet. A variety of different identifiers are available in PuRe.

Details 📄 hide				
Language of Publication	deu	German		$\oplus \ominus$
Date	Date published in print	Date published online	Date accepted	
	YYYY-MM-DD	2020-05-13	YYYY-MM-DD	
	Date submitted	Date modified	Date created	
	YYYY-MM-DD	YYYY-MM-DD	YYYY-MM-DD	
	Total no. of pages			
	Table of content			
				11
	Review type			
Identifier	Type of identifier	Identifier value		⊕⊝

To add an identifier proceed as follows:

Open the drop-down menu in the "Type of identifier" field. The menu opens.

	Identifier	Review type - Type of identifier -	Identifier value		⊕ ⊖
hide		ADS arXiv BibTex Citekey BMC CoNE DOI		Grant ID	
	Funding	eDoc ISBN ISI ISSN Other Patent Application Nr. Patent Nr.		Program ID Org. ID	
hide	Genre Title	Patent Publication Nr. PII PMC PMID PND Report Nr.	•		

- Select the type of identifier.
- You can choose between: ADS, "Other", arXiv, BibTex Citekey, bioRxiv, BMC, ChemRxiv, CoNE, DOI, EarthArXiv, EdArXiv, eDoc, ESS OpenArchive, ISBN, ISI, ISSN, medRxiv, Patent Application Nr., Patent Nr., Patent Publication Nr., PII, PMC, PMID, PND, PsyArXiv, Report No., Research Square, SocArXiv, SSRn, URI, URN, ZDB. (as of October 2023)
- Enter the identifier's value in the "Value of identifier" field next to the drop-down menu.
- To add another identifier, click the ⊕-icon after the entry fields.

Attention: When entering the DOI, please ensure to only enter the DOI identifier (e.g. 10.1000/182 [...]).

## 10.4.26 Add project information

In PuRe, you can add information about funding projects in which context a publication has appeared. The fields in the section "Project information" are compliant with the " OpenAIRE Guidelines" version 3.0.

( https://guidelines.openaire.eu/wiki/OpenAIRE\_Guidelines: For\_Literature\_repositories).

Note for Max Planck Society users: The repository OpenAIRE harvests PuRe-data via the <u>OAI-PMH</u> interface. Harvested are all datasets that have at least one public full text and one of the content categories "Any Fulltext", " Preprint", "Postprint" or "Publisher Version", or which have a project ID specified.

	Identifier	Type of identifier Identifier		Θ
Project information 📋 hide				
		Project name	Grant ID	⊕ ⊝
	Funding	Funding program	Program ID	
		Funding organization	Org. ID	
Source1 🔁 hide				
	Genre	Journal 🗨		$(\mathbf{D})$

To add project information about a publication, proceed as follows:

- Enter the name of the project in the "Project name" field.
- Enter the GrantID of the project in the "Grant ID" field. It is a unique identification number usually assigned by a funding agency for a specific project.

An autosuggest list supports the "Funding program" field. After entering the first few letters of the funding program, the autosuggest list appears. Alternatively, you can enter the abbreviation of the funding program.

Project information   E hide				
		Project name	Grant ID	
				⊕ ⊝
	Funding	Funding program	Program ID	
		fu		
		Wellcome Trust Funding - Wellcome Trust (WT)	Org. ID	
		Funding Programme 7 (FP7) - European Commission (EC)		
Source1 I hide		Horizon 2020 (H2020) - European Commission (EC)		

- Select the appropriate funding program. The fields "Program ID", "Funding organization" and "Org. ID" will be auto-filled. For OpenAire, only the values from the dropdown-menu "Funding Programme 7" and "Horizon 2020" (h2020) are relevant. The manual entry of other values are allowed to provide project information about a publication.
- The "Program ID" field is significant for OpenAIRE. It is auto-populated when the funding program is selected from the autosuggest-list.
- The "Funding organization" field is used to enter the organization that provides financial support for the project. An autosuggest-list supports this field as well. Enter the first two letters of the funding organization, and the autosuggest list appears. Select the desired funding organization. For OpenAIRE, only the listed values "European Commission" (EC) or "Wellcome Trust" (WT) are relevant. You can manually populate the field with other values to reflect project information.

Project information   📄 hide				
		Project name	Grant ID	
				$\oplus \ominus$
F	Funding	Funding program	Program ID	
		Funding and station		
		Funding organization	Org. ID	
		eq		
Source1 🛛 🖯 hide		European Commission (EC)		

The selected funding organization appears in the "Funding organization" field. The "Org. ID" field is also filled in.

|--|

		Project name	Grant ID	
		//		$\oplus \ominus$
	Funding	Funding program	Program ID	
		Funding organization	Org. ID	
		European Commission	EC	
Source1 📄 hide				

The abbreviation of the funding organization will be entered in the "Org.-ID" field. This field is significant for OpenAIRE and will be filled automatically when the funding program or funding organization is selected.

m 
m 
m M Attention: For the OpenAIRE harvesting via the OAI-PMH interface the fields "Grant ID", Program ID and "Org. ID" are essential. The fields in the "Project Information" section are not only intended for OpenAIRE. You can freely enter information about projects that are not explicitly queried by OpenAIRE.

## 10.4.27 Add information about the source

You can add data about the source of a publication in the last section of the advanced entry mask. The displayed fields depend on the genre of the publication.

Attention: The genres "journal article", "book chapter", "conference paper" or "review article" need at least one source specified so that the item can be saved.

Source1	🖃 hide					
	Genre	-				⊕⊝
	Title					00
					∕⁄ ⊕	
	Persons & Organizations					
			Family name	1	DrgNi	
		-   Person		1	$\oplus \ominus$	
		Organization		Address		
	1				$\oplus \ominus$	
			/.		1	
	Details of Source	Volume	1			
		Total no. of pages				
		Publisher	]	Place		
	Identifier	-			<b>a a</b>	
	Identifier				$\oplus \ominus$	
		Issue				
		Start Page	Endpage	Sequence Num	her	

Proceed as follows when entering data in the "Source" section:

- Select a genre. •
- Enter the title, as well as authors and organizations. The entry is analogous to the entry of • this data in the upper section of the advanced entry. For more information about entering the title of a source, see the following <u>chapter "Enter journal title of the source"</u>.
- Enter the details of the source. •

Attention: Some journals do not use page numbers and instead have so-called "E-Number" or "Sequence Number". It can be entered in the "Sequence Number" field.

## 10.4.28 Enter journal title of the source

An autosuggest-list supports the entry of journal titles of a source. It is generated from CoNE. Proceed as follows:

- Select " Journal" as the genre for the source. •
- Enter the first letters of the title in the "Title" field. The autosuggest-list opens. •

Source1   📄 hide						
Genre						
Title	Nat					
	Contributions to Zoology; Nationaal Natuurhistorisch Museum, Leiden					
Persons & Organizations	Inizations JOURNAL OF RESEARCH OF THE NATIONAL INSTITUTE OF STANDARDS AND TECHNOLOGY; National Ins					
	J. Res. Natl. Inst. Stand. Technol.; National Institute of Standards and Technology, Gaithersburg, MD					
	Memoirs of National Institute of Polar Research, Special Issue; National Institute of Polar Research, Tokyo					
	NATO Legal Gazette; Allied Command Transformation/Staff Element Europe, Bruxelles					
	Legal Gazette / NATO; Allied Command Transformation/Staff Element Europe, Bruxelles					
	Natural Hazards and Earth System Sciences Discussions; European Geophysical Society, Copernicus Publ., Ka					
1	NHESSD 2, 5079–5111, 2014 Seasonal forecasting of fire over Kalimantan, Indonesia A. C. Spessa et al. Title Page A					
	Nature astronomy; Springer Nature, London					
	Nature Cell Biology; Springer Nature, London					
Details of Source	'Nat. Cell Biol.'; Springer Nature, London					
	Nature Electronics; Springer Nature, London					

Select the relevant title. Title, publisher information, and ISSN are auto-filled if the journal is specified in CoNE.

Genre	Journal	⊕⊝
Title	Nature Cell Biology	00
Alternative Title	Type Title Other Nat. Cell Biol.'	
Persons & Organizations		
	Role     Type     Family name     Given name     OrgNr       -     ✓     Person     1     ⊕ ⊖	
	Organization Address	
1		
Details of Source	Volume	
	Total no. of pages	
	Publisher Place	
	Springer Nature	
Identifier	ISSN 🔹 1465-7392	
	CoNE /journals/resource/954925625310	

## 10.5 Fetch data

This function allows you to fetch metadata and full text(s) from other system like **arXiv** or **Crossref**.

Attention: The "fetch" function is only available if the user role "Depositor" has been assigned to the logged-in user.

### 10.5.1 Open the "fetch" function

Log in to PuRe.

• If you have the required permissions, the "Submission" area for the data entry will appear on the start page.

START MY ITEMS WORKSPACES SUBMISSION BASKET	(0) TOOLS
	Start
WELCOME TO MPG.PuRe -         WHAT DO YOU WANT TO WORK ON         TODAY?         Submission         There are several ways to enter new publications into         PubMan. You can         • use the Simple Submission. Here you can enter basic         • use the Simple Submission. Here you can enter the         complete metadata of a publication.         • use the Fetch. Here you can enter the         complete metadata of a publication.         • use the Fetch. Here you can fetch single items from         external repositories like arXiv or BioMed Central.         • use the Import. Here you can upload multiple items         out of various formats.	Most Recently Released Items Unravelling the structural complexity of glycolipids with cryogenic infrared spectroscopy Kirschbaum, Carla; Greis, Kim; Mucha, Eike; Kain, Lisa 2021-02-22 Glycolipids are complex glycoconjugates composed of a glycan headgroup and a lipid moiety. Their modular biosynthesis creates a vast amount of divers Previous trial effect in visuomotor integration depends on an implicit short-term memory mechanism in premotor cortex and hV5/MT+ De Azevedo Neto, RM; Amaro, E; Bartels, A - 2021-02-22 The so-called previous trial effect has been reported from perception to motor output in human behavior. For example, the speed from previously exper

• Click on "Fetch". The enty mask or available contexts open.

Alternatively, the function can also be opened via "Submission" in the navigation menu:

• Click on the "Submission" button in the navigation menu. The overview page of the different entry types opens.

EASY FULL FETCH IMPORT	Submission Method
EASY	
Using the simple submission one can enter stepwise information on a publication. At the end of the wizard one can save the item or switch to the full submission mask to add more details.	
FULL	
The full submission offers a genre specific entry mask for entering reference data. Additionally one or more full texts can be uploaded and information on externally stored data (e.g. Supplementary Material) can be specified.	
FETCH This method allows you to fetch metadata and full text(s) from other systems like arXiv or Crossref.	
IMPORT	
This method allows you to import multiple items in a structured format (e.g. EndNote, BibTex).	

- Click on the "Fetch" button.
- In the next step, select a context in which the publication should be entered.
- You will then be directed to the "Fetch" entry mask.

START MY ITEMS WORKSPACE	S SUBMISSION BASKET (0) TOOLS	
EASY FULL FETCH IMPORT		Start / Start submission / Fetch
EAST FULL FETCH IMPORT		Fetch
This item will be part of PubMan Test Collection	ı.	
Fetch From	Source Identifier	
	arXiv 🔻	
Fetch file(s)	PDF All available None	
Cancel		Fetch

#### 10.5.2 Import single items from a server

To import individual items from a server, proceed as follows:

- Open the fetch function.
- Enter the arXiv or Crossref identifier of the record you want to import into the "Identifier" field.
- You can leave "arXiv:" in front of the number or just use the number.
- Select whether and in which format attached full texts are to be imported. To do so, click on the appropriate check box.

START MY ITEMS WORKSPACES	SUBMISSION BA	ASKET (0) TOOLS		
EASY FULL FETCH IMPORT			Start / S	Start submission / Fetch
This item will be part of PubMan Test Collection.				
Fetch From	Source arXiv 💌	Identifier arXiv:2101.06203		
Fetch file(s)	PDF     All available	None		Fetch
Cancer				retur

Attention: Above the entry mask, the collection is indicated to which the data set is assigned. The collection depends on the user who is logged in.

• If you choose Crossref as the source, enter the publication's DOI you want to fetch.

START MY ITEMS W	ORKSPACES	SUBMISSION	BASKET (0) 1	TOOLS	
EASY FULL FETCH IMPORT					Start / Fetch
This item will be part of PubMa	an Test Collection.				
Fetch		Source Crossref 💌	Identifier 10.1242/jeb.184	1689	
Cancel					Fetch

- Click on the "Fetch" button. The advanced entry mask will be displayed with the imported data.
- If needed, you can make changes. To save the item in PubMan, click on the "Save" button below. You also have the option of validating and submitting the data record.

## 10.6 Import

In the import function, you can import any number of data sets at once into PubMan.

The following chart shows the import formats and which file extension the file should have.

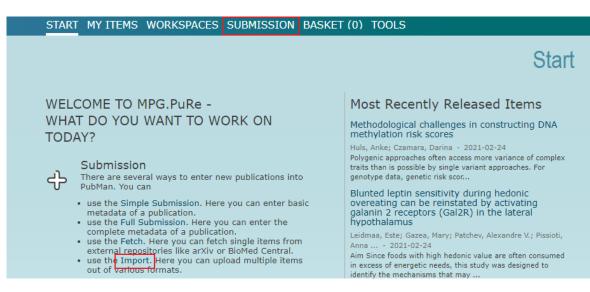
Import-Format	Datei-Format
eSciDoc-XML	.xml
BibTeX	.bib/.txt
RIS	.txt
wos	.txt
MAB	
eDoc_XML	.xml
ZfN_Tei_Xml	
Marc21	.mrc
Marc_Xml	.xml
Mac         Mac           ZN_Tet_xml         Marc21           Marc_Xml         Marc3           BMC_Xml         EndNote	.xml
EndNote	.txt

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## 10.6.1 Open import

To open the import mask, procees as follows:

- Log in to PuRe.
- Click on "Import".



<u>Or:</u>

- After login, the import can also be opened via the "Submission" menu item in the navigation menu.
- The overview page of the submission opens. Then click on "Import".

START MY ITEMS WORKSPACES SUBMISSION BASKET (0) T	OOLS
EASY FULL FETCH IMPORT	Submission Method
EASY Using the simple submission one can enter stepwise information on a publication. At the end of the wizard one can save the item or switch to the full submission mask to add more details.	
FULL The full submission offers a genre specific entry mask for entering reference data. Additionally one or more full texts can be uploaded and information on externally stored data (e.g. Supplementary Material) can be specified.	
FETCH This method allows you to fetch metadata and full text(s) from other systems like arXiv or Crossref.	
IMPORT This method allows you to import multiple items in a structured format (e.g. EndNote, BibTex).	

#### 10.6.2 Import records

To import data from other systems, proceed as follows:

- Open the import function.
- Select the context in which the data should be imported. Then the import mask opens. START MY ITEMS WORKSPACES SUBMISSION BASKET (0) TOOLS

EASY FULL FETCH IMPORT IMPORT WORKS	Ιπροπ
This item will be part of PubMan Test Collection.	
IMPORT Import format	WOS
Upload file	+ Upload file
Cancel	Import

 Choose an appropriate import format in the dropdown menu. The selected format is highlighted in blue.

EASY FULL FETCH IMPORT IMPORT WORKSPACE       Start / Multiple Import         This item will be part of PubMan Test Collection.       Import format         IMPORT       Import format         Upload file       EndNote         BibTeX       RIS         WOS       MAB         eDoc_Xmll       eSciDoc_Item_Xmll         Zfin_Tei_Xml       Marc21n         Marc21n       Marc21n         Marc21n       Marc2 mol	START MITTEMS WORKSPACES	5 SUDMISSION DASKET (U) TOU	L3
IMPORT Import format Upload file EndNote EndNote BibTeX RIS WOS MAB eDoc_Xml eSciDoc_Item_Xml ZfN_Tei_Xmi Marc_11 Marc_Xml	EASY FULL FETCH IMPORT IMPORT WORKS	SPACE	
Import format     EndNote       Upload file     BibTeX       RIS     WOS       WOS     MAB       eDoc_Xml     eSciDoc_Item_Xml       ZfN_Ter_Xml     Marc2.1       Marc2,Xml     Marc2,Xml	This item will be part of PubMan Test Collection.		
	Import format Upload file	EndNote BibTeX RIS WOS MAB eDoc_Xml eSciDoc_Item_Xml ZfN_Tei_Xml Marc21	Import

• Click on the "Upload file" button to select the file you want to upload.

START MY ITEMS WORKSPACES	S SUBMISSION BASKET (0) TOOLS
EASY FULL FETCH IMPORT IMPORT WORKS	SPACE Start / Multiple Import
This item will be part of PubMan Test Collection.	
IMPORT Import format	EndNote
Upload file	+ Upload file
Cancel	Import

- The explorer of your operating system opens. Select the file you want to upload. Be sure to use the required <u>file format</u>.
- The file will be uploaded.

START MY ITEMS WORKSPACES SUBMISSION BASKET (0) TOOLS	
EASY FULL FETCH IMPORT IMPORT WORKSPACE	Start / Multiple Import
This item will be part of PubMan Test Collection.	
IMPORT Import format EndNote	
Upload file Endnote_Testimport.txt	
Cancel	Import

• Click on the "Import" button. The configuration mask opens.

START MY ITEMS WORKSPACES	5 SUBMISSION	BASKET (0	) TOOLS	
EASY FULL FETCH IMPORT				Start / Multiple Import / Import Parameters
This item will be part of PubMan Test Collection.				
Import	Endnote_Testimport.tx	t, 246KB		
	Please select your impo	ort parameters		
	Undo on error			
	<ul> <li>Don't check for dup</li> <li>Don't import duplication</li> </ul>		5	
	If duplicates are det		ort anything	
	Import Name			
Import configuration	Flavor	0	THER 🔻	
	CoNE	tr	ue 🔻	
Cancel				Import

- Define the settings for the import. For more information about the configuration mask, see the next <u>chapter</u>.
- Click on the "Import" button to start the import.

## 10.6.3 Specify settings for import

The import mask settings appear after format and file have been selected for import. The mask is divided into the sections "Import" and "Import configuration". In the "Import" section, various import parameters like a check for duplicates can be defined. In the "Import Configuration" section, various other options can be defined depending on the import format.

#### 10.6.3.1 Select import parameters

Different import parameters need to be set for each import. To do so, proceed as follows:

- Open the import.
- Select the import format.
- Select the file to be imported. (See the previous chapter )
- Click the "Import" button. The configuration mask appears after clicking the "Import" button with the default settings.

START MY ITEMS WORKSPACE	S SUBMISSION BASKET (0	) TOOLS
EASY FULL FETCH IMPORT		Multiple Import / Import Parameters
This item will be part of PubMan Test Collection	1.	
Import	Endnote_Testimport.txt, 246KB	
	Please select your import parameters	
	Undo on error	
	<ul> <li>Don't check for duplicate publications</li> <li>Don't import duplicate publications</li> </ul>	5
	If duplicates are detected, don't impo	ort anything
	Import Name	
Import configuration		THER
	CoNE	ue 🔻
Cancel		Import

#### Note: We recommend to use the default import parameters in the "Import" section.

- The import parameter "**undo on error**" is **deactivated** by default. This way, an import can also be performed if individual data records cannot be imported. Otherwise, the import is cancelled and reset when a single error occurs.
- For the duplicate check, the options "Don't check for duplicate publications", "Don't import duplicate publications" and "If duplicates are detected, don't import anything" are available for selection. Currently, the duplicate check is not yet sufficiently implemented in PubMan and is set very "hard". Therefore, we recommend selecting the default option "Don't check for duplicates".

Attention: If you have selected the option "Don't check for duplicate publications", already existing records will be imported again. If you have selected the option "If duplicates are detected, don't import anything", the import will be cancelled as soon as a duplicate is found.

• Enter a name for the import in the "Import Name" field.

Attention: Do not use umlauts in the name of the import. This will cause problems in the list view of the import.

• Proceed by specifying the import configuration. For more information, see the next chapter.

## 10.6.3.2 Set import configuration for individual file formats

Depending on the file format, different import configurations have to be set. For the formats eDoc, EndNote, RIS, WoS, BMC, MARC21 and MARCXML, the import scheme and CoNE matching have to be selected. In each case, the institute-specific mapping is defined in the import schema. The data is entered into the fields specified by the institute. The data records to be imported are linked to the CoNE person entries via CoNE matching.

Import configuration	Flavor CoNE	OTHER V true V	
Cancel		Import	

Proceed as follows:

In the "Flavor" field, select the import scheme from the drop-down menu. The default scheme is called "**Other** ".

Note for Max Planck Society users: Some institutes have customized import schemas for specific formats. For example, each institute that has migrated from eDoc has its own import scheme for eDoc. It includes customizations that are specific to each institution. If required, the name of the respective schema can be requested from the PuRe support team.

In the "CoNE" field, select "true" if a CoNE matching is to be carried out. This option is only useful if CoNE is used to manage person entries. Select "**false**" if no CoNE matching should be carried out.

**M** Note: We recommend selecting "false" since PubMan uses the CoNE entries from all institutes for the matching process. Errors due to identical last names are very likely.

Attention: If you do not perform a CoNE match, the authors will not be linked to the researcher portfolio. The imported publication will not be listed there. Furthermore, the publication cannot be found when browsing the organizations. The imported records must be edited individually and linked to the matching CoNE entries.

• Start the import by clicking on the "Import" button.

To set up the import configuration for the BibTeX format, proceed as follows:

Import configuration	CoNE OrganizationalUnit CurlyBracketsForCoNEAuthors	true  Max Planck Digital Library no	
Cancel			Import

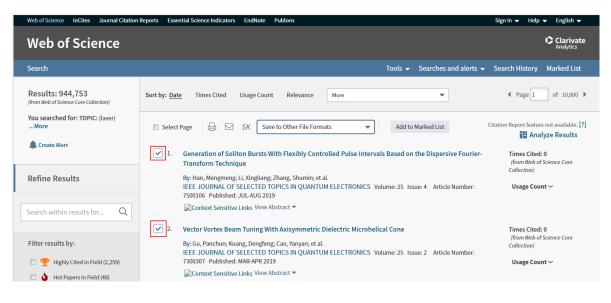
- In the "CoNE" field, select "true" if a CoNE matching should be carried out. Select "false" if no CoNE matching should be carried out.
- In the field "CurlyBracketsForCoNEAuthors" various matching options can be set via identifiers. This is only used in a few individual cases and is therefore not further explained.
- In the "OrganizationalUnit" field, you can limit the CoNE entries to a specific Organizational Unit. To do so, enter the name of the relevant organizational unit in the "OrganizationalUnit" field. The name must match the spelling in the OU structure. If you want to match the entire CoNE structure, remove "MPI" from the "OrganizationalUnit" field.

# 10.6.4 Export data from WoS for the PuRe import

Web of Science is a scientific database. To export records from the "Web of Science" portal, proceed as follows:

- Open the "Web of Science" portal with the URL: <u>http://apps.webofknowledge.com</u>
- Perform a search in the "Web of Science" portal. A results list will be displayed.

Web of Science InCites Journal Citation	Reports Essential Science Indicators EndNote Publons	Sign In 👻 Help 👻 English 👻
Web of Science		Clarivate Analytics
Search	Tools 👻 Searches and alerts 👻	· Search History Marked List
Results: 944,753 (from Web of Science Core Collection)	Sort by: Date Times Cited Usage Count Relevance More 💌	✓ Page 1 of 10,000 ▶
You searched for: TOPIC: (laser) More	Select Page 🔒 🖂 5K Save to EndNote online 🔹 Add to Marked List	Citation Report feature not available. [?]
4 Create Alert	Generation of Soliton Bursts With Flexibly Controlled Pulse Intervals Based on the Dispersive Fourier- Transform Technique	Times Cited: 0 (from Web of Science Core Collection)
Refine Results	By: Han, Mengmeng; LI, Xingliang; Zhang, Shumin; et al. IEEE JOURNAL OF SELECTED TOPICS IN QUANTUM ELECTRONICS Volume: 25 Issue: 4 Article Number: 7500106 Published: JUL-AUG 2019	Usage Count 🗸
Search within results for Q	Context Sensitive Links View Abstract 💌	
Filter results by:	2.         Vector Vortex Beam Tuning With Axisymmetric Dielectric Microhelical Cone           By: Gu, Panchun; Kuang, Dengfeng; Cao, Yanyan; et al.         IEEE JOURNAL OF SELECTED TOPICS IN QUANTUM ELECTRONICS Volume: 25 Issue: 2 Article Number: 7300307 Published: MAR-APR 2019	Times Cited: 0 (from Web of Science Core Collection) Usage Count ~
🔲 🍐 Hot Papers in Field (48)	Context Sensitive Links View Abstract 👻	$\searrow$



• Check the titles which should be exported.

• Or export all results by specifying the export range in the next step.

• Select the "Save to Other File Formats" option from the drop-down menu.

Web of Science InCites Journal Citation	Reports Essential Science Indicators EndNote Publons		Sign In  Help  English  Clarivate Analytics
Search		Tools 👻 Searches and alerts 👻	Search History Marked List
Results: 944,753 (from Web of Science Core Collection)	Sort by: Date Times Cited Usage Count Relevance More	•	
You searched for: TOPIC: (laser) More	Select Page G 5K Save to EndNote online	Add to Marked List	Citation Report feature not available. [?]
🌲 Create Alert	Save to EndNote online         1.         Generation of Soliton Bui Transform Technique         Save to EndNote desktop         /a	ls Based on the Dispersive Fourier-	Times Cited: 0 (from Web of Science Core
Refine Results	Save to ResearcherID - I wrote these By: Han, Mengmeng; Li, Xing Save to InCites	ume: 25 Issue: 4 Article Number:	Collection)
Search within results for Q	7500106 Published: JUL-AL Save to Other File Formats ©Context Sensitive Links View Abstract ▼		-

• Other **export options** are displayed to choose from.

Send to File		×
2 records selecte	d	
Record Content:	Author, Title, Source, Abstract 🔹	
File Format	Other Reference Software	
	Send Cancel	

• In the "Record Content" field, select which **data** to export.

Send to File		×
2 records selected	1	
Record Content:	Author, Title, Source, Abstract	(They
	Author, Title, Source	
File Format	Author, Title, Source, Abstract	
	Full Record	
	Full Record and Cited References	

• In the "File Format" field, select the export format "Plain text ".

1	Send to File		×
	2 records selected		cle
	Record Content:	Author, Title, Source, Abstract	)
2	File Format	Other Reference Software	
		Other Reference Software	
3.	Laser-Assisted Permeatio Monitored by OCT and Dif	BibTeX HTML Plain Text	Endometr
	By: Li, Caiyun; Wei, Huajiang; IEEE JOURNAL OF SELECT 7300109 Published: MAR-AP	Tab-delimited (Win) Tab-delimited (Mac)	e: 2 Article
	Context Sensitive Links Vi	Tab-delimited (Win, UTF-8)	

• Start the download by clicking the "**Send**" button.

Send to File		×
Number of Records:	<ul> <li>All records on page</li> <li>Records to</li> </ul>	
Record Content:	Full Record 🔻	)
File Format	Plain Text 🔻	]
	Send Cancel	

- The **download manager** of your browser opens.
- Select whether the file should be opened in the editor or saved on the computer. The file will be opened or downloaded.
- To import the data into PubMan, perform an import with the WoS file. For more information, see <u>chapter "Import records"</u>.

## 10.6.5 Export data from Endnote for the PuRe import

Open EndNote and select the datasets you want to import into PuRe. Then open the file menu.

EndNote X9 - [2018_publications_MPI-Age.enl]						
💌 File	Edit References Groups	Tools Window He	elp			
My	New Open Library Open Shared Library	Ctrl+O Ctrtl+Shift+O	e			
6	Open Recent	+	ove			
<mark>ି</mark> ତି ୧	Close Library	Ctrl+W	pact oTA			
<b>9</b>	Save Save As Save a Copy Revert	Ctrl+S	erpla oxo od Po ort-T			
	Share		nloc			
<b>_</b> 2	Export Import	÷	ngin cific roto			
	Print Print Preview Print Setup	Ctrl+P	ne Ex nom mbr			
	Compressed Library (.enlx)		id dr			
	Exit	Ctrl+Q	ie-e) ie la			
		McCann B   D				

Here you select "Export...". The "Export file name:" window opens. Select where the file should be saved. Enter the file name and select the file type "\*.txt" and the output style "EndNote Export".

Export file name:							
Speichern in:	🔰 Downloads	•	G 🤌 🛤	۶ 🛄 🛨			
C.	Name			Änderungsdatum			
	👢 Archiv			29.08.2019 13:27			
Zuletzt besucht	👢 2018_publicati	ions_MPI-Age.Data		12.08.2019 15:42			
Desktop							
Bibliotheken							
Computer							
Netzwerk	•	III			•		
Netzwerk	Dateiname:	EndNote to PuRe Export.txt		<ul> <li>Speich</li> </ul>			
	Dateityp:	Text File (*.txt)		<ul> <li>Abbred</li> </ul>	hen		
	Output style:	EndNote Export		<b>▼</b>			
	-	Export Selected References					

You can import the saved file in the "EndNote" import format. The further steps are described in the <u>chapter "Import records"</u>.

# 10.7 End Submission

After entering the data in the **advanced input** mask, by **fetching data** or **import**, there are subsequently three steps to choose from:

Validate Save Submit

• Validate: The system checks the item for correctness. If the item is not valid, for example, if a mandatory field such as the date field is not filled in, a warning message is displayed. The item can still be edited in the same entry mask. Validation does <u>not</u> automatically save the item.

		Mandatory	rields are printed bold
 System Messages and Warnings:	×	e Locators   Persons & Organizations   Conte	ent   Details   Source
<ul> <li>If genre is not equal to "Series" or "Journal" or "Other" or "Manuscript" at least one date has to be provided.</li> </ul>		micro-blogging services	
		//	$\oplus$

- Save: Save enables a temporary (intermediate) saving. The data entry can be continued, or the item can be released at a later time. When saving, no validation takes place. After the item has been saved, it is in the "pending" or "submitted" status. For more information on the dataset status, see the <u>chapter "Workflow"</u>.
- **Submit:** This step simultaneously leads to validation, saving and, after confirmation of an intermediate window, finally to the submission of the item. Users with Depositor rights can release the item in the next step.

Whether "Submit" or "Release" is available for selection at the end of the input mask depends on the respective workflow. More information about the workflows can be found in the following <u>chapter</u>.

	Item Summary / My Items / View item
	Submit Item
The morphology of	a population of thoracic intersegmental interneurones
	a population of anotacle intersegmental internet ones
in the locust	
- 11 · · ·	
Publication	item_3265095
Creator	Laurent, G.
Creator	Latient, G.
Submit Comment	
Cancel	Submit

After entering the data in the simple entry mask, it is possible to change to the advanced entry mask by clicking on "Add more details now" or to save the item. The item is not automatically validated during the saving process.



# 11. Basket

You can collect items from different lists and detailed views - independent from the item status in the basket. It can be used with and without login and will be active for the entire session. If you close the PuRe tab, the basket will also be emptied. To move discarded items into the basket, you must be logged in.

A maximum of 2800 items can be collected in the basket.

START MY	ITEMS WORKSPACES SUBMISSION BASKET (3) TOOLS	
VIEW SORT E Bibliographic List	EXPORT REMOVE FROM BASKET	Start / My Items / Basket Basket
3 Items (descen	ding sorted by Modification Date)	
25 🔻 per page	e A Previous 1 Next D	1 of 1
State	Expand all	
Discarded	Parallel effects of joint receptors on motor neurones and intersegmental interne More Creators Laurent, G. Dates Published in Print: 1987-03-01 Genre Journal Article Files - Locators 1 Locator	
In Rework	The morphology of a population of thoracic intersegmental interneurones in the l More Creators Laurent, G. Dates Published in Print: 1987-02-15 Genre Journal Article Files - Locators 1 Locator	
Pending	Proprioceptive inputs to nonspiking local interneurons contribute to local refle More Creators Burrows, M.; Laurent, G. J.; Field, L. H. Dates Published in Print: 1988-08-01 Genre Journal Article Files Locators 1 Locator	

If an item from the basket is edited and released, then the item will be removed automatically.

# 11.1 Add items to the basket

You can add items from any list to the basket. Use the checkboxes to the left of the items to select the appropriate ones. Then click on "Actions" and add the selected items to the basket via "Add to basket". In parenthesis behind "Basket" in the header, the amount of added items are shown.

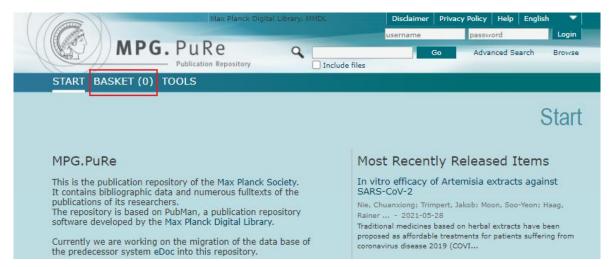
	START M	Y ITEMS WOR	KSPACES	S SUBMISSION BASKET (3) TOOLS	
		_		Start / Administrative Searc	h / My Items
	VIEW FILTER	R SORT EXPORT A	CTIONS	Mix	Items
- I	Add selected t	to basket Add select	ion to batch	h processing IVI y	ILEIIIS
	678 Items (de	escending sorted by M	odification D	Date)	
	25 🔻 per pa	age	<ul> <li>Previo</li> </ul>	ous   1   2   3   4   5   6   7   Next ▶ ▶	1 of 28
	State	Expand all			
			gy of a po	opulation of thoracic intersegmental interneurones in the I	
	Submitted	More	Creators		
	Submitted		Dates	Published in Print: 1987-02-15 Journal Article	
			Files	Journal Article	
				4 1 Locator	
		Proprioceptive	e inputs to	o nonspiking local interneurons contribute to local refle	
	<u>Z</u>	More		Burrows, M.; Laurent, G. J.; Field, L. H.	
	Pending		Dates		
			Genre	Journal Article	
			Files	- 	
			Locators	1 Locator	
	<u> </u>	Parallel effect	s of joint	receptors on motor neurones and intersegmental interne	
	쓰	More	Creators	Laurent, G.	
	Pending		Dates		
			Genre	Journal Article	
			Files Locators	- National Action	
			Locators		

An item can also be added to the basket from the individual item view.

START BAS	SKET (0) TOOLS	
ITEM ACTIONS		tem Summary / View item
Add to Basket	Summary Details Release History	Statistics   Local Tags
	Integrin beta1 subunit controls mural cell adhesion, spreading, and bloo vessel wall stability	d Released
	Abraham, S., Kogata, N., Fässler, R., & Adams, R. H. (2008). Integrin beta1 subunit controls mural cell adhesion, spreading, and blood vessel wall stability. <i>fgtjfzgzki</i> . Retrieved from http123456789.	

# 11.2 Open the basket

The basket can be accessed from any MPG.PuRe page - regardless of whether the user is logged in or not.



# 11.3 Remove from basket

You can remove items from the basket by checking the boxes to the left.

START MY	ITEMS WORKSPACES SUBMISSION BASKET (3) TOOLS
Bibliographic Lis	ding sorted by Modification Date)
State	Expand all
Submitted	The morphology of a population of thoracic intersegmental interneurones in the I More Creators Laurent, G. Dates Published in Print: 1987-02-15 Genre Journal Article Files - Locators 1 Locator
Pending	Proprioceptive inputs to nonspiking local interneurons contribute to local refle         More       Creators         Burrows, M.; Laurent, G. J.; Field, L. H.         Dates       Published in Print; 1988-08-01         Genre       Journal Article         Files       -         Locators       🎱 1 Locator

An item can also be removed from the basket in the individual item view.

START BAS	SKET (1) TOOLS	
ITEM ACTIONS Remove from Ba	EXPORT	n Summary / View item Item Statistics   Local Tags Released

# 11.4 Export from basket

If you perform an export from the basket, then all items that are in the basket will be exported. Even if items have been explicitly selected via the checkboxes to the left of the entries, all items will be exported.

The export can also be performed as described in <u>chapter "List view -Export items from</u> <u>lists"</u>.

START MY	ITEMS WORKSPA	CES SUBMISSION	BASKET (4)	TOOLS	
					Start / Basket
VIEW SORT E	EXPORT REMOVE FROM B	SKET			Basket
pdf	T APA	Download E-Mail			Duonot
4 Items (descen	ding sorted by Modification	Date)			
25 🔻 per pag	e   <b>∢∢</b> p	evious   1   Next 🕨 🕨			1 of 1
State	Expand all				
P	The morphology of	a population of thorac	ic intersegment	al interneurones in the I	
Submitted	More Crea				
Submitted		tes Published in Print: 19 The Journal Article	87-02-15		
		les -			
	Loca	ors 🚳 1 Locator			
P	Proprioceptive inpu	s to nonspiking local i	interneurons cor	ntribute to local refle	
<u></u>	More Crea				
Pending		tes Published in Print: 19 The Journal Article	88-08-01		
		les -			
	Loca	ors 🚳 1 Locator			

2800 items can be collected and also at once exported via the basket. In comparison, a maximum of 250 items can be exported at the same time by <u>exporting from a list</u>. A maximum of 5000 items can be exported at once, using the <u>REST-interface</u>.

# 12. Tools

In the following subchapters you will find more information about the tools and interfaces available in PubMan.

# 12.1 Admintool

The Admintool is an administrative tool to manage users, Organizational Units (OUs) and contexts for MPG.PuRe.

If you do not yet have the permission for the Admintool ("Local Admin"), please contact the MPG.PuRe Support .

# 12.1.1 Admintool Homepage

1 + 4 The menu items "Users", "Ous" and "Contexts" lead to the corresponding functions and can be found in the header as well as on the main interface.

2 As in MPG.PuRe, the menu items "Disclaimer" and "Privacy Policy" direct you to the corresponding Colab pages. The "Help" function in the header will redirect you to the <u>MPG.PuRE</u> <u>Help page</u>.

**3** Login section: Use the login credentials of MPG.PuRe to log in to the admintool.



### 12.1.1.1 Open Admintool

You can open the Admintool in two ways:

- (1) Via the "Tools" section in MPG.PuRe
- (2) Or directly by opening the link https://pure.mpg.de/admintool/home

# 12.1.1.2 Admintool Login

Use the login credentials from MPG.PuRe to log in to the Admintool.

<u>Password changes</u> set in MPG.PuRe are automatically applied to the Admintool.

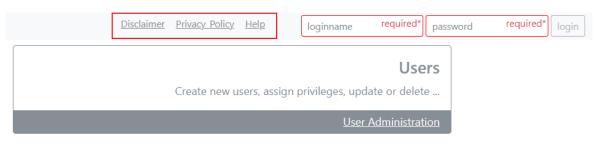
If you do not yet have the "Local Admin" permission for the Admintool, please contact <u>MPG.PuRe-Support</u>.

<u>Disclaimer</u> <u>Privacy_Policy</u> <u>Help</u>	loginname required* password required* login
	<b>Users</b> Create new users, assign privileges, update or delete
	<u>User Administration</u>
	<b>Organizations</b> Create children, update or delete descriptions
	Ou Administration

# 12.1.1.3 Disclaimer/Privacy Policy/Help

As in MPG.PuRe, the menu items "Disclaimer" and "Privacy Policy" direct you to the corresponding Colab pages.

The "Help" function in the header redirects you to the <u>MPG.PuRE Help</u> page, where you will find, for example, the PuRe support contact details, the user manual or the FAQ.



# 12.1.2 Users

This section is used for the PuRe user administration. The function allows:

- Search for users
- Password reset
- Creation of PuRe user accounts
- Change information and permission of already created user accounts

						testlocaladmin
loginname*	testlocaladmin				id u:	ser_3337697
organization*	Max Planck Digital Librar	У		change	ould	u_persistent25
active	true	deactivate				
name*	Local Admin Test					
email	test@mpdl.mpg.de					
						cancel save generate password
grants	LOCAL_ADMIN	Max Planck Digital Library	ou_persistent25	OPENED	Max Planck Society	x
	DEPOSITOR	Publications of the Max Planck Digital Library	ctx_28054	OPENED	Max Planck Digital Library, Planck Society	Max
	MODERATOR	Publications of the Max Planck Digital Library	ctx_28054	OPENED	Max Planck Digital Library, Planck Society	Max
						add grants

### 12.1.2.1 Search for users

As a Local Admin, you can only search for users of your own organization (MPI):

It is possible to filter for users within your organization and search by the user name and login name.

After typing in only one letter into the search mask, a suggestion list will be displayed.

**User Administration** 

				Users
				+
filter by name of organization				
search by name of user				
search by loginname of user				« prev 1 <u>2</u> <u>next</u> :
Adriana	user_114	ACTIVE	Max Planck Digital Library	
Andrea	user_101(	DEACTIVATED	Max Planck Digital Library	
Andreas	user_3€	DEACTIVATED	Max Planck Digital Library	
Caroline	user_182	DEACTIVATED	Max Planck Digital Library	

### 12.1.2.2 Reset passwords

Local admins can generate and thus reset a user's password in case he/she has forgotten the password or has been locked due to multiple incorrect login attempts.

To do so, perform a search for the user and go to their account details. Then click on "**generate password**". A small window will display the user's new one-time password in green. You can find more about how to change a password in <u>chapter "Homepage - Change password"</u>.

						testlocaladmin
loginname*	testlocaladmin				id user	_3337697
organization*	Max Planck Digital Libra	ry		change	ould ou_t	persistent25
active	true	deactivate				
name*	Local Admin Test					
email	test@mpdl.mpg.de					
						cancel save generate password
grants	LOCAL_ADMIN	Max Planck Digital Library	ou_persistent25	OPENED	Max Planck Society	x
	DEPOSITOR	Publications of the Max Planck Digital Library Publications of the Max Planck Digital Library	ctx_28054 ctx_28054	OPENED	Max Planck Digital Library, M. Planck Society Max Planck Digital Library, M. Planck Society	
						add grants

### 12.1.2.3 Edit user accounts

1 organization: Here you can change the affiliation to an organization (MPI) if necessary.

2 active : User accounts can be deactivated if they are no longer needed. In reverse, accounts can also be reactivated. Deleting an account is not possible.

3 name : Unlike the login name, the "name" (preferably the full name) can still be changed.

4 email : The email address can also be changed at any time.

**5** grants: In the "grants" section, permissions can be assigned and also removed (with "x"). The different permissions are also explained in <u>chapter "Create user accounts"</u>.

						testlocaladmin
loginname*	testlocaladmin				id user	_3337697
organization*	Max Planck Digital Library			change	1 ould ou_p	persistent25
active	true	deactivate 2				
name*	Local Admin Test				3	
email	test@mpdl.mpg.de				4	
						cancel save
						generate password
grants	LOCAL_ADMIN	Max Planck Digital Library	ou_persistent25	OPENED	Max Planck Society	x
	DEPOSITOR	Publications of the Max Planck Digital Library	ctx_28054	OPENED	Max Planck Digital Library, M Planck Society	ax x
	MODERATOR	Publications of the Max Planck Digital Library	ctx_28054	OPENED	Max Planck Digital Library, Ma Planck Society	ax x
						add grants 5

#### 12.1.2.4 Create user accounts

To create a new user account as a Local Admin, go to the "Users" section and click on the plus sign "+".

**User Administration** 

	Users •
filter by name of organization	
search by name of user	
search by loginname of user	« prev 1 <u>2 next</u> »

You will be redirected to an blank entry mask, which you can now fill in accordingly. All fields marked with an asterisk\* are mandatory fields.

					stest
loginname*	stest	1			
organization*	Max Planck Digital Library - ou_persistent25 - OPENED < Max Planck Society	2	ould	ou_persistent25	
active	true 🗸 3				
name*	Stefanie Test	4			
email	test@mpdl.mpg.de	5			
				cancel	save

1 login name: This name is used for the login. Usually the login name consists of the first letter of the first name and the last name. Login names are unique within the Max Planck Society. Common and therefore possibly already assigned login names like "mueller" lead to an error message when saving.

**2** organization: Supported by a suggestion list, here you can define the affiliation of the user account to an organization.

**3** active: If you want the account to be active and usable immediately, please select "true". If you want to activate the account at a later point in time, please select "false".

4 name: Usually, the full name - in the schema *first name and last name* or *last name*, *first name* - is used in this field. The name specified here is displayed in PuRe, for example, in

the header at the top right or in the details of your released items (only visible within your own organization).

5 email: The specified email address is only used as additional information for the Local Admin and is so far not used by PubMan.

Finish the entry by clicking "save". The password for the one-time login will be displayed, which then can be sent to the new user. More about how to change the password can be found <u>in chapter "Homepage - Change password"</u>.

			S	test
loginname*	stest	id	user_3337707	
organization*	Max Planck Digital Library	ould	ou_persistent25	
active	false activate			
name*	Stefanie Test			
email	test@mpdl.mpg.de			
			cancel sav	re
			add grant	ts

Now the button "add grants" is displayed with which you can assign permissions/rights.

			2227777
loginname*	stest	id	user_3337707
organization*	Max Planck Digital Library	ould	ou_persistent25
active	false		
name*	Stefanie Test		
email	test@mpdl.mpg.de		
			cancel save
grants	CONE_OPEN_VOCABUL/		x
	DEPOSITOR		
	dig		
	Publications of the Max Planck Digital Library - ctx_28054 - OPENED < Max Planck Digital Library		~
	External Publications of the Max Planck Digital Library - ctx_513085 - OPENED < Max Planck Digital Library Import Context of the Max Planck Digital Library - ctx_1752789 - OPENED < Max Planck Digital Library Publications of the Max Planck Digital Library - ctx_28054 - OPENED < Max Planck Digital Library		
	[["role":"DEPOSITOR","objectRef":"ctx_28054")]		add grants cancel

The following grants are available:

CoNE Open Vocabulary Editor: For working in CoNE.

For Depositors and Moderators, the workflows of each context play a major role.

**Depositor**: With this role, items can be entered, saved, and submitted but not released. This role is assigned to users who work in contexts with the "standard" workflow.

**Moderator**: With this role, items can be controlled, edited, and released. Moderators also have additional depositor rights in the standard and simple workflow.

By using suggestion lists, the corresponding contexts can be selected. Add the required contexts by "add" to the box and then click on "add grants". Grants can be removed with "x" if necessary.

After assigning the grants, the creation of the user account is complete and you can send the login credentials to the new user.

# 12.1.3 Organizational Units (OUs)

In PuRe, the affiliations that are entered in the publications are organized via "Organizational Units" (OUs). However, those OUs are managed in the Admintool. More about OUs can be found in the corresponding chapter.

The OU function in the Admin Tool allows you to:

- Search for OUs
- Create new OUs
- Rename OUs
- Close OUs
- Edit information about OUs

	MPG. PuRe Q Go Advanced Search Brows
START BA	ASKET (0) TOOLS
	Start / Choose Browse By / Organizati
	Organizatio
Organization	n * @ Max Planck Society [Description]
	Administrative Headquarters of the Max Planck Society [Description]
	Bibliotheca Hertziana - Max-Planck-Institut für Kunstgeschic [Description]
	Center of Advanced European Studies and Research (caesar) [Description]
	💬 Ernst Strüngmann Institute (ESI) for Neuroscience in Coopera [Description]
	Friedrich Miescher Laboratory [Description]
	Fritz Haber Institute [Description]
	Gesellschaft für wissenschaftliche Datenverarbeitung mbH Göt [Description]
	Kunsthistorisches Institut in Florenz, MPI [Description]
	MPDL Services GmbH [Description]
	MPI for Astrophysics [Description]
	MPI for Biophysical Chemistry [Description]

### 12.1.3.1 Search for OUs

Home Users Ous Contexts	Disclaimer Privacy Policy Help
Organizational Units Administration	
	Organizations
	•
1 search by name of organization	
collapse all	
2 > Max Planck Digital Library - ou_persistent25 - OPENED	

**1** Search: Here you can search for specific OUs within your organization. The search field is supported by a suggestion list.

2 Tree structure: Or search for an OU by expanding the OU tree structure (">") and navigating to the OU you are looking for.

### 12.1.3.2 Create OUs

To add an OU, first click on the plus sign "+" .

Users Ous Contexts	Disclaimer Privacy Policy Help
Organizational Units Administration	
	Organizations
search by name of organization	
collapse all	
> Max Planck Digital Library - ou_persistent25 - OPENED	

			Test Research	Group
1 name*	Test Research Group			
2 parent*	Max Planck Digital Library - ou_persistent25 - OPENED < Max Planck Society	parentid	ou_persistent25	
3 address	Amalienstraße 33, 80799 München Country DE 4 start	01.01.2018	end	
5 alternative names			Test Forschungsgruppe	x
6 descriptions	2018 -		4	>>
	Die Max Planck Digital Library ist eine zentrale Einrichtung der Max-Planck-Gesellschaft in der Amalienstraße 33 in d	der Münchner M	1axvorstadt.	x
7 identifiers			www.mpdl.mpg.de	x
	<<			8
			cancel	save

An entry mask will be displayed.

1 name\*: The name of the OU is specified here (mandatory field).

2 parent\*: Here the OU is specified to which the new OU is hierarchically subordinated (mandatory field).

3 address: Optionally, the address of the organization can be specified.

4 start - ende: The time period can be used as additional information for the Local Admins, but is <u>not</u> displayed in the publicly visible description of the OU (the organization details). The "descriptions" field (6) is used for this purpose. The start date, as well as the end date, can be displayed individually.

**5** alternative names: In this field, the alternative name of the OU can be entered, such as the German translation.

6 descriptions: You can add some more information about the OU in the "description" field.

**7** identifiers: An identifier for the OU can be specified here, such as the address of the website or the Orcid-ID. The field provides additional information only and will not be processed by PubMan.

8 save: After entering the required data, you can finish with "save" or "cancel" the data entry.

After saving, the OU has the status "**opened**" and is thus already available in PuRe. The data entered is publicly visible as "organization details" in PuRe. The OU can be closed again with "close" and is also displayed as <u>closed</u> in the OU tree structure in PuRe. OUs can <u>no</u> longer be deleted.

In addition, after opening the OU, the "parentID" field is displayed, which directs to the entry of the hierarchically higher OU (parent). If the new OU is a successor of a previous OU, the predecessor unit can be specified under "**add predecessor** " and a connection can be created.

							Test Research	Group
name*	Test Research Group (attention: changes to organization names are N	OT automatically reflec	cted in existing	g records or Co	DNE author entries	id )	ou_3337710	
parent*	Max Planck Digital Library					parentid	ou_persistent25	
state	OPENED close							
address	Amalienstraße 33, 80799 München		country	DE	start	01.01.2018	end	
rnative names			>>				Test Forschungsgruppe	x
			<<					
descriptions							1,	>>
				1.61.1.4				<<
	Die Max Planck Digital Library ist eine zentrale 2018 -	Einrichtung der Max-	Planck-Gesells	chaft in der Ai	nalienstraße 33 in	der Munchner Ma	axvorstadt.	x
identifiers			>>				www.mpdl.mpg.de	x
			<<					
							cancel	save
							add pred	ecessor

The publicly available organizational details of the sample organization are then displayed as follows:

	Organisationsdetails
Test Research Gro	bup
Details Alternativer Tite	Test Forschungsgruppe
Organisationssitz	Amalienstraße 33, 80799 München, DE
Beschreibung	Die Max Planck Digital Library ist eine zentrale Einrichtung der Max- Planck-Gesellschaft in der Amalienstraße 33 in der Münchner Maxvorstadt.
Identifikator	www.mpdl.mpg.de

### 12.1.3.3 Change OU names

OUs can be renamed, but we recommend closing the OU and creating a new OU instead. External websites that use PuRe as a reference database for publication lists may experience data processing and display errors.

If you decide to rename an OU, change the name of the OU in the "name\*" field. After the change, the "save"-button can be clicked. The OU is now available in PuRe (if not, delete the browser's cache if necessary).

# Important: The OU name in the existing articles, as well as in the CoNE author entries, will not be changed automatically.

Usually, the former OU name should remain in the existing items, and the new, upcoming items should then be linked to the renamed OU. It has been proven helpful to adjust the author CoNE entries on a case-by-case basis manually. A list of <u>CoNE authors</u> to be changed can be generated by inserting the previous OU name into the following link <u>https://pure.mpg.de/cone/persons/query?format=html&q="\*max planck digital library\*"&n=0</u>. Find more in <u>chapter "CoNE - Generate CoNE-Lists"</u>.

		Test Ju	nior Research Group
name*	Test Junior Research Group (attention: changes to organization names are NOT automatically reflected in existing records or CoNE author entries!)	id	ou_3337710
parent*	Max Planck Digital Library	parentId	ou_persistent25
state	OPENED close		
address	Amalienstraße 33, 80799 München DE start	01.01.2018	end
native names		1	Test Forschungsgruppe 🛛 🗴
	<<		
descriptions			>>
			<<
	Die Max Planck Digital Library ist eine zentrale Einrichtung der Max-Planck-Gesellschaft in der Amalienstraße 33 in de	er Münchner Ma	x x
identifiers			www.mpdl.mpg.de 🛛 🗙
	<<		
			cancel save

### 12.1.3.4 Close OUs

You can change the status of OUs to "closed" by clicking "close". OUs can<u>not</u> be deleted.

Important: OUs in the "closed" status can still be linked to items and CoNE author entries.

name*	Test Research Group	id	ou_3337710
	(attention: changes to organization names are NOT automatically reflected in existing records or CoNE author entries!)		
parent*	Max Planck Digital Library	parentId	ou_persistent25
state	OPENED close		
L			
name*	Test Research Group	id	ou_3337710
	(attention: changes to organization names are NOT automatically reflected in existing records or CoNE author entries!)		
parent*	Max Planck Digital Library	parentId	ou_persistent25
state	CLOSED open		

Also, in the OU tree structure in PuRe, the OUs are displayed as closed and are listed after the open OUs:

τς	🔁 Max Planck Digital Library [Beschreibung]
	💬 Big Data Analytics Group [Beschreibung]
	💬 Collections [Beschreibung]
	💬 Core Service Operations [Beschreibung]
	💬 Digital Labs [Beschreibung]
	💬 Information [Beschreibung]
	Software Licensing Group [Beschreibung]
	💬 Test Research Group (GESCHLOSSEN) [Beschreibung]

### 12.1.3.5 Edit OU information

Except for the "parent" field, which specifies the parent unit in the hierarchy, all other fields can also be changed subsequently. When changing the name of the OU in the "name" field, a few further points must be considered, see the following chapter.

With the buttons "<<" and "x" one can remove fields/information again. With the button ">>" further information can be added. The changes can be saved by clicking on "save".

		Test Ju	nior Research Group
name*	Test Junior Research Group (attention: changes to organization names are NOT automatically reflected in existing records or CoNE author entries)	id	ou_3337710
parent*	Max Planck Digital Library	parentid	ou_persistent25
state	OPENED close		
address	Amalienstraße 33, 80799 München Country DE start	01.01.2018	end
alternative names		Test Jur	nior Forschungsgruppe
descriptions	2018 -		>>> //
	Die Max Planck Digital Library ist eine zentrale Einrichtung der Max-Planck-Gesellschaft in der Amalienstraße 33 in	ler Münchner Ma	
identifiers			www.mpdl.mpg.de x
	<<		cancel save

# 12.1.4 Contexts

In PuRe, items are entered into contexts that group the items together. With the help of contexts, you can define settings such as rights and workflows. These contexts are managed in the admintool.

More about contexts can be found in the corresponding <u>chapter "Contexts & Workflows -</u> <u>Contexts"</u>.

This function enables:

- Search for the contexts of the own institute
- Create the contexts
- Close the contexts
- Add and remove genres
- Setting the workflow
- Adding classifications

### 12.1.4.1 Search for contexts

In the admintool, you can search for the contexts available for your organization (MPI).

- In doing so, you can filter by the contexts of the organizations
- Or search for a particular context with the specific name

Users Ous Contexts				Disclaimer Privacy Policy Hel
Context Administration				
				Contexts
		1		•
filter by name of organization				<u> </u>
search by name of context				« prev <u>1</u> next »
	External Publications of the Max Planck Digital Library Import Context of the Max Planck Digital Library	ctx_513085 ctx_1752789	OPENED OPENED	Max Planck Digital Library Max Planck Digital Library

### 12.1.4.2 Create contexts

To add a new context, first click on the plus sign "+".

Users Ous Contexts		Disclaimer Privacy Policy Help
Context Administration		
		Contexts +
filter by name of organization		
search by name of context		« prev <mark>1</mark> next »
External Publications of the Max Planck Import Context of the Max Planck	 OPENED OPENED	Max Planck Digital Library Max Planck Digital Library

An entry mask will be displayed:

					Test Contex
1 <sup>name*</sup> 2 organization*	Test Context Max Planck Digital Library - ou_persistent25 - OPENED < Max Pl	anck Society	~	ould	ou_persistent25
3 description	Test Publication Context of the Max Planck Digital Library				
4 workflow	STANDARD ~				
5 contact email	test@mpdl.mpg.de				
6 allowed genres*	OPINION OTHER PAPER PATENT POSTER PREPRINT PRE_REGISTRATION_PAPER PROCEEDINGS REGISTERED_REPORT REPORT REPORT REVIEW ARTICLE	(attention: the	e genre to be deleted must not	be included in the o	ARTICLE × BOOK × BOOK × DATA_PUBLICATION × PREPRINT ×
subject classifications	DDC ISO639_3 JEL MPIC2_PROJECTS MPINP MPIPKS MPIG MPIS_GROUPS MPIS_PROJECTS MPIWG_PROJECTS	>> all <<			DDC x
					cancel save

**1** name\*: This mandatory field specifies the name of the new context. Usually, there are the following for each institute:

- a publication context: "Publication Contexts of the Max Planck Digital Library".
- an external context: "Non MPI Publications of the Max Planck Digital Library staff"
- and sometimes additionally an import context

2 organization\*: This mandatory field defines the organization for which the context needs to be created.

**3 description** : In the description field, the purpose of the context can be defined in more detail. For example, a publication context can be described as "Productive Context for the Publications of the MPI for xyz" or an external context as "External context for non-MPI publications created by members of the MPI for xyz".

4 workflow: An important field is the selection of the workflow. In PuRe, two workflows, Simple and Standard, are available. You can find more information in the following <u>chapter</u>.

5 contact email: The entered email address will be used as the contact address in all items of the context at "Contact: Moderator". It is only visible for logged-in PuRe users.

			Übersicht Details Freigaber	geschichte   Lokale Tags
Seque	ential generat	ion of proje	ected entangled-pair states	
Wei, Z pair st		irac, J. I. (202	21). Sequential generation of projected entangled	d- Freigegeben
	Kontakt	Moderator		
⊕ ein	blenden: alle			
Basisdaten 📃 aus	blenden:			
Dater	nsatz-Permalink	http://hdl.h	andle.net/21.T11998/0000-0012-06E7-1	
Vers	sions-Permalink	http://hdl.h	andle.net/21.T11998/0000-0012-0C96-6	

6 genres\*: At this point, the <u>genres</u> allowed for the context can be selected. These are then available in the PuRe entry mask. To be able to save the new context, at least one genre must be selected.

**7** subject classification: A <u>classification</u> for subject indexing can also be selected for publication entry in PuRe. Most of the classifications available are specific to certain MPIs.

8 cancel/save: After the required data has been entered, it can be saved with "save" or the entry can be canceled with "cancel".

#### 12.1.4.3 Edit contexts

All fields of the context mask can be changed subsequently.

Generally applies with the control:

With the buttons "<<" and "x" fields can be removed again. With the button ">>" further fields can be added.

							Test C	:oni
name*	Test Context					id	ctx_3337711	
1 organization*	Max Planck Digital Library				change	ould	ou_persistent25	
description	Test Publication Context of the Max Planck Digital Library							
2 state	OPENED							
3 workflow	STANDARD	~						
contact email	test@mpdl.mpg.de							
		4	(attention: the	genre to be de	eted must not be	included in the d	organization's publicatio	on da
allowed genres*	ARTICLE BLOG_POST BOOK BOOK,TEM BOOK,REVIEW CASE_NOTE CASE_STUDY COLLECTED_EDITION COMLECTED_EDITION COMMENTARY CONFERENCE_PAPER	•	>> all <<				ARTICLE BOOK BOOK_ITEM DATA_PUBLICATION PREPRINT	x x x
subject classifications	DDC [SO639_3 JEL MPICC_PROJECTS MPINP MPIRS MPIRG MPIS_GROUPS MPIS_PROJECTS MPIWG-PROJECTS	•	>> all <<				DDC	X

**1** organization: The organization of a context can be changed. However, it is recommended to create new contexts if, for example, MPIs are renamed or merged.

2 state: If a context is no longer needed, you can change the status and "close" it. Vice versa, a context can also be opened again.

**3** workflow: The <u>workflow</u> can be changed from standard to simple or the other way around at any time.

4 genre: The genres available for the context can be extended at any time. When removing genres, however, it must be ensured that the genre to be removed is not already in the context's publication collection. This means, for example, that if there are items with the genre "Journal" in the context, the genre "Journal" cannot be deleted. An advanced or admin search with the categories "Context" and "Genre" is recommended to find out if a genre has already been used.

### 12.1.4.4 Subject classifications

Classifications for subject indexing can also be selected for publication entry in PuRe. You can choose between general classification systems and classifications specified individually for institutes.

Subject classifications	Description
DDC	The Dewey Decimal Classification is an internationally used classification for subject indexing of library collections. It is based on the decimal system and divides knowledge into ten main categories.
ISO639_3	ISO 639_3 is an international standard that defines three-letter codes for identifying languages.
JEL	The JEL classification is a subject classification system used in economics and was created for the Journal of Economic Literature (JEL).
MPICC_PROJECTS	Classification for projects of the MPI for Foreign and International Criminal Law (now: MPI for Research on Crime, Security and Law)
MPINP	Classification for the MPI for Nuclear Physics
MPIPKS	Classification for the MPI for Physics of Complex Systems
MPIRG	Classification for the MPI for European Legal History (now: MPI for Legal History and Legal Theory)
MPIS_GROUPS	Classification for groups of the MPI for Solar System Research
MPIS_PROJECTS	Classification for projects of the MPI for Solar System Research
MPIWG_PROJECTS	Classification for projects of the MPI for the History of Science

# 12.2 CoNE

In CoNE (Control of Named Entities) the open and controlled vocabulary for PubMan is managed.

The open vocabulary includes the categories:

"Persons", "journals" "mpirg" "mpis-groups", "mpis-projects" "jel" "imago" and "citation-styles"

The <u>closed</u> vocabulary includes the categories:

"ISO 639-1" "ISO 639-2" "ISO 639-3", "DDC", "MPIPKS", "MPINP", "MIMETypes", "ESciDOC-MIME-Types", "cclicenses", "funding-organizations", "funding-programs"

There are different permissions for editing open and closed vocabularies. Usually, PubMan users, including library staff, are only given rights to edit the open vocabulary.

# 12.2.1 Access CoNE

To access CoNE, proceed as follows:

#### 1.

Open the tools section of PubMan.

There, select Control of Named Entities (CoNE).

	Max Planck Digital Library, MMDL	Disclaimer Priva
	MPG. PuRe Publication Repository	Go
START WO	DRKSPACES BASKET (0) TOOLS	
CONE SEARCH	H AND EXPORT CITATION-STYLE-EDITOR	
Here is an over	view of the available tools and interfaces.	
nere is an over	Control of Named Entities (CoNE)	
	Search and administrate controlled vocabularies for persons, journa classifications or languages.	ls,
	Citation-Style-Editor	
	Create your own CSL conform citation style with the visual editor. Afterwards these styles can be uploaded to CoNE (see above) and w ready to use immediately.	vill be

or:

2.

Open a new browser tab.

Enter the URL <u>https://pure.mpg.de/cone/</u> in the input line of the browser. Confirm by clicking the Enter key.

S CoNE - Control of Named Entitie × +	
← → C   pure.mpg.de/cone/	
	C R NE Control of Named Entities
	HOME SEARCH

# 12.2.2 Generate CoNE-Lists

In CoNE you can browse through the different categories and create list views for the entries of the different vocabularies in CoNE.

In each browsing section you can choose from the following formats:

- HTML
- RDF (XML)
- Json
- Options
- JQuery

query	all	details
query	all	details
	query query query	queryallqueryallqueryallqueryallqueryall

Under "query", various search queries can be defined via the URL.

"all" returns the complete list of all available entries. Please note that for vocabularies with a large number of entries (e.g. "persons") this option may fail because the number of hits is too large to be displayed in the browser.

In "**details**", one record at a time is displayed with all available metadata. In the list views of "query" and "all" metadata is partly summarized.

#### **Create a query**

Example: Author lists for individual OUs

Using "query" in the vocabulary "persons" you can, for example, create a list of all CoNE authors of your institute.

Here the format HTML is useful since you can click on the individual entries to view them in detail and edit them if necessary.

A query for an institute would look like the following: <u>https://pure.mpg.de/cone/persons/query?format=html&q="\*max planck digital</u> <u>library\*"&n=0</u>

Instead of the name in bold, you can enter any institute name, or the name of a subunit. It is important that the spelling exactly matches the respective unit in the PubMan organisational units (OUs), or the affiliations of the CoNE authors.

If you enter an institute or a department, then you will always (also) receive all authors in the list who have an affiliation from the substructure below it, if applicable.

The length of the lists is limited by default. With "&n=0" at the end of the URL you can remove the limitation.

If you want to have all existing metadata displayed in the list as well (e.g. in RDF or Json formats), then add "&m=full" to the URL:

<u>https://pure.mpg.de/cone/persons/query?format=rdf</u>&m=full&q="\*max planck digital <u>library\*"&n= 0</u>

# 12.2.3 CoNE Login

To edit existing entries from the open vocabulary or to be able to create new entries, first, log in to CoNE with your PubMan account.

Attention: The account must have the user role "CoNE-Open-Vocabulary-Editor".

Note for users of the Max Planck Society: If you do not have this user role, please contact the PubMan support team.

To log in to CoNE, proceed as follows:

- Open CoNE.
- Click on the "Login" button at the top of the screen.

C 🎄 N E				Logir		About
Control of Named Entities HOME SEARCH		_	_			
HOME SEARCH	CONE	Control	~£ N		En	tition
	CONE -	Control	01 1	lameu	EU	uties
The login mask opens.						
C 🎄 N E						*
Control of Named Entities						_
BACK TO CONE						
						Login
			_			
Login			സ്റ്റ്			
Username						
Password						
		Login				

- Enter your PubMan login data in the "Username" field and the password in the "Password" field.
- Click on the "Login" button. The CoNE start page opens.

# 12.2.4 Search in CoNE

In CoNE you can search for existing entries. A login is not necessary. To search for CoNE entries, proceed as follows:

- Open CoNE.
- Click on the "Search" button. The search mask opens.

HOME	BACK TO SEARCH	ENTER NEW ENTITY	IMPORT		
			(	CoNE -	Search
Search	h term journals	•			Search

• Select a search category from the drop-down menu.

arch term	journals 💌		 -	Search
	journals	λ		
	iso639-1			
	iso639-2	Ν		
	iso639-3			
	persons			
	ddc			
	mpipks			
	mpinp			
	mimetypes			
	cclicenses			
	mpirg			
	mpis-groups			
	mpis-projects			
	mpiwg-projects			
	mpicc-projects			
	jel			
	imago			
	funding-organizations			
	funding-programs	-		
	runung-programs			

• Enter the search term in the search box.

Attention: The drop-down menu to the right of the search box is intended for selecting the language. Up to now, the consistent entry of the language in the CoNE entry screen (see Chapter 18.5) has not been done. Since the CoNE entry may no longer be searchable by specifying a language, we do not recommend using this field.

• Click on the "Search" button.

A results list with the available spellings is displayed.

Search term	norcono –	Data:		Canada
	persons	Peter		Search
arch results		Agstner, Peter (MPI for Comparative and International Private Law, Max Planck Society)		Ed
		Ahlfeld, Peter (Max Planck Institute of Molecular Cell Biology and Genetics, Max Planck Society)		Ed
		Aichele, Peter (Department of Immunology, Max Planck Institute for Infection Biology, Max Planck Society)		E
		Aichele, P. (Department of Immunology, Max Planck Institute for Infection Biology, Max Planck Society)		E
		Anding, Peter (Department of Immunology, Max Planck Institute for Infection Biolog Max Planck Society)	ly,	E
		Anding, P. (Department of Immunology, Max Planck Institute for Infection Biology, Max Planck Society)		E
		Anthoni, Peter (Department Biogeochemical Processes, Prof. ED. Schulze, Max Planck Institute for Biogeochemistry, Max Planck Society)		Ed
	ß	Anthoni, P. (Department Biogeochemical Processes, Prof. ED. Schulze, Max Planck Institute for Biogeochemistry, Max Planck Society)		E
		Anthoni, P. M. (Department Biogeochemical Processes, Prof. ED. Schulze, Max Planck Institute for Biogeochemistry, Max Planck Society)		Ec

Attention: Every existing spelling in CoNE will be displayed. These can also be alternative spellings. Not every form of spelling leads to an independent entry.

To open an entry, click on a name. The CoNE entry opens.

EDIT ENTITY			View	persons
Data	URI	persons/resource/persons125557		
	Complete Name	Agstner, Peter		
	Family Name	Agstner		
	Given Name	Peter		
	-	ation MPI for Comparative and International Private Law, Max Planck Society oc-ID ou_24030		
	Last Modification Date	2014-01-24 09:48		
	Creation Date	2014-01-24 09:45		
	Modified By	ou_826576		
	Created By	ou_826576		

### 12.2.5 Add CoNE-Entities for Persons

Important: Each natural person should be recorded in CoNE with only **one** entry. Visit the<u>chapter</u> "<u>Recommendations for working with CoNE</u>" to read more about this topic.

To add a person in CoNE, proceed as follows:

Open CoNE and log in with your PubMan password. The start page of CoNE opens. Click on "**Enter New Entity**". An overview with all categories opens.

	Select Entity Type
journals	
persons	
mpirg	
mpis-groups	
mpis-projects	
mpiwg-projects	
mpicc-projects	
jel	
imago	
citation-styles	

Select the category "persons " and the entry mask opens.

<u>or:</u>					
persons	Description	Persons	;		$\oplus$
	HTML	query	all	details	
	RDF/XML	query	all	details	
	JSON	query	all	details	
	Options	query	all	details	
	JQuery	query	all	details	

Click on the "+"-icon next to persons, to open the person entry mask.

6			New	persons
				·
Data *Cone-ID	Will be generated automatically			
*Complete Name			$\oplus$	
Alternative Name			$\oplus$	
*Family Name			$\oplus$	
Given Name			$\oplus$	
Photo-URL				
Identifier	Ð			
Researcher URL	-			
Keywords of research			Ð	
fields and interests			0	
Subject (DDC)		Ð		
Degree			$\oplus$	
Awards			$\oplus$	
Position	$\oplus$			
E-mail Address				
Telephone				
Actual Status				
*Last Modification Date	Will be generated automatically			
	Will be generated automatically			
	Will be generated automatically			
*Created By	Will be generated automatically			
* mandatory field				
				Save

All fields marked with an asterisk "\*" are mandatory fields and must be filled in before saving. By clicking on the  $\oplus$ -symbol behind the entry fields, you can add further fields.

Attention: Behind some entry fields, like for example "Complete Name" there is another entry field. These fields are intended for language specifications. By default, they are filled in "German" (de).

• Enter the full name in the form "Doe, John" in the **Complete Name** field.

• After each entry of a name, PubMan will **check for duplicates.** The colored borders have different meanings:

green = this entry does not yet exist in CoNE.

*Complete Name	Lee, Lu	i	Ð
red = this entry alr	eady exists in CoNE, it is a duplicate.		
*Complete Name	Lee, Anna	i	Ð

blue = this entry already exists several times in CoNE. A blue border appears only for fields where a double entry is acceptable.

*Family Name	Lee	i	€	)
			4	

If you click on the "!" button behind an entry field, all existing entries containing the duplicate spelling will be displayed.

*Complete Name	Lee, Anna	(f)
Alternative Name		Lee, Anna (Research Department List, Max-Planck-Institut für Kohlenforschung, Max Planck Society) [edit] [new window]
Given Name		Lee, A. (Research Department List, Max-Planck-Institut für Kohlenforschung, Max Planck Society) [edit] [new window]
Photo-URL Identifier		
Researcher URL	$\oplus$	
words of research ields and interests		
Subject (DDC)		
Degree		
Awards		-
Position	$\oplus$	

In case it is actually a different person with an identical name, it is still possible to save the CoNE entry.

- Enter an alternative name in the form "Last name, First name" in the "Alternative name " field. This can be an additional form of the name.
- Enter the last name of the person in the "Family Name " field.
- Enter the person's first name in the "Given Name " field.
  - If you want to include a photo in the "Researcher Portfolio", enter the URL where the photo can be found in the "Photo URL" field.

To specify an identifier for the person, click on the -icon behind the "**Identifier**" label. The "**Value**" and "**ID Type** " fields open.

Data	*Cone-ID	Will be generated automatically	
	*Complete Name		$\oplus$
	Alternative Name		$\oplus$
	*Family Name		$\oplus$
	Given Name		$\oplus$
	Photo-URL		
	Identifier		
		*ID Type	
		*Value	

- For the "ID Type " you can choose between a number of predefined possibilities:
  - ORCID
  - ISNI
  - ResearcherID

- GND
- ScopusAuthorID
- DigitalAuthorID
- MRAuthorID
- IRIS
- MPIKYB
- MPIB

You can also fill this field with free text. If you want to have more IDs included in the autosuggest list, please contact the <u>PuRe Support Team</u>.

• Enter the corresponding ID in the field "Value".

Identifier $\bigoplus igodot$		_
*ID	O Type ORCID	i
*	Value https://orcid.org/ 0000-0002-2661-8242	

Attention: All subsequently added ORCID IDs will only be linked to new records. To link already entered records with the ORCID ID of a person, the batch processing function can be used. Instructions for this can be found in <u>chapter "Workspaces - Batch processing</u> - <u>Actions - Change metadata"</u>.

To include a person's website in the "Researcher Portfolio", click on the plus symbol behind the "**Researcher URL**" label. The "**Value**" and "**Description** " fields open.

Researcher URL 🕀 🕀			
*Value	https://www.MariaMuster.org	i	
*Description	Homepage of Dr. Muster		Ð

- Enter the URL of the homepage in the "**Value**" field. In addition to a personal or institution-related website, this could also be a XING, LinkedIn, ResearchGate, GitHub or comparable site.
- Enter a short description in the "**Description** " field, for example "Homepage of Dr. Doe".

Enter keywords related to the person's research field in the "Keywords of research fields and interests" field.

In the "**Subject** (**DDC**)" field, enter a keyword from the Dewey Decimal Classification (DDC) as "Subject - number".

For example, "Technology - 600." To search for a suitable DDC keyword, you can use the CoNE category "DDC". There you can browse for keywords. You can also research a keyword using the CoNE search. For more information, see the chapters <u>Search in CoNE</u> and <u>Generate CoNE-Lists</u>.

Enter the academic title of the person in the "Degree" field.

Enter the person's awards in the "Awards" field.

Open the entry fields for "**Position**" by clicking on the  $\oplus$ -icon to the right. Various metadata fields open:

Keywords of research fields and interests		$\oplus$
Subject (DDC)	Ð	
Degree		$\oplus$
Awards		$\oplus$
Position 🕀		
E-mail Address	-	
Telephone		
Actual Status		

Enter the name of the affiliation in the **Organization** field. If the affiliation was created as an Organizational Unit, an autosuggest list will appear.

Awards			$\oplus$	
Position	$\oplus$ $\ominus$			
	Organization	MPDL MPDL Services GmbH, Max	Planck Society	Ð
	OU-ID	Max Planck Digital Library, M	lax Planck Society	
	Position Appellation			$\oplus$
	From			
	Until			
	E-mail Address			
E-mail Address				
Telephone				
Actual Status				

Select the name of the Organizational Unit. The OU ID is automatically entered in the **OU ID** field. If the affiliation was not created as an organizational unit, enter the name manually. In this case, the "OU-ID" field remains empty.

Attention: If you use the OU from the autosuggest list, do not change (or overwrite) the entered OU. The OU must be entered together with the parent OUs.

In the **Position Appellation** field, enter the person's position in the organization.

Attention: Do not enter the position in the "Position" field, otherwise the author names will be displayed incorrectly in PubMan. Use the "Position Appellation" field for this purpose.

Position 🔂 🕀 Organization	$\bigcirc$
OU-ID	
Position Appellation	
From	
Until	
E-mail Address	

- In the "From " field, enter the sart date of the affiliation with the organization.
- In the "Until " field, enter the time when the organization affiliation ended.
- The time periods are relevant for the assignment during migration.

Attention: If possible, enter the time data in the format "year" or "year-monthday" (for example, 2015-02-07). Otherwise, PubMan cannot perform the matching with the year information in data records. If dates are entered to the day, the system will not assign publications from 2015 to the person.

- Enter an email address of the person in the "Email Address" field.
- Enter a phone number of the person in the "Telephone" field.
- Enter the person's activity status in the described "Organizational Unit" in the "Actual Status" field.
- Click the "Save" button to save the person entry. A search with the newly created entry as search result is displayed .

# 12.2.6 Add CoNE-Entities for Journals

Each journal that is supposed to appear in the autosuggest list of the (source) title field must be entered in CoNE beforehand.

To do so, proceed as follows:

Open CoNE and log in.

Click on the "+"-icon next to journals, to open the journal entry mask.

<u>Or:</u>

Click on the "Enter new Entity" link.

Control of Named E			IMP	PORT			Logout	About
				Control	of	Name	ed En	tities
About	The purpose of this service facilitate data access and da		de me	ethods to deal with contro	olled lists	of named entities t	o assure data qu	ality and
journals	Description HTML RDF/XML	query	all all	details details				$\odot$
	JSON Options JQuery	query	all	details details details				ß

An overview with all categories opens. Click on "journals".

	Select Entity	Туре
journals		
persons		
mpirg		
mpis-groups		
mpis-projects		
mpiwg-projects		
mpicc-projects		
jel		
imago		
citation-styles		

The entry mask opens:

				New journals
Data	*Cone-ID	journals/resource/		
	*Journal Name			
	Alternative Journal Name		€	)
	Abbreviation			
	Identifier	Ð		
	Publisher			
	Publisher Place			Ð
	Citation Style			
* mandatory field				
				Save

Proceed as follows when filling in the entry mask:

- Enter a unique identifier for the journal in the "**Cone-ID** journals/resource/" field. If available, use the **ISSN** number (e.g. 1234-5679)
- Enter the **full name** of the journal in the "Journal Name" field.
- If available, enter the **alternative name** of the journal in the "Alternative Journal Name" field.
- If available, enter the **abbreviated title** in the "Abbreviation" field.

• After entering a journal name, PubMan will **check for duplicates.** The colored borders have different meanings:

green = this entry does not yet exist in CoNE.

red = this entry already exists in CoNE, it is a duplicate.

blue = this entry already exists several times in CoNE. A blue border appears only for fields where a double entry is acceptable .

If you click on the "!" button behind an entry field, all existing entries containing the duplicate spelling will be displayed.

• To specify an **identifier** for the journal, click on the  $\bigoplus$ -icon behind the "Identifier" label. The "**Value**" and "**ID Type** " fields open: Enter the value of the identifier in the "Value " field. Then specify the kind of identifier in the "ID Type" field e.g ISSN.

Identifier 🕀 ⊖	
*Value	1234-5679 i
*ID Type	ISSN

• If available, enter the publisher in the "Publisher" field.

• If available, enter the publisher's location (and optional the postal code) in the "**Publisher Place**" field.

• The "Citation Style" field controls the citation of the journal in the JUS citation style. There are three possible citation styles that can be entered in the field:

- Kurztitel\_ZS Band, Heft (Jahr)
- Titel\_ZS Band, Heft (Jahr)
- (Jahr) Band, Heft Titel\_ZS

The fields **CoNE-ID**, **Journal Name** and **Identifier** are mandatory fields. The remaining fields such as "Citation Style" or "Publisher Place" can be filled in optionally if information is available.

• Click the "Save" button to save the entry.

			Ν	ew joui	rnals
Data *Cone-ID	journals/resource/1234-693	31	i		
*Journal Name	MPG.PuRe Journal		i 😑		
Alternative Journal Name			<b>(</b>		
Abbreviation	PuRe Jour.		i 😑		
Identifier					
	*Value	1234-6931		i	
	*ID Type	ISSN			
Publisher	Max Planck Society	[	i		
Publisher Place	Munich		i	$\oplus$	
Citation Style					
* mandatory field					
					Save

The created entry is displayed and can be searched from this point on.

Example of a finished journal entry:

EDIT ENTITY	View journals
Data URI	journals/resource/2397-3366
Journal Name	Nature astronomy
Abbreviation	Nat. Astron.
Identifier	/alue 2397-3366
ID	Type ISSN
Publisher	Springer Nature
Publisher Place	London

# 12.2.7 Edit CoNE-Entities

To edit existing CoNE entries, proceed as follows:

- Search for the CoNE entry you want to edit using the search.
- Click on the CoNE entry in the results list. The entry is displayed.
- Click on the "Edit Entity " button above the CoNE entry.

HOME BACK TO SEARCH	ENTER NEW ENTITY IMPORT	
EDIT ENTITY		View journals
Data	URI journals/resource/1234-5678	
Journal	Name Journal of Librarian	
Abbrev	iation Journal of Lib.	
Ide	ntifier Value 1234-5679	
	ID Type ISSN	
Pub	lisher Musterverlag	
Publisher	Place München	
Citation	Style Titel_ZS Band, Heft (Jahr)	

• The entry mask opens.

	journals:journals/r	resource/1234-5678
Data	*Cone-ID	journals/resource/1234-5678
	*Journal Name	Journal of Librarian i 😑
	Alternative Journal Name	$\oplus$
	Abbreviation	Journal of Lib.
	Identifier	
		*Value 1234-5679 i O
		*ID Type ISSN $igodot$
	Publisher	Musterverlag i $\Theta$
	Publisher Place	München i $\oplus \Theta$
	Citation Style	Titel_ZS Band, Heft (Jahr) i
	Delete	Save

- Make the desired changes by clicking into the corresponding field. Existing content can be deleted and new data can be entered.
- Click on the "Save" button to save the changes.

# 12.2.8 Delete CoNE-Entities

Proceed as follows to delete CoNE entries:

- Open the entry you want to delete.
- Click on the "Edit Entity" button that appears above the CoNE entry. The entry mask opens.
- Click on the "Delete" button below the entry to delete it.

journals:journals	/resource/1234-5678
Data *Cone-I	D journals/resource/1234-5678
*Journal Nam	i O
Alternative Journal Nam	e 🕒
Abbreviatio	n Journal of Lib. i \ominus
Identifi	er ⊕ ⊖
	*Value 1234-5679 i O
	*ID Type ISSN $\Theta$
Publich	st Musterinder
Publish	Pr Musterverlag i $\Theta$
Publisher Plac	i 🕀 \ominus
Citation Sty	e Titel_ZS Band, Heft (Jahr) i $\Theta$
Delete	Save

- The message "Really delete this entry" appears.
- Confirm the message by clicking the "OK" button. The entry is deleted.
- The entry mask appears with another message "Entry deleted successfully".

Attention: The deletion of entries is **not reversible**.

		New journals
Entry deleted successfully.		
Data *Cone-ID	journals/resource/	
*Journal Name	Journal of Librarian	Θ
Alternative Journal Name		$\oplus$
Abbreviation	Journal of Lib.	Θ
Identifier		
	*Value 1234-5679	i $\Theta$
	*ID Type ISSN	Θ
Publisher	Musterverlag	Θ
Publisher Place	München	i ⊕⊖
Citation Style	Titel_ZS Band, Heft (Jahr) i	Θ
* mandatory field		Save

# 12.2.9 Recommendations for working with CoNE

Following are some recommendations for working with CoNE.

### 12.2.9.1 Persons

Each natural person should be recorded in CoNE with only **one** entry. This also applies for people who work at different Max Planck Institutes over time.

Multiple entries of persons (duplicates) worsen the clarity of the inventory and reduce the actual added value of CoNE: the clear identification of persons for search and exports. Therefore, it is worth investing some time and effort in the management of the CoNE-entries.

When creating new person entries, each individual case should be carefully examined:

- Using the search function in CoNE to determine if there is already an entry.
- This is especially true for individuals who are known to have previously worked at another MPI.
- Paying attention to the automatic duplicate check when entering data in the metadata fields of CoNE (colored hints).
- In unclear cases, it is often possible to clarify, e.g., by telephone with colleagues at the other institute, whether it is really the same person.

Change of institute:

- Existing CoNE entries can be expanded to include the new information. In unclear cases, the other institute concerned should be briefly informed: e.g. if a scientist is employed at both MPIs for a while.
- If new affiliations are added to a person, the already existing affiliations should be kept. This makes the clear identification of people easier.
- The MPI at which the scientist is currently working should have "sovereignty" over the data.

When entering alternative name variants, **only the variants really needed for the entry** in the publications should be entered - not all conceivable and theoretically possible forms. Too many name variants quickly extend the suggestion lists during entry and search and thus worsen the clarity.

The (at least additional) entry of **full first names** considerably makes the identification of authors easier. With the growing number of persons recorded, it can become very difficult in the long run to make distinctions on the basis of initials alone.

Only the respective **own MPI-authors** should be recorded continuously in CoNE. However, external partners can also be co-managed.

For external persons who regularly appear as partners in publications, **external organizational units** can be created by the MPG.PuRe-support (e.g. "University of Hamburg"). These can then be

assigned with their own ID as affiliations in CoNE.

#### Be careful when

**deleting CoNE entries**! These cannot be restored. **No CoNE entries should be deleted that are still linked to publications** in PuRe. This can be checked via the search in PuRe.

Time details for affiliations: This information is particularly important for imports during migration to ensure automated assignment to the appropriate affiliations. It is not necessary to maintain this information in CoNE. The effort to do so over time is relatively large, but there is little benefit beyond the imports - CoNE is not a tool for managing personnel data.

If time periods are entered for affiliations, it is strongly recommended that **only yearly data** be entered - no monthly or daily data. Otherwise, imports may result in incorrect assignments, since publications usually also contain only yearly data.

The short fields behind the individual metadata fields in the CoNE mask were originally intended to specify different languages. However, this function has undesirable side effects on the search, which is why these fields should generally be left

empty.

Tip for shortening the suggestion

lists in the entry mask and search: In addition to the name, enter a term from the affiliation (e.g. from your institute name). This is especially helpful for very frequently occurring author names. The chosen institute structure may affect the searchability in CoNE: Names of department and group heads in the designations of the respective organizational unit lead to the fact that all CoNE authors from the department/group are always also displayed, if actually only the department head/group head is searched for.

### 12.2.9.2 Journals

In contrast to the authors, where the exact link from CoNE to the publications in PuRe is very important for subsequent use, the CoNE journals should rather be seen as help for entering journal data.

- Nevertheless, care should also be taken here not to create too many duplicate, redundant or incorrect entries.
- Too many or overloaded entries reduce the clarity of the proposal lists considerably (duplicates and many short titles/alternate titles).
- Using the suggestion lists when entering is not mandatory: it should be a simplification of the work, otherwise it is advisable to ignore them.

When using the suggestion lists in PuRe, keep in mind:

- There are (numerous) duplicates
- Data may not be up-to-date (anymore): ISSN, publisher information may have changed over time.

When entering/maintaining journals, please note:

- Please do not simply edit the existing titles/short titles/alternate titles according to your own wishes: These are also used by other MPIs and may be just as desired.
- In case of doubt, a vote on the PuRe-Users list might be helpful.
- On the other hand, please do not extend the list of alternative titles endlessly: the clarity of the proposal lists suffers greatly from this.
- An orientation towards "standardized" templates would be conceivable: e.g., the <u>ZDB</u>.
- Separate entries should be created for e-journals
- It is sufficient to enter the ISSN ID-Type in the form "ISSN".
- The field "Citation Style" is only relevant for the Jus citation style and should otherwise be left blank.

# 12.3 REST-Interface

Integrated in PubMan is the "Search and Export" tool. It uses the "REST" interface to export records.

REST is the main interface in PubMan. You can use it not only to export data but also to import and update it. The base URL is: <u>https://pure.mpg.de/rest/</u>.

Other tools, like Swagger, can also use the REST interface. Here you can find the for PubMan configured Swagger: <u>https://pure.mpg.de/rest/swagger-ui.html</u>

To find more documentation about the interface follow: https://colab.mpdl.mpg.de/mediawiki/INGe\_REST\_API\_Documentation

# 12.3.1 Perform export via REST

The REST interface can be accessed directly from PuRe through the "Search and Export" interface.

To export data from PuRe, proceed as follows:

- Perform an advanced search. For more information see: Open the advanced search
- Insert the search query into the REST-interface. For more information, see <u>Insert query in</u> <u>REST-interface</u>
- Specify other settings for the export in the "Sorting" section. In the "Sort key" field, you can use a sorting key to define the sorting of the results list. The list of allowed sorting keys highlighted in blue is located above the field. Additionally, you can sort by another criterion within a criterion. Find more information in the next <u>chapter</u>.
- Select in the sorting order field whether the order should be "ascending" or "descending".
- You can add more or delete sorting fields with the + and icons.

			Export E-Mail / Tools / Search And Export Search And Export
Search Query Form	*Elastic Search Query	{ "bool" : { "must" : [ { "term" : { "publicState" : { "xalue" : "RELEASED", "boost" : 1.0 }	•
	Sorting	List of allowed sorting keys Sorting Key metadata.title.keyword	Sorting Order ascending 🖌 🕀 🔿
	*Record Span	Offset 0	Maximum Records (max. 5000) 5000
	*Export Options	MarcXML	
			Download Exportfile Download Curl Command

- In the "**Record Span**" section, specify which records of the results list should be displayed. This function is particularly relevant if only a specific section of a very extensive results list should be displayed. The data records are numbered consecutively in the results list. Enter the number of the first and the last data record. The data records in between will be displayed.
- Specify the export format in the "Export Options".

			Search And Export	
Search Query Form	*Elastic Search Query	{     "bool" : {     Export formats without citation     EndNote (UTF-8)     BibTeX     JSON     eSciDoc XML     MarcXML	•	
	Sorting	Export formats with citation pdf docx (MS Word, Open Office) html (plain)	Sorting Order ascending	
	*Record Span	html (linked) JSON Snippet eSciDoc Snippet	Maximum Records (max. 5000) 5000	
	*Export Options	MarcXML	Download Exportfile	

• For export formats with citation, another field appears to select the export format.

Sorting	List of allowed sorting key Sorting Key metadata.title.keyword	/S		Sorting Order ascending 💙	<b>⊕</b>	
*Record Span	Offset 0			Maximum Record	ls (max. 5000)	
*Export Options	pdf	•	APA APA (Chir AJP JUS CSL	nJapKorean)		Download Exportfile ownload Curl Command

- You can save the results in the selected export format using the "Download export file" button or download the "Curl command".
- You can retrieve a link for a search feed in ATOM format. To do so, retrieve the link from "Atom, version 1.0".

	Sorting	List of allowed sorting keys Sorting Key metadata.title.keyword		Sorting Order ascending ♥ ⊕⊙		
	*Record Span	Offset 0		Maximum Record 5000	ds (max. 5000)	
	*Export Options	pdf	APA	•		
					Do	Download Exportfile wnload Curl Command
Search Feed	Atom, version 1.0					

# 12.3.2 Sort by multiple criteria

Using the REST interface, sort keys can be used to sort on multiple levels. Please proceed as follows:

- Perform an **advanced search**, for instance, for an institute.
- To do so, enter the name of the institute in the "Organization" field. After entering three letters, an autosuggest list will appear. Select the name of the organization from the autosuggest list.
- Start the search by clicking on the "Start search" button at the bottom right. Find here more information about <u>search</u> in PuRe. The results list appears.
- Insert the search query into REST by clicking the "Insert query in REST interface" button. This button is located above the displayed results.

VIEW SORT EXPORT ACTIO	INS	Start / Search Results
Bibliographic List Table View		Search Results
3389 Items found (descending	sorted by Modification Date)	
Revise Search Show Query	Insert query in REST-Interface	
25 💌 per page	◀ ◀ Previous   1   2   3   4   5   6   7   Next ▶ ▶	1 of 136

• Individual sorting keys can be entered directly into the corresponding field to create curl commands or downloads. To get a first-level sort in alphabetical ascending order by title, enter the appropriate sorting key in the REST interface mask using the following syntax in the "Sorting key" field: metadata.title.keyword.

Note for users of the Max Planck repository: The list of available citation styles can be found here: INGe-REST sorting key

- For a multi-level sort, first download the "Curl command". Then, complete the sort command in an editor. The sort command can look like the following: "sort":
   [{"metadata.genre" : {"order" : "ASC"}},{"sort-metadata-creators-first" : {"order":
   "ASC"}}]
- This will be integrated into the curl command before "size". A finished curl command could look like the following: curl -X POST

   https://qa.pure.mpdl.mpg.de/rest/items/search?format=docx&citation=APA" -H 'Cache-Control: no-cache' -H 'Content-Type: application/json' -d '{"query":
   {"bool":{"must":[{"term":{"publicState":{"value":"RELEASED","boost":1.0}}},{"term":{"vers ionState":{"value":"RELEASED","boost":1.0}}},{"term":{"vers ionState":{"value":"RELEASED","boost":1.0}}},{"term":{"term":{"metadata.creat ors.person.organizations.identifierPath":{"value":"ou\_persistent25","boost":1.0}},{"term ":{"metadata.creators.organization.identifierPath":{"value":"ou\_persistent25","boost":1.0}}},"sort": [{"sort-metadata-creators-compound,,sort-metadata-dates-by-category":
   {"order": "ASC"}}]"size": "50","from": "0"}'
- This command allows you to export the items using an HTTP request tool, such as Postman.

Attention: Please take care not to copy any spaces in front or behind the command.

				Nod Export
Search Query Form	*Elastic Search Query	{ "bool": { "must": [ { "term": { "publicState": { "value": "RELEASED", "boost": 1.0 }		
	Sorting	List of allowed sorting keys Sorting Key metadata.title.keyword	Sorting Order ascending ▼ ⊕ ⊖	
	*Record Span	Offset 0	Maximum Records (max. 5000) 5000	
	*Export Options	MarcXML		
			D	Download Exportfile ownload Curl Command

# 12.4 Citation Style Editor

The Citation Style Editor (abbreviated as CSE in the following) is a tool that allows you to change a citation style in the "Citation Style Language" (CSL).

The CSE can be accessed via the following link and is also available in PubMan in the "Tools" section: <u>https://pure.mpg.de/csl-editor/about/</u>.

	Search Search for the name of a style, the title of a Journal, or search by example.	
. Find a style	2. Edit the style	3. Use the style
earch by name	If you can't find a style that quite suits your needs, find one that's a pretty close match and click the "Edit style" button to open that style in the visual editor.	Once you've found a style that's suitable for you to use, simply click the "Install button on the search results, or "Save" a style you've edited, to use it in MPG PuRe or your reference manager.
u're looking for a style like APA, Harvard, etc just use the search box te top of the page to search for a style name, or journal title.	American Journal of Medical Genetics	MPG.Purke of your reference manager.
earch by example	INLINE CITATION [McInnis and Nelson, 2011]	
you don't know the name of the style, but know what the final citation nould look like, you can use our search by example tool to find styles that lost closely match.	BIBLIOGRAPHY         Molnnis, MD, Nelson, LP. 2011. Shaping the Body Politic: Ar Formation in Early America. University of Virginia Press. 313           Install         Edity_View code	
INLINE CITATION		
(McInnis & Nelson, 2011)		
BIBLIOGRAPHY		
McInnis, M. D., & Nelson, L. P. (2011). Shaping the Body Politic: Art and Formation in Early America. University of Virginia Press.		

# 12.4.1 Video tutorials

To get an insight into the features of the CSL editor, we recommend the following videos (in German): Most videos are in German, but by clicking on "settings", "subtitles" and "automatically translate", subtitles in English are available.

- A Citation Style Editor webinar for Citation Style Language (CSL) (90 minutes): <u>https://www.youtube.com/watch?v=NDnf0o80dwg</u>
- An introductory video for the Citation Style Editor (in German): <u>https://www.youtube.com/watch?v=tOkCKX-i0sA</u> (15 minutes)
- A description of the entire workflow from saving new citation styles to the desktop, uploading them to CoNE to reopening existing styles in the editor (in German): <u>https://www.youtube.com/watch?v=IKq8eqRxqR0</u>
- A description of the "basics", i.e. a short introduction to the menu items of the editor (in German): https://www.youtube.com/watch?v=F9pHroiwM6M
- A general description of the "Visual Editor", i.e. the area where you can make changes to the citation style using a tree structure (in German): <u>https://www.youtube.com/watch?v=TZD6vmXOofM</u>

Tip: English subtitles for German videos: By clicking on "settings", "subtitles" and "autotranslate -- English", subtitles in English are available. The quality of the subtitles varies.

# 12.4.2 Use of ready-to-use or customized

### styles

In PubMan, you can use the available <u>ready-to-use standard styles</u> (approx. 1400) and also your own custom citation styles. Starting from the summary or detailed view of an item or starting from a results list, select a form from the "Export formats with citation" area in the export options and then select the citation "CSL". An input field appears and by using a keyword from the citation style title, an autosuggest list is generated. There you can select the desired style. The citation styles are also available in the <u>REST interface</u>.

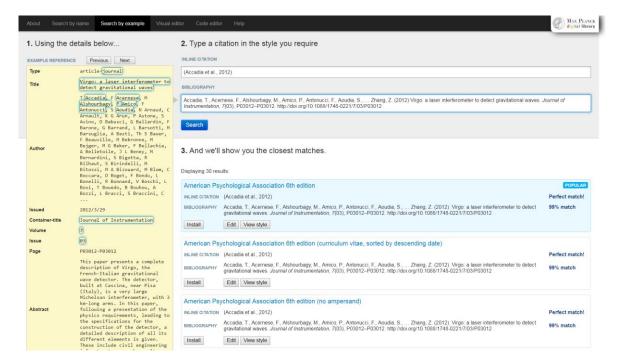


# 12.4.3 Creation of a new style in CSE

Creating a new citation style from scratch is time-consuming and error-prone. It has proven useful to modify an existing citation style to suit your needs. Find more information in the next chapters.

# 12.4.4 Find a basic style

To find a suitable style, the "**Find a style**" function is available in CSE. You can <u>search for the name</u> <u>of a style</u> or <u>use an example</u> to find a style that already meets many of your requirements. You can adapt the suitable style by clicking on "Edit". This will take you to the "<u>Visual Editor</u>". Here, in the "EXAMPLE REFERENCE" area, you can click on the segments you want to customize and make the adjustments.



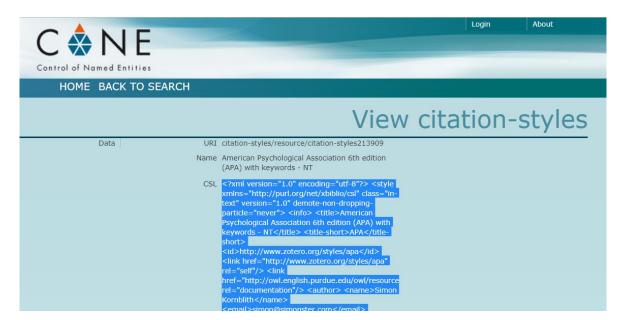
### 12.4.5 Open a custom style in CSE

There are several ways to open a style in CSE:

1. If you store your citation styles on your desktop, just click on "Style" in the Visual Editor of the CSE, then "Load Style". Then click on "Browse", select your folder and open the style you want to edit.

About Search by name Sear	ch by example Visual editor Code editor Help	MAX PLANC digital librar	
Style • Edit •	American Psychological Association 6th edition	Example citations	
STVLE NFO Global Formating Options HLINE CTATIONS F-C Layout F-G Layout F-G Sont HAGEROS - Macro contane-contributors - Macro secondary-contributors - Macro acutor - Macro access	EXAMPLE CITATIONS (Accadia et al., 2012) (McLinia's Nelson, 2011) EXAMPLE BIBLIOGRAPHY Accadia, T., Acenese, F., Alshourbagy, M., Amico, P., Antonucci, F., Aoudia, S., Zhang, Z. (2012). Virgo: a laser interferometer to detect gravitational waves. <i>Journal of Instrumentation</i> , 7(03), P03012 -P03012. doi:10.1088/1748-0221/7033P03012 McLiniis, M. D., & Nelson, L. P. (2011). Shaping the body politic: Art and political formation in early america. Charlottesville, VA: University of Virginia Press.		
Macro: title     M	Info         Title       American Psychological Association 6th edition         Title (short)       APA         D       Htp://www.zotero.org/styles/apa         Summary       Choose a CSL file to load         Rights       This work is licensed under a Creative Commons Attribution-Sharo/         Published       Durchsuchen         elssN       Durchsuchen         ISSNs       Durchsuchen         Add ISSN       Durchsuchen         Intext       Durchsuchen         Ittp://oww.zotero.org/styl.geif       Delete         http://oww.zotero.org/styl.geif       Delete		

2. If you do not store your citation styles on your dektop, retrieve them from CoNE. (The ready-touse standard citation styles, as a basis for your own styles, can be found directly in CSE). Open CoNE and search for your style via "Search" or "Back to search". In the search, select the "citationstyles" field and enter your search terms. Select the citation style you want to open and edit. Copy the content of the CSL field:



Open the "<u>code editor</u>" in CSE and delete the current code. Then copy the CSL code from CoNE into the code editor.

About	Search by name	Search by example	Visual editor	Code editor	Help	MAX PLANCK digital library
FORMA	ITED INLINE CITATIONS					
	dia et al., 2012)					
(McIr	nis & Nelson, 2011)					
FORMA	ITED BIBLIOGRAPHY					
	tia, T., Acernese, F., Als 221/7/03/P03012.	shourbagy, M., Amico, P.,	Antonucci, F., Ac	oudia, S., Zhar	ng, Z. (2012). Virgo: a laser interferometer to detect gravitational waves. Journal of Instrumentation, 7(03), P03012–P03012. doi:10.1088/174	48-
McIni	iis, M. D., & Nelson, L. I	P. (2011). Shaping the bo	dy politic: Art and	political formatio	n in early america. Charlottesville, VA: University of Virginia Press.	
cro="lo	cators"/> <group< td=""><td>delimiter=", " pref</td><td>ix=". "&gt; <tex< td=""><th><t macro="eve&lt;/th&gt;&lt;th&gt;nt"></t> <text macro="publisher"></text> <text macro="access" prefix=" "></text> <td>raphy&gt; </td></th></tex<></td></group<>	delimiter=", " pref	ix=". "> <tex< td=""><th><t macro="eve&lt;/th&gt;&lt;th&gt;nt"></t> <text macro="publisher"></text> <text macro="access" prefix=" "></text> <td>raphy&gt; </td></th></tex<>	<t macro="eve&lt;/th&gt;&lt;th&gt;nt"></t> <text macro="publisher"></text> <text macro="access" prefix=" "></text> <td>raphy&gt; </td>	raphy>	

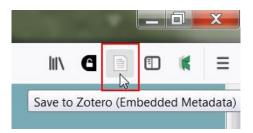
Then go to the "Visual Editor" where you can edit the style as usual.

3. Or you create a csl file with the code. For this, paste the copied code (context menu or "Ctrl" + "v") into an empty file of any text editor (Windows Editor, Notepad++ or Wordpad) and then save the file/citation style on your desktop. Be sure to use the ".csl" file extension. Then upload the style to the CSE using the "Load style" function and edit the style.

### 12.4.6 Add examples to the CSL editor

Following is a detailed step-by-step guide:

- Open Zotero
- Search in the browser for the publication in PubMan
- Add the publication to Zotero using *Zotero Connector* in the browser.



• Export the selected entry to Zotero by a right-click on the entry.

+ 🗡 🖓 🛱	⊥ "≣ ∭ …	
Title	BibLaTeX	^
🗎 A Guide To The regulation	Bibliographic Ontology RDF	
🖹 Effects of electric fields on pr	BibTeX	
Intrinsic Rates and Activation	Citation Style Language data format	ulling Experiments
🖹 Kinetics of the Chiral Disulfor	COinS	iction
🖹 Organocatalytic Enantioselec	MODS	Malonic Acid Half Thioesters with
	Netscape Bookmark File Format	
	Refer/BibIX	
	RIS	
	Text Encoding Initiative (TEI)	
	Unqualified Dublin Core RDF	
	Wikipedia Citation Templates	
	Zotero RDF	

- Then export the entry in the format CSL JSON in Zotero available as "Citation Style Language data format".
- Save the export file on your desktop and open it in an editor.
- Copy the code.
- Open the CSL-Editor: <u>https://pure.mpg.de/csl-editor/visualEditor/</u>
- Open e.g. "Citation 1" of "Example citations" in the right corner.

MAX PLANCK digital library
Example citations 🔹
Citation 1
Citation 2
Citation 3

• Then go to "Advanced".

	Citation 1			
1	article- journal	Virgo: a laser interferometer to detect gravitational waves	Normal citation	•
	report	Country clustering in comparative political economy	Normal citation	•
	book	Selected non-fictions	Normal citation	•
	article- journal	The varieties of capitalism and hybrid success	Normal citation	,
	book	Planting green roofs and living walls	Normal citation	•
	article- journal	On the electrodynamics of moving bodies	Normal citation	,
	article- newspaper	Rooftop greenhouse will boost city farming	Normal citation	٠
	book	Beyond varieties of capitalism: conflict, contradiction, and complementarities in the European economy	Normal citation	,
	book	Steve Jobs	Normal citation	•
	chapter	Firms and the welfare state: When, why, and how does social policy matter to employers?	Normal citation	•
	book	Shaping the body politic: Art and political formation in early america	Normal citation	•
	patent	Yo-yo having a modifiable string gap	Normal citation	•
	article- journal	Molecular structure of nucleic acids; a structure for deoxyribose nucleic acid	Normal citation	,
	webpage	CSL search by example	Normal citation	•
Rese	et all citation	ns to default		

- Scroll down to "Add new reference" and paste the copied code into the box.
- Confirm by clicking on the button "Add new reference". Now the publication is listed as new example at the end of the list.

Edit Citation 1				
chapter	Firms and the weifare state: when, why, and now does social policy matter to employers?	Normal citation	٣	
book	Shaping the body politic: Art and political formation in early america	Normal citation	•	
patent	Yo-yo having a modifiable string gap	Normal citation	•	
article- journal	Molecular structure of nucleic acids; a structure for deoxyribose nucleic acid	Normal citation	•	
webpage	CSL search by example	Normal citation	•	
✓ article- journal	The Benefits of Cotranslational Assembly: A Structural Perspective	Normal citation	•	
Reset all cita	tions to default			
<ul> <li>Advanced</li> </ul>	1			
∆dd nev	v reference			
Add liev	( reference			
Input csl-	data.json here and click "Add new Reference"			
			_	
			_//	
Add new	/ reference			

• The added sample remains in the CSE until the cache is cleared.

## 12.4.7 Modify a style

Before you can use a style edited in CSE, the following steps must be completed:

	Correction of Named Entropy of the second se	
In the CSL-Editor: - Customize a style according to your needs	In Cone: - Add your style with an appropriate name	In PuRe: - The new style can be used in PuRe
- Save or copy the code of the style		

In the following chapters you will find some examples on how to modify styles.

### 12.4.7.1 Format a variable

In the Visual Editor, click on the variable/text (see number 1) you want to format. In the following example, it is the title.

Then, in the "Bibliography" (on the left side), you can see the section where the changes will be made. You can customize the output in the "Text formatting" section (see number 2). For instance, you can display the text in bold or specify a "prefix" or "suffix".

	Visual editor Code editor Help
Style + Edit +	American Psychological Association 6th edition
STYLE INFO +	(Accadia et al., 2012) (Einstein, 1905)
NLINE CITATIONS	EXAMPLE BIBLIOGRAPHY Accadia, T., Acernese, F., Alshourbagy, M., Amico, P., Antonucci, F., Aoudia, S., Zhang, Z. (2012). Virgo: a laser interferometer to detect gravitational waves. Journal o Instrumentation, 7(03), P03012–P03012. doi:10.1088/1748-0221/7/03/P03012
Croup     Group     Group     Group     Group     Group     Group     Group	Einstein, A. (1905). On the electrodynamics of moving bodies. Annalen Der Physik, 17(4), 1–26. doi:10.1088/0143-0807/27/4/007
	Layout > Group > Group > author (macro) > Names > Substitute > Conditional > If report > title (macro) > Conditional > Else > title (variable) Type variable  title variable title form long •
<ul> <li>If report</li> <li>If with the interval</li> <li>If the (matro)</li> <li>If conditional</li> <li>If report OR thesis (</li> <li>E Ese</li> <li>If it (variable)</li> <li>If the (variable)</li> </ul>	Text formatting
- 1/2 issued (macro) - 1/2 title-plus-extra (macro) - 1/2 container (macro) - 1/2 legal-citles (macro) - 1/2 locators (macro)	prefix suffix

### 12.4.7.2 Edit the title

To edit the title, click on the title in the "Example Bibliography"(1) or navigate to the appropriate location (title) in the "Bibliography" tree (2).

Style - E	dit -	American Psychological Association 6th edition	Example
	Formatting Options	EXAMPLE CITATIONS (Accadia et al., 2012) (McInnis & Nelson, 2011)	
1 4		Accadia, T., Acernese, F., Alshourbagy, M., Amico, P., Antonucci, F., Aoudia, S., Zhang, Z. (2012). <u>Virgo: a laser interferometer to detect gravitational waves</u> . <i>Instrumentation</i> , 7(03), P03012–P03012. doi:10.1088/1748-02217/03.P03012     McInnis, M. D., & Nelson, L. P. (2011). Shaping the body politic: Art and political formation in early america. Charlottesville, VA: University of Virginia Press.	Journal of
	Names     Ocntitional     Orditional     Ordit	Layout > Group > Group > author (macro) > Names > Substitute > Conditional > If report > title (macro) > Conditional > Else > title (variable)  Type: Variable  title variable  title form long	
		Fext formatting       B     I     U     Swatt Cars     x*     strip Periods       text-case     •       display     •	
MACROS	container-contributors	prefixsuffix	

In "Text formatting", you can set the formatting. For example, for *text-case* you can choose from seven options:

- Empyt field = The title will be used as entered in PubMan.
- lowercase =
- uppercase = VIRGO: A LASER INTERFEROMETER TO DETECT GRAVITATIONAL WAVES.
- capitalize-first = Virgo: a laser interferometer to detect gravitational waves.
- capitalize-all = Virgo: A Laser Interferometer To Detect Gravitational Waves.
- title = Virgo: A Laser Interferometer to Detect Gravitational Waves.
- sentence = Virgo: a laser interferometer to detect gravitational waves.

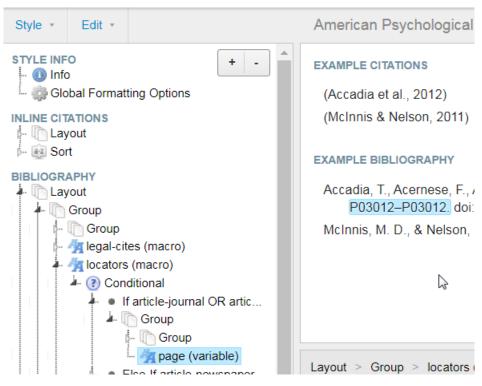
### 12.4.7.3 Add a new variable

In order to add a new variable, the corresponding name of the variable in the CSE is needed. For example, if the sequence number should be displayed, then first search in the <u>field-mapping-table</u> for the variable in which the article number is defined.

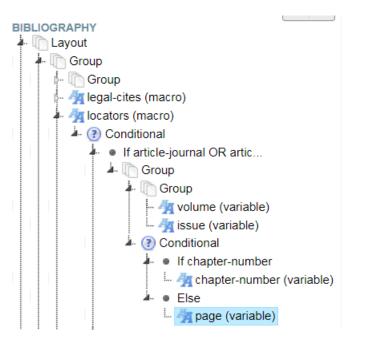
	L	1	1
98	1st (Source) Details		
99		source publisher	publisher (wenn nicht aus eigentlicher Publikation vorhanden)
100	source_publishing_info	source place	publisher-place
101		source edition	edition (wenn nicht aus eigentlicher Publikation)
102	source total number of pages	source total number of pages	number-of-pages
103		source volume	volume
104		source issue	issue
105	source_volume_issue_pages	startpage	page-first (auch in page s. u.)
		startpage-endpage	page 🔀
106			- 0
107	source_sequence_number	sequence number	chapter-number
108	source_identifiers		

You can see from the table that the sequence numbers are displayed in the chapter-number field. Open the style in which you want to include the sequence number. In this example, the style American Psychological Association 6th edition (APA6) is used.

In this example, the sequence number should be displayed if no page number is specified. To do so, first find the section where the page number is defined. For that click on the page number in the "Example Bibliography".



Instead of page (variable) you can insert a **condition**. For instance, if the variable chapter-number is defined, then it will be displayed. If it is not defined, then the page number will be displayed.

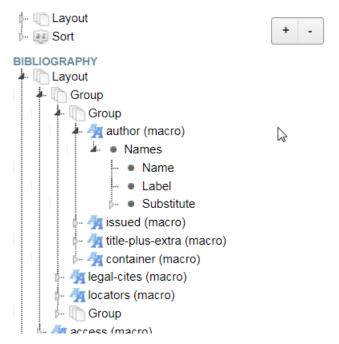


You can find the style for this example under: *American Psychological Association 6th edition\_NT\_example\_page+chapternumber*.

### 12.4.7.3.1 Add keywords variable

To add another meta field, proceed as follows:

For example, if you want to display keywords, find the appropriate section in the "Bibliography" tree and click on the plus-icon:



Then select "Text":

Add	node within Lay	out	
Ď	Group	Use to group rendering elements. Groups are useful for setting a delimiter for the group children, for organizing the layout of bibliographic entries (using the "display" attribute), and for suppressing the rendering of terms and verbatim text when variables are empty.	
?	Conditional	Use to conditionally render rendering elements.	
#	Number	Use to render a number variable.	
<b>4</b> A	Text	Use to call macros, render variables, terms, or verbatim text.	
	Label	Use to render a term whose pluralization depends on the content of a variable. E.g., if "page" variable holds a range, the plural label "pp." is selected instead of the singular "p.".	
175	Date		
	Names	Inherits variable from the parent cs:names element.	//.

To select the correct variable in the "Type"section, first check the <u>field-mapping</u> to find out which variable is used to display keywords. Of course, the variable "keyword" is intended for the display of keywords. Here is the corresponding section of the field-mapping:

35	Content			
36		free keywords	keyword	
37		ddc subject	keyword	falls keine keywords vorhanden
38		abstract	abstract	Ŷ

Now select the "Type variable" (No. 1). Then, select the "variable keyword" (No. 2):

About Search by name Search by example	Visual editor Code editor Help	C
Style - Edit -	American Psychological Association 6th edition	Exar
Layout     Layout     Sort     Sort     Group     Group     Group     Group     Group     Annes	EXAMPLE BIBLIOGRAPHY Accadia, T., Acernese, F., Alshourbagy, M., Amico, P., Antonucci, F., Aoudia, S., Zhang, Z. (2012). Virgo: a laser interferometer to detect gravitational waves. Journal of Instrumentation, 7(03), P03012–P03012. doi:10.1088/1748-0221/7/03/P03012 Einstein, A. (1905). On the electrodynamics of moving bodies. Annalen Der Physik, 17(4), 1–26. doi:10.1088/0143-0807/27/4/007	òf
• Name     • Label     ··• Substitute     ···• Substitute     ·································	Layout > keyword (variable)	
<ul> <li>In Agricontainer (macro)</li> </ul>	variable Keyword   form Long	
- A access (macro) A keyword (variable)	Text formatting           B         /         U         Small CAPS         x <sup>8</sup> x <sup>an</sup> Strip Periods	
MACROS	text-case  display	
- ⊚ Macro: author - ⊗ Macro: author-short - ⊗ Macro: access - ⊗ Macro: title - ⊗ Macro: title-bus-extra	Affixes prefix suffix	

In our example, the keywords are shown at the end.

In this particular "Visual editor" example, no keywords are displayed because none are included in the examples. You will see the keywords when you perform an export with the corresponding style in PubMan.

### 12.4.7.3.2 Add identifier variable

You can also add other variables like identifiers, the same way as described in the chapter "Adding a new variable".

Here is an excerpt from the <u>field-mapping table</u>, from which you can see which variable you need to insert to display a specific identifier:

Typ des Identifiers wird mit ausgeben.		
identifer type = other 11	number (Rangfolge der Identifier Types beachten!)	
identifer type = arXive 8	number (Rangfolge der Identifier Types beachten!)	
identifier type = BibTeX Citekey 10	number (Rangfolge der Identifier Types beachten!)	
identifier type = BMC 9	number (Rangfolge der Identifier Types beachten!)	
identifier type = CoNE		
identifier type = DOI	DOI	
identifier type = eDoc		
identifier type = eSciDoc		
identifier type = ISBN	ISBN	
identifier type = ISI 5	number (Rangfolge der Identifier Types beachten!)	
identifier type = ISSN	ISSN	
identifier type = Patentantragsnummer 3	number (Rangfolge der Identifier Types beachten!)	
identifier type = Patentnummer 1	number (Rangfolge der Identifier Types beachten!)	
identifier type = Patentpublikationsnummer 2	number (Rangfolge der Identifier Types beachten!)	
identifier type = PII 6	number (Rangfolge der Identifier Types beachten!)	
identifier type = PMC	PMCID	
identifier type = PMID	PMID	
identifier type = PND		
identifier type = Reportnr. 4	number (Rangfolge der Identifier Types beachten!)	
identifier type = SSRN 7	number (Rangfolge der Identifier Types beachten!)	
identifier type = URI	URL	Rangfolge: Locator (Typ: Any Fulltext, Post, Pre, Publisher
		Version), PuRe-File (öffentl. + Typ: Any Fulltext, Post, Pre,
		Publisher Version); Identifier URI (erster Eintrag)
identifier type = URN	URL	z. B. falls keine URI vorhanden?

### Variable number

For example, if you want to display the arXiv number, then add the variable number as described above. In the entry "identifier type = arXiv 8" the "8" stands for the display-location of the identifier. The order looks like this:

- 1. Patent number
- 2. Paten publication number
- 3. Patent application number
- 4. Report number
- 5. ISI
- 6. PII
- 7. SSRN
- arXiv
   BibTeX Citekey
- 10. other

If the identifiers 3, 8 and 11 are available in the PuRe item, then the first populated identifier, in this case, 3 = patent application number, is displayed, even if 8 and 11 are also available. So if you want to display the arXiv number, the prior seven identifiers should not be populated in PuRe.

### Variable URL

In case you want to display the URL variable, it will be displayed in the following order: Locator (type: Any Fulltext, Post, Pre, Publisher Version), PubMan-File (public + type: Any Fulltext, Post, Pre, Publisher Version); Identifier URI (first entry).

This means: If an external reference (locator) is entered, then it will be displayed. If none is entered, then the link to the attached file (PubMan file) will be displayed instead. If there is no external reference available and also no uploaded file, then the first URI entry will be displayed.

### 12.4.7.4 Modify the display of authors

There are several ways to display authors:

In the section "Names", you can enter prefix and suffix, change the display to bold, etc.

Style - Edit -	American Psychological Association 6th edition
STYLE INFO + -	EXAMPLE CITATIONS
Global Formatting Options	(According at al. 2012)
	(Accadia et al., 2012)
INLINE CITATIONS	(McInnis & Nelson, 2011)
	EXAMPLE BIBLIOGRAPHY
BIBLIOGRAPHY	Accadia, T., Acernese, F., Alshourbagy, M., Amico, P., Antonucci, F., Aoudia, S., Zhang, Z. (2012).
Layout	P03012. doi:10.1088/1748-0221/7/03/P03012
A Group	
- Group	McInnis, M. D., & Nelson, L. P. (2011). Shaping the body politic: Art and political formation in early a
author (macro)	
A Names	
- • Name	
• Label	
j∽ ● Substitute	
🦫 🦣 issued (macro)	
🗁 💁 title-plus-extra (macro)	Layout > Group > Group > author (macro) > Names
🦫 🚈 container (macro)	
- 🦣 legal-cites (macro)	
- Marine (macro)	Text formatting
🥍 🕼 Group	B / U SMALL CAPS X <sup>S</sup> X <sub>S</sub>
🥍 🚰 access (macro)	
j∽ @_ Sort	display 🔹
MACROS	
- 🎱 Macro: container-contributors	⊂ Affixes
- 🌑 Macro: secondary-contributors	
Macro: author	delimiter
- 🆤 Macro: author-short	prefix
Macro: access	
- 🎱 Macro: title	suffix
- 🌑 Macro: title-plus-extra	
- 🎱 Macro: publisher	Names
- 🎱 Macro: event	
Macro: issued	variable Disable
Macro: issued-sort	variable +
- 🏐 Macro: issued-year	
🔓 🕋 Macro: edition	

You can also define what and how it will be displayed.

BIBLIOGRAPHY	Accadia, T., Acernese, F., Alshourbagy, M., Amico, P., Antonucci, F., Aoudia, S., Zhang, Z. (2012). P03012. doi:10.1088/1748-0221/7/03/P03012
🔺 🛅 Group	McInnis, M. D., & Nelson, L. P. (2011). Shaping the body politic: Art and political formation in early an
🔺 🚈 author (macro)	
A Names	
• Name	
• • Label	
j- ● Substitute	
- Maissued (macro)	
- Ag container (macro)	Layout > Group > Group > author (macro) > Names > Name
- Ag legal-cites (macro)	
- A locators (macro)	C Text formatting
Group	
🦗 🕂 access (macro)	B I U SMALL CAPS X <sup>S</sup> X <sub>S</sub>
- J Sort	
MACROS	Affixes
- 🏐 Macro: container-contributors	
- 🏐 Macro: secondary-contributors	delimiter ,
- 🎱 Macro: author	prefix
Macro: author-short	suffix
Macro: access	
Macro: title	Name
Macro: title-plus-extra	Name
🎱 Macro: publisher 🎱 Macro: event	form long 🔻
- Macro: issued	and symbol ▼
Macro: issued-sort	delimiter-precedes-et-al contextual
Macro: issued-year	delimiter-precedes-last always
- 🎱 Macro: edition	et-al-min V
- 🏐 Macro: locators	
- 🏐 Macro: citation-locator	
🖙 🏐 Macro: container	et-al-subsequent-min
Macro: container-title	et-al-subsequent-use-first
	at al una last falsa =

Setting	Descripti on	Output
	Here you	- long:
form	can	Accadia, T., Acernese, F., Alshourbagy, M., Amico, P., Antonucci, F., Aoudia, S
	specify	(2012). Virgo: a laser interferometer to detect gravitational waves. Journa
	whether	Instrumentation, 7(03), P03012–P03012. doi:10.1088/1748-0221/7/03/P0

	all parts of the name	- short: Accadia, Acernese, Alshourbagy, Amico, Antonucci, Aoudia, Zhang. (2012
	should be displayed:	interferometer to detect gravitational waves. <i>Journal of Instrumentation</i> , P03012. doi:10.1088/1748-0221/7/03/P03012
	- long = The entire name is displayed	<ul> <li>- count:</li> <li>7. (2012). Virgo: a laser interferometer to detect gravitational waves. Journal o Instrumentation, 7(03), P03012–P03012. doi:10.1088/1748-0221/7/03/P03</li> </ul>
	- short = Only the last name is displayed	
	- count = The number of authors is displayed	
and	Defines the separator between the second- last and the last name. - text = "and" - symbol = "&" - null = No separator is shown.	<ul> <li>text:</li> <li>McInnis, M. D., and Nelson, L. P. (2011). Shaping the body politic: Art and poliin early america. Charlottesville, VA: University of Virginia Press.</li> <li>symbol:</li> <li>McInnis, M. D., &amp; Nelson, L. P. (2011). Shaping the body politic: Art and politic early america. Charlottesville, VA: University of Virginia Press.</li> <li>null:</li> <li>McInnis, M. D., Nelson, L. P. (2011). Shaping the body politic: Art and political early america. Charlottesville, VA: University of Virginia Press.</li> </ul>
	This defines when the <i>name</i> <i>delimiter</i> (defined in the Global Formattin g Options; default value is ", ") is used between a truncated name list and the term "et al":	- contextual: Accadia, T., Acernese, F., Alshourbagy, M., Amico, P., et al. - always: Accadia, T., Acernese, F., Alshourbagy, M., Amico, P., et al. - never: Accadia, T., Acernese, F., Alshourbagy, M., Amico, P. et al. - after-inverted-name: Accadia, T., Acernese, F., Alshourbagy, M., Amico, P. et al.

		1
	contextual	
	= The	
	name	
	delimiter	
	is used	
	only for	
	name lists	
	truncated	
	on two or	
	more	
	names.	
	- always =	
	The <i>name</i>	
	delimiter	
	is always	
	used.	
	- never =	
	The <i>name</i>	
	delimiter	
	is never	
	used.	
	- after-	
	inverted-	
	name =	
	The <i>name</i>	
	delimiter	
	is only	
	used if the	
	name is	
	inverted	
	(i.e. first	
	name last	
	name) due	
	to the	
	name-as-	
	sort-order.	
	E.g. with	
	the <i>name-</i>	
	as-sort-	
	order set	
	to <i>first</i> .	
	<i>cojusi</i> .	
	This	
	defines	- contextual:
	when the	Hancké, B., Rhodes, M., & Thatcher, M.
	name	conflict, contradiction, and complem
	delimiter	New York: Oxford University Press.
	is used	<sup>8</sup> McInnis, M. D. & Nelson, L. P. (2011). <i>Sl</i>
	between	
delimiter-	the	- always:
precedes-	second-	Hancké, B., Rhodes, M., & Thatcher, M.
last	last and	conflict, contradiction, and complem
	the last	New York: Oxford University Press.
	name of a	McInnis, M. D., & Nelson, L. P. (2011). Si
	non-	- never:
	truncated	Hancké, B., Rhodes, M. & Thatcher, M.
	name list.	conflict, contradiction, and complen
	Only	New York: Oxford University Press.
	works if	McInnis, M. D. & Nelson, L. P. (2011). S
	text or	nonnio, m. b. a noison, e. r. (2011). 0

<b></b>		
	symbol is	- after-inverted-name:
	selected	Hancké, B., M. Rhodes & M. Thatcher
	for "and"	Press.
	(second	McInnis, M. D., & L. P. Nelson. (2011).
	line).	
	If "and" is	
	not set (=	
	null) the	
	name	
	delimiter	
	is used.	
	15 0300.	
	-	
	contextual	
	= The	
	name	
	delimiter	
	is used	
	only for	
	name lists	
	with three	
	or more	
	names.	
	- always =	
	The <i>name</i>	
	delimiter	
	is always	
	used.	
	- never =	
	The <i>name</i>	
	delimiter	
	is never	
	used.	
	useu.	
	- after-	
	inverted-	
	name =	
	The <i>name</i>	
	delimiter	
	is only	
	used if the	
	name is	
	inverted	
	due to the	
	name-as-	
	sort-order	
	attribute.	
	E.g. with	
	the name-	
	as-sort-	
	order set	
	to "first".	
	If the	
	number of	at all using - Found at all first 4.
et-al-min	names	- et-al-min = 5 und et-al-first = 4:
	matches	Accadia, T., Acernese, F., Alshourbagy, M., Amico, P., et al.
	or exceeds	
	the	

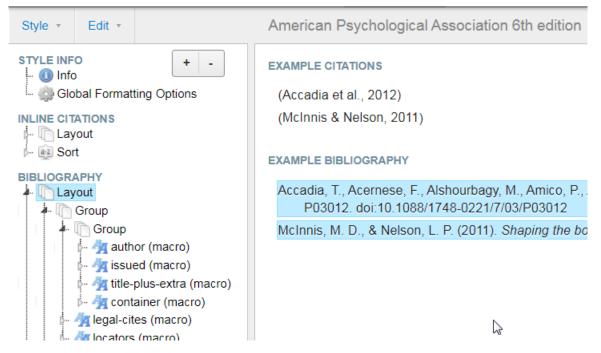
	number entered in et-al-min, an "et al" or "" is inserted. The first names defined in <i>et-al-use-</i>	
	first are then displayed. If et-al- min is smaller than et-al- use-first, then all authors are displayed.	
et-al-use- first	Here you select how many authors are displayed before "et al" is entered.	
al- subseque nt-use- first	If used, the values of these settings replace the values of <i>et-al-</i> <i>min</i> and <i>et-al-use-</i> <i>first</i> for subsequen t citations (cited with reference to previously cited items).	This special case is not relevant for our purposes.
et-al-use- last	If set to "true", the term "et al" is replaced by an ellipsis followed	- true: Accadia, T., Acernese, F., Alshourbagy, M., Amico, P., Antonucci, F., Aoudia, S., A - false: Accadia, T., Acernese, F., Alshourbagy, M., Amico, P., Antonucci, F., Aoudia, S., Arnai

	by the last	
	name.	
initialize	If the value is "true" (default value), then the first names are displayed abbreviate d with initials. With "false" the first names are fully displayed, if they are entered.	<ul> <li>true:</li> <li>McInnis, M. D., Nelson, L. P. (2011). Shaping the body politic: Art and political early america. Charlottesville, VA: University of Virginia Press.</li> <li>false:</li> <li>McInnis, Maurie Dee, Nelson, Louis P. (2011). Shaping the body politic: Art an formation in early america. Charlottesville, VA: University of Virginia Press</li> </ul>
initialize- with	The entered value is added after each initial (". " e.g. results in "McInnis, M. D."). For compound first names (e.g. "Jean- Pierre"), hyphenati on of the initials can be set with the global option <i>initialize- with-</i> hyphen.	- true: McInnis, M. D., Nelson, L. P. - false: McInnis, Maurie Dee, Nelson, Louis P.
name-as- sort-order	Specifies that names should be displayed with the first name after the	- null: M. D. McInnis, & L. P. Nelson. - first: McInnis, M. D., & L. P. Nelson. - all: McInnis, M. D., & Nelson, L. P.

	last name.	
	The	
	attribute	
	has three	
	possible	
	values:	
	-null = The	
	order is:	
	first name	
	last name.	
	- first =	
	This	
	setting res	
	ults	
	in "last	
	name, first	
	name" for	
	the first	
	author.	
	- all = All	
	names are	
	changed	
	to "last	
	name, first	
	name".	
	Sets the	
	separator	
	for name	
	componen	
	ts that	
	have	
	changed	
	positions	
	due to	
	sort order	- disabled:
	by name-	McInnis, Maurie Dee, Nelson, Louis P.
	, as-sort-	- ". "
	order. The	McInnis, M. D., Nelson, L. P.
	default	
sort-	value is ",	
separator	"	McInnis, M.D., Nelson, L.P.
	("McInnis,	- ", "
	Maurie	McInnis, M. D., Nelson, L. P.
	Dee"). As	-"; "
	with sort-	McInnis; M. D., Nelson; L. P.
	order, this	
	setting	
	affects	
	only	
	names	
	written in	
	the Latin	
	or Cyrillic	
	alphabets.	

### 12.4.7.5 Global Formatting Options

The Global Formatting Options are the second item of the STYLE INFO.



The Global Formatting Options take effect if no settings have been selected, e.g. in the Name settings.

(	Global Formatting Options		
	─Global Formatting Options─		
		in-text •	
	version	1.0	
	name-delimiter		Enable
	name-form	long 🔻	
	and	T	
	delimiter-precedes-et-al	contextual •	
	delimiter-precedes-last	contextual •	
	et-al-min	T	
	et-al-use-first	T	
	et-al-subsequent-min	T	
	et-al-subsequent-use-first	▼	
	et-al-use-last	false 🔻	
	initialize	true v	
	initialize-with		Enable
	name-as-sort-order	T	
	sort-separator	,	
	names-delimiter		Enable
	page-range-format	T	
	initialize-with-hyphen	true 🔻	
	demote-non-dropping-particle	never •	
	default-locale		
	xmIns	http://purl.org/net/xbiblio/csl	

Setting	s Descriptio n	Output
class	Specifies whether the style uses "in- text"	The setting has no known effect on our usage.

	citations or "notes".	
name- delimiter	Specifies the string used to separate names within a name list. The default is ", " (e.g. "McInnis, M. D.").	McInnis, M. D., Nelson, L. P.
name- form	See chapter <u>Modify the</u> <u>display of</u> <u>authors</u>	
and	See chapter <u>Modify the</u> <u>display of</u> <u>authors</u>	
delimite r- precedes -et-al	See chapter <u>Modify the</u> <u>display of</u> <u>authors</u>	
delimite r- precedes -last	See chapter <u>Modify the</u> <u>display of</u> <u>authors</u>	
et-al- min	See chapter <u>Modify the</u> <u>display of</u> <u>authors</u>	
et-al- use-first	See chapter <u>Modify the</u> <u>display of</u> <u>authors</u>	
et-al- subseque nt-min	See chapter <u>Modify the</u> <u>display of</u> <u>authors</u>	
et-al- subseque	See chapter <u>Modify the</u>	

nt-use- first	<u>display of</u> <u>authors</u>	
et-al- use-last	See chapter <u>Modify the</u> <u>display of</u> <u>authors</u>	
initialize	See chapter <u>Modify the</u> <u>display of</u> <u>authors</u>	
initialize -with	See chapter <u>Modify the</u> <u>display of</u> <u>authors</u>	
name- as-sort- order	See chapter <u>Modify the</u> <u>display of</u> <u>authors</u>	
sort- separato r	See chapter <u>Modify the</u> <u>display of</u> <u>authors</u>	
names- delimiter	Specifies the string used to separate names in a name variable. The default is ", " (e.g. " McInnis, M. D.").	McInnis, M. D., Nelson, L. P.
page- range- format	Defines the output of the page specificatio n. - chicago = e. g. "321- 28" - expanded = e.g. "321-328".	<ul> <li>- chicago:</li> <li>Campbell, J. L., Pedersen, O. K. (2007). The varieties of capitalism and hybrid <i>Comparative Political Studies</i>, 40(3), 307–32. doi:10.1177/001041400628</li> <li>- expanded:</li> <li>Campbell, J. L., Pedersen, O. K. (2007). The varieties of capitalism and hybrid <i>Comparative Political Studies</i>, 40(3), 307–332. doi:10.1177/00104140062</li> </ul>

	minimal	- minimal-two:
	e.g."321- 8"	Campbell, J. L., Pedersen, O. K. (2007). The varieties of capitalism and hybrid Comparative Political Studies, 40(3), 307–32. doi:10.1177/0010414006286
	- minimal-	
	two = e. g. "321-28"	
	- null =	
	Displays	
	the page	
	numbers	
	as entered.	
	If the	
	attribute is	
	not set,	
	page	
	ranges are displayed	
	without	
	reformatti	
	ng.	
	Specifies	
	whether	
	compound	
	first names	
	(e.g. "Jean-	
	Pierre") should be	
	initialized	- true:
initialize	with a	Arcoragi, JP.
-with-	hyphen	- false:
hyphen	("JP.",	Arcoragi, J. P.
	value =	, iteologi, e. i.
	"true",	
	default) or	
	without	
	("J.P." <i>,</i>	
	value = "falco")	
	"false").	
	Defines	
	the display	
	and sorting	
	behavior of non-	- display-and-sort:
	dropping-	Malsburg, C. von der.
	particle	or Laat, S. W. de, Tertoolen, L. G. J.
demote-		- never:
non-	den". "von	Von der Malsburg, C.
dropping	der" etc.)	or
-particle	in names	De Laat, S. W., Tertoolen, L. G. J.
	with	
	prepositio n. The	- sort-only: Von der Melsburg, C
	n. The sorts from	Von der Malsburg, C.
	the CSE are	
	not	
	applied in	
L	1	

		[]
	PubMan.	
	Allowed	
	values:	
	- display-	
	and-sort	
	(default) =	
	Dropping	
	(e.g. "de")	
	and non-	
	dropping-	
	particle	
	are	
	attached.	
	attacheu.	
	- never =	
	The non-	
	dropping-	
	particle is	
	considered	
	as part of	
	the family	
	name,	
	while the	
	dropping-	
	particle is	
	attached	
	(e.g. "de	
	Koning,	
	W.", "La	
	Fontaine,	
	Jean de").	
	- sort-only	
	= Same	
	display as	
	never.	
	Sets a	
	default	
	country for	
	style	
	localization	
	. The value	
	must be a	
	country	
	code.	
	Examples:	- de-DE: instead of "et al" "u. a." will be used
	- en-GB	Accadia, T., Acernese, F., u. a. 2012. Virgo: a laser interferometer to detect gravitat
default-	- de-DE	Instrumentation. 7(03):P03012–P03012. DOI: 10.1088/1748-0221/7/03/P03012.
locale	- de-DE - en-US	
	These	<ul> <li>en-GB/en-US: "et al" will be used:</li> </ul>
	codes are	Accadia, T., Acernese, F., et al. 2012. Virgo: a laser interferometer to detect gravitat
	used to	Instrumentation. 7(03):P03012–P03012. DOI: 10.1088/1748-0221/7/03/P03012.
	locate	
	citations	
	and	
	bibliograph	
	ies, and	
	consist of	
1	localized	

terms,
date
formats,
and
grammar
rules.

### 12.4.7.6 Add conditionals

For example, if you want to display a metadata field when certain conditions exist in the dataset, do the following:

Select an appropriate position. In the example, the position below "keyword" is selected. To add a "conditional" there, click on "layout" and then on the plus sign:

About Search by name Se	earch by example	Visual editor	Code editor	Help
Style • Edit •		American Ps	sychological A	Association 6th edition
STVLE INFO Global Formating Options INLINE CITATIONS Clayout Sort BIBLOGRAPHY Clayout	2	Instrum	Acernese, F., A entation, 7(03),	Ishourbagy, M., Amico, P., Antonucci, F., Aoudia, S., Zhang, Z. (2012) Virgo: a laser interferometer to detect a P03012–P03012. doi:10.1088/1748-02217/703/P03012 electrodynamics of moving bodies. <i>Annalen Der Physik</i> , 17(4), 1–26. doi:10.1088/0143-0807/27/4/007
- Maccess (macro) - Maccess (macro) - Maccess (macro) - Maccess (macro) - Maccess (macro) - Maccess (macro)			dd node withir	Use to group rendering elements. Groups are useful for setting a delimiter for
MACROS - Macro: container-contributors - Macro: secondary-contributors - Macro: author		Affixas	Group	the group children, for organizing the layout of bibliographic entries (using the display' attribute), and for suppressing the rendering of terms and verbatim text when variables are empty.
- Macro: author-short - Macro: access - Macro: title			# Numbe	r Use to render a number variable.
- Macro: title-plus-extra Macro: publisher Macro: event Macro: issued			Text	Use to call macros, render variables, terms, or verbatim text. Use to render a term whose pluralization depends on the content of a variable. E.g., if "page" variable holds a range, the plural label "pp." is selected instead of the singular "p.".
Macro: issued-sort Macro: issued-year Macro: edition Macro: locators			Date Names	
- Macro: citation-locator			/////	

Then click on the plus sign again. Now only the "if" can be selected. Then the conditions are set. In the example, for a (journal) article, an action is to be performed whenever an abstract is present.

About	Search	by name	Search by example	Visual editor	Code editor	Help					
Style •	Edit 👻			American F	sychological A	Associa	ation 6th edition				
STYLE INFO	bal Formati ATIONS out	ting Options	+ -	Instrun	, Acernese, F., A nentation, 7(03),	P03012	bagy, M., Amico, P., 2–P03012. doi:10.1 bdynamics of mov	1088/1748-02	221/7/03/P030	12	
🧖	out Group access (ma keyword (v Conditional If article	ariable)	I	if all	nditional > If artic f the following c nent type is	conditio		•		and	
🏐 Mac		er-contributor lary-contributo		The variab			abstract	Ţ	is present	• 2	- +

By clicking on the plus sign again, you can select what should be displayed. In this example, the variable "abstract" should be displayed. This can be performed as explained in "<u>Add keyword</u> <u>variable</u>".

Then you can add an "Else-if" or "Else". To do so, select "Conditional" (No. 1 in the following image) and click on the plus sign (No. 2):

About Search by name Search by exa	mple Visual editor Code editor Help				
Style - Edit -	American Psychological Association 6th edition				
STYLE INFO Slobal Formatting Options INLINE CITATIONS Sort Sort	<ul> <li>EXAMPLE BIBLIOCRAPHY</li> <li>Accadia, T., Acernese, F., Alshourbagy, M., Amico, P., Antonucci, F., Aoudia, S., Zhang, Z. (2012). Virgo: a laser interfero Instrumentation, 7(03), P03012–P03012. doi:10.1088/1748-0221/7/03/P03012</li> <li>Einstein, A. (1905). On the electrodynamics of moving bodies. Annalen Der Physik, 17(4), 1–26. doi:10.1088/0143-0807/2</li> </ul>				
BIBLIOGRAPHY Layout Group Access (macro) Access (macro) Access (macro) Access (macro) Access (macro) Access Conditional Access Conditional Access Conditional Conditional Access Conditional Conditi	Layout > Conditional This node allows you to customise the formatting depending on the properties of the reference being cited. e.g. To show the volume number <i>only</i> if the document type is article-journal: 1. 1. 2. 2. i 3. 3. Else-If Else 3				
Macro: title					

Here you can proceed as with the settings for "if".

### 12.4.7.7 Modify the publication year

### 12.4.7.7.1 Display the year in bold

Display the publication year in **bold** by selecting the year in the example and then choose bold in the section "Text formatting":

	EXAMPLE BIBLIOGRAPHY
RAPHY .ayout Group Group - Coup - Ag author (macro)	<ul> <li>Accadia, T., Acernese, F., Alshourbagy, M., Amico, P., Antonucci, F., Aoudia, S., Zhang, Z. (2012). P03012–P03012. doi:10.1088/1748-0221/7/03/P03012</li> <li>McInnis, M. D., &amp; Nelson, L. P. (2011). Shaping the body politic: Art and political formation in early ar.</li> </ul>
Argissued (macro)     Arging (macro)     Argi	Layout > Group > Group > issued (macro) > Conditional > If NOT (bill OR legal_case > Condition
<ul> <li>▲ ③ Conditional</li> <li>▲ ● If issued</li> <li>▲ Group</li> <li>▲ ☐ Group</li> <li>▲ ☐ Date</li> <li>↓ ● Date-pai</li> <li>↓ ↓ ♀ar-suffix (</li> </ul>	Type: date-parts ▼ date-parts year-month-day ▼ form ▼
<ul> <li>↓- ⑦ Conditional</li> <li>↓- ୩ title-plus-extra (macro)</li> <li>↓- ୩ container (macro)</li> </ul>	Text formatting

### 12.4.7.7.2 Display the year without parentheses

To exclude the parentheses before and after the year, remove the parentheses in the prefix and suffix of the year in the *Group*:

BIBLIOGRAPHY	
🖡 🛅 Layout	Accadia, T., Acernese, F., Alshourbagy, M., Amico, P., Antonucci, F., Aoudia, S., Zhang, Z. (2012). Virgo: a laser interferome:
🛓 🕅 Group	7(03), P03012–P03012. doi:10.1088/1748-0221/7/03/P03012
🗼 🕅 Group	McInnis, M. D., & Nelson, L. P. (2011). Shaping the body politic: Art and political formation in early america. Charlottesville, VA:
- 4 author (macro)	
A Maissued (macro)	
Conditional	
▲ ● If NOT (bill OR legal_case	
A (?) Conditional	
↓ ● If issued	
- Group	
🗼 📅 Date	Layout > Group > Group > issued (macro) > Conditional > If NOT (bill OR legal_case > Conditional > If issued > Group
🛄 🛛 Date-part	
- Ag year-suffix (variable)	C Text formatting
- 💮 Conditional	
- • Else	B / U SMALL CAPS x <sup>S</sup> x <sub>S</sub>
- 🌆 title-plus-extra (macro)	display
- 🙀 container (macro)	uspay
- 🧖 legal-cites (macro)	
- 🧖 locators (macro)	Affixes
- Group	delimiter
- Maccess (macro)	
- 🗟 Sort	prefix (
MACROS	suffix )
MACROS	

### 12.4.7.7.3 Date-parts

If you want to display a date, select the *Date* field at "add node".

Style - Edit -	American Psychological Association 6th edition
STYLE INFO Global Formatting Options INLINE CITATIONS Clayout Sort BIBLIOGRAPHY Group Caccess (macro) Date Sort	EXAMPLE CITATIONS (Accadia et al., 2012) (McInnis & Nelson, 2011) EXAMPLE BIBLIOGRAPHY Accadia, T., Acernese, F., Alshourbagy, M., Amico, P., Antonucci, F., Aoudia, S., Zhang, Z. (2012). Virgo: a laser in Instrumentation, 7(03), P03012–P03012. doi:10.1088/1748-0221/7/03/P03012March.29, 2012 McInnis, M. D., & Nelson, L. P. (2011). Shaping the body politic: Art and political formation in early america. Charlotte Add node within Layout
Macro: container-contributors Macro: secondary-contributors Macro: author Macro: author-short Macro: author-short Macro: access Macro: title Macro: title Macro: publisher Macro: publisher Macro: publisher Macro: issued-sort Macro: issued-sort Macro: issued-sort Macro: issued-sort Macro: container Macro: container Macro: container Macro: container Macro: container	Use to group rendering elements. Groups are useful for setting a delimiter for the group children, for organizing the layout of bibliographic entries (using the "display" attribute), and for suppressing the rendering of terms and verbatim text when variables are empty.         Image: Conditional Use to conditionally render rendering elements.         Image: When Variable Use to conditionally render rendering elements.         Image: When Variable Use to render a number variable.         Image: Ward Decision of the singular provide the singular "provide the singular" provide the present content.         Image: Date 2         Names       Inherits variable from the parent cs:names element.

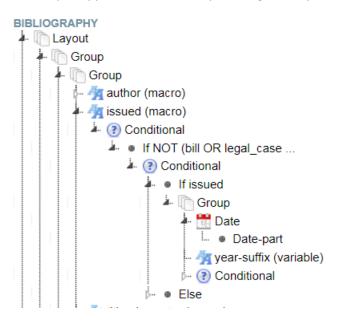
Then select which *date-parts* should be displayed.

Type: date-par	rts ▼	
date-parts	year-month-day 🔻	
form	year-month-day	
	year-month Year, month	and day
Text formatting	year	
rext formatting	1	

If you want a different order or a special separator, then use the display of individual parts. To do so, add a node at *Date* with "add node".

Add node within I	Date	×
Date-part	Specify overriding formatting for localized dates (affixes cannot be overridden, as these are considered locale-specific). Example uses are forcing the use of leading- zeros, or of the "short" month form. Has no effect on which, and in what order, date parts are rendered. Specify, in the desired order, the date parts that should be rendered and their formatting.	

The output appears as the already existing APA style setting:



### 12.4.7.7.4 Display (submitted) instead of the year

If you want to display "(submitted)" instead of the date for submitted publications, use a conditional query.

Using the *American Psychological Association 6th* edition style as an example, the suggested solution is as follows:

Style × Edit ×	American Psychological Association 6th edition
BIBLIOGRAPHY agout Group Group Group Conditional A I fisued A Conditional A I fisued A Group A Group A Group A Conditional A I fisued A Group A Group A I fisued A Group A Gro	American Psychological Association 6th edition         EXAMPLE CITATIONS <ul> <li>(Accadia et al., 2012)</li> <li>(McInnis &amp; Nelson, 2011)</li> </ul> EXAMPLE BIBLIOGRAPHY         Accadia, T., Acernese, F., Alshourbagy, M., Amico, P., Antonucci, F., Aoudia, S., Zhang, Z. (2012). Virgo: a laser interferometer to detect gravitati                 Instrumentation, 7(03), P03012–P03012. doi:10.1088/1748-02217/03/P03012         McInnis, M. D., & Nelson, L. P. (2011). Shaping the body politic: Art and political formation in early america. Charlottesville, VA: University of Virgini         Layout > Group > Group > issued (macro) > Conditional > If NOT (bill OR legal_case > Conditional > Else-If submitted > (submitted)
	Text formatting       B     I       U     SMALL CAPS       x8     x8       text-case       v       display

If the variable *submitted* is populated, then output the value (submitted). You can find the citation style listed as *American Psychological Association 6th edition\_NT\_example\_(submitted)*.

### 12.4.7.8 Limits of the CSL

<u>Additional spacing between lines</u> cannot be inserted with the CSL editor. You can work around by inserting a sequence of characters at the appropriate locations in the suffix or prefix, which you later replace in the exported Word document by "Search & Replace" with a "^p" for a blank line.

Also, it is <u>not possible to generate content related queries</u>. For example: If the word "MPG" is in the Abstract field, then output the abstract.

### 12.4.8 Name a style

If you have created a new style or changed one of the ready-to-use styles, you have to assign a new name and ID.

Usually, after creating/editing a style, you are in the "Visual Editor". There you can click on "Info" in the upper left corner of "Style Info".

About Search by name Searc	h by example Visual editor Code editor Help	C digital libra
Style * Edit *	American Psychological Association 8th edition (APA) with keywords - NT	Example citations
STULINO Definition Construction Construction States States States States States States States States States States States States States States St	EXAMPLE CITATIONS (Activity & Relation, 2011) (Activity & Netion, 2011	
- (i) Macro: title-plus-extra - (i) Macro: title-plus-extra	into	
Concernent     C	Time     American Psychological Association Bh edition (APA) with keyword       Time (mor)     APA       D     Imp //mow zoten: origityte/signa       Sommary     Imp //mow zoten: origityte/signa       Rotin     This work is licensed under a Creative Commons Attribution Share/       Publishe     Imp //mow zoten:       ISSN     Imp //mow zoten:	
	Links	
	med     end     and lang       http://www.solenc.org/shy/jeef     Delete       ftp://www.solenc.org/shy/jeef     Delete       Add Lank     Delete	
	Simon Kombälth simon@ximonster.com Delete	

In the corresponding entry fields, enter the name of your style according to the following rules:

Institute abbreviation\_[Own name\_]Original title[\_change(s)].

The components "Own name" and "Change(s)" are optional.

#### The original title

"Harvard - University of Cape Town"

would for instance be:

#### "MPDL\_Doe\_Harvard - University of Cape Town\_Authors\_bold"

or respectively

"MPDL\_Harvard - University of Cape Town".

As ID, we suggest to also enter the name you have chosen. At the time when you want to save the style in your own citation style directory, you will get a hint if you have already assigned the name (and thus the ID).

### 12.4.9 Save a style

Click on "Style" > "Save Style", and in the following pop-up window, click on "Save to disk" to save the style in your citation style directory.

About Search by nume Sear	ch by example Vis	Save CSL Style	× Mix Planck
Style · Edit ·	American Psych		Example citations +
STYLE INFO	EXAMPLE CITATION (Accadia et al., 2)	To use in MPG.PuRe or your reference manager	
INLINE CITATIONS	(McInnis & Nelso	* MPG.PuRe	
Accos     Sort     BULGORAPHY     Casual     Accoda     doi:1     Macros     Macro secondary-contributors     Macro secondary-contributors     Macro secondary-contributors     Macro secondary-contributors		To use your citation style in MPG.PuRe follow these steps: • Save the style on your computer • Go to CollE and log in • Go to menu item "Enter new entity" and choose "citation-styles" • Upload and save your style. The fields will be filled automatically after t • You then can use your style in MPG.PuRe	ial waves <i>Journal of Instrumentation</i> , 7(03), P03012–P03012 Tress.
Macro: author-short Macro: access Macro: title Macro: title Macro: title-plus-extra			
- Macro: publisher	Info Title America	Mendeley	
- G Macro, issued		> Zotero	0111111111111111111
Macro issued-sort	Title (short) APA	Papers 2	
Macro edition	ID http://w	Docear4Word	
Macro locators     Macro locators     Macro container     Macro container     Macro container     Macro container     Macro logal-ottes     Mounto-ED     Global Formating Options	Published ISSNL eISSN Add ISSN Links href http://www.zotero.co	rel stricture rel stricture rgstyle self Delete	

You can also save a citation style without using a file. This is also useful, for example, when the Flash Player is not working.

Here is a brief instruction:

- In the CSL editor, switch to the code editor.
- Copy the entire "code".
- Open CoNE and create a new citation style.
- Copy the "Code" into the CSL field.

There is also a screencast (without audio) available: <u>https://subversion.mpdl.mpg.de/repos/smc/tags/public/PubMan/Support-</u> <u>Erkl%C3%A4rungsvideos/CSL-Stil\_speichern.wmv</u>

Alternatively, the "code" can also be saved locally on your computer.

### 12.4.10 Add a style to CoNE

Log in to <u>CoNE</u> and select the menu item "Enter new entity" and then "citation-styles". The entry mask for a new citation style opens.

	Ne	ew	citation	-styles
*Name Abbreviation	Will be generated automatically	]		
*CSL	Datei auswählen Keine ausgewählt			
	Will be generated automatically Will be generated automatically		//	
*Modified By	Will be generated automatically Will be generated automatically Will be generated automatically			Save

The fields "Name" and "Abbreviation" are automatically populated during upload (if entered before saving in CSE). Click on "Browse" and select the new style in your citation style directory. Then click "Save" and the new citation style will be available in MPG.PuRe.

Or copy the code from the "Code editor" into the CSL field and copy the <title> into the CoNE name field.

	New citation-styles
Data *Cone-IE	Will be generated automatically
*Name	
Abbreviation	
*CSI	Datei auswählen Keine ausgewählt
	<pre></pre>
*Last Modification Date	e Will be generated automatically
*Creation Date	e Will be generated automatically
*Modified By	/ Will be generated automatically

The ready-to-use default styles from the CSE, which are added to CoNE, are available in PuRe and in the CSE. Transferring these ready-to-use default styles between CoNE and CSE is therefore NOT necessary.

# 12.4.11 Mapping-tables

The mapping of genres and fields from PubMan to CSE, can be found in the following mapping tables:

Field-Mapping

Genre-Mapping

# 13. Export

You can export records for publication lists or other purposes in several ways.

# 13.1 Export a selection of items

You can export a selection of items from almost any list. There is one restriction: Even if individual items are selected in the repository, all items that are in the repository will be exported.

When exporting a selection, proceed as described in chapter "List view - Export items from lists".

# 13.2 Collect items in basket and export

You can add items to the repository in any list view. All items that are in the basket can be exported using the export function. For more information, see <u>chapter "Basket - Export from</u> <u>the basket"</u>.

# 13.3 Export an advanced search query via the REST interface

Perform an advanced search and transfer the search query to the REST interface. Configure the export as explained in <u>chapter "Tools - REST-Interface - Perform export via REST"</u>.

# 14. Contexts & Workflows

In PubMan, items are entered into a context that bundles the records. Through such a context, rights, workflow, and other settings are defined.

# 14.1 Contexts

Each institute has at least one context.

• A **publication context** in which all publications of the institute are entered. For example: "Publications of the Max Planck Digital Library".

Some institutes also have other contexts:

- An **Import Context**, where migrated publications are located. For example: "Import Context of the MPI for Biological Cybernetics".
- An External Context for publications that did not originate at the institute, but are to be listed on certain lists. For example: "External Context of the MPI for Marine Microbiology" or "Non MPI Publications by MPI for Evolutionary Anthropology Staff".
- Other contexts as needed. For example: "Publications of Extreme Events ICE".

Contexts are also important for managing **publication lists** in different CMS-Systems like FIONA. By adding the "context filter", you can ensure that only publications from your context -

and therefore your MPI - are populated in the CMS. By just filtering by Organizational Units (OUs), display of duplicate items from other institutes are very likely.

#### **Context settings**

Contexts are used to define:

- 1. Genres for data entry
- 2. Classifications
- 3. Contact eMail
- 4. Publication workflow
- 1. Genres: You can select which genres are available when you create or edit an item.

Context: 'PubMan Test Collection'. Created by 'user_3247732'.			Mai	ndatory fields are printed bold
	F	ile   File Locators	Persons & Organizations	Content   Details   Source
Basic 📄 hide Genre Title File 📄 hide Save file	File     File Lo       Journal Article     Journal Article       Book     Book       Book Chapter     Proceedings       Conference Paper     Talk       Conference Report     Poster       Teaching     Thesis       Report     Keport			
File Locators 🕒 hide Save locator	Journal Issue Series Other Editorial Contribution to Handboo			Upload from URL
Add multiple	Contribution to Festschri Contribution to Commer Contribution to Collected Role Type Fa Author Person	itary	Given name Or	rgNr ⊕⊖
1	Organization		Address	$\oplus \ominus$

An overview of the available genres can be found in the <u>Genre Overview</u>. If you want to extend or minimize your selection, please contact the PuRe support.

2. Classifications: You can add different classifications to your contexts. For example:

- DDC
- ISO639\_3
- JEL
- customized classifications

When a classification is available for the context, you can select it in the content area:

Content 🛛 🖯 hide				
Free keywords			1	
Classification	Type - DDC MPIPKS ISO639-3 PACS MPIS-GROUPS	Value	- <b>▼</b>	$\oplus \ominus$
Details 📄 hide Language of Publication Date	MPIS-PROJECTS MPIRG MPINP JEL MPIWG-PROJECTS YYYY-MM-DD Date submitted YYYY-MM-DD Total no. of pages	Date published online YYYY-MM-DD Date modified YYYY-MM-DD	Date accepted YYYY-MM-DD Date created YYYY-MM-DD	$\oplus \ominus$

3. The **contact email address** provided in the context is used to have a contact person for all items of the context. You can find the corresponding information by clicking on "Contact - Moderator":



#### 4. Publication workflow:

Two workflows are available: Simple and Standard. For more information, please see the following <u>chapter "Workflows"</u>.

### **Contexts in practice**

Before entering a publication, it is necessary to select the context to which the publication should be linked.

Please choose a	context for your item.
	External Publications of the Max Planck Digital Library
	This context contains publications that have been submitted by MPDL staff members, but which are not directly affiliated to the MPDL.
	PubMan Test Collection
	Sandbox collection for test purposes within the productive server. Please do not release any of the items stored in this context!
	Publications of the Max Planck Digital Library
	Productive Context for the Publications of the MPDL
	Back

### **Contexts and rights**

To enter items in a context, you need to have depository <u>rights</u> for that context. If you have depository rights for only one context, selecting a context as described above is skipped, and you enter the data directly into the context for which you have depository rights. Each item is associated with exactly one context.

Users with moderator rights can change the context via the <u>Batch processing</u> function.

### **Context visibility**

Contexts are <u>not</u> visible to external users. Only logged-in users can see in which context an item is saved.



### **Contexts in search**

Contexts are an essential criterion for search queries.

On the one hand, you can divide your collection into major units based on the contexts: for example, older publications, newer publications, "external" publications, etc. For example, external publications can be excluded right away via the context for advisory board lists or other reports.

On the other hand, only by integrating your contexts into the search query can you ensure that only publications created by accounts of your institute are included in the results list. When searching only with the search term "organization" (see the following <u>chapter</u> "Search - Search ogranizations"), there is always a chance also to retrieve data sets that have

been entered in PubMan by other MPIs (duplicates). All users can use PuRe-metadata like organizations for the data entry.

Your contexts are already selected in the <u>administrative search</u>. You can deselect them.

				Administrative Se	arch
Search terms	( Title	•			⊕⊖
	AND 🔻				
	( Person	•	Person 💌		$\oplus \ominus$
	AND 🔽				
	( Organization	•	Include history		⊕⊝
	AND 🔻		,		
	( Date	From:	YYYY-MM-DD		⊕⊝
		To:	YYYY-MM-DD		
My Contexts	External Publicat	ions of the Max P	PubMan Test Collection	✓ Publications of the Max Planck Dig	
	Import Context o	of the Max Planck		-	

If you want to retrieve a publication list with all items of your MPI by using the <u>advanced search</u>, you should add the context search term. A query with brackets and the search operator "OR" are recommended for this purpose:

		Advanced	Search
Search terms ( <sub>x</sub>			$\oplus \ominus$
Context	Publications of the Max Planck Digital Library	•	$\oplus$ $\ominus$
OR 👻			
( Context 🗨	External Publications of the Max Planck Digital Library	•	$\oplus \ominus$
OR 💌			
( Context 🗨	Import Context of the Max Planck Digital Library	•	$\oplus \ominus$
)×			$\oplus \ominus$
AND 💌			
( Organization	Include history		$\oplus \ominus$

By searching with contexts, you avoid having duplicates from other institutions on your list.

# 14.2 Rights

Each user can be assigned different rights for a context. Either Depositor and/or Moderator rights. In the role of the **depositor**, items can be entered, saved, and set, but not released.

In the **moderator** role, items can be controlled, edited, and released. Almost all moderators also have depositor rights.

Additional rights are required to work in **CoNE**.

# 14.3 Workflows

Two workflows are implemented for the publication process: The Simple and the Standard workflow. Which workflow will be used is set via the context. Please reach out to the PuRe-support if you are interested in changing the workflow settings.

### 14.3.1 Simple Workflow

The Simple Workflow is well designed for institutions where one or a few people enter data, for example, in One Person Libraries (OPLs).

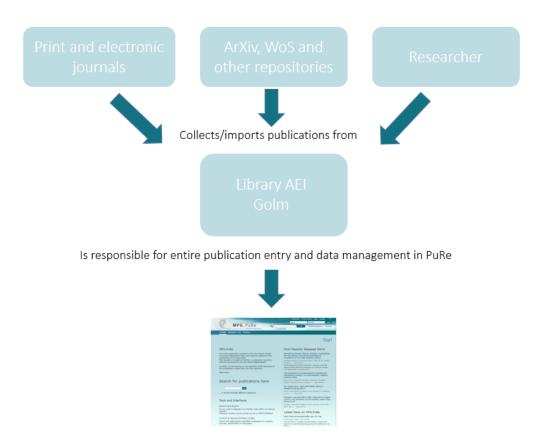
A library in the "Depositor" role enters data in PuRe and immediately publishes the dataset (release). Before the dataset is published, it is validated by the system.

### Simple Workflow



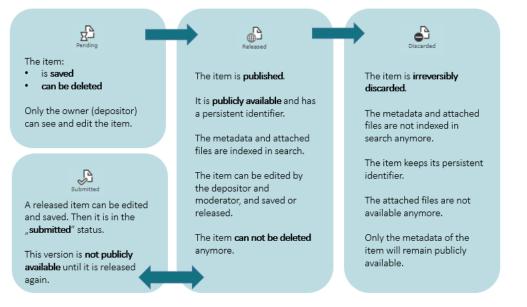
The depositor can discard the released item or modify and release it again.

#### An example for a simple workflow:



In the Simple Workflow, items can go through the following cycle:

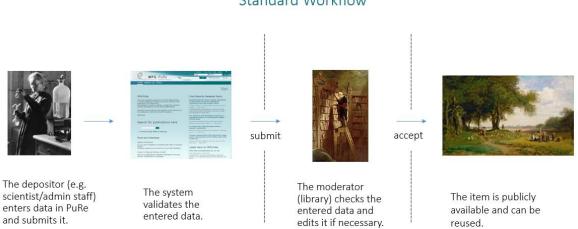
### Item cycle of the Simple Workflow



# 14.3.2 Standard Workflow

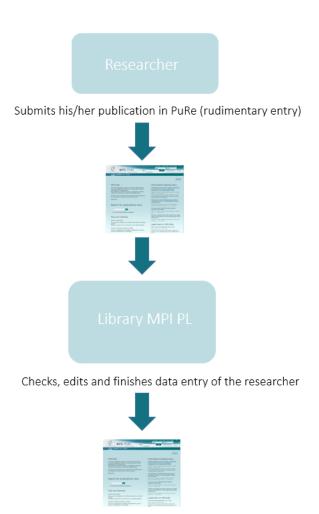
The standard workflow is designed for libraries or institutes where many people enter publications into PuRe, and the librarians check those entries before publishing.

For example, scientists/administration staff or other colleagues enter data in the role "Depositor" and submit it for approval (Einstellen/Submit). The depositors themselves do not have the authorization to release the publications. The library checks the entries in its role as "Moderator" and modifies as well as completes the item if necessary or sends it back to the depositor with a request for revision. When it is ready for publication, the moderator can publish (release) the item. From then on, the item is publicly available and can be reused.

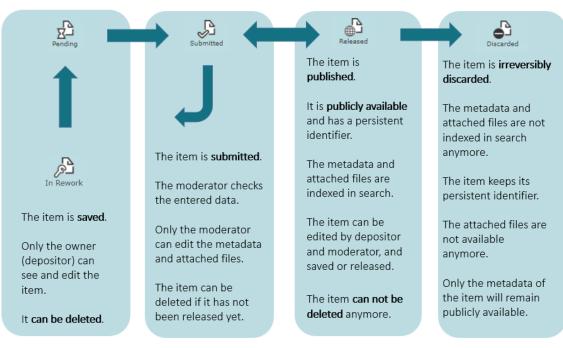


#### Standard Workflow

Here is an example of an institute with a Standard Workflow:



In the Standard Workflow, items can go through the following cycle:



### Item cycle of the Standard Workflow

# 15. Organizational Units (OUs)

Affiliations entered in the publications are managed by "Organizational Units" (OUs). For each MPG institute working with PubMan, at least one OU is created. You can find the current list of OUs via the <u>Browse function</u>.

To add new OUs, reach out to the PuRe-support team.

The organization list has three umbrella units:

- Max Planck Society
- Kaiser-Wilhelm-Gesellschaft

#### • External Organizations

START MY I	TEMS WORKSPACES SUBMISSION BASE	(ET (0)	TOOLS	
				Start / Choose Browse By / Organization
Organization	Max Planck Society [Description]			
	້ 🛱 Kaiser-Wilhelm-Gesellschaft [Description	n]		
	* 🖘 External Organizations [Description]			

The institute list of the "Max Planck Society" is sorted alphabetically. The institutes are usually listed with the English name. Until about 2013, the institutes were registered with the abbreviation "MPI". Since 2013 the institutes are entered with "Max Planck Institute".

Each OU has a unique ID, e.g. like ou\_1234567. With the help of the ID, the searches are performed.

Here you will find instructions on finding the OU ID.

Here you can find a description of how to search for organizations.

# 15.1 Open the description of an organization

A description can be added to each organization. To view this description, proceed as follows:

- Open the category "Organization" in the browse-by function . The overview of all organizations opens.
- Click on the "Description" link behind the organization to open it.
- pure.mpg.de/pubman/faces/AffiliationDetailPage.jsp?id=ou\_persistent25

	Organization Description
Max Planck Digital	Library
Details Alternative Title	MPDL
Location	Amalienstr. 33, 80799 Munich, DE
Description	The Max Planck Digital Library (MPDL) is a scientific service unit within the Max Planck Society, established in January 2007. The MPDL provides services to help the MPS researchers manage their scientific information workflow. Such services comprise the provision of actual content and of technical solutions, but also the support to users by acting as a centre of competence and community facilitator in the domain of scientific information management. This is achieved through close collaboration with the Max Planck Institutes and their libraries. The core activities of the MPDL lie in building up infrastructures and tools for publications and research data. A substantial task of the MPDL is to provide most effective access to scientific information and fostering the Open Access policy of the Max Planck Society. Die Max Planck Digital Library (MPDL) is te eine wissenschaftliche Serviceeinheit
	innerhalb der Max Planck Gesellschaft. Sie hat ihre Arbeit am 1. Januar 2007 aufgenommen. Die MPDL bietet den Forschern der Max-Planck-Gesellschaft Dienste an, die ihnen helfen, den wissenschaftlichen Informationsablauf zu organisieren. Diese Dienste beinhalten u.a. die Bereitstellung von Forschungsdaten und technischen Lösungen. Die MPDL unterstützt die Wissenschaftler als Kompetenzzentrum und
	Ratgeber im Bereich wissenschaftliches Informationsmanagement. Eine wesentliche Aufgabe der MPDL ist es, einen optimalen Zugang zu wissenschaftlichen Informationen zu ermöglichen und die Max-Planck-Gesellschaft in ihrer Open Access Politik zu unterstützen.

# 15.2 Hierarchy

Each institute can choose whether and which subgroups and departments are created. There are two kinds of hierarchy to distinguish:

Some institutes decide for a **flat hierarchy**, which means all departments/groups are subordinated to the institute. Here is an example of a flat hierarchy:

* 💭 MPI for Plant Breeding Research [Description]
Central Microscopy [Description]
Department of Chromosome Biology (Raphael Mercier) [Description]
Department of Comparative Development and Genetics (Mil [Description]
Department of Plant Developmental Biology (George Coupl [Description]
Department of Plant Microbe Interactions (Paul Schulze [Description]
IMPRS [Description]
independent Research Groups [Description]
Mass Spectrometry [Description]
Max Planck Genome Centre Cologne [Description]
Other Publications [Description]

Other institutes decide for a **leveled hierarchy** - a tree structure with sub-departments/groups. Here is an example:

Max Planck Institut f ür Ornithologie [Description]
Radolfzell [Description]
Abteilung Couzin [Description]
Abteilung Wikelski [Description]
Forschungsgruppe Aplin [Description]
Vogelwarte Radolfzell [Description]
Forschungsgruppe Peters [Description]
Forschungsgruppe Quillfeldt [Description]
Seewiesen [Description]

The hierarchy also affects the **search**. For example, suppose you search for the OU "Vogelwarte Randolfzell" in the leveled hierarchy (see above). In that case, you will find the publications from "Vogelwarte Randolfzell" as well as from the OUs "Forschungsgruppe Peters" and "Forschungsgruppe Quillfeldt". If you only want the publications from the OU "Vogelwarte Randolfzell", then search as follows:

- Vogelwarte Randolfzell
  - NOT
  - (Forschungsgruppe Peters
  - **OR**
  - Forschungsgruppe Quillfeldt)

This means, when you search for an OU, the children ( in this case, the OUs below it) will be searched as well.

Search terms	(Organization	Radolfzell, Max Planck Institut für Ornitho ★ 💬 झ ☐ Include history	$\oplus \Theta$
	NOT 💌		
	( <sub>×</sub>		$\oplus \bigcirc$
	Organization	Forschungsgruppe Peters, Vogelwarte Re	$\oplus \Theta$
	OR 💌		
	Organization	Forschungsgruppe Quilifeldt, Vogelwarte X ↔ =	$\oplus \ominus$
	)		$\oplus \ominus$

## 15.3 External organizations

Not only MPG institutes are added as an organization. If required, we also include external organizations that are frequently used. Please get in touch with PubMan support if needed.

External Organizations [Description]
 Center for Language Studies [Description]
 Centre for Cognitive Neuroimaging, Donders Institute for Bra... [Description]
 Charité Universitätsklinik Berlin [Description]
 Conders Institute for Brain, Cognition and Behaviour [Description]
 Fachbeirat des MPIER [Description]
 Freie Universität Berlin [Description]
 Goethe-Universität Frankfurt am Main [Description]
 Harvard University [Description]

### 15.4 Rename OUs

If a department/group is renamed, then this can also be shown in PubMan.

Please let PubMan support know which department/group is afftected and how it was renamed. After the OU renaming, the old name will remain in the publications and CoNE entries. The selected OU name will always remain.

In order to be able to select the new name by using **CoNE** in the future, the <u>CoNE</u> entries of affiliated authors should be edited accordingly. The old position entry should be *deleted* and a *new entry* with the new OU name should be added.

	persons:persons/r	esource/persons963	304				
Data	*Cone-ID	persons/resource/persons96	5304				
	*Complete Name	Boosen, Martin		i	$\oplus \ominus$		
	Alternative Name	Boosen, M.		i	$\oplus \ominus$		
	*Family Name	Boosen		i	⊕⊝		
	Given Name	Martin		i	⊕⊝		
	Photo-URL						
	Identifier	Ð					
	Researcher URL	-					
	Keywords of research				Đ		
	fields and interests						
	Subject (DDC)			$\oplus$			
	Degree	M.L.I.S.		i	⊕⊝		
	Awards				Ð		
	Position	$\oplus \ominus$					~ ~
		Organization	Collections, Max	Planck Digital Libra	ary, Max P	i	⊕⊝
		OU-ID	ou_1753285			Θ	
		Position Appellation	Repository Manag	ger			$\oplus \ominus$
		From					
		Until					
		E-mail Address	boosen [at] mpd	l.mpg.de		Θ	
		$\oplus$ $\ominus$					
		Organization					Ð
		OU-ID					
		Position Appellation					Ð

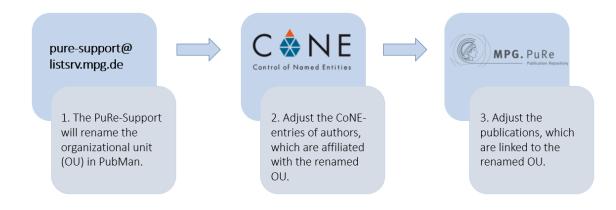
Depending on the agreement with the department/group management, the publications with the old affiliation entries sometimes need to be adjusted retroactively. If this is the case, then each PubMan entry must be edited manually and the affiliation must be replaced in each item. You can

find information on how to enter an affiliation in <u>chapter "Submission - Full submission - Add an</u> <u>organization as affiliation"</u>.

In some cases, the previous OU name should remain in the PubMan entries. Then you do not need to change anything in the items.

Since the OU-ID is entered in both the old and the new affiliation, all entries will be found in the **search**. Because when an OU is renamed, the OU-ID doensn't change.

Here you can find an overview of the renaming-process:



### 15.5 Close OUs

If a group/department is closed at your MPI, then please reach out to the PuRe-Support. The OU will then be closed in PuRe. If an OU is closed, it will be indicated as "(CLOSED)" after the name of the OU. It will also move to the end of the list (as seen on the screenshot). You can still find the closed OU in the auto-suggest list of the entry mask and continue to assign the OU.

Ť ¢	MPI for Plant Breeding Research [Description]
	Central Microscopy [Description]
	Department of Chromosome Biology (Raphael Mercier) [Description]
	Department of Comparative Development and Genetics (Mil [Description]
	💬 Department of Plant Developmental Biology (George Coupl [Description]
	Department of Plant Microbe Interactions (Paul Schulze [Description]
	IMPRS [Description]
	Independent Research Groups [Description]
	Mass Spectrometry [Description]
	Max Planck Genome Centre Cologne [Description]
	Other Publications [Description]
	ADIS (CLOSED) [Description]
	Department of Biochemistry (Klaus Hahlbrock) (CLOSED) [Description]
	Department of Genetic Principles of Plant Breeding (Joz (CLOSED) [Description]
	Department of Molecular Plant Genetics (Heinz Saedler) (CLOSED) [Description]
	💬 Department of Plant Breeding and Genetics (Maarten Koor (CLOSED) [Description]
	Department of Plant Breeding and Yield Physiology (Fran (CLOSED) [Description]

### 15.6 Move OUs

Sometimes the structure at an institute changes and a department/group moves in the hierarchy. You can consider whether the OU should be moved or whether a new OU should be created.

When an OU is moved, the affiliation changes. Here is an example (the changes are in bold):

Previous Affiliation: 4pi Photon Atom Coupling, Leuchs Division, Max Planck Institute for the Science of Light, Max Planck Society.

New Affiliation: 4pi Photon Atom Coupling, **Emeritus Group Leuchs, Emeritus Groups**, Max Planck Institute for the Science of Light, Max Planck Society

If an OU is moved, we recommend proceeding as described in chapter <u>Rename OU</u>. For instance, the CoNE author entries need to be adjusted and depending on the case also the previous publications.

# 15.7 Create new OU

If a new department/group is opened at the institute, then please reach out to the PubMan support and a new entry in the organizational structure will be added.

Please provide the following information of the OU (mandatory fields are printed in bold):

Name Parent OU Address Type (department, institute, project) Start and end date Alternative names (e.g. abbreviations, translations) Description Identifiers (e.g. homepage)

This is how an entry can look like:

		Organization Description		
	Emmy Noether Group: Lifespan Neural Dynamics Group			
Details	Details Alternative Title Emmy-Noether-Gruppe: Neuronale Dynamik über die Lebensspanne			
	Location	Lentzeallee 94, D-14195 Berlin, DE		
	Description 2017 - ; Head: Douglas D. Garrett			
	Identifier	http://www.douglasdgarrett.com/		

The predecessor and successor of the OU can also be specified. This information can be used for the search:

					Ac	vanced Search
Search terms   ( Ti	itle	•				⊕⊝
	AND 🔻					
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	AND 🔻					
	rganization	<b>·</b> [	Include histor	у		$\oplus \ominus$
	AND 🔻					
	ate		YYYY-MM-DD YYYY-MM-DD			$\oplus \Theta$

# 16. DOI function

**DOIs** (Digital Object Identifiers) are unique identifiers for digital objects to identify them.

With the DOI function available in PuRe you can assign DOIs to publications that do not (yet) have a DOI through the traditional publication process.

# 16.1 Assign a DOI

With "create DOI" you can assign DOIs to publications in PuRe.

Note for users outside the Max Planck Society: DOI assignment may not be available in other PubMan instances.

This function is only available if:

- an item is released
- contains a **full text** with the visibility "**public**".
- the logged-in user needs the user role "moderator" for the DOI-assignment
- the item must not have a DOI yet as an external reference or as an identifier

For the public file, the following content categories can be selected:

- Any fulltext
- Preprint
- Postprint
- Publisher version
- Code
- Research data
- Multimedia

(Excluded from the DOI assignment are: Supplementary Material, Correspondence, Copyright transfer agreement, Abstract, Table of contents)

To assign a DOI proceed as follows:

Open the item which needs a DOI. The detail view will appear. At the top right, in the item actions area you will find the "Generate DOI" button.

START MY ITEMS WORKSPACES SUBMISSION BASKET (0) TOOLS	
Administrative Search / Search ITEM ACTIONS EXPORT Edit   Discard   Use item as template   Add to Basket   Add to Batch processing create DOI Item ID: 'item_3337219_1'. Context: 'PubMan Test Collection', Affiliated to: 'Max Planck Digital Library'. Created by 'Stefanie Andergassen' 2021-09-06 14:33 Last modified by 'Stefanie Andergassen' 2021-09-06 14:34 Latest Message: -	h Results / View item
Summary Details Release History	/ Log Local Tags
Survey Results - Test Andergassen, S. (2021). Survey Results - Test. <i>Nature</i> .	Released

#### Click on the "Generate DOI" and a window with a warning appears:

S EXPORT	s tamplate   Add to Basket   Add to Batch processing   create DOI		lte
1_3329081_: ernal Publicat tefanie Ande by 'Stefanie ie: -	By continuing with the next step you authorize the Max Planck Digital Library to register a DataCite DOI (Digital Object Identifier) for this MPG.PuRe record. The DOI registration cannot be undone, therefore please use this function with care and only if you are aware of the consequences.		
	In particular you confirm with a DOI registration the scientific quality of the content and the fact that there has not been assigned any DOI to the publication before by the MPG or any other institution. Further details on this requirements can be found <u>here</u> . You also agree that the MPG.PuRe URL and bibliographic metadata will be transferred	Statistics	Log Local
Ornelas Talk Se	to the German National Library of Science and Technology (TIB) in order to register the DOI name.	ted at	Released
https://	Contact Moderator		

Please read the warning notice carefully. If you agree, click on the "create DOI" button at the bottom right. The DOI will be generated. The following metadata will be delivered to DataCite:

- Title of the publication
- Genre of the publication
- Authors

- Affiliations of the authors
- Date with prioritization: Date published in print, Date published online, Date accepted, Date submitted, Date modified, Date created and Event date
- Publisher

The newly assigned DOI appears in the "Identifier" field as type "DOI" in the publication.

## 16.2 DOI structure

A DOI assigned in PuRe can be determined in advance because the structure follows a certain rule.

The DOI always consists of the permanent PuRe DOI prefixe 10.17617/2. and the item ID (without the version number).

an/faces/ViewItemOverviewPage.jsp?itemI	d=item_3283734_3	
💱 MPG.PuRe \land Admintool 🔇 CoNE	🗂 KEEPER 💠 JIRA 🐧 PuReBlog	g S Subversion/Pubman
MPG. PuRe Publication R		Disclaimer Privacy Policy Help English sername password Login Go Advanced Search Browse
START BASKET (0) TOOLS		Start / View item / Item Summary
ITEM ACTIONS EXPORT Add to Basket		ltem
	Summary	Details   Release History   Statistics   Local Tags
	Paper Series 51-2020:Wi ends in Europe turn negat Fulltext (public)	ive? Paper
There are no MPG-Authors available	Fulltext (public)	Supplementary Material
External Resource –7	SHARE_WP_55-2020.pdf (Publisher version), 738KB	available
External Resource	Citation	<b>9</b> 9
	Börsch-Supan, A., Ferrari, I., & Salerno, L. (20 2020:Will long-run health trends in Europe tur	
	Cite as: http://hdl.handle.net/21.11116/0000	-0007-E8E3-3

# 17. Harvesting & Reuse

All data that have been published in PuRe are openly available via various interfaces and can be freely downloaded and reused by external services or interested users.

**Metadata harvesting** is the systematic collection and processing of metadata from databases, repositories, and other digital sources. This process is made possible (in addition to the REST interface ) primarily by an **OAI-PMH** interface. This increases the visibility, findability and reusability of publications. OAI-PMH stands for "OAI Protocol for Metadata Harvesting".

#### **Google / Search Engines:**

Google and Google Scholar mainly use so-called web crawlers for indexing PuRe content. Both the sitemap and so-called meta elements (DC and Highwire Press) in the detailed view of each item are important. The latter are visible when the source code of the page is displayed in the detailed view.

How often Google or Google Scholar harvests PuRe is not known and can also not be influenced. If unwanted content appears in Google searches via PuRe, in serious cases a deletion request can be submitted to Google via the PuRe-support.

Various external platforms periodically retrieve content from PuRe via OAI-PMH. The most important are:

**BASE**: PuRe's content on the BASE platform is very up-to-date. According to the website, BASE retrieves data about twice a month per data provider and roughly fetches the entire published data from PuRe.

<u>OpenAIRE</u>: Specifically for OpenAIRE a certification was made. The retrieval interval at that time was once per week. The current intervals are not known at this time. For OpenAIRE, a separate "set" of data is available in OAI-PMH. There are all items that either have at least one public full text and one of the content categories "Any full text", "Preprint", "Postprint", "Publisher version", or in which a grant ID is specified.

<u>CoRE</u>: CoRE (COnnecting REpositories) also harvests PuRE, but the retrieval interval varies. CORE works with a scheduler, a software component that uses several criteria to decide which repository to harvest and when. One criterion is, for example, the size of the repository.

<u>OpenDOAR</u>: Registries such as OpenDOAR also operate via the OAI interface (determining the number of publications), but do not store the publications themselves.

# 18. Further reading

- MPG.PuRe
   <u>https://pure.mpg.de</u>
- MPG.PuRe Blog <u>https://blog.pure.mpg.de</u>
   CoNF
- https://pure.mpg.de/cone/
- CSL Editor <u>https://pure.mpg.de/csl-editor/about/</u>
- MPG.PuRe Users Mailing List
   <a href="https://listsrv.mpdl.mpg.de/mailman/listinfo/pure-users">https://listsrv.mpdl.mpg.de/mailman/listinfo/pure-users</a>
- YouTube PubMan Channel
   <u>https://www.youtube.com/channel/UC64tYCVVKatqH8aPUCKILwg/videos</u>
- OAI-PMH Schnittstelle
   Base-URL: <u>https://pure.mpg.de/oai/provider</u>
   Overview: <u>https://pure.mpg.de/oai/</u>
   Retrieval-form: <u>https://pure.mpg.de/oai/oaisearch.do</u>
- Sitemap <u>https://pure.mpg.de/pubman/sitemap.xml</u>
   REST

Base-URL: <u>https://pure.mpg.de/rest/</u> Overview: <u>https://pure.mpg.de/rest/swagger-ui.html</u> Documentation: <u>https://colab.mpdl.mpg.de/mediawiki/INGe\_REST\_API\_Documentation</u>

# 19. Glossary

Term	Explanation
MPG	Max-Planck-Gesellschaft - Max Planck Society
MPG.PuRe	Publication repository of the Max Planck Society. An instance of the PubMan software.
PubMan	Publication Management - Open Source Repository Software
INGe	Infrastructure Next Generation - Technical Framework for PubMan since 2018
eSciDoc	Technical Framework for PubMan until 2018

CoNE	Control of Named Entities - Controlled Vocabulary Management Tool
OU	<b>O</b> rganizational <b>U</b> nits - Individual elements of the institute structures
handle	Permanent link