MPG.PuRe Manual

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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 ⚠ symbol.

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

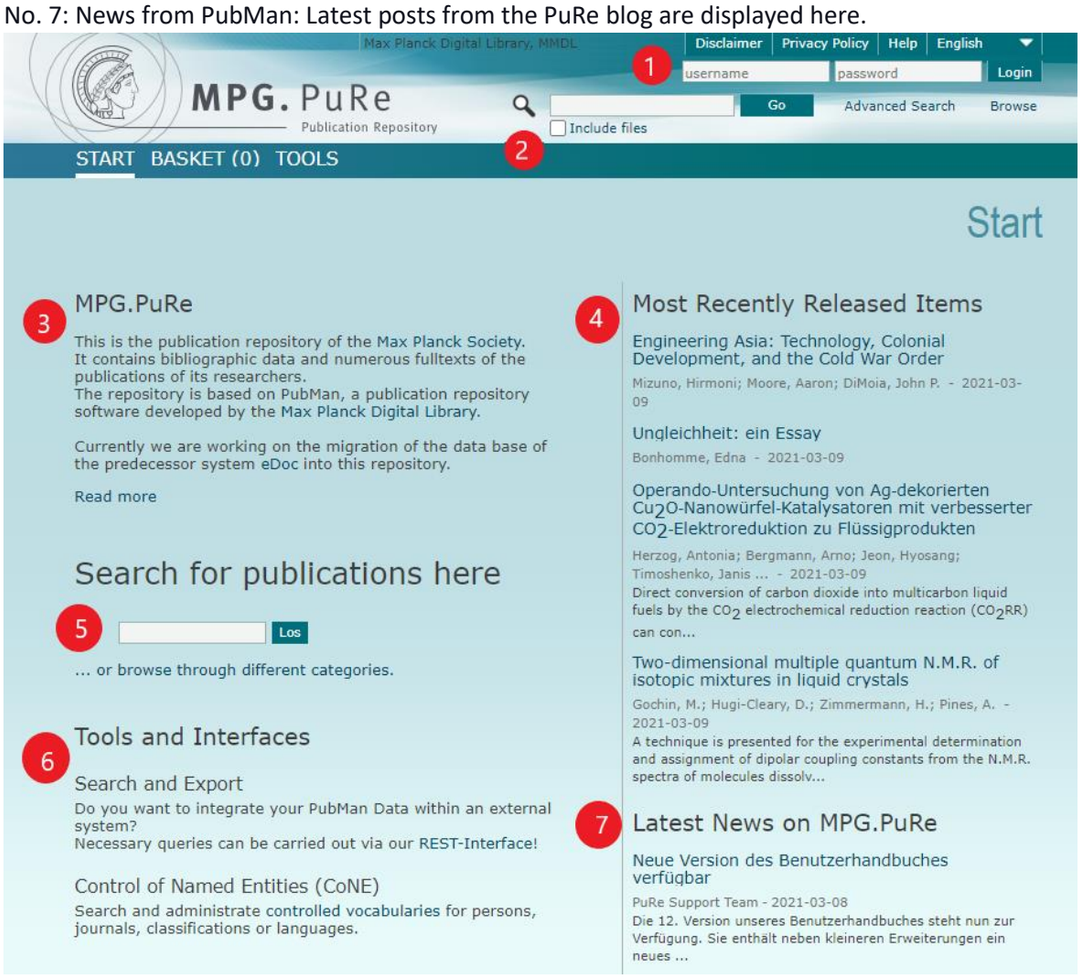
This is version 12.7 (as of April 11th, 2024) of the PubMan user manual.

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 MPG.PuRE Help, 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: http://pure.mpdl.mpg.de.

- 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.

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 Support-Team. 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 Support-Team or if applicable the Local Admin at your MPI. Users can't reset the password on their own.

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

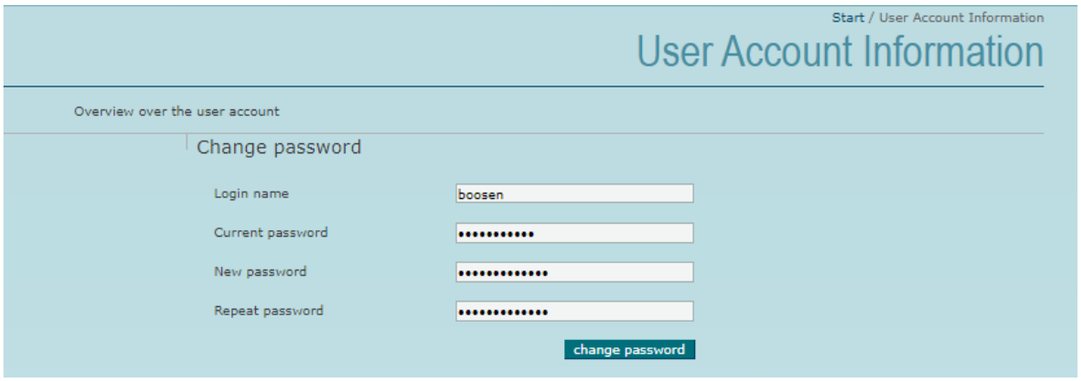
1. Password change after reset/account creation

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.

3. You will be directed to an entry mask. Here you enter your user name, the current password and twice the desired new 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 not 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

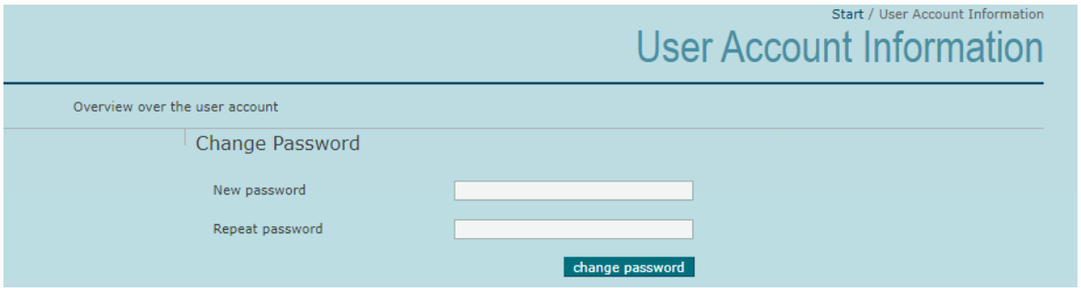
- It must not contain a space

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.



- 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** .

2.4 Help

The "Help" function redirects you to MPG.PuRE Help, 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 Team 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.
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 d
  wenden Sie sich bitte zunächst ebenfalls an den MPG.PuRe Support.

Mitarbeiter der Max-Planck-Gesellschaft können sich auf der Mailingliste PuRe Users 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 auszu

User Manual / Benutzerhandbuch [edit]

- User Manual (English)
- Benutzerhandbuch (deutsch)

FAQ [edit]

- FAQ (English)
- FAQ (deutsch)

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.

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.

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.

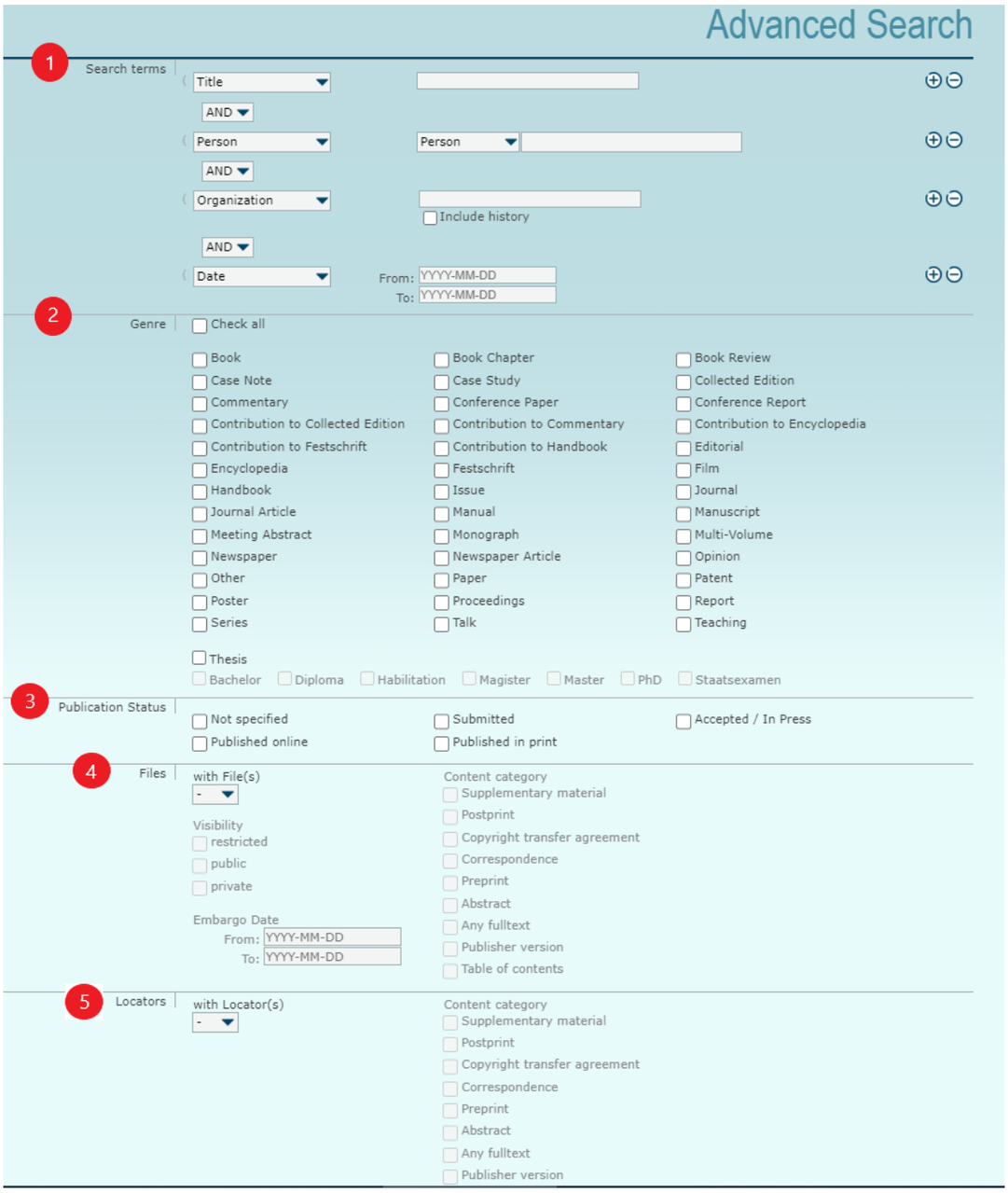
Note for users of the Max Planck Society: Certain terms such as “and”, “or” and articles are ignored as search terms. An up-to-date deny list is available on request from the PubMan support team.

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.



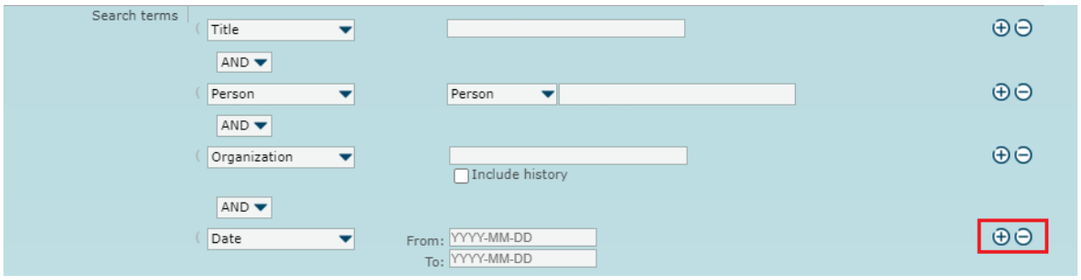
The search mask is divided into the following sections:

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.

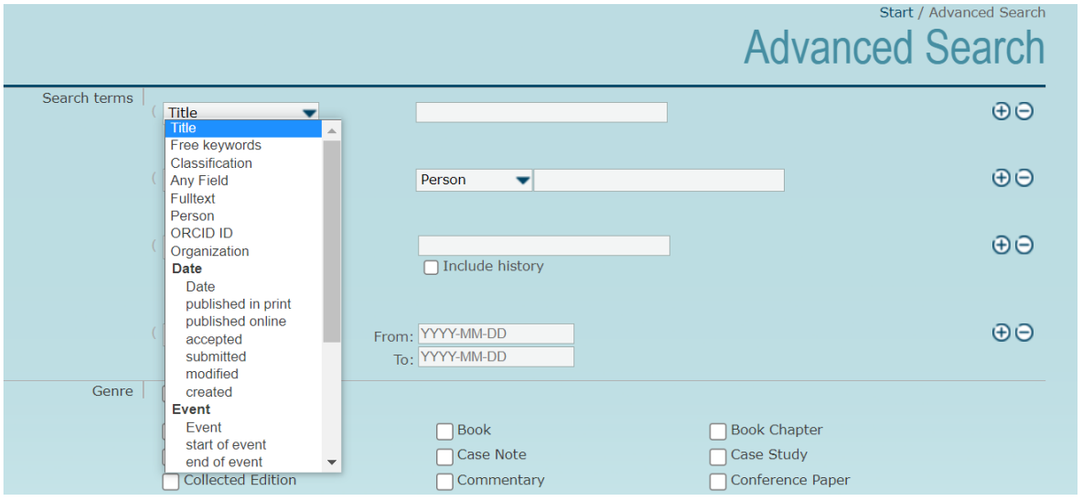


Delete search fields

- 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:

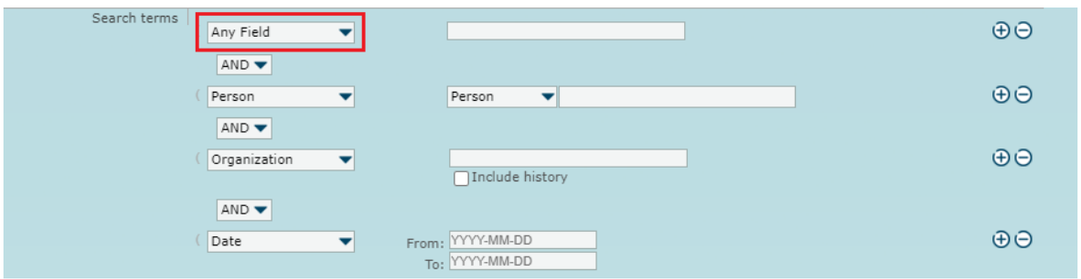


- Open the drop-down menu of a search field by clicking on the arrow symbol to the right of the field. The drop-down menu opens.
- Please select the required search field from the drop-down menu by clicking on it. The selection is going to be displayed in the search field.
- Enter the search term to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

3.4 Search any field

You can either search any field in the simple search function (seechapter "Simple search") or the advanced search function. For the second option, proceed as follows:

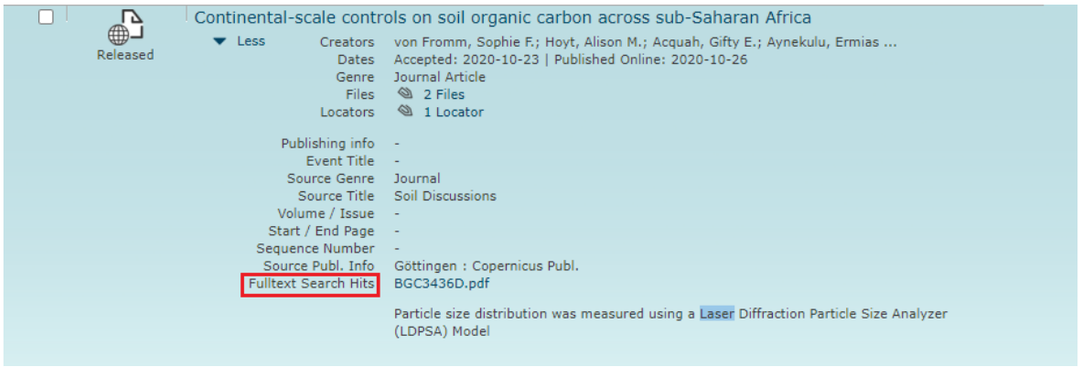
- Select “any field” in the drop-down menu.
- Enter the search term in the field to the right and start the search.



3.5 Search attached files

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

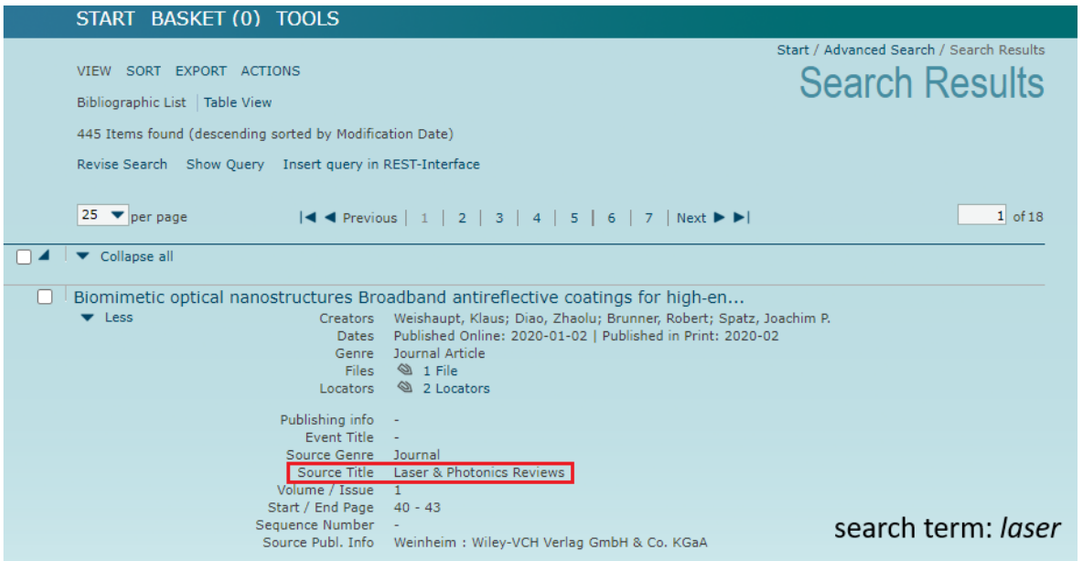
- Select the search field "Fulltext"
- Enter your search term and start the search.
- To see the results in the full texts, click the "expand all"-button in the header of your search results. The expanded list view opens, with the search hits in full texts displayed.
- Click on the file name in bold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



3.6 Search source titles

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

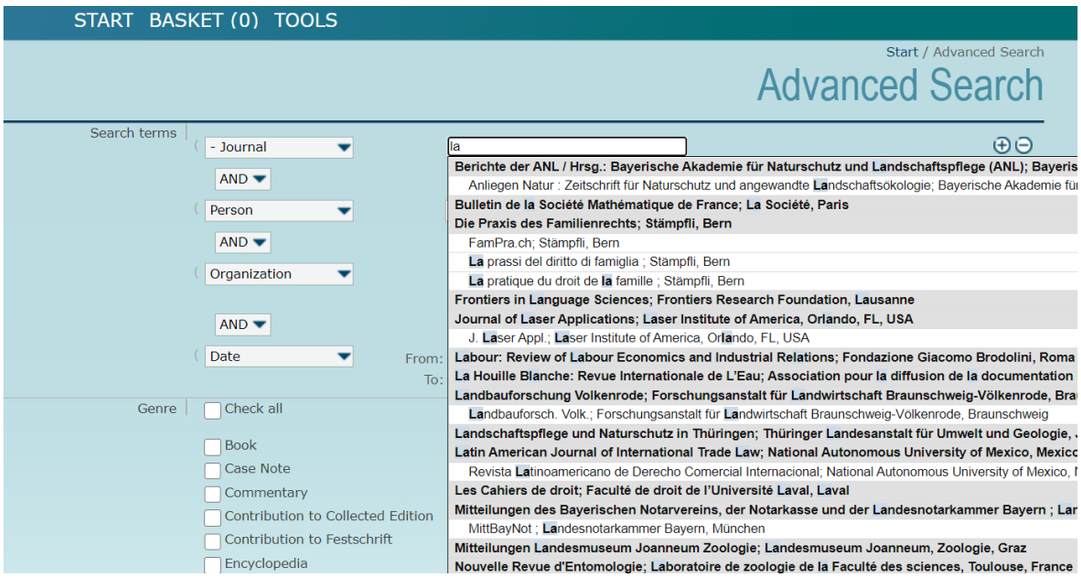
- Select "Source" in the search field (see chapter "Search fields"), enter the title you are looking for in the search box, and start the search.



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 chapter "Search fields")
- 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.

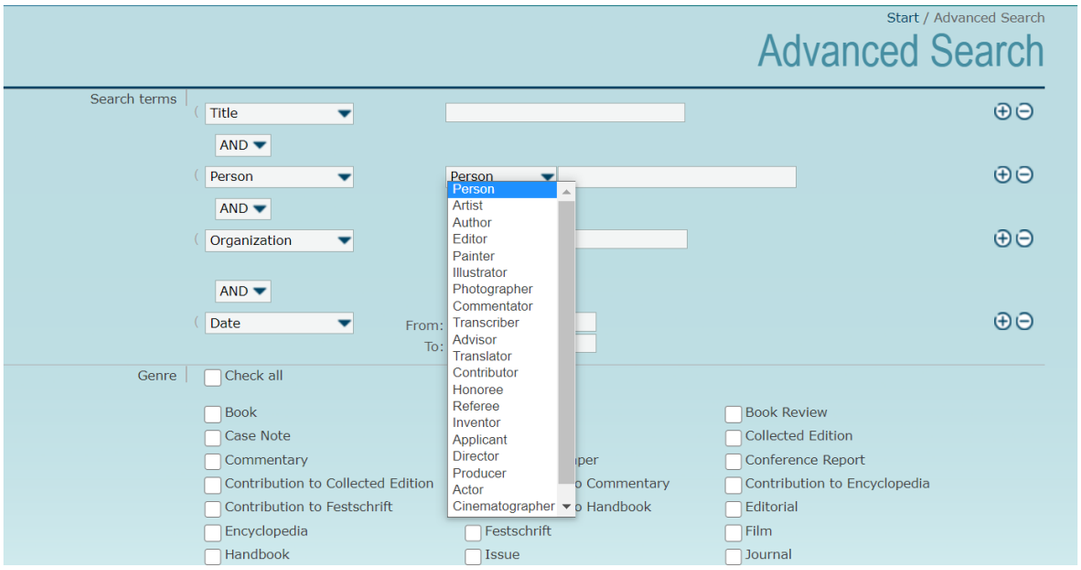


- Select the preferred journal title in the autosuggest list, start the search, and as result, you will get all publications related to the journal.
- In case you want to search for a journal title, which is not recorded in CoNE, enter the journal title manually in thesearch box.

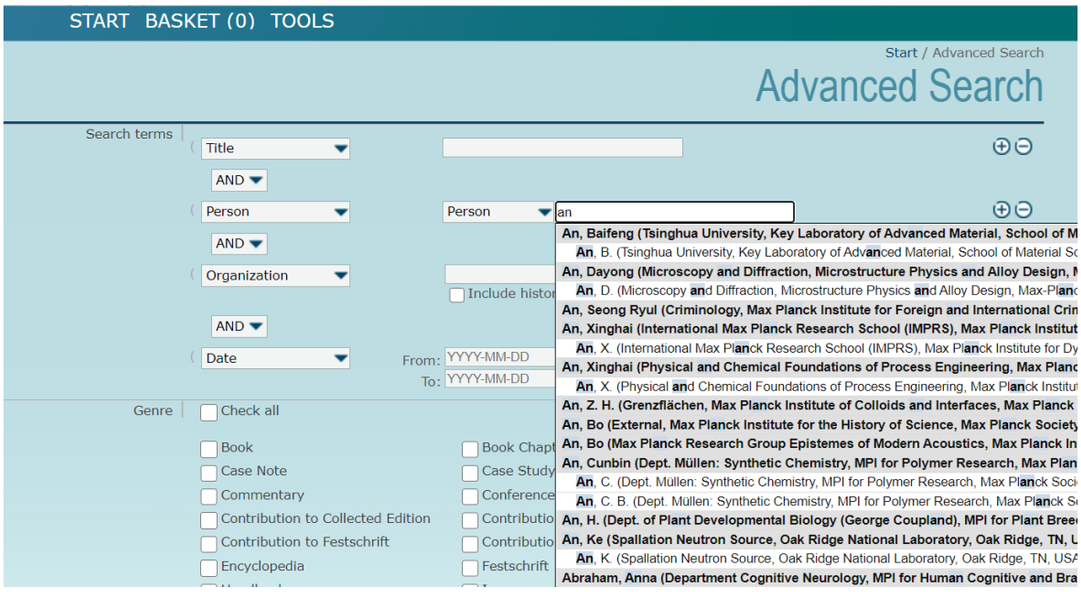
3.8 Search person

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

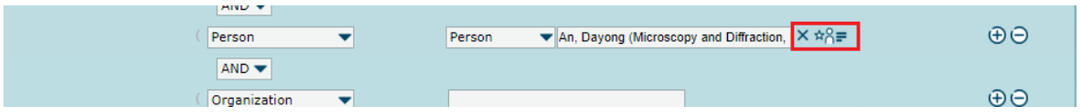
- Select the search field "Person". Two search fields will appear.
- In the first search field, you can select the person's "role" via a dropdown-menu.



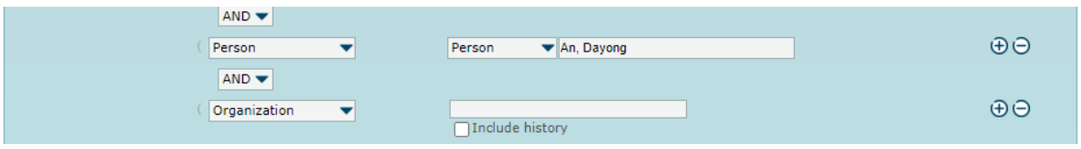
- Enter the first few letters of a person's name in the search field on the right. If the author has a CoNE entry, the autosuggest list opens. For more information on the CoNE service, see chapter "Tools - CoNE".
- The autosuggest list displays all entries and existing forms of names. If a person in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



- 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.



- 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.



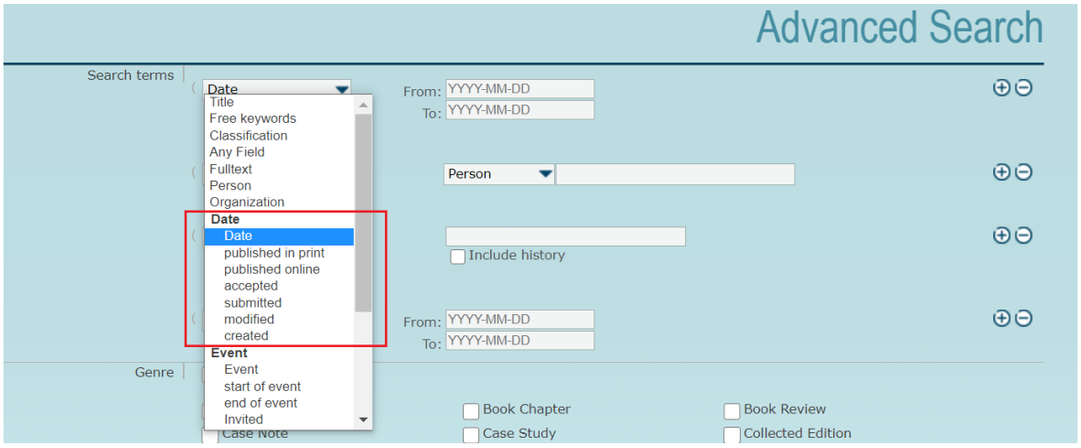
- If an ORCID ID is connected to the searched for person in CoNE, you can find that person by their ID and select them in the autosuggest list.

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.

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 chapter "Search fields")

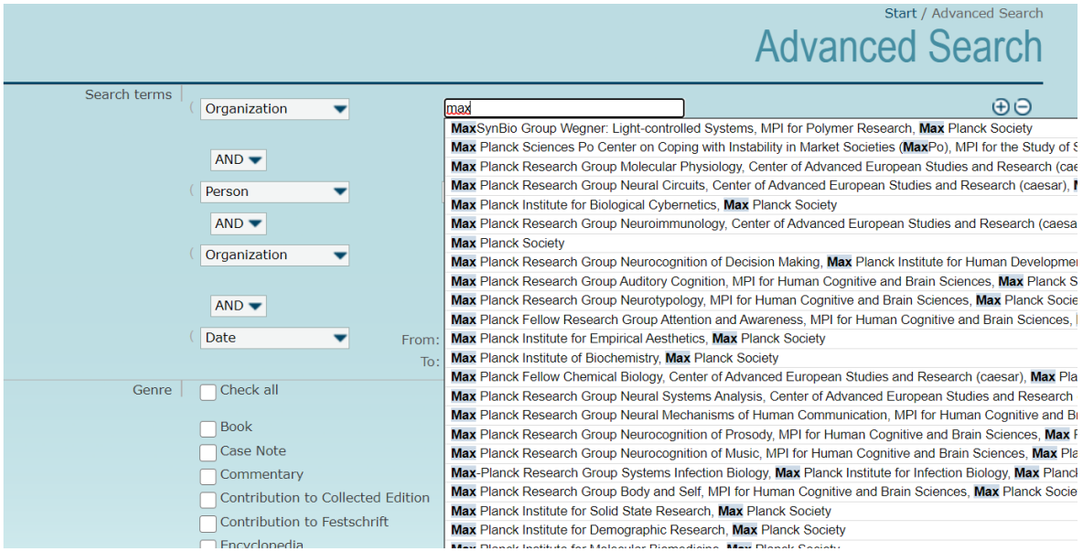


- Enter the start date of the period in the "From" field and the end date in the "To" field. You can also search by start or end date only. You can find further information on the format of the date in chapter "Add a date" .

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 chapter "Organizational Units (OUs)".



- 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.

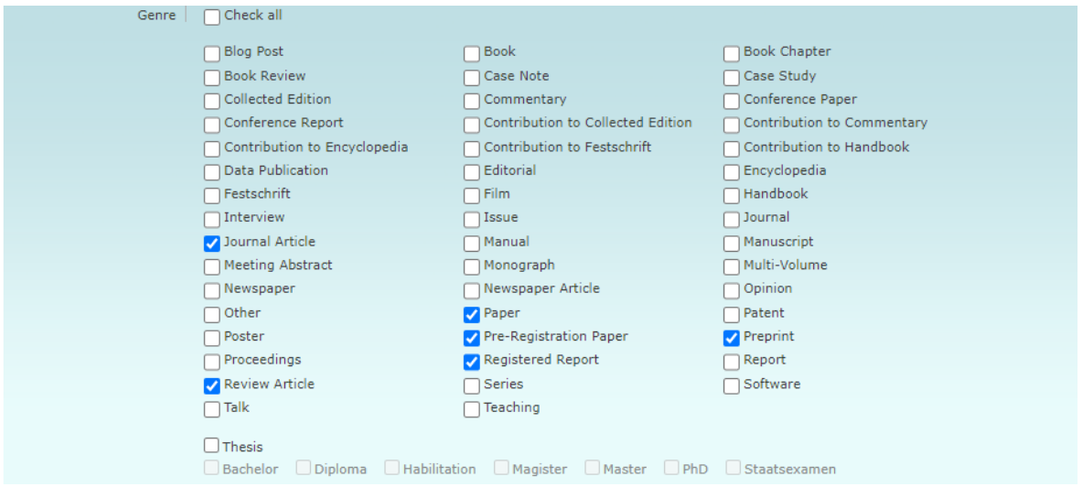
⚠ Attention: When opening the search mask, no genre is selected by default. That means the search will query all genres.

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

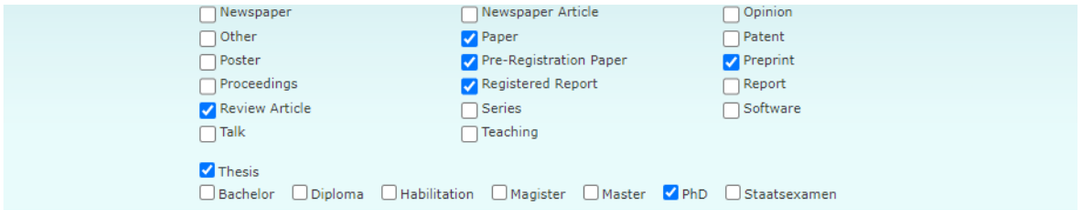
3.11.1 Select individual genres

To select individual genres, proceed as follows:

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

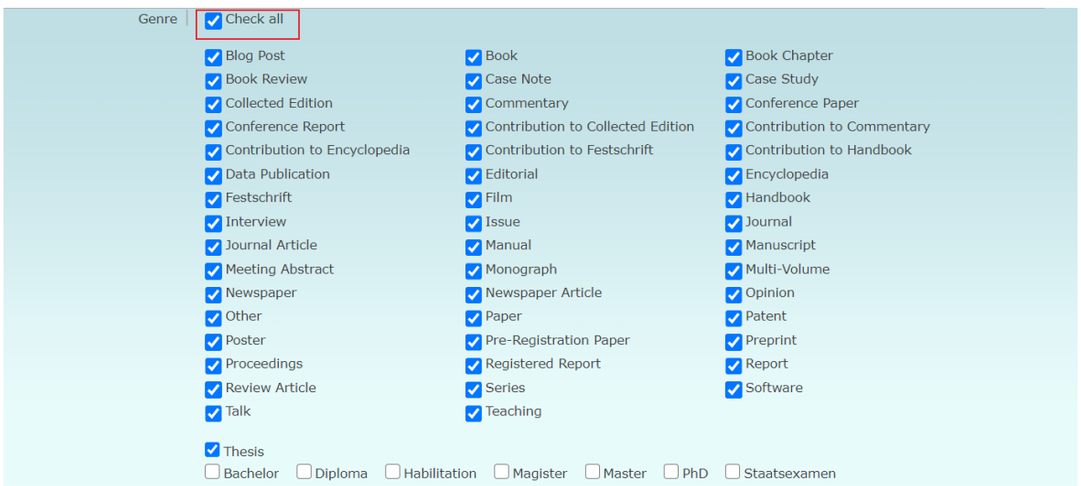


In PubMan, you can distinguish the genre "thesis" by the type of degree. To do so, select the "thesis" genre in the lower area of the genre selection. The degree types are no highlighted in grey and can be chosen. Select the degree types you are looking for. A checkmark will indicate them.



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

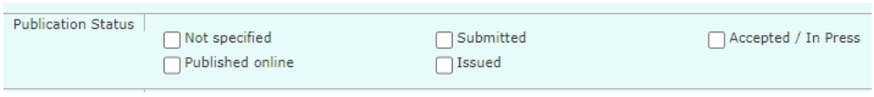
The publication status results from the entered year.

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

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.

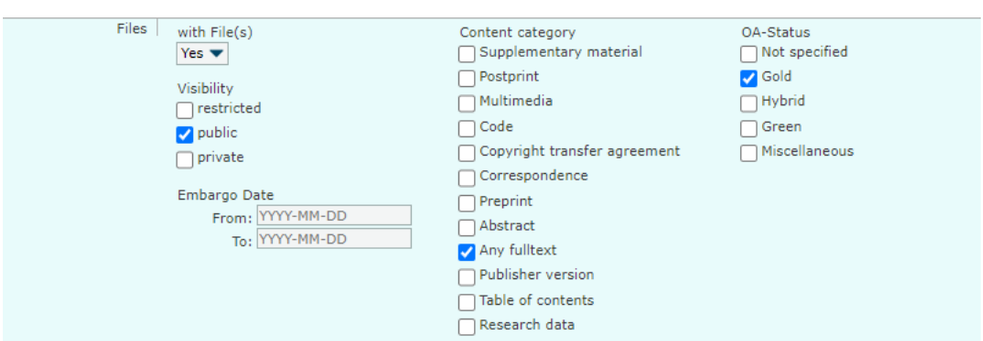


- If you select the status "Not specified", items without a date are searched.

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.

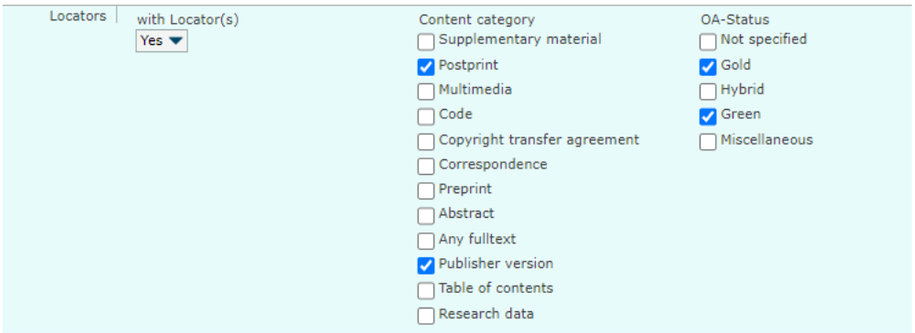
- In the field with File(s) you can select the **visibility** of the attached files. To do so, click on the desired visibility.
- Additionally, you can search for the “**Embargo Date** ” of a record. Enter the date in the field “from” or “to”. Or fill out both fields if you want to search for a particular 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 chapter "Submission - Open Access Overview" .



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.

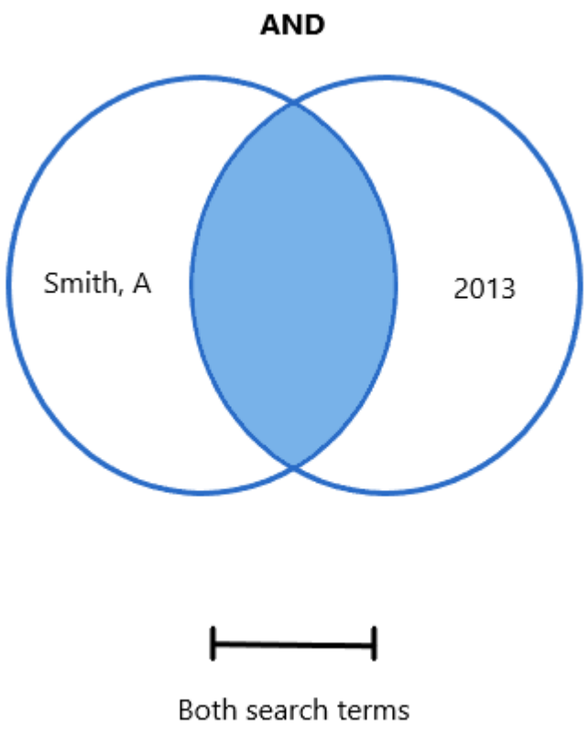
- You can select which “**content category(s)** ” the locators/external reference you are looking for should correspond to. The chosen content categories are marked with a checkmark.
- On the right you can clarify the **Open-Access-status** of the locator/external reference. Find more information on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



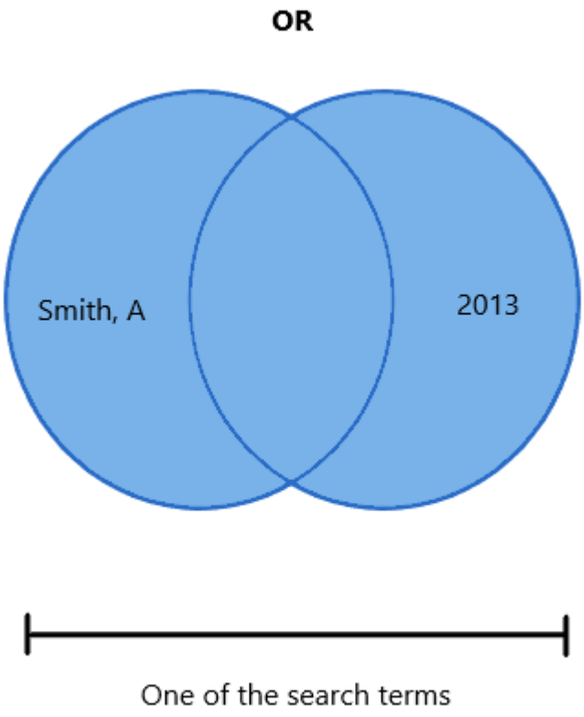
3.15 Link search terms

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

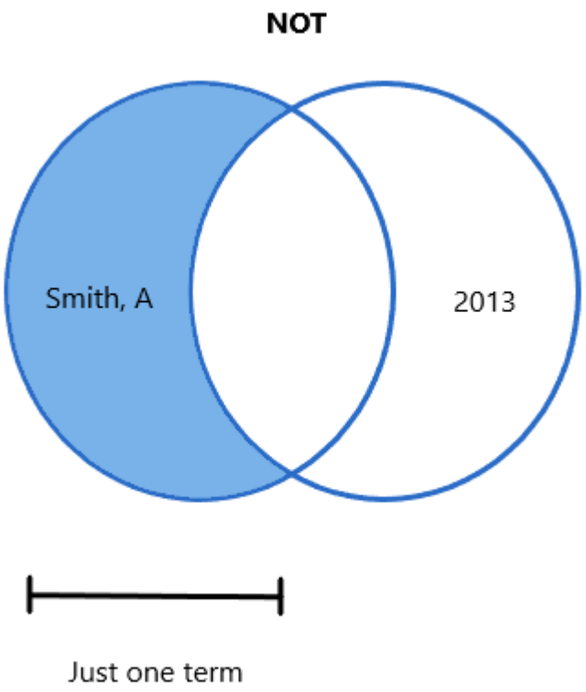
With the operator "**and**", you can combine two search terms that should both match the data records you are looking for. For example, if you are looking for records by the author "Smith, A." from the year "2013", combine these two search terms with "and".



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.



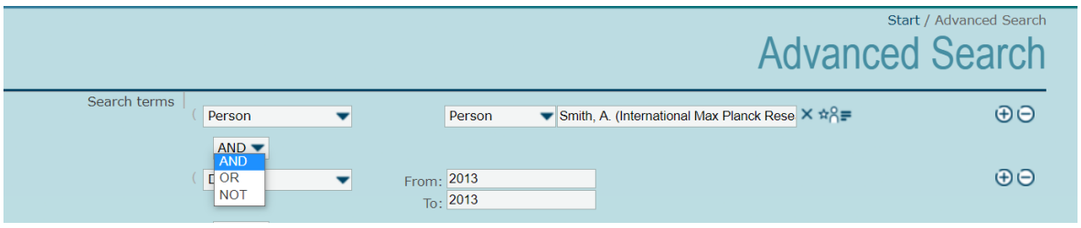
You can use the operator "**not**" to exclude specific search terms from the search. For example, if you want to search for all data records with the keyword "laser", but want to avoid getting data records from the author "Meyer, B.", combine these two search terms with "not".



⚠ 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:

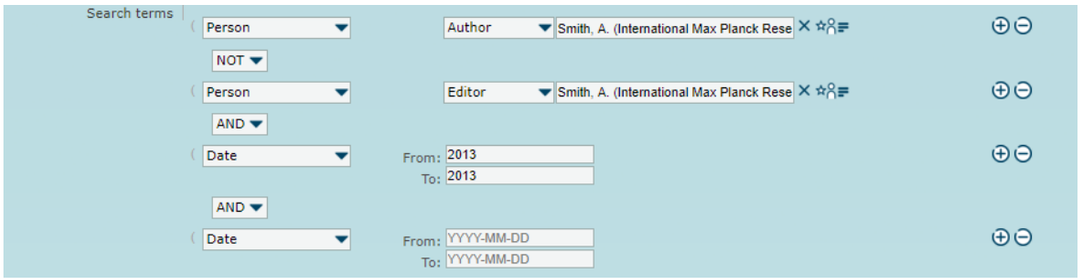
- Select multiple search fields and enter search terms.
- Link the search fields using the Boolean operators, which are available as a drop-down list between the individual search fields.



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.



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.

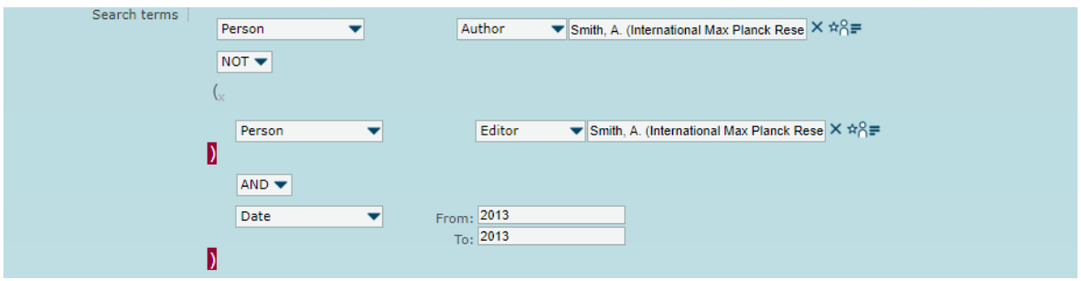
With the help of the bracket's function, this query can be linked in such a way that all journal articles are searched that contain the author "Smith", but neither include the publisher "Smith" and were published in 2013.

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.

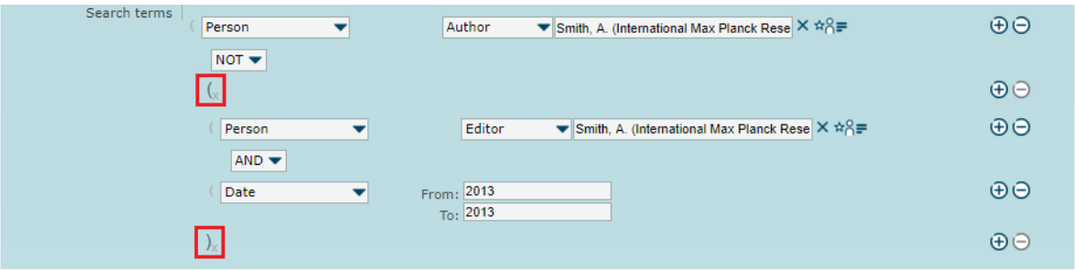
The search mask suggests closing brackets.

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



- 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.



- 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.

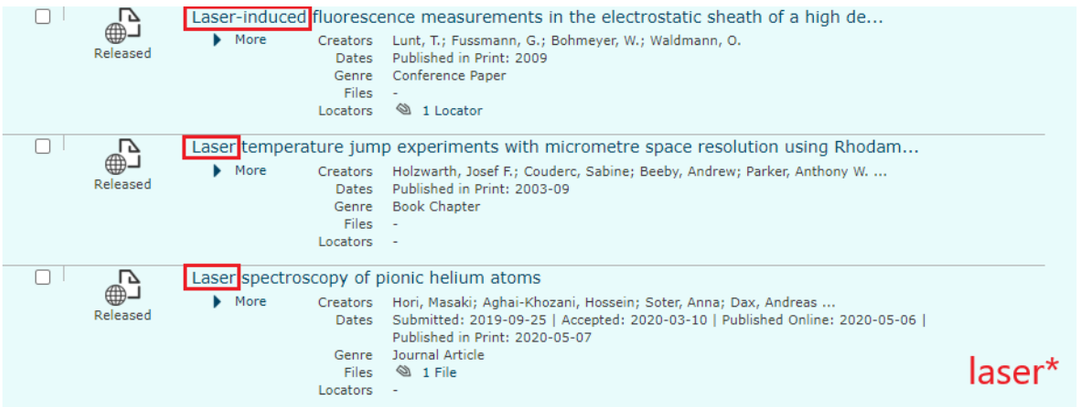
Truncation can enhance the search , e.g. other spellings or grammatical forms can be included. In PuRe, the wildcard asterisk *, without spaces before and after, is used for truncation.

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

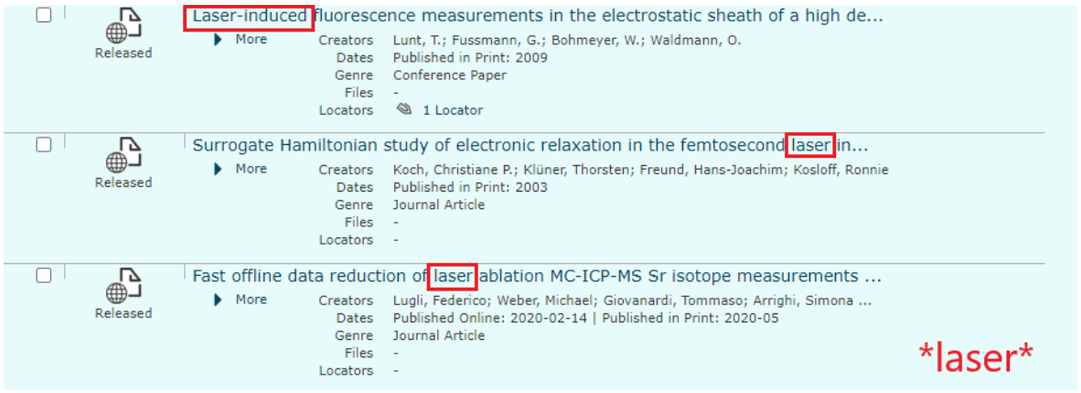
As soon as you use the truncation symbol *, PuRe searches over the field's entire content as a phrase: You would theoretically have to enter the entire field content to find the corresponding data record.

⚠ 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".



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.

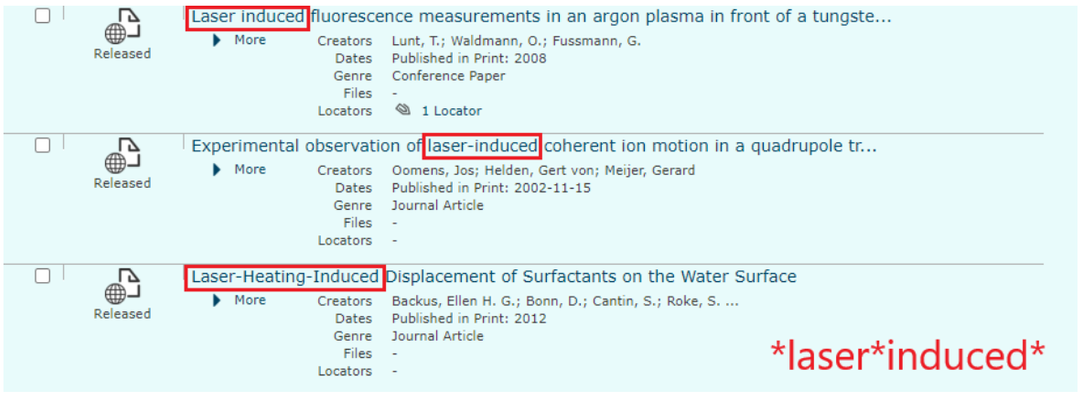
In this case, the spellings "Maßnahme" and "Massnahme" are found, as well as the respective plural variants ("Maßnahmen").

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

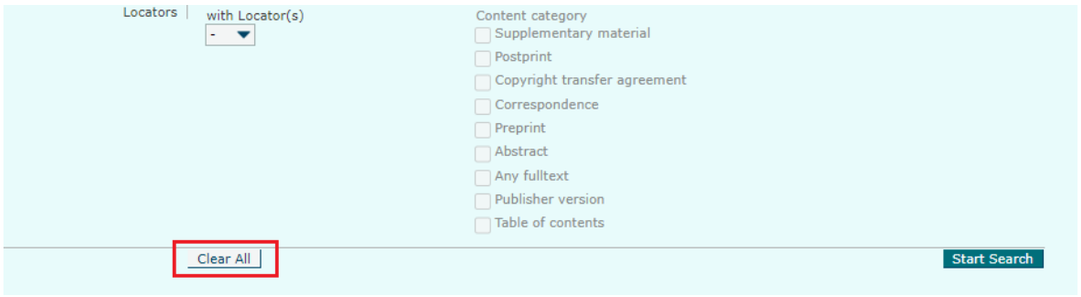
In this case, all publications containing the term "laser induced" (with spaces or hyphen) are searched. However, search will also query publications containing both terms at any distance from one another.



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”



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.

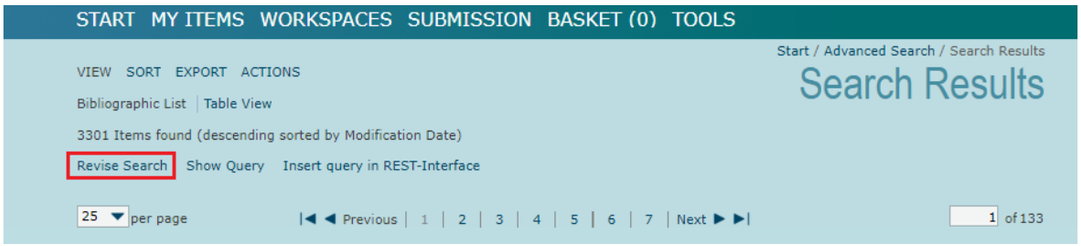
3.20 Refine advanced search

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

⚠ 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.



The advanced search mask with the search query appears.

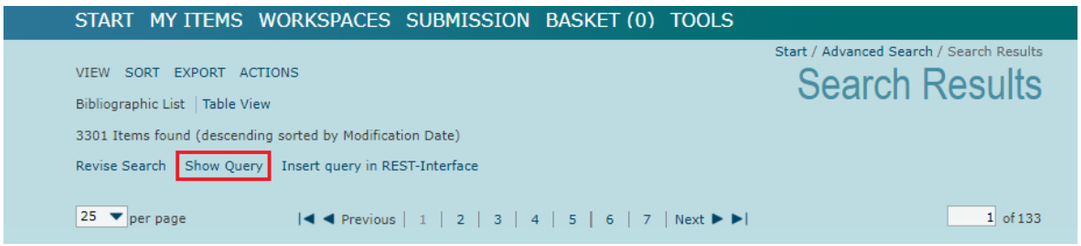
- You can now edit the search query.
- Click on the "Start Search" button to perform the search query again. The list with the results appears.

3.21 Show advanced search query

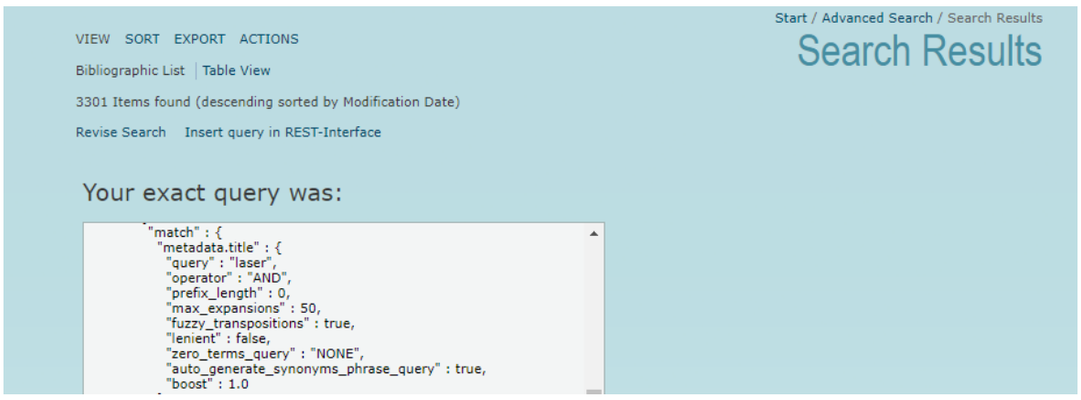
With the function "Show query" the search query can be displayed as an elastic search query.

⚠ 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.

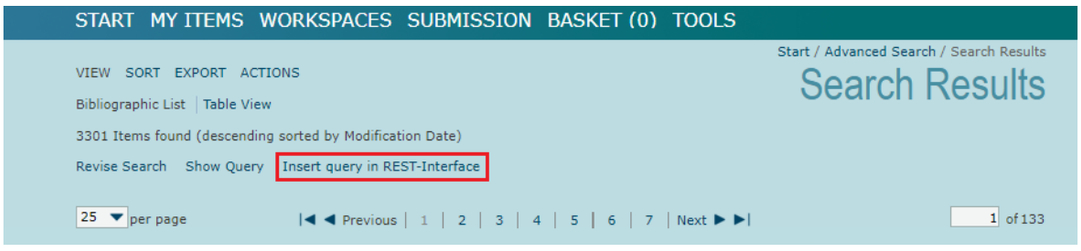


3.22 Insert query in REST-Interface

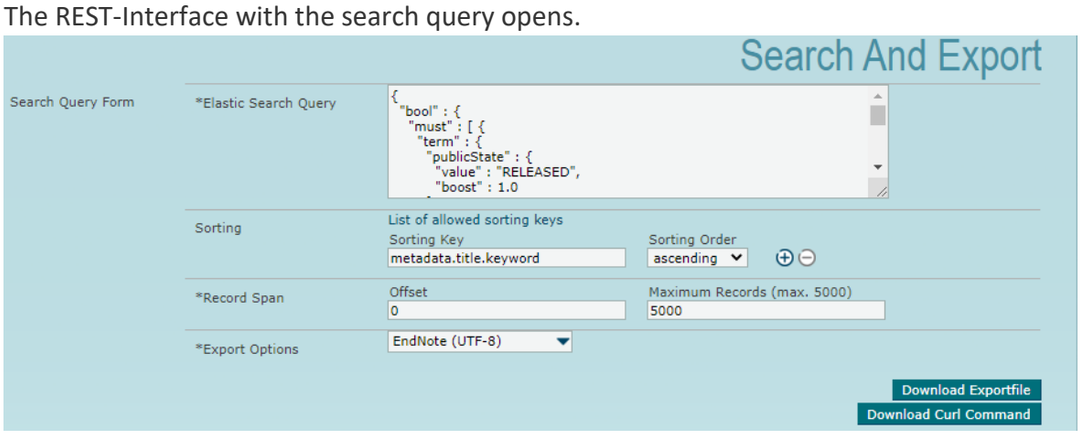
You can transfer a search query from PuRe directly to the REST interface. This is especially relevant if records are supposed to be reused on other websites.

⚠ 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".



The REST-Interface with the search query opens.



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

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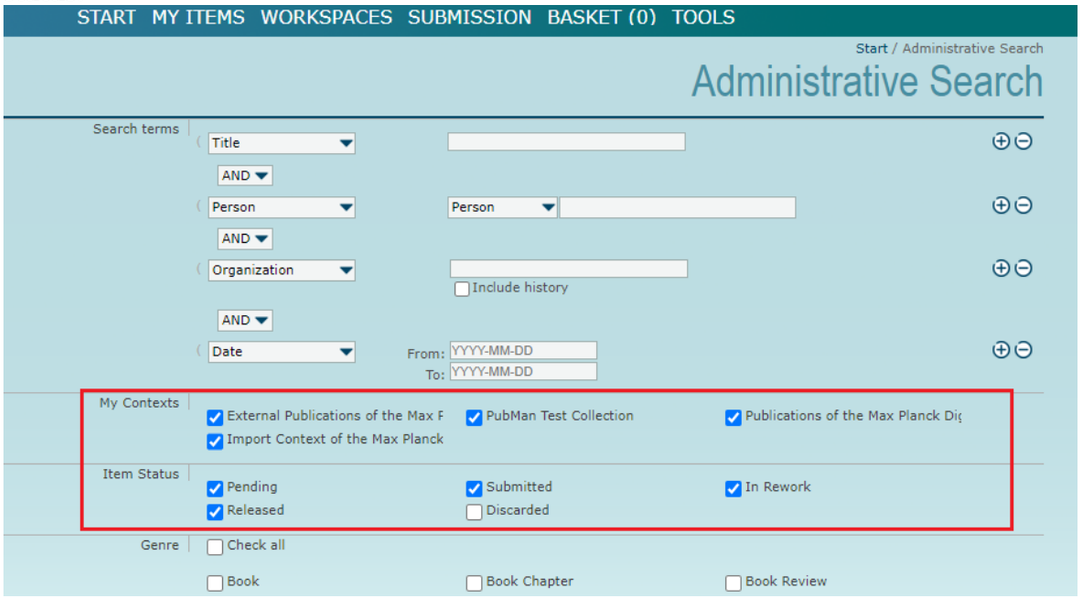
3.23 Perform administrative search

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.**



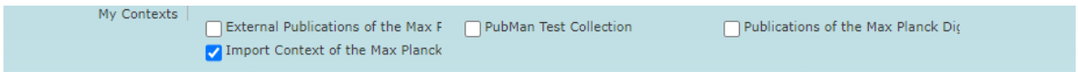
3.23.2 Search by context

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:

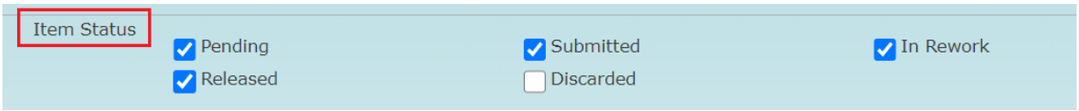
- Open the admin search.
- All contexts, which the logged-in user has permission for, are preselected. If you want to search for items related to a specific context, remove all other checkmarks.



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.



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.

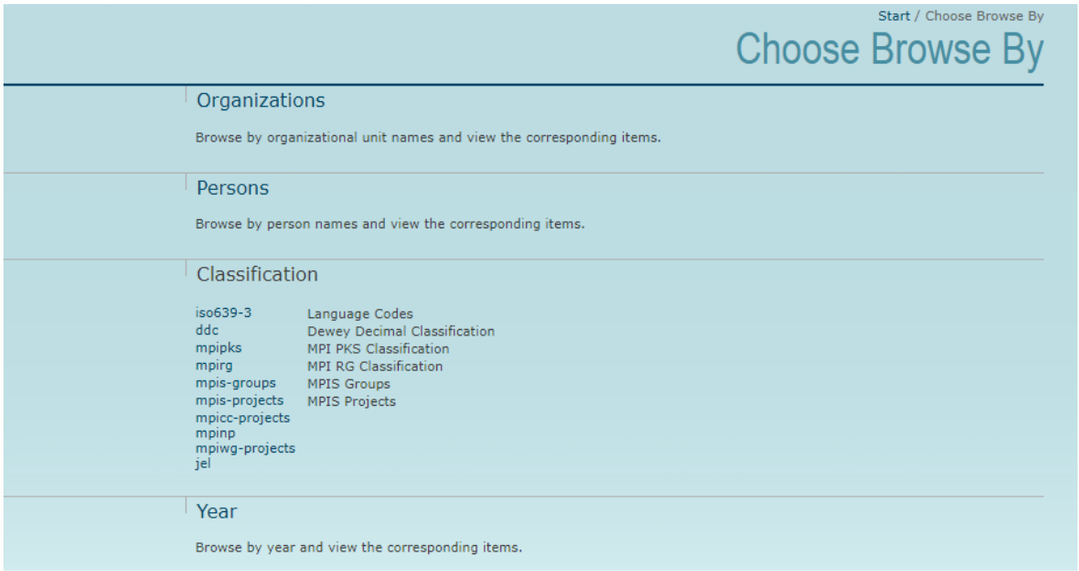
3.24 Browse by category

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.

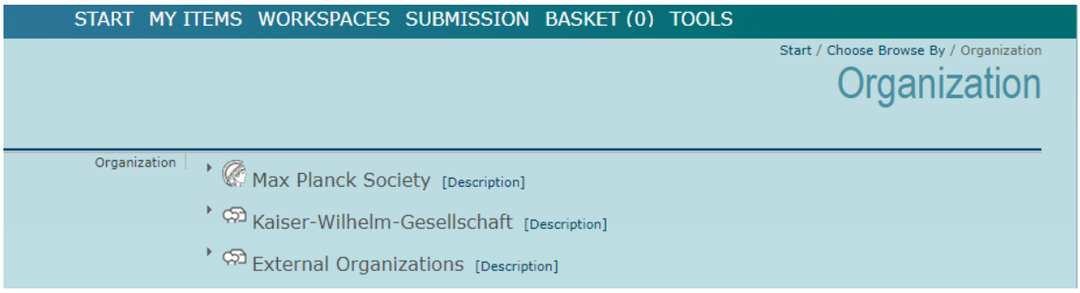
The overview with the available categories opens.

- Click on the category you want to browse. You will get an overview of the available sub-categories or the letters of the alphabet.



3.24.1 Browse by organization

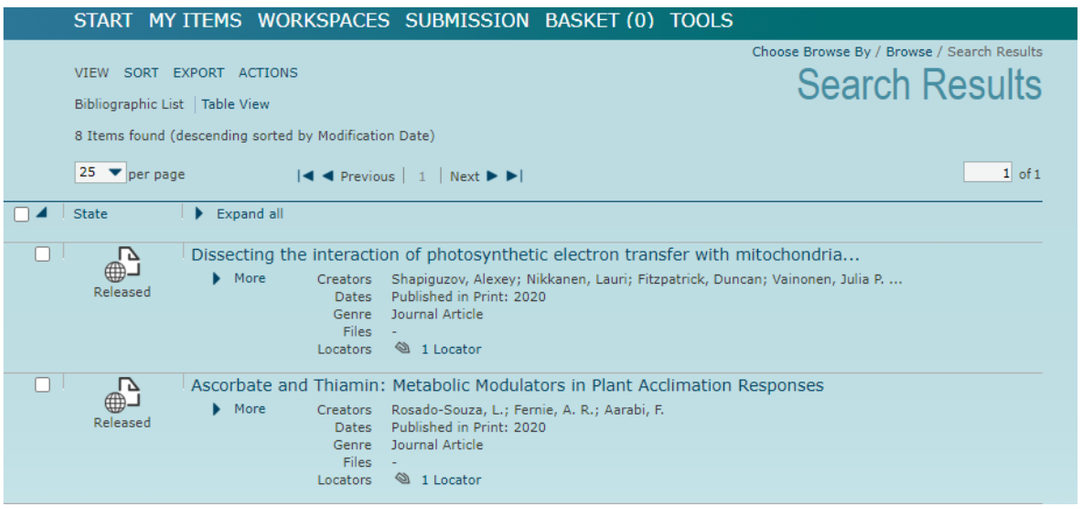
The organizations are generated from the "Organizational Units" structure in the PuRe backend.
To create an organization in PuRe please contact the support. More information can be found in the chapter "Organization Units (OUs)".



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.

Next to the person name you will find the -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.



Open researcher portfolio

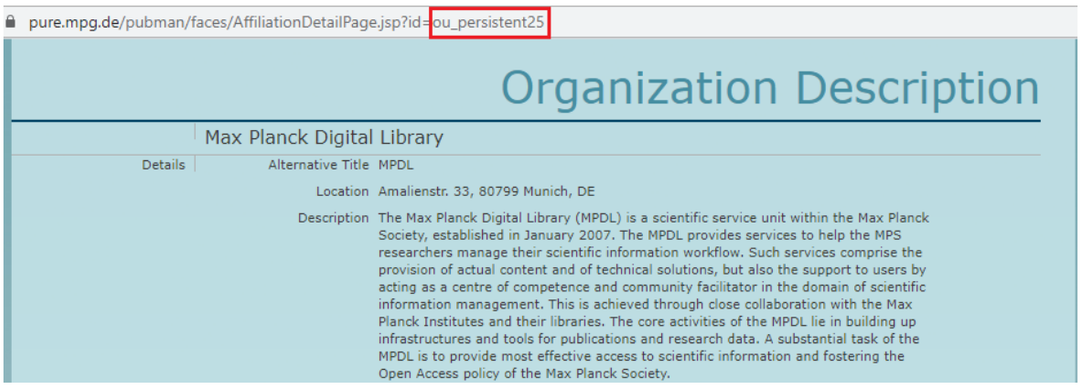
For each CoNE entry, there is a researcher portfolio where contact information and a photo can be stored. All publications linked to the CoNE entry are displayed here.
To open the researcher portfolio, proceed as follows:

- Open the "Person" category and select a letter. All person entries for this letter are displayed.
- Click on the -icon.
- The researcher portfolio opens.

3.25 Identify the ID of an OU

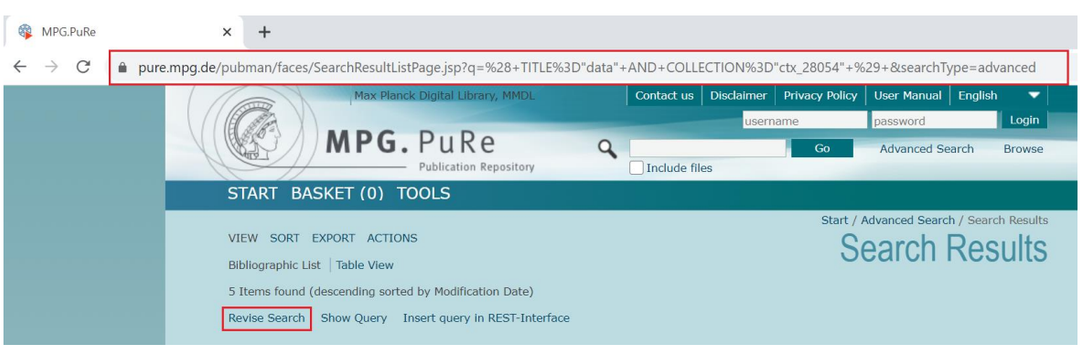
To determine the ID of an organizational unit, proceed as follows:

Browse for the organizational unit you are looking for. For more information on browsing, see thechapter "Browse by category" .
Open the description of an Organizational Unit (as described in the chapter chapter "Organizational Units (OUs)") 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.

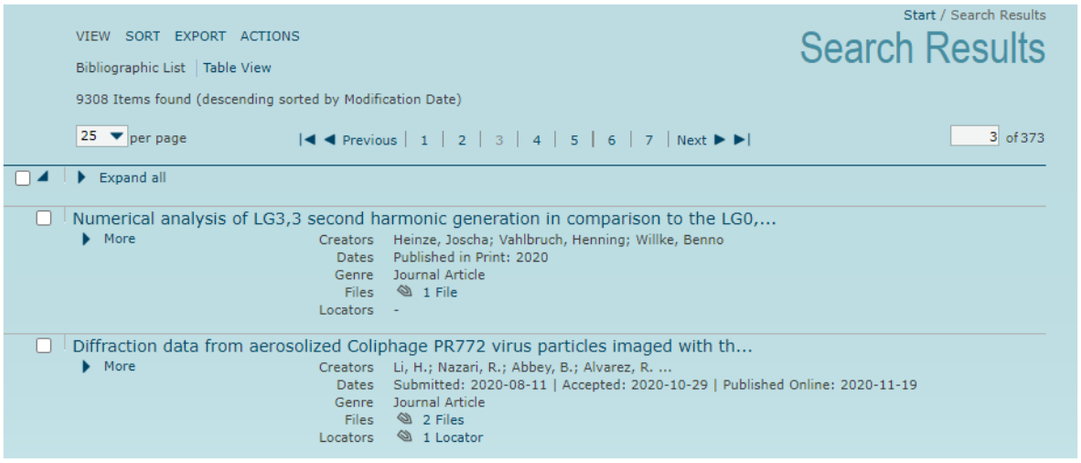


It is possible to revise the search query. By clicking on "Revise Search", you will be redirected to the search mask.
You can use the link on this page to save the completed search mask or share it with

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

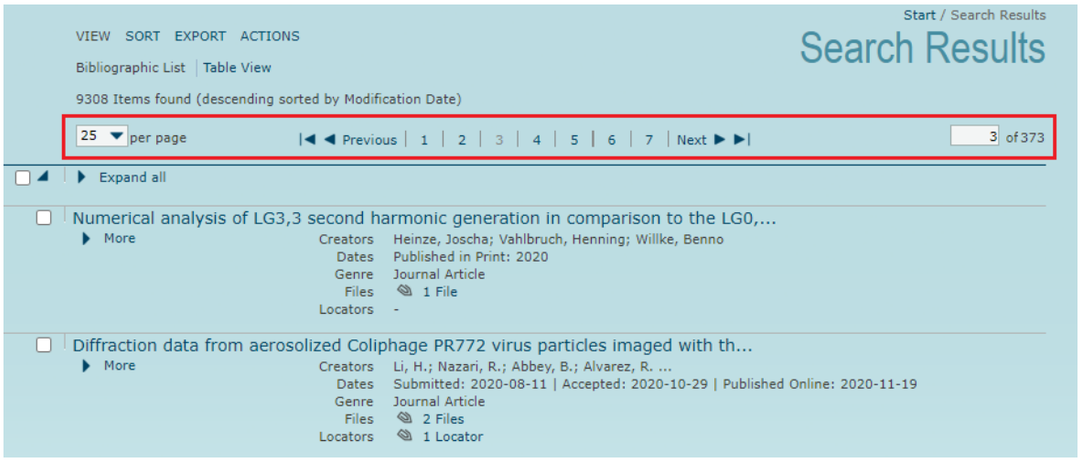
4. List view

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

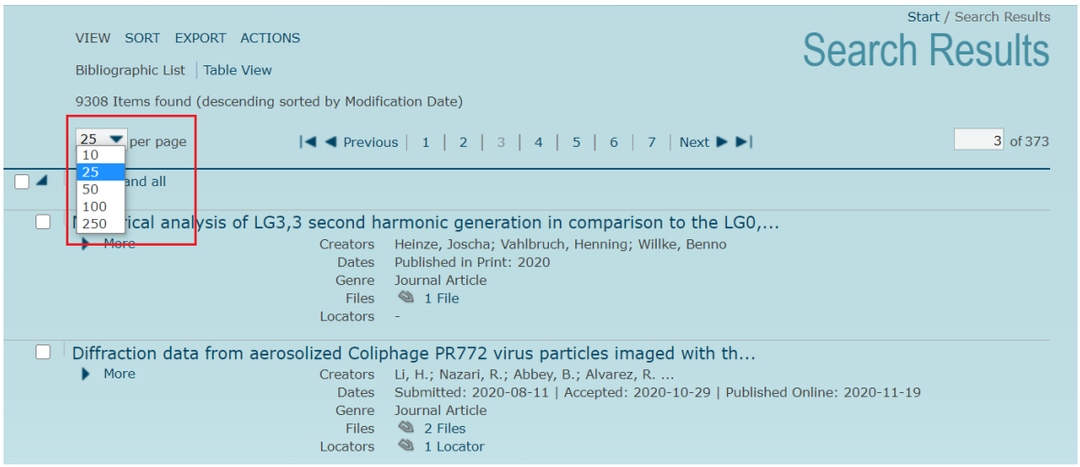
The navigation for all lists in PuRe is designed identically and can be found above the search results.



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 icon. The drop-down menu appears.



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

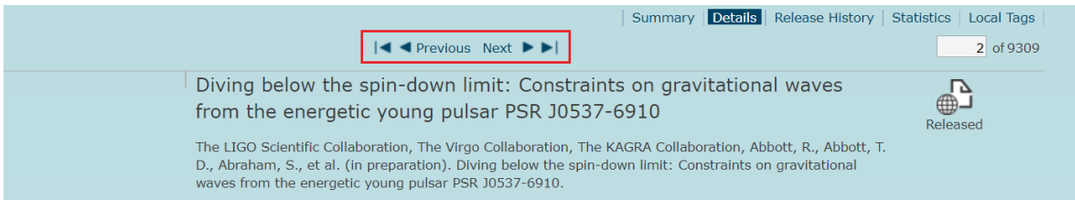
- Scroll through the pages of the list by clicking the page number in the center navigation bar.

- Click on " Next" and " Previous" or the icons ◀ and ▶ to jump one page forward or back. Click the |◀ or ▶| icon to jump to the first or last page of the list view.
- Go directly to a specific page by entering the page number in the field on the right. Confirm with the enter key. The selected page will be opened.

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.



⚠ 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.

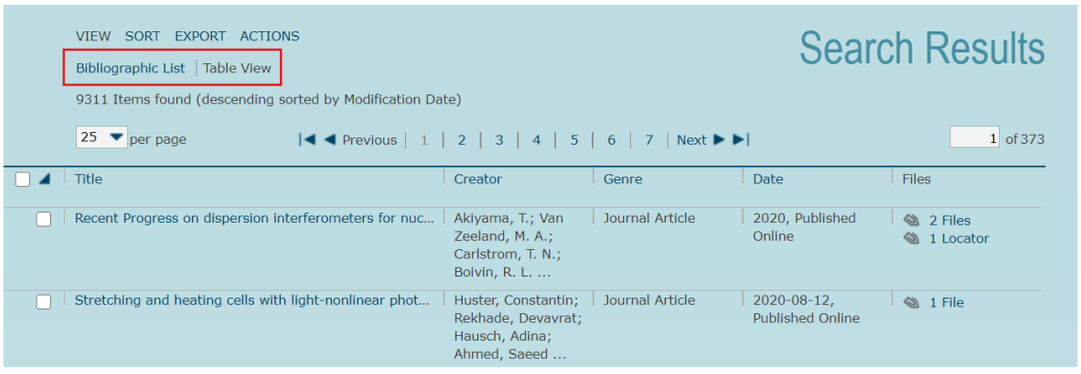
To view details of all titles in the results list, click on the "Expand All" button.

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.



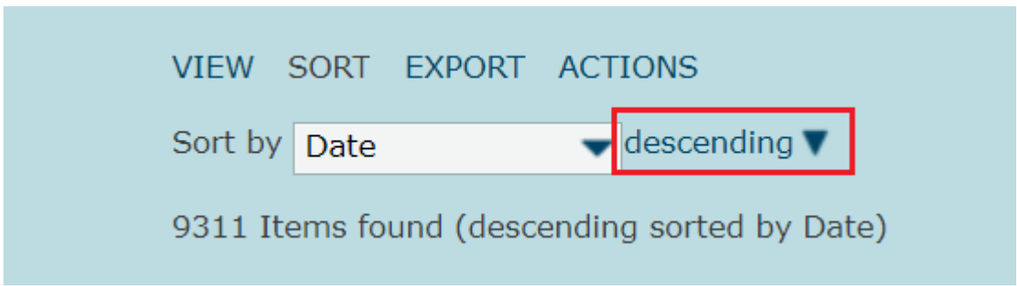
4.4 Sort lists

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".

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.



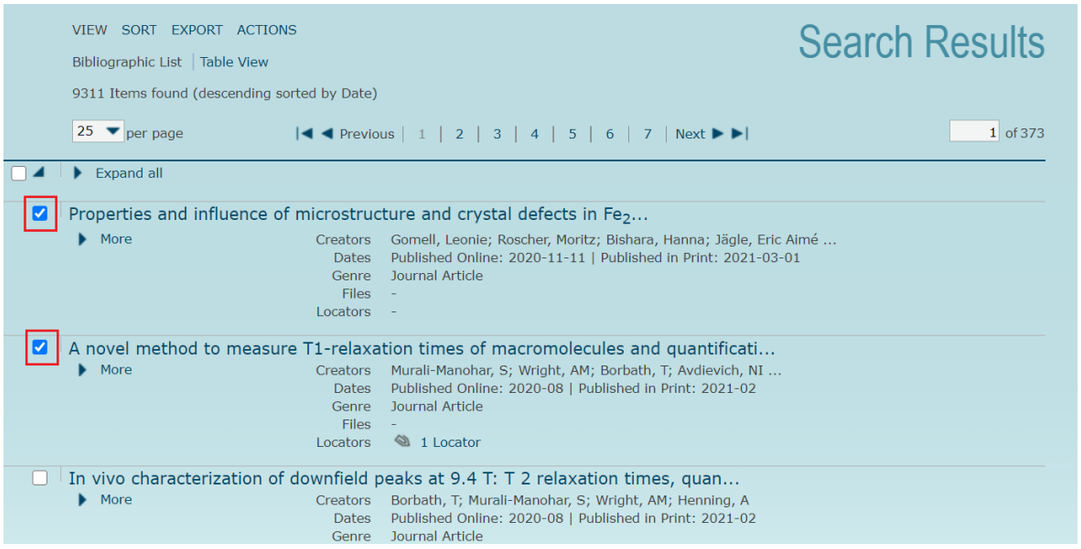
4.5 Export items from lists

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

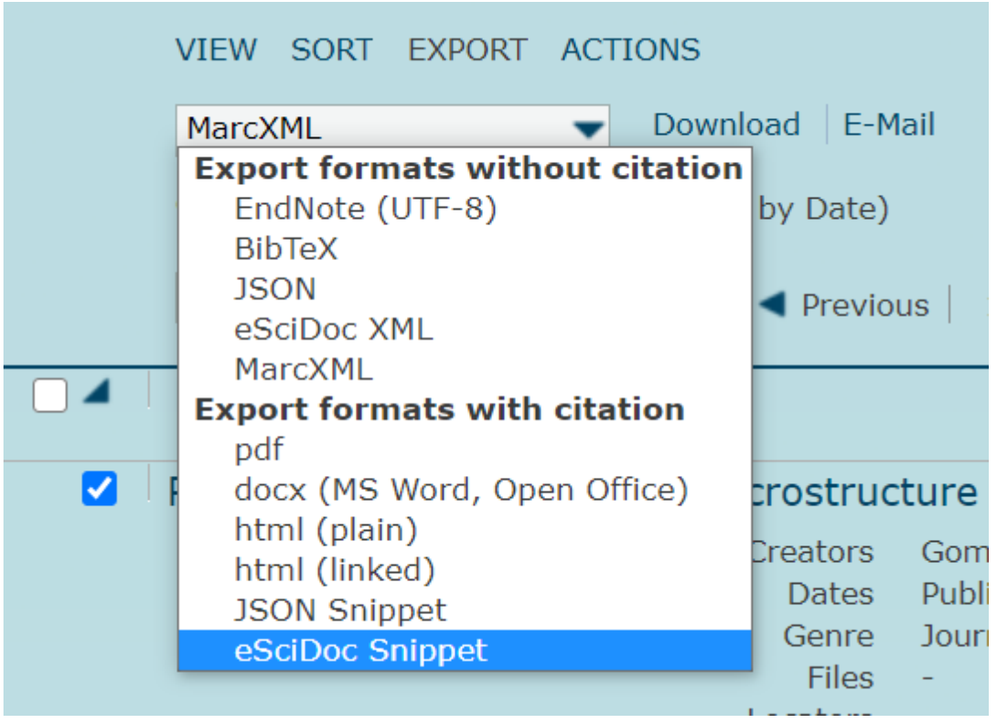
- Click the "Export" button.

The export mask opens.

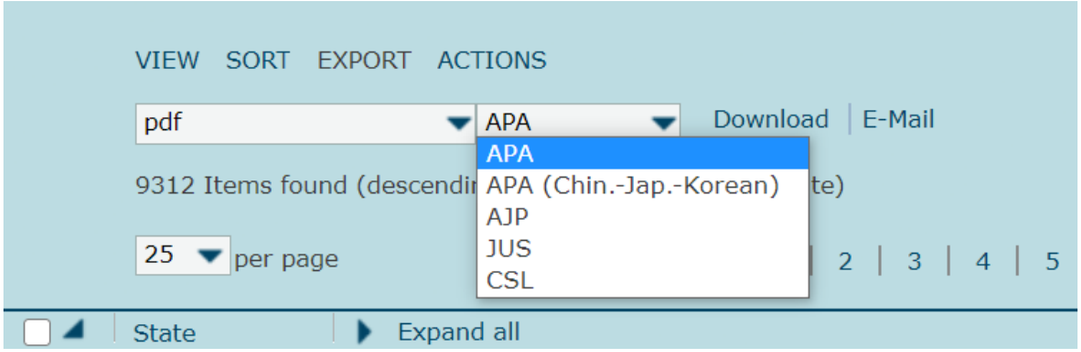
- Select the items you want to export by clicking the checkbox to the left of the title.



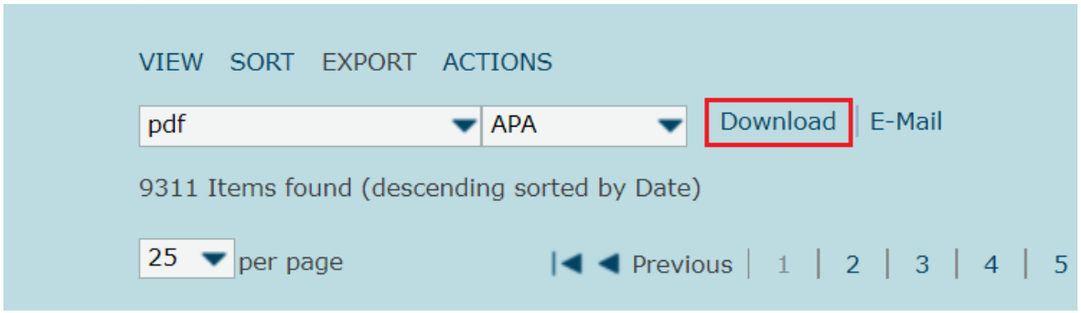
In the export mask, select the desired export format using the drop-down menu.



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



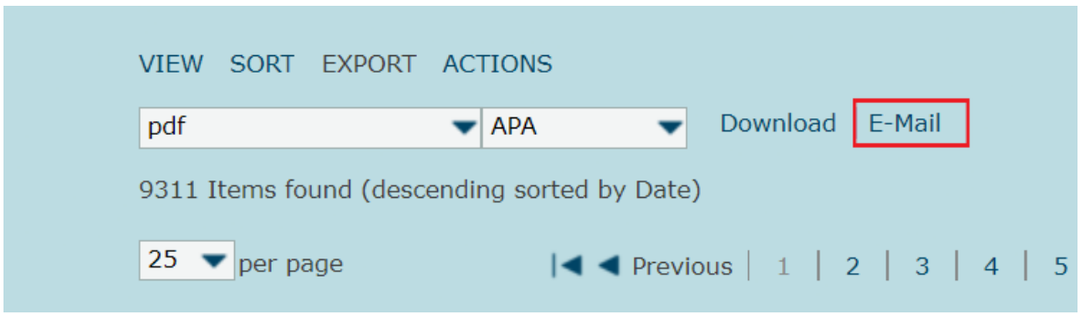
- To download the items in the selected format, click on the "Download" button.



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.

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



The following entry mask will appear:

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.

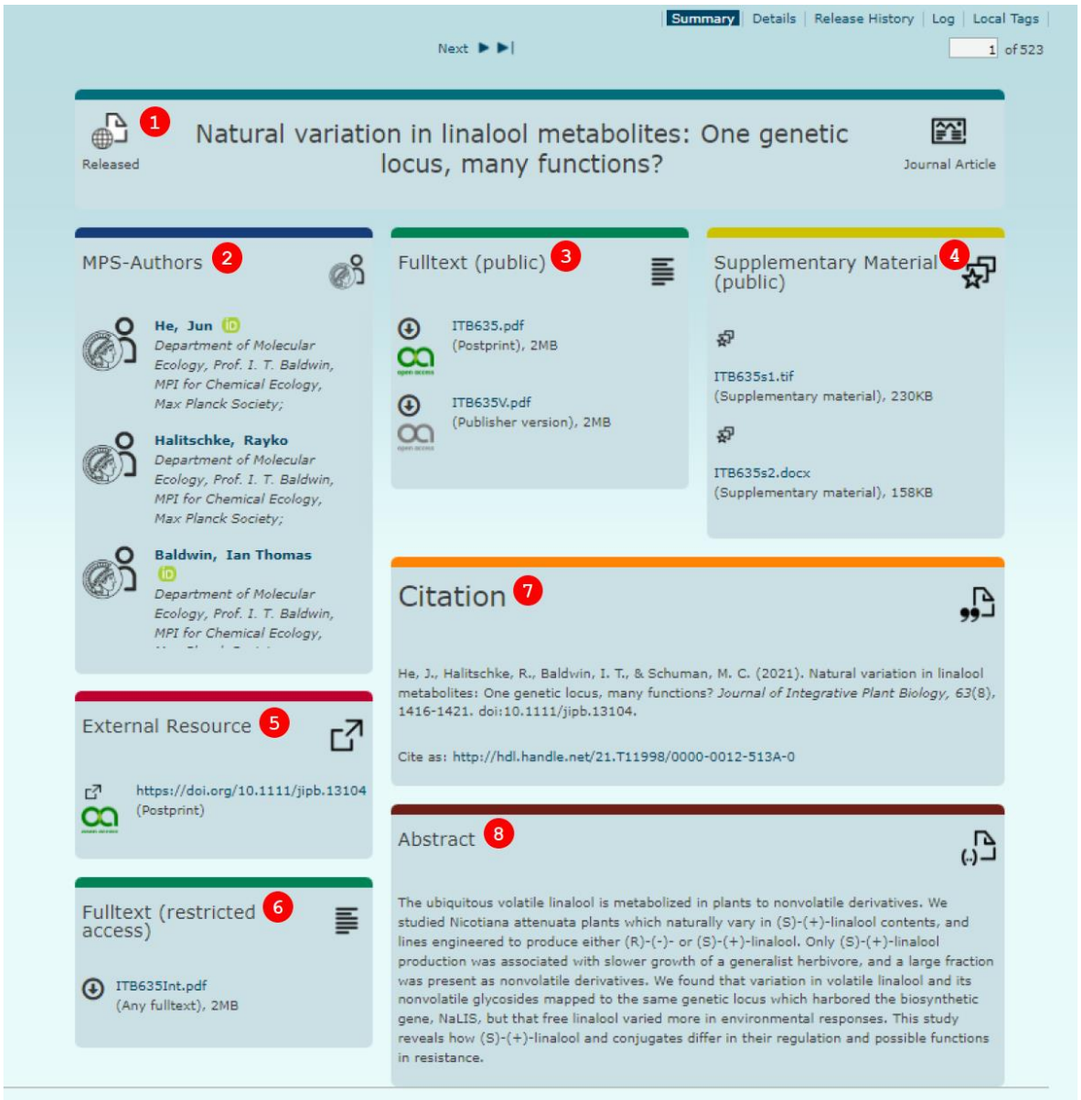
4.6 Add items to basket

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

5. Summary view

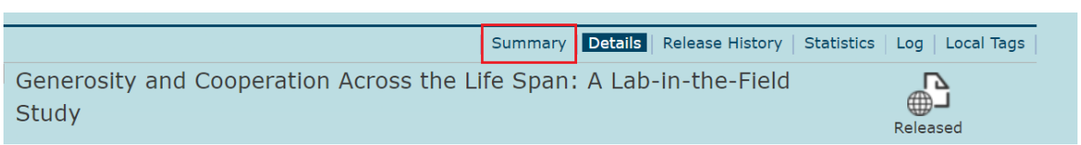
Not logged in users, such as users coming from web search engines like Google, get directed to the summary view, when opening an item. The summary view gives a structured overview of the most important metadata of a publication.

- **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:

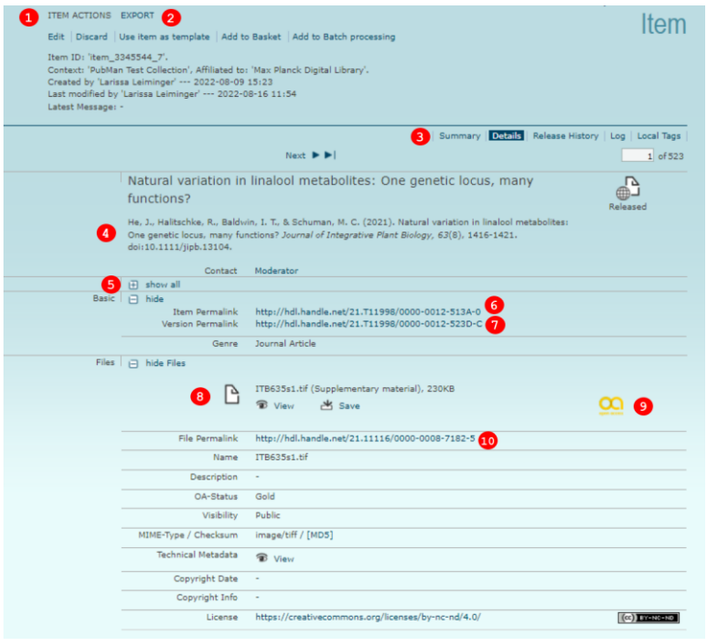
- First open a data set. The item details are displayed.
- Click on the "Summary" tab.



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 chapter "Open Access Overview".
- **10 - File-Permalink** : The permalink for the attached full text is displayed here.

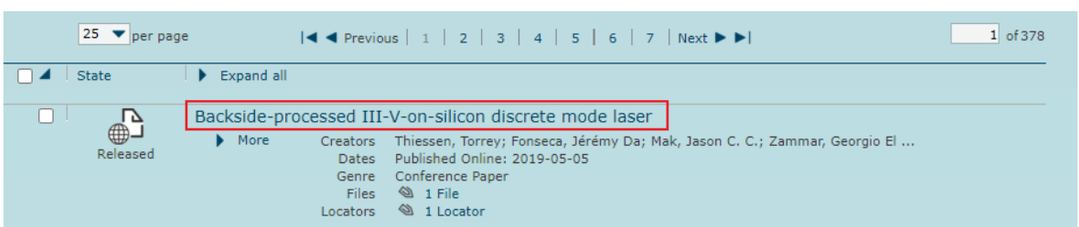


6.1 Open detailed view

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.



The detailed view opens.

Alternatively, you can open an item via the URL. Enter the URL of your PubMan instance (http://pure.mpdl.mpg.de/) 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 chapter "Item versions".

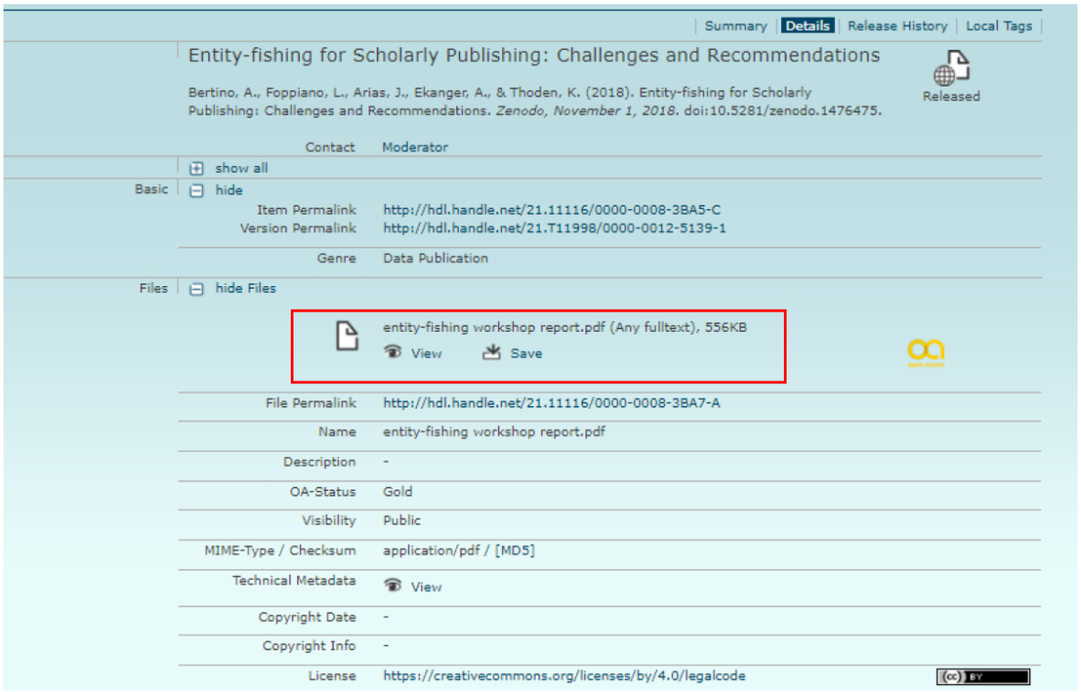
6.2 Open attached files

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 chapter "Submission - Enter metadata for full texts".

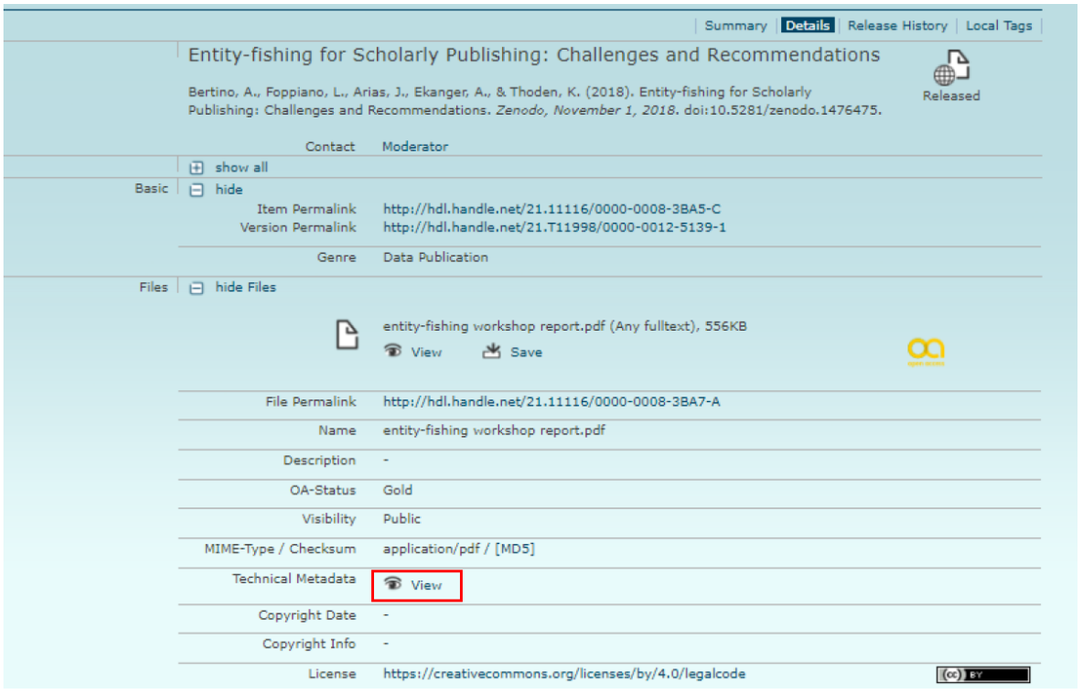


When clicking on "View", another browser tab with the file opens up.

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.



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.

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.

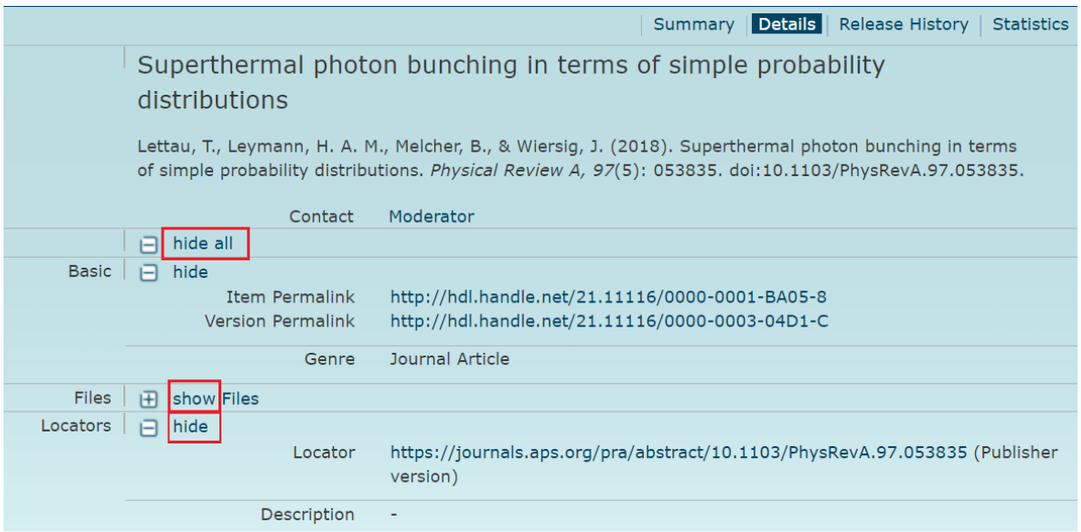
2. The S-symbol indicates that the CoNE-entry of a person contains an ORCID ID and it is linked to the metadata of the given data record. When you click the S-symbol, you are redirected to the person's ORCID web page.

3. The -symbol is displayed behind all organizations in the "Affiliations" section. This refers to the linked "Organization Unit" (OU) in the organization structure. An overview of the organization structure can be found in the Browse - Organizations area . 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.

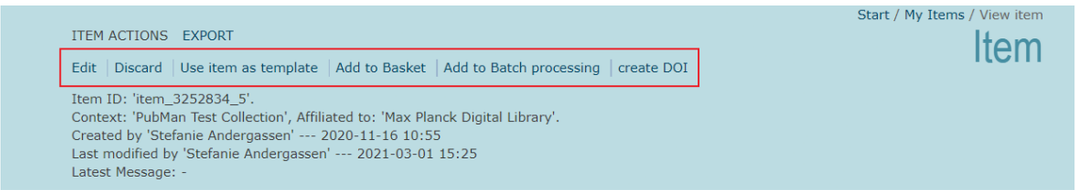


Besides, you can hide (and show) all sections at once.

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".

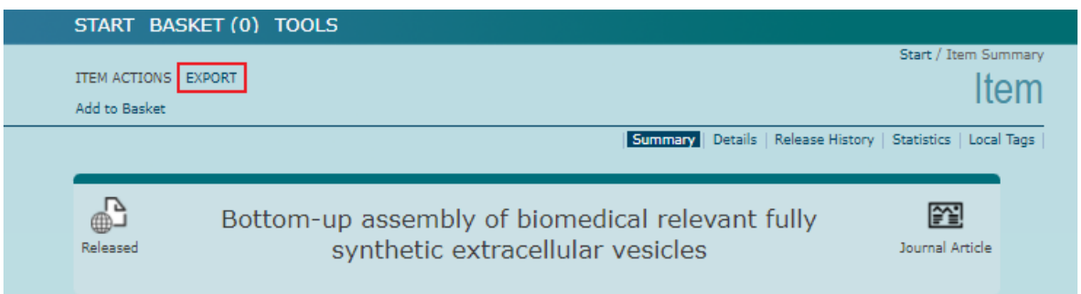


When an action is performed, the status of the item changes, which can be as follows:

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.



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

6.8 View the log

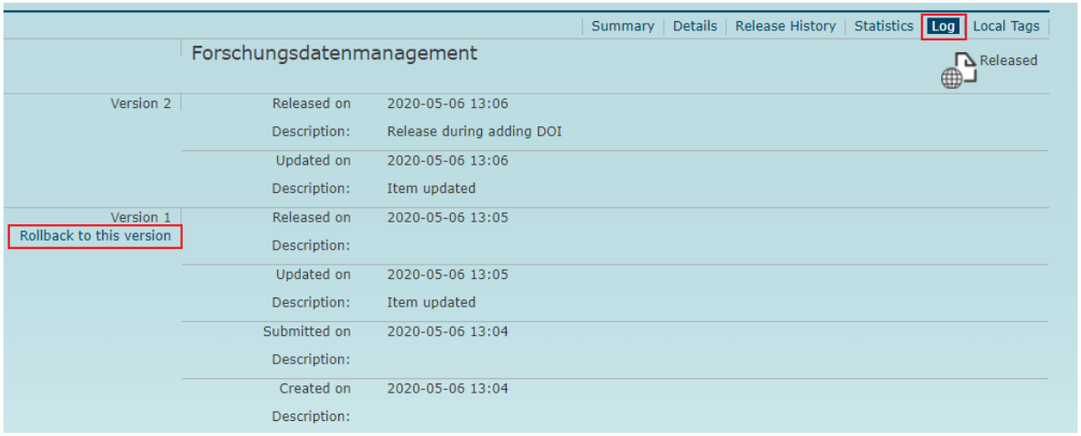
The log, or editing history, provides information about when a published item was created and what changes were made to certain item versions. To view the log, click on "Log" above the title. You need to be logged in to PubMan.

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.

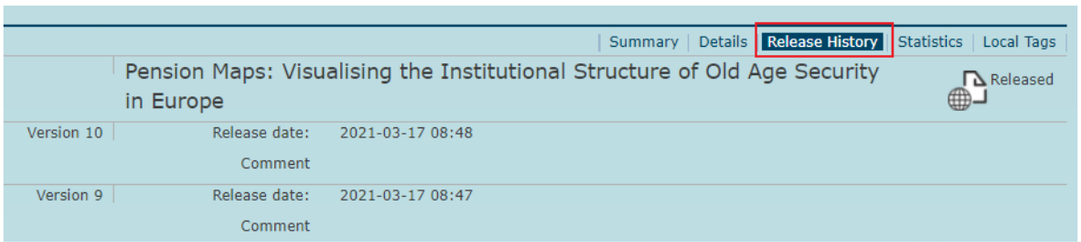


6.10 View the release history of an item

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

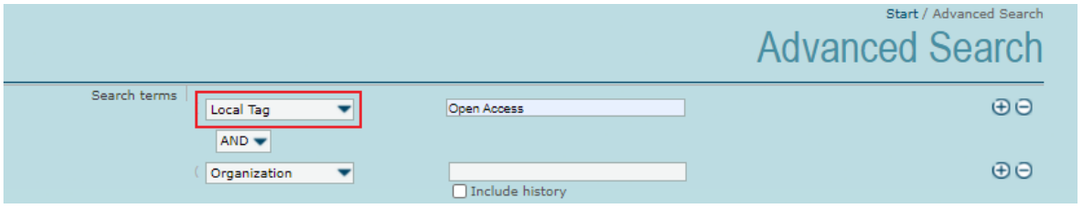
Attention: The "Release history" is only available if the item has already been released.

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.



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.



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

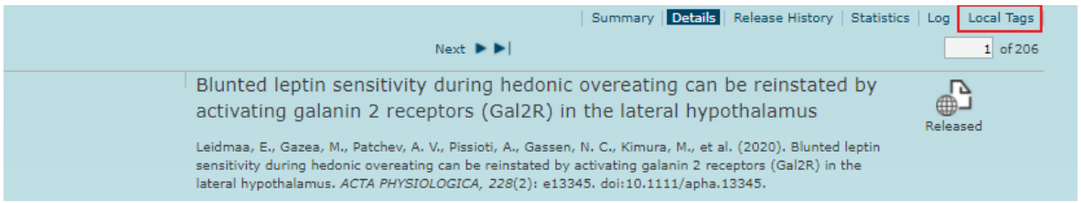
To view local tags, proceed as follows:

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

6.12 Add and edit local tags

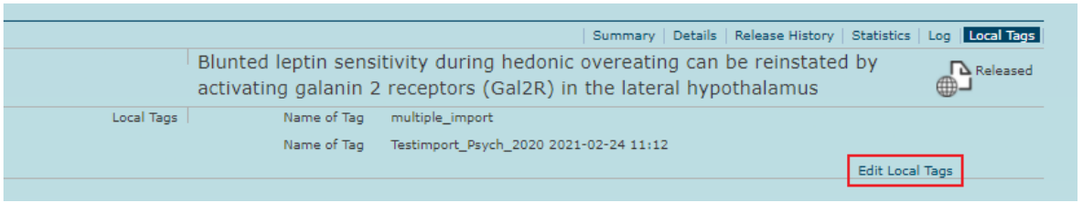
To add or edit local tags, proceed as follows:

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



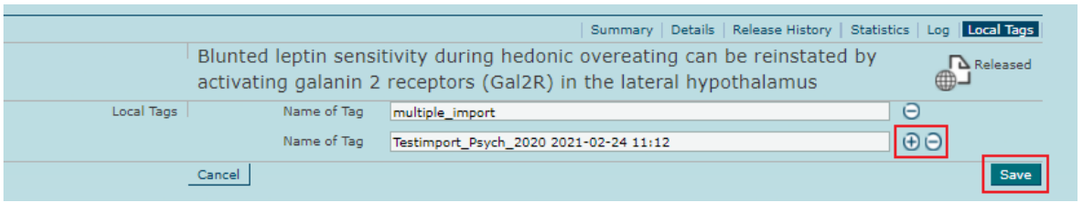
Already assigned tags will be displayed.

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



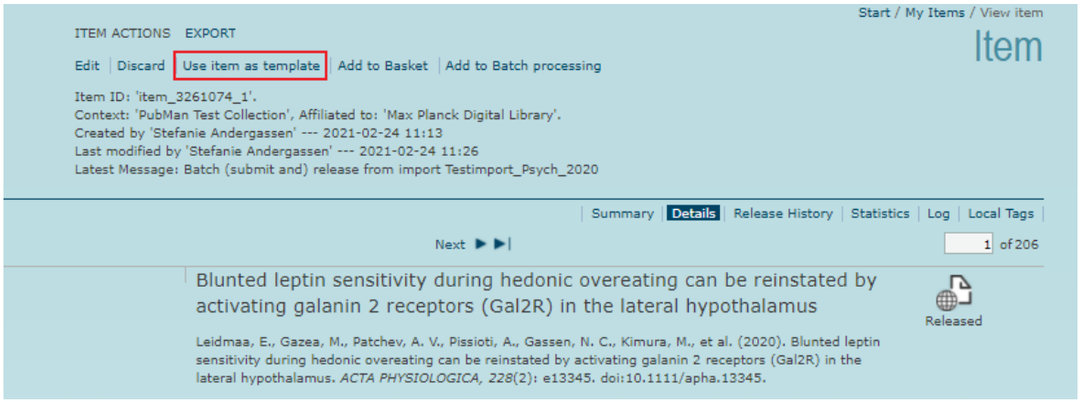
The entry mask opens.

- 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.



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.



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"

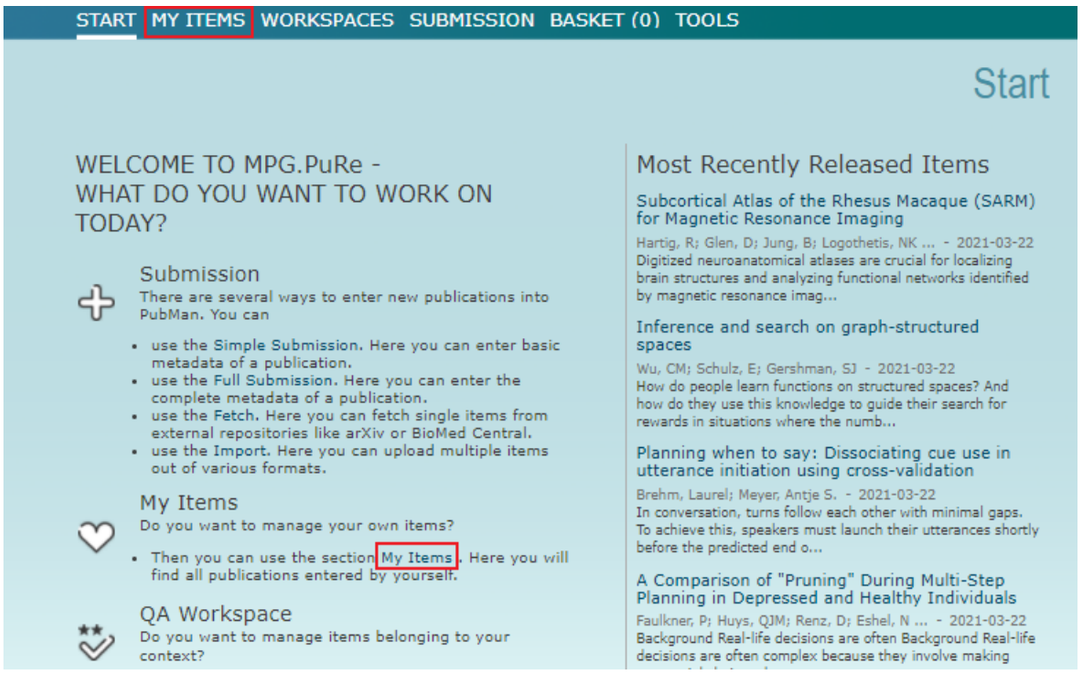
The "My items" area displays all the items that the logged-in user has entered as a depositor. In "My Items", you can view, filter, sort, export, and add the items to the basket. From there, you can also go to the advanced view of the items.

⚠ Attention: The "My items" area is only available with the "Depositor" user role.

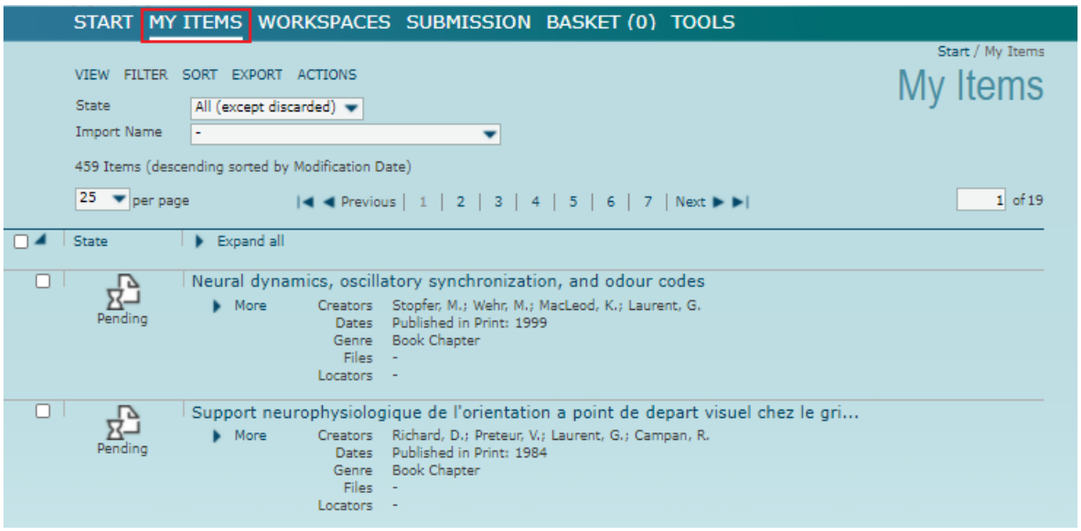
8.1 Open "My Items"

Log in to PubMan.

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



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



8.2 Navigate in "My Items"

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

8.3 View items of "My Items"

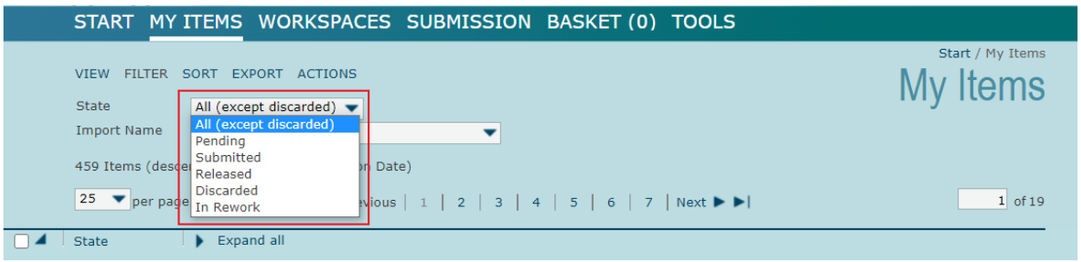
For more information on how to view items, see the chapter "Detailed view - Open detailed view" .

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.



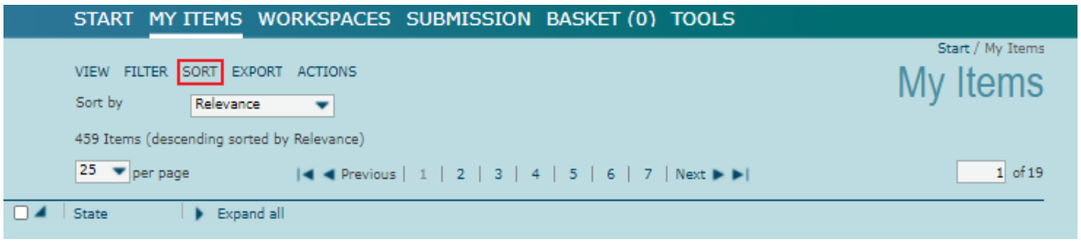
- Click on the required status. The page will be rebuilt, and only the records with the selected status will be displayed.
- To filter items by import name, proceed in the same way.

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.

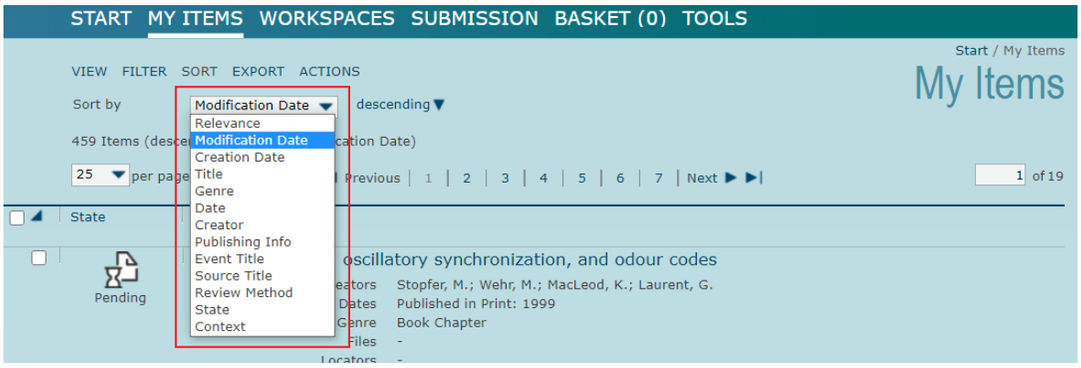
To sort the items, proceed as follows:

- Click on "Sort".



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.



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

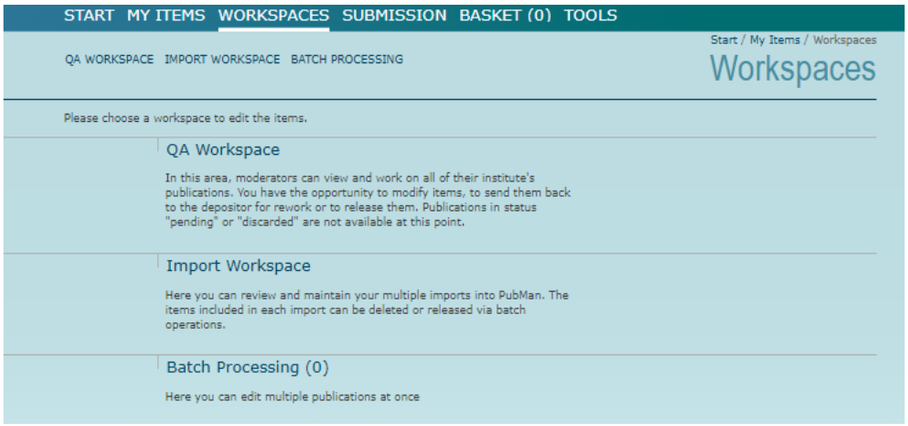
8.6 Export items from "My Items"

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

8.7 Add items from "My Items" to the basket

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

9. Workspaces



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).

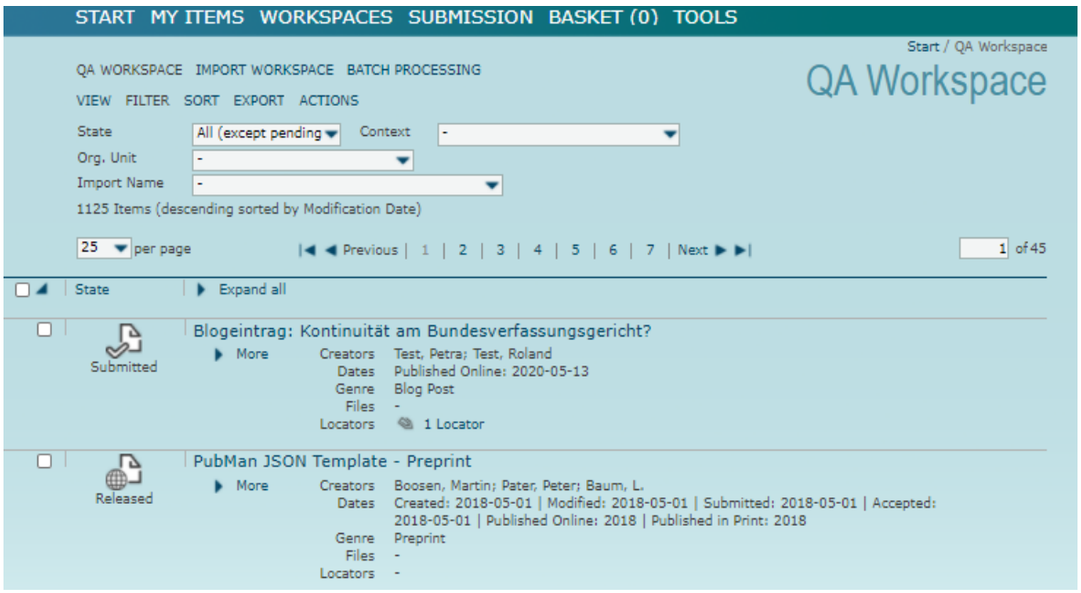
Attention: The QA workspace is only available if the logged-in user has the user role "Moderator" assigned.

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.

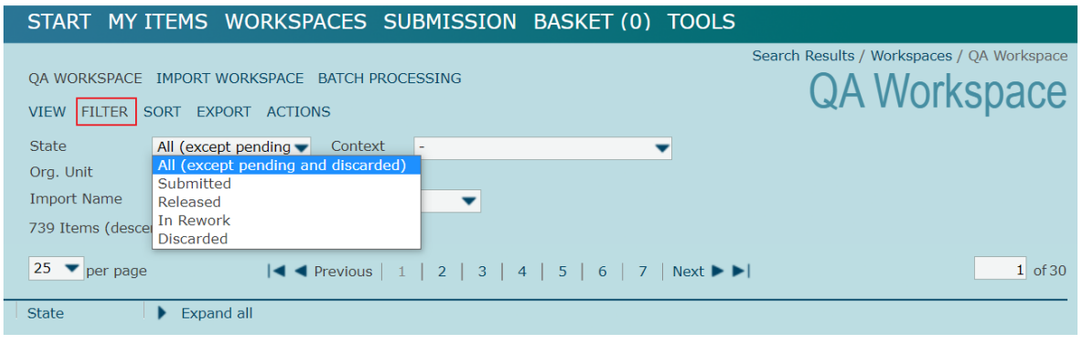
- Then c lick on "QA Workspace" in the overview or the navigation menu.



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.



- 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 chapter "List view - Sort lists" .

9.1.4 Export items from the QA Workspace

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

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" .

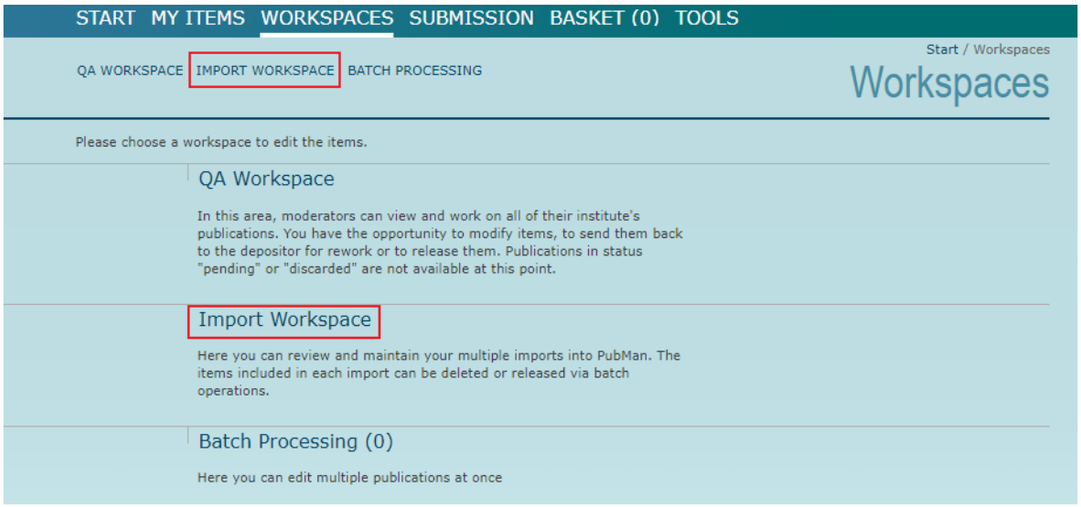
9.2 Import Workspace

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

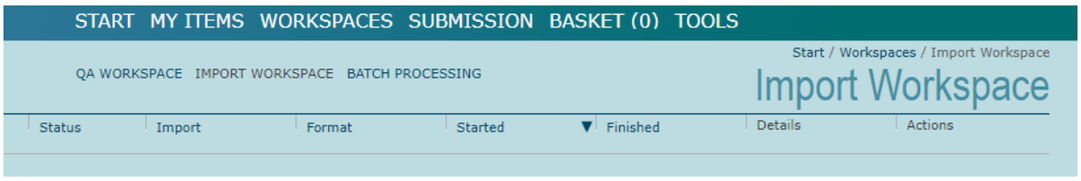
9.2.1 Open Import Workspace

Log in to PubMan.

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



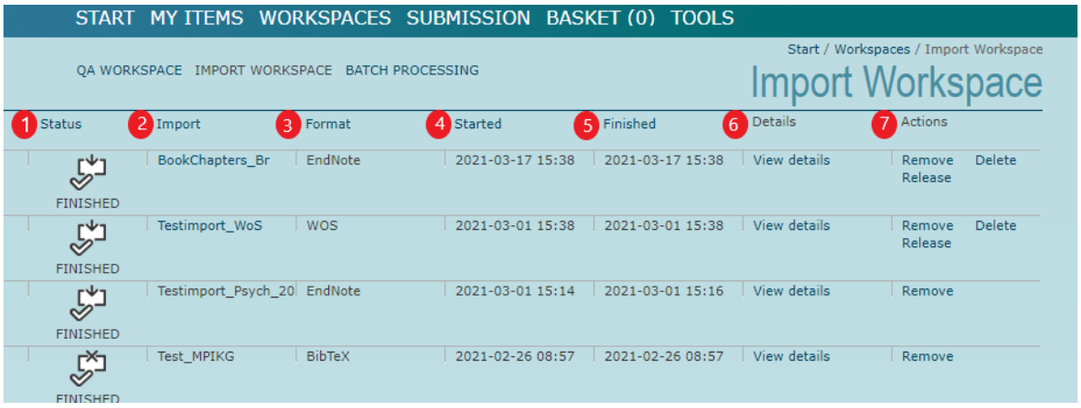
Then click on "Import Workspace" in the overview or the navigation menu.



After an import, the import workspace opens up automatically.

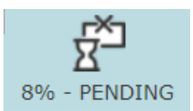
9.2.2 Review imports

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.



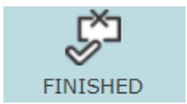
- **1-Status:** The status of the imports is displayed in the "Status" column.

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.

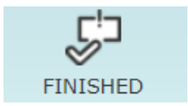


A completed import has the status "**Finished**". This status can be distinguished in 3 further types:

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.



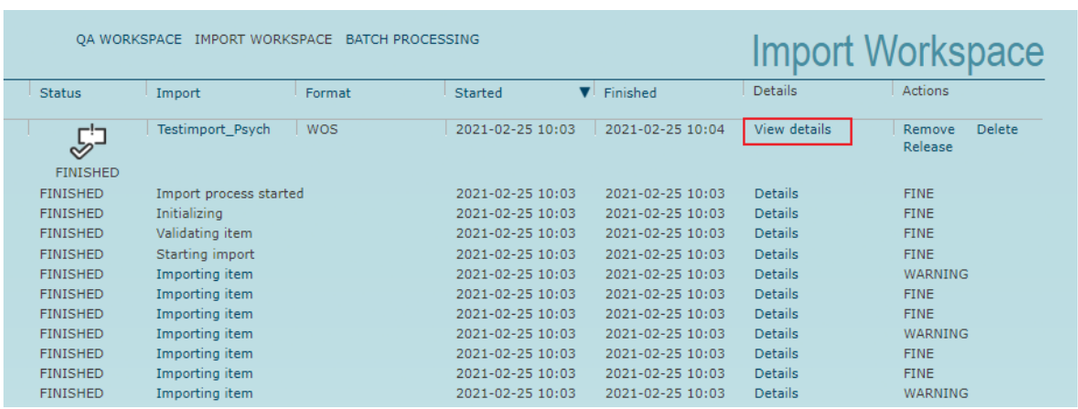
The symbol with the exclamation mark indicates that the import was released.

- **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 chapter "Submission - Import - Specify settings for import".
- **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 chapter "Review import steps".
- **7-Actions:** This column shows the available actions "Release", "Delete"and/or "Remove".

9.2.3 Review import steps

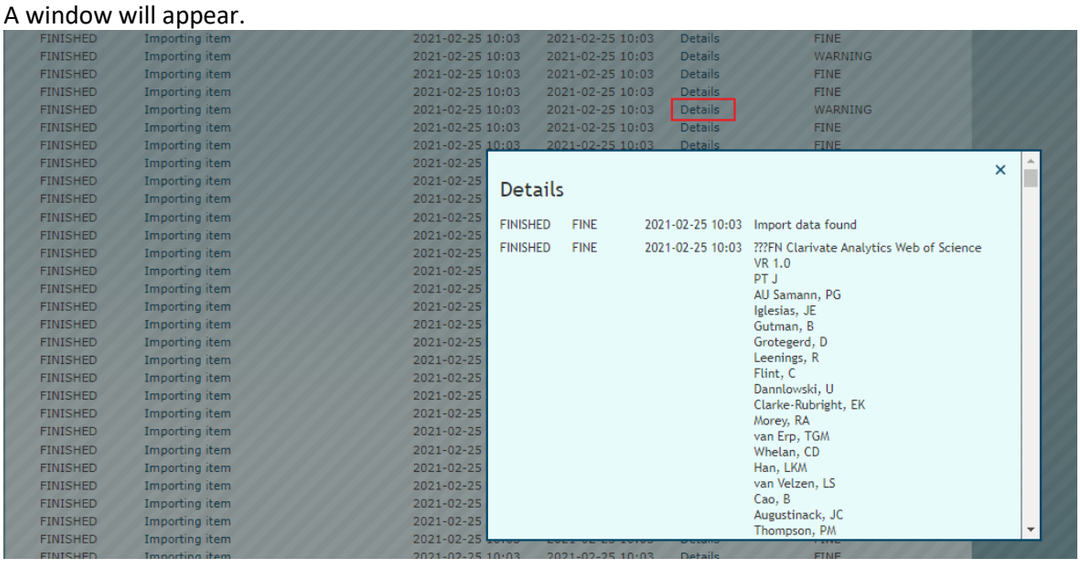
To review the individual import steps first log in to PubMan.

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

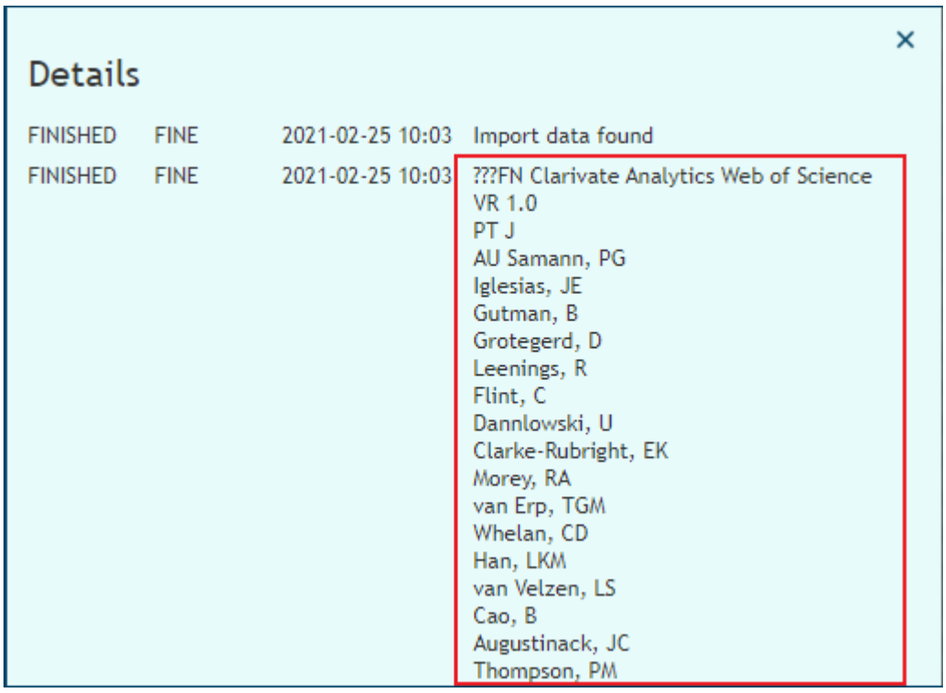


- The individual steps are listed in the "Import" column. In the "Importing item" step, one data set is imported at a time. To view it, directly click on "Importing item" highlighted in blue. The detailed view of the item opens.
- In the column "Status", you can see the status of each step.
- In the "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.



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



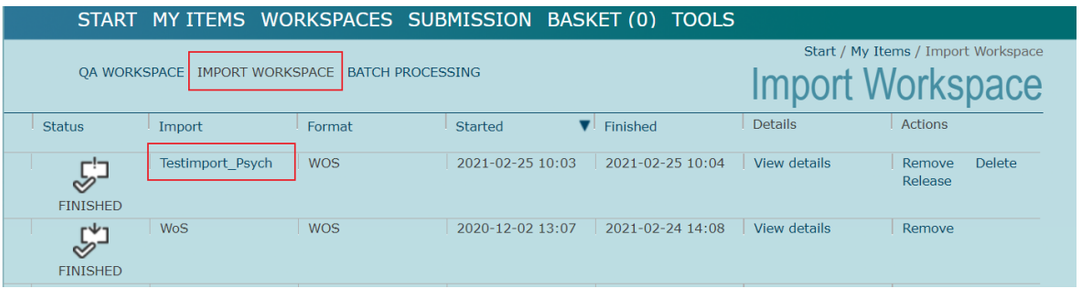
- After the output format, the XML-version of the item and its description are shown. The XML-Version is generated by PubMan.

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

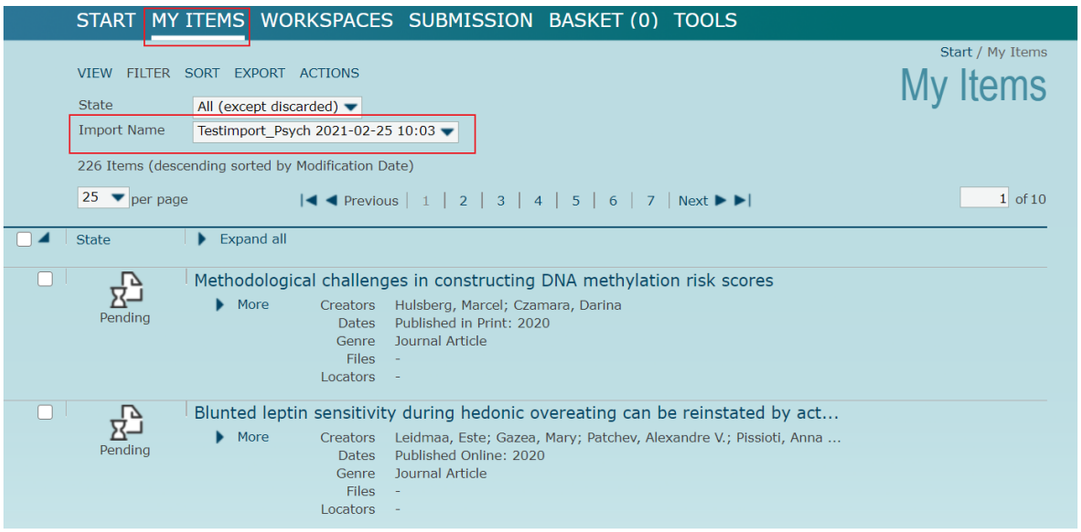
- You can close the window at the very top by clicking on the X.

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.



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

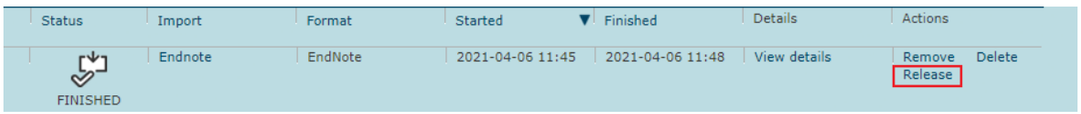


⚠ Attention: The filter in "My Items" is set to show the clicked import items by default. If you select another name in the drop-down menu of the "Import Name" field, the items of this import will be displayed.

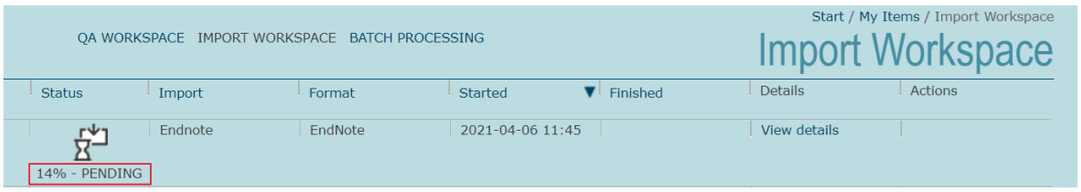
9.2.5 Release imported items

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

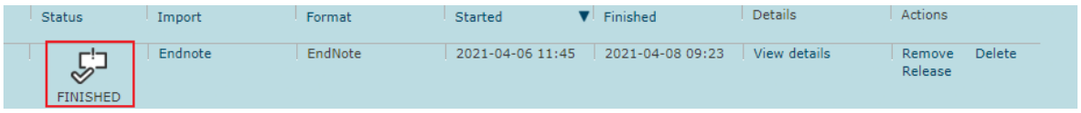
- Open the import workspace.
- Click on "Release" in the "Actions"-column.



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



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



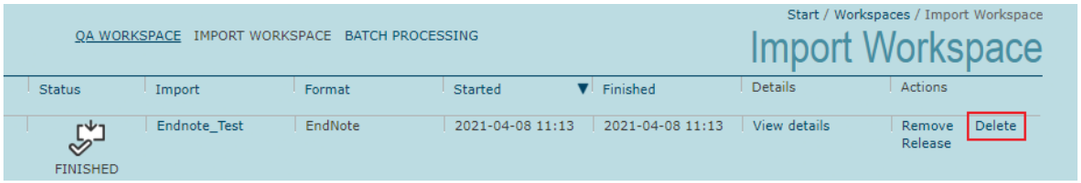
⚠ Attention: The items are only indexed after they have been released. Indexing is a requirement for the items to be retrievable via search.

9.2.6 Delete imported items

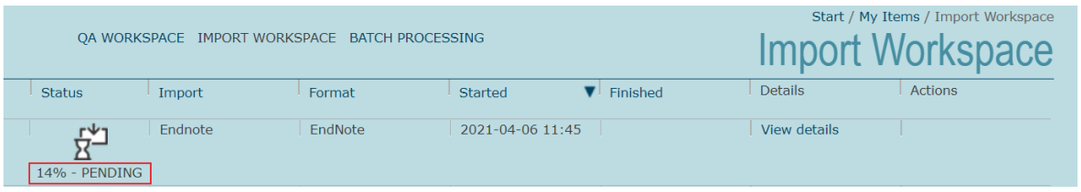
If you do not want to transfer the imported into PubMan, you can delete them:

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

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



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



After all items have been deleted, the only possible action left is "Remove". The import status is again set to "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 chapter "My Items - Filter items in My Items" .

9.2.7 Remove import

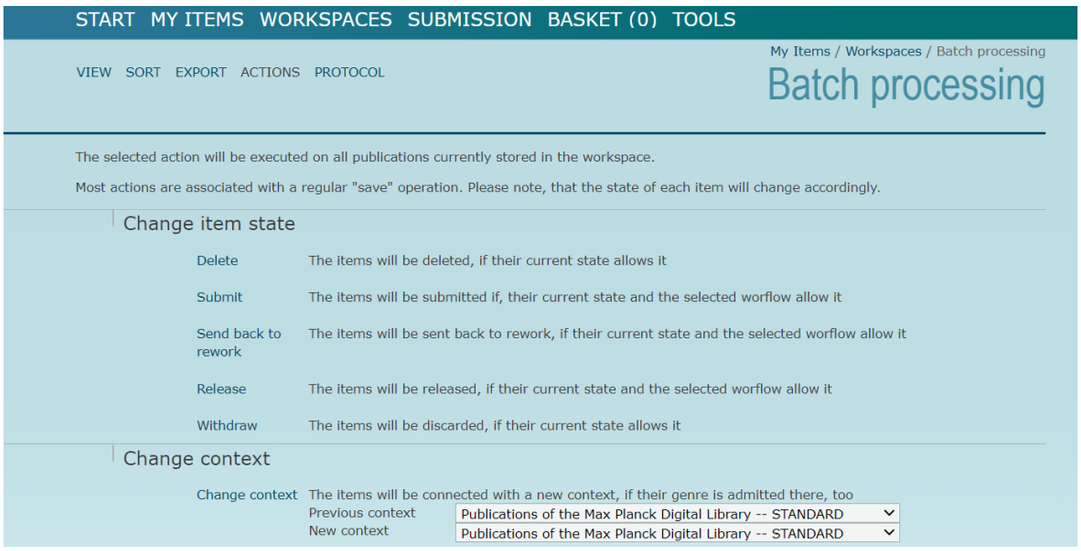
Removing the import from the import workspace is the last step in reviewing and processing an import. After that, the import no longer appears in the Import area, and releasing, editing, and deleting the import is only possible by opening the individual items. Also, the import no longer appears in the 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.

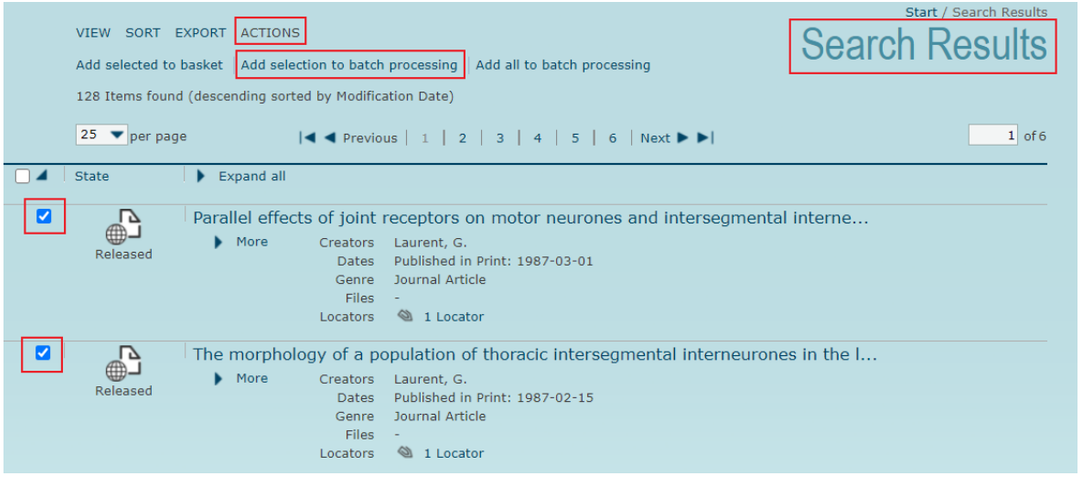


9.3.1 Add to Batch Processing

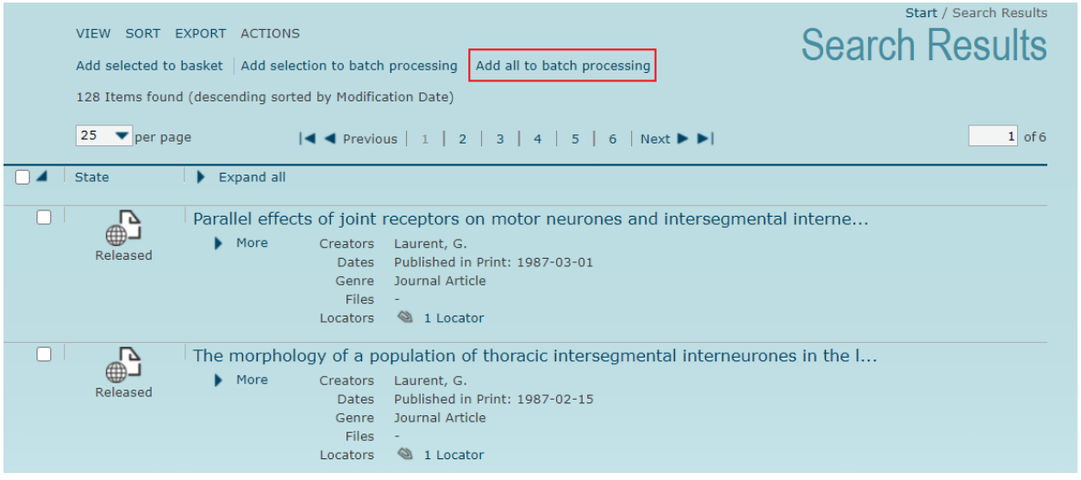
There are multiple ways to add items to the batch processing. In general, items can be added from the list view (1.) and the detailed view (2.). The batch processing function can be found in the header under "Actions". The previous function "Add to basket" is also available there.

(1.) List view

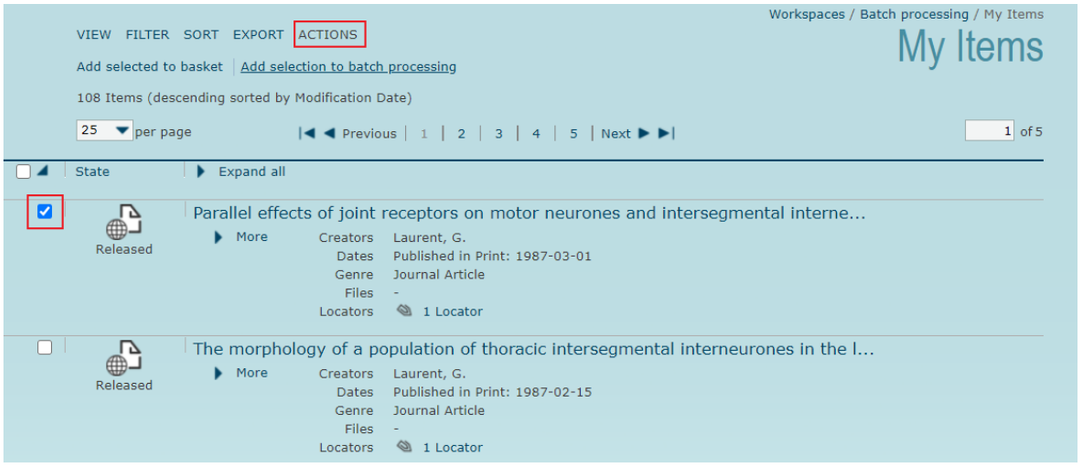
- You can select the needed items with a checkmark on all search result pages and then add them to the batch processing.



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

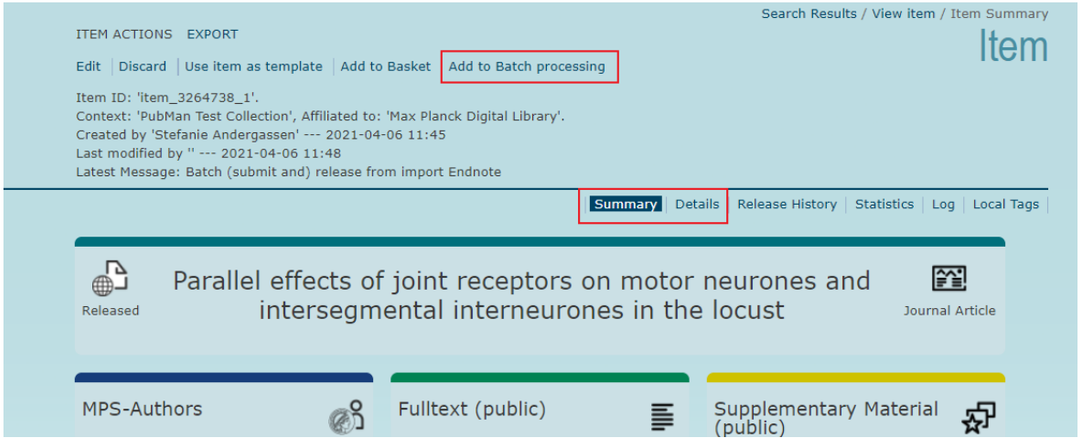


- In the other lists ("My Items", "QA Workspace") the function mentioned above, "Add all," is not available. Here, only individual items can be selected by a checkmark.



(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.



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

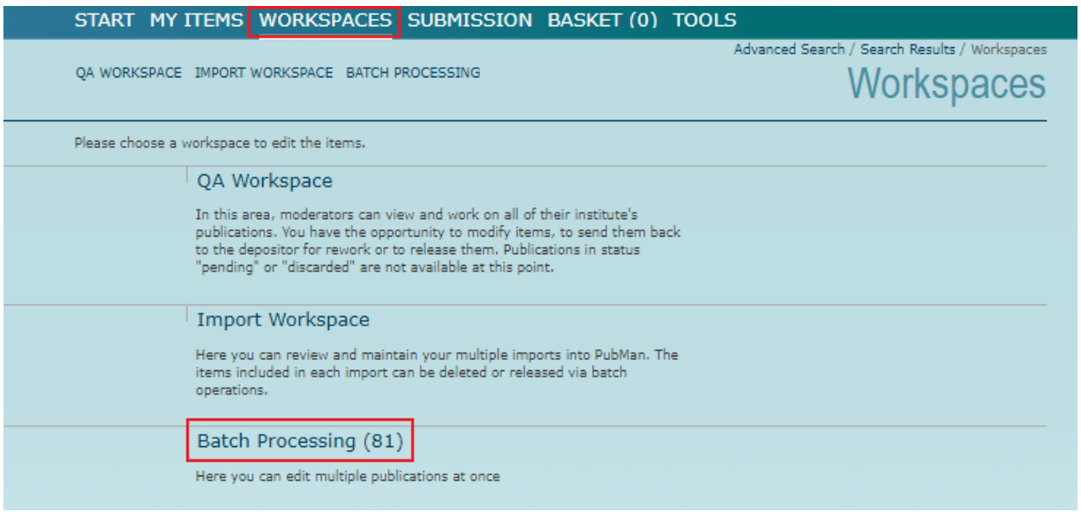
In general, all selected items are transferred to the batch processing. The account permissions and other requirements are only specifically checked when batch operations are performed.

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.

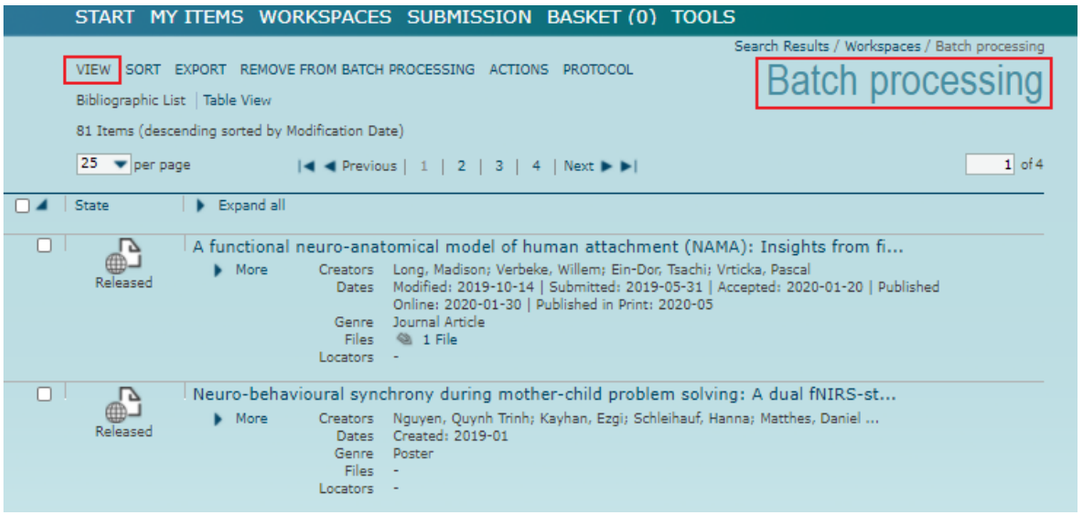
The maximum number of items in the batch processing workspace is 2800 items.

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.



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.



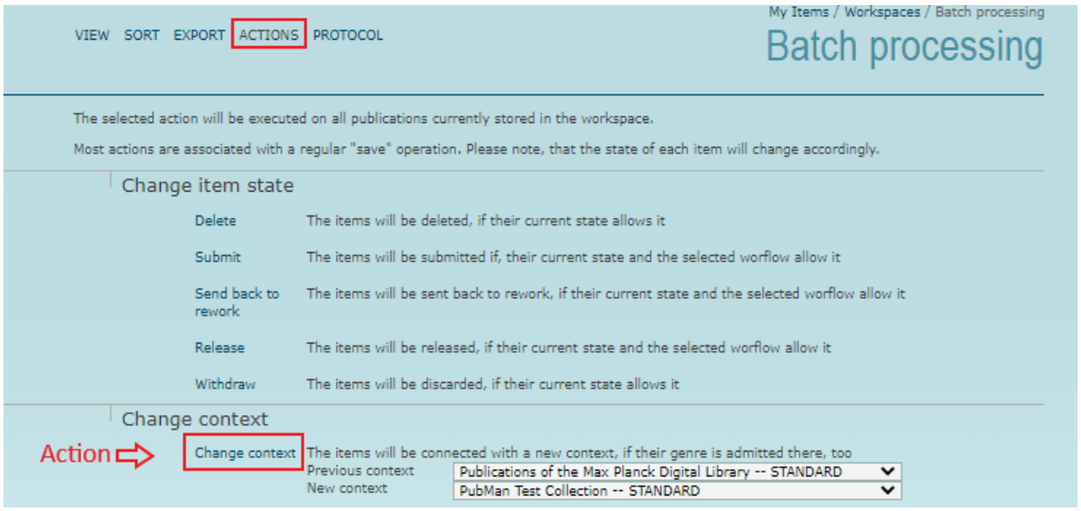
9.3.3 Actions

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.)



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.

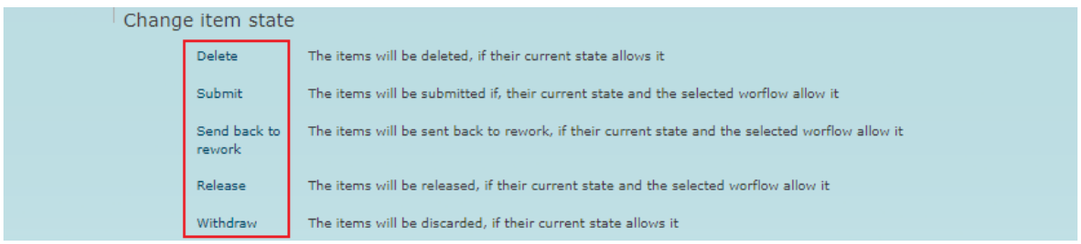
⚠ Attention: After clicking on the relevant action, it will be executed **without further verification** through a pop-up window. The actions performed are **irreversible** .

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:

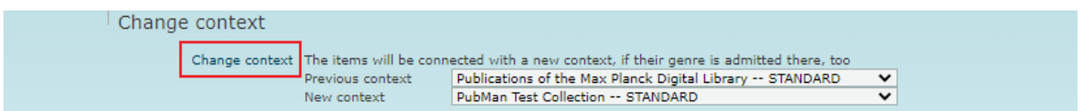
- Delete
- Submit
- Send back to rework
- Release
- Withdraw



⚠ 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.

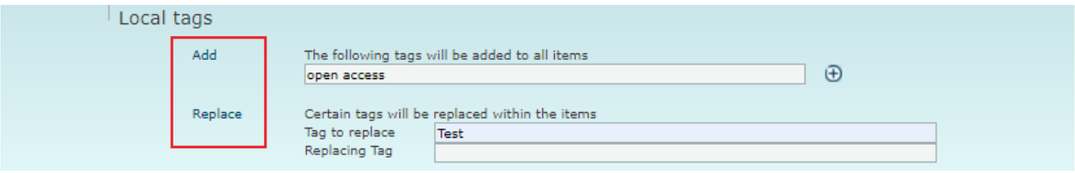


⚠ All actions lead to a "saving" of the data. After clicking on the relevant action, it will be executed **without further verification** through a pop-up window. The actions performed are **irreversible**.

9.3.3.3 Manage local tags

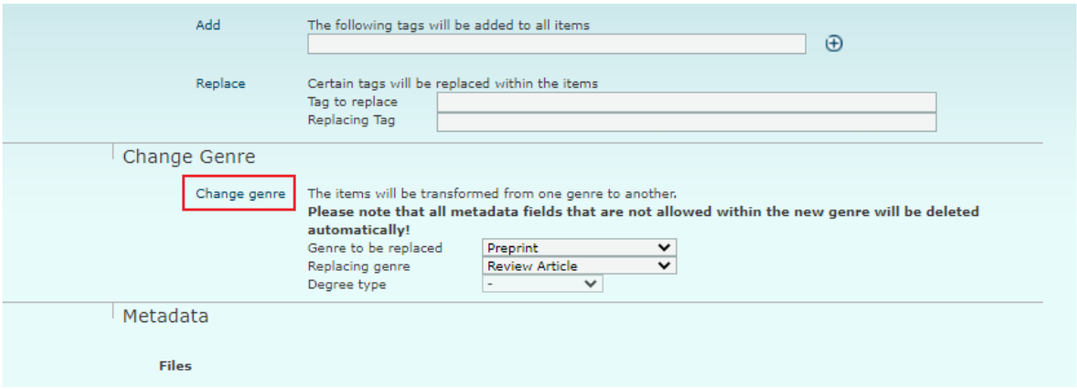
Here you can either:

- **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.



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.



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.

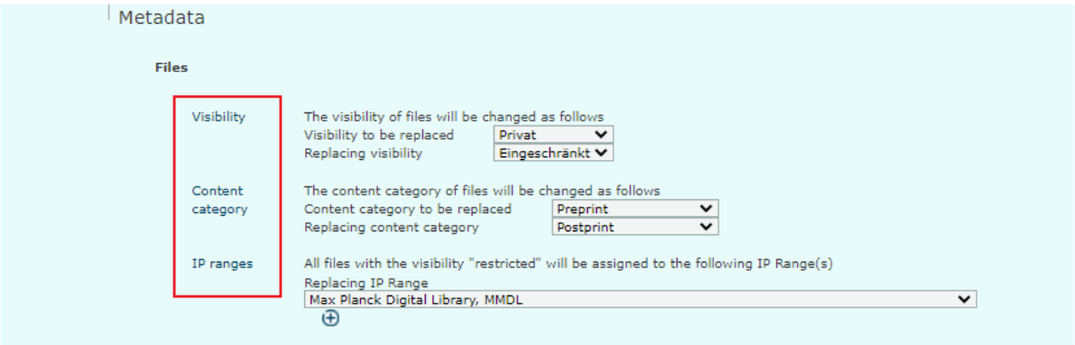
9.3.3.5 Change metadata

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).

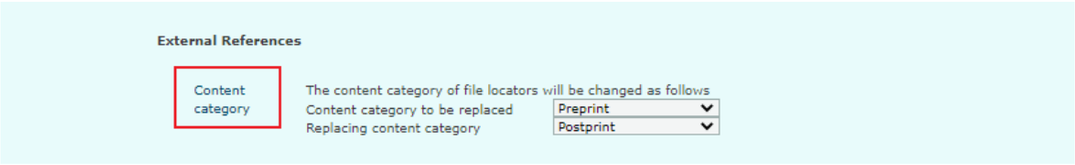
Content Category: The previous and the desired new content category must be set. All files for which the old value applies will be changed accordingly.

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).

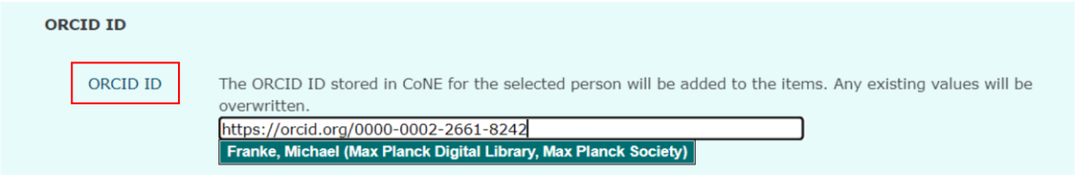


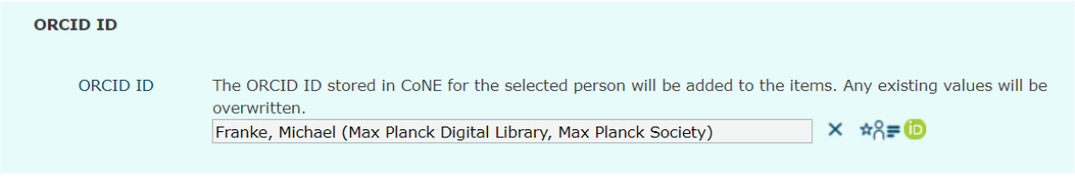
External References

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.



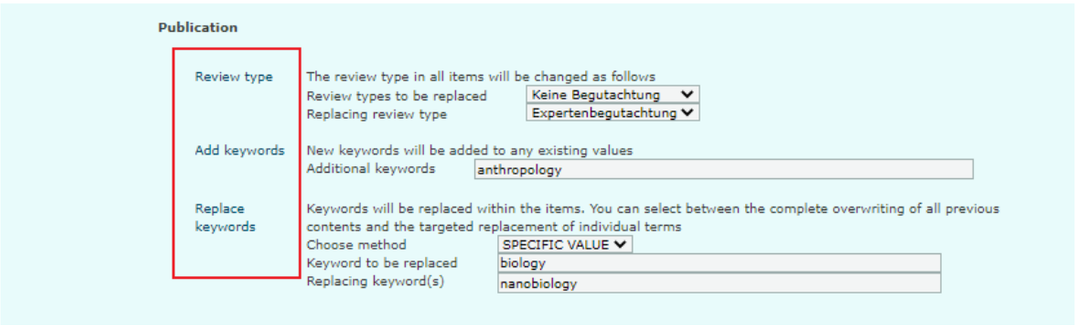
ORCID ID





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 -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



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.

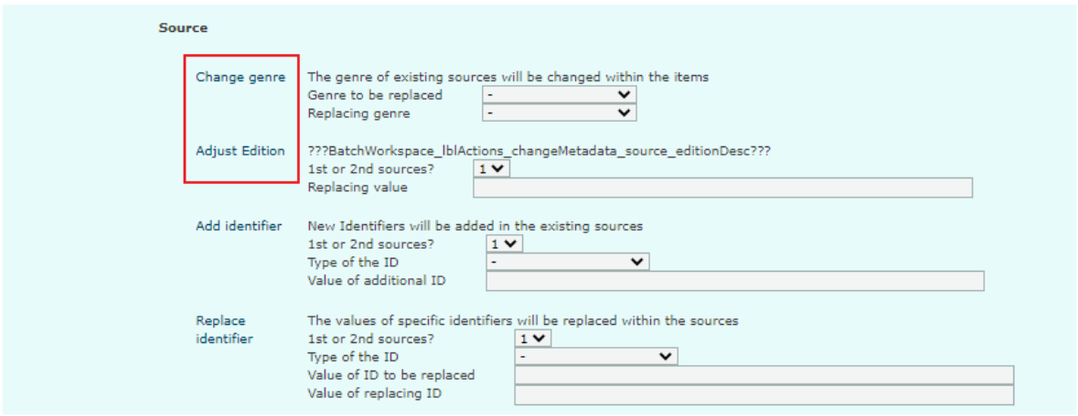
Add keywords: New keywords will be added to all items. If values are already assigned, the new keywords are added additionally.

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.

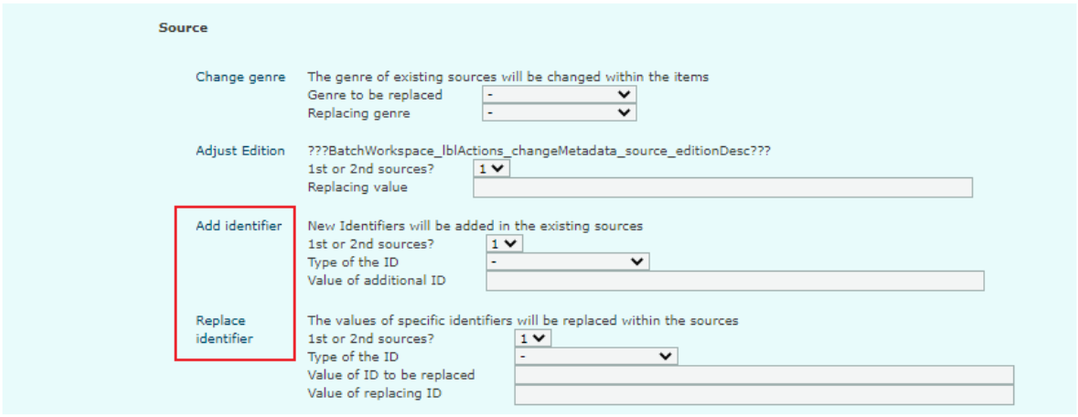
- *Single keywords:* Single values of already existing keywords can be replaced individually. The previous value need to match the values in the publications. This includes upper/lower case, special characters and umlauts.Truncation is not possible. This means: Only complete terms can be replaced, which 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



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.



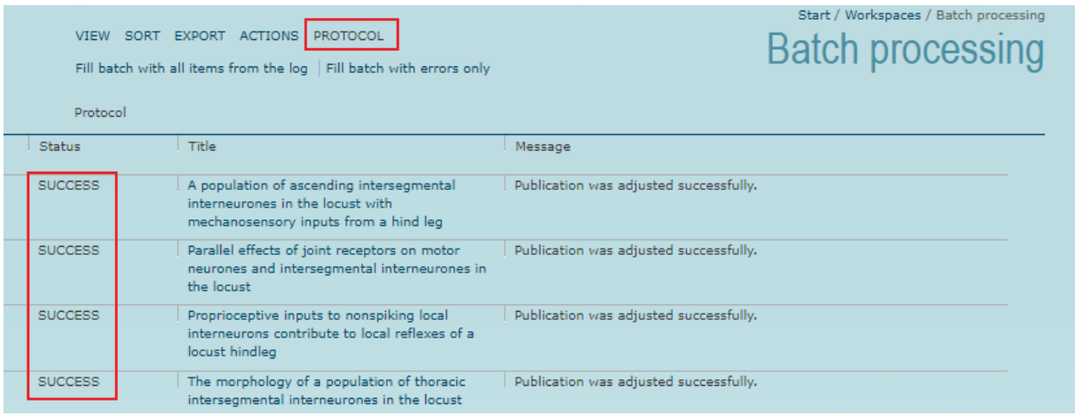
Add identifier: An additional ID is added to all publications with a source. Type and value of the new ID must be specified. It must be specified whether the changes should be made in the first or the second source.

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.

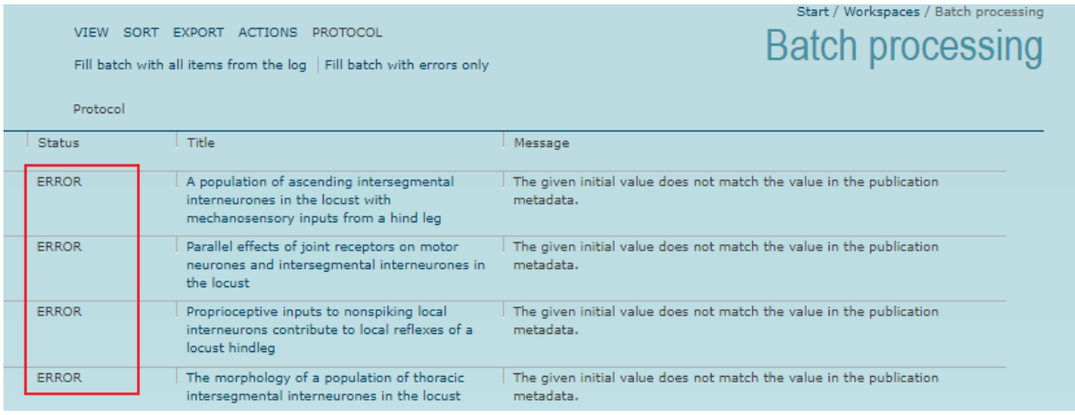
9.3.4 Protocol

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

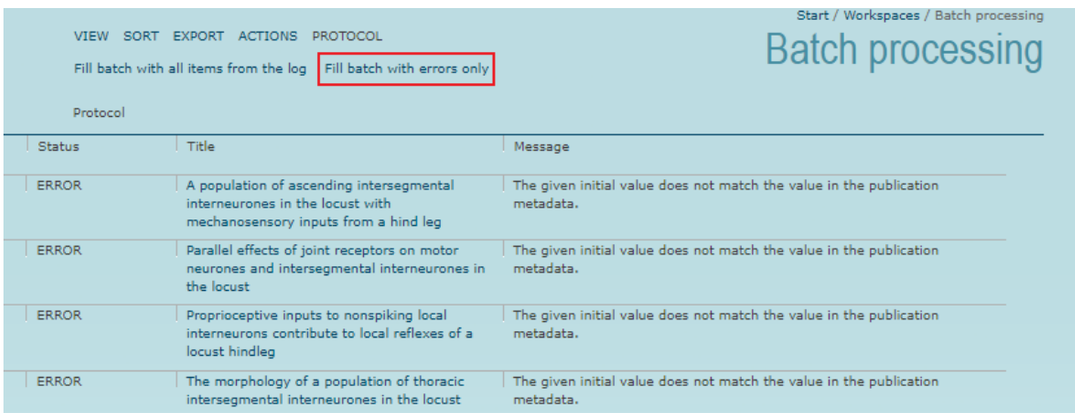
The header displays the number of successfully adjusted items and, if applicable, also the number of items that were not adjusted due to error messages.
Information about the last completed action is always displayed here.



Listed are all items with:
- **Status** ("Success" or "Error"),
- **Title** of the publication (clickable)
- a **message about the action** (an error message, if applicable).



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.



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.

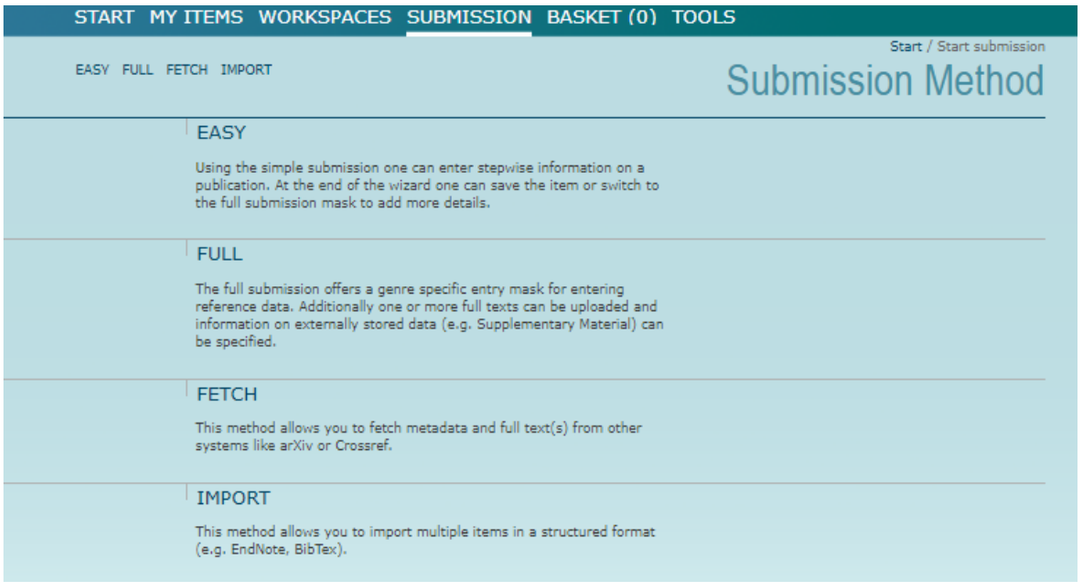
All items that may have already been newly selected for the batch area are not on the list.

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.



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 chapter "Enter metadata for full text" and "Add file locators ".

1. Open Access gold:

open access 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:

open access 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/self-archiving) 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 local tags , 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 **does not apply to a normal peer-reviewed article** . 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.

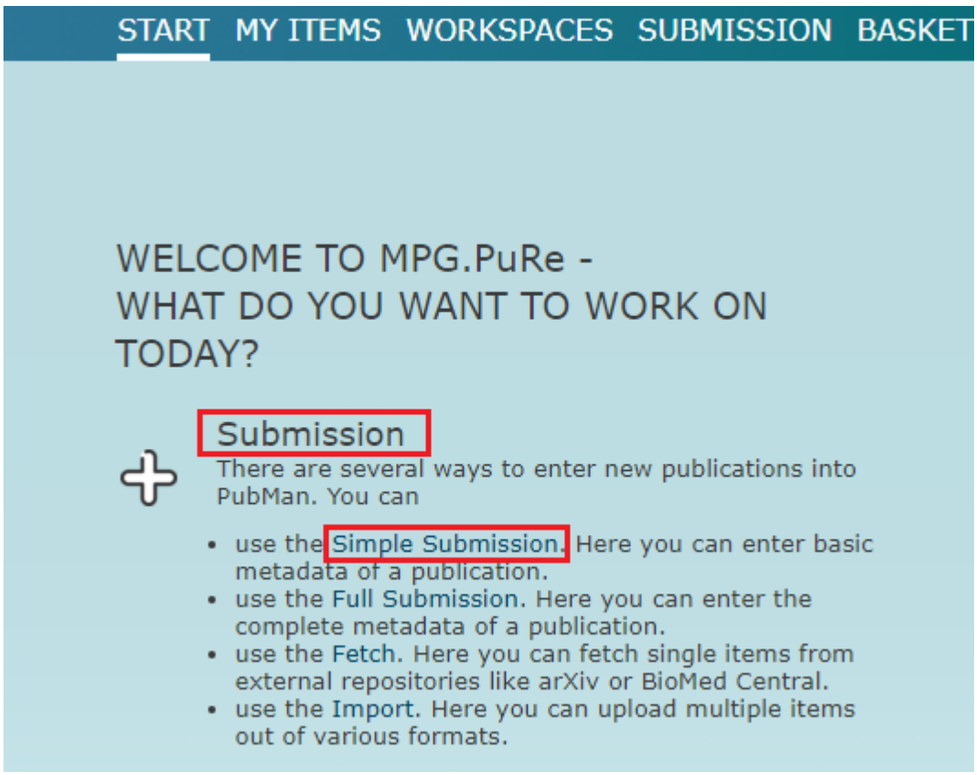
⚠ Attention: The data entry is only available if the user role "Depositor" has been assigned to the logged-in user.

10.3.1 Open the simple submission

There are two ways to open the simple submission:

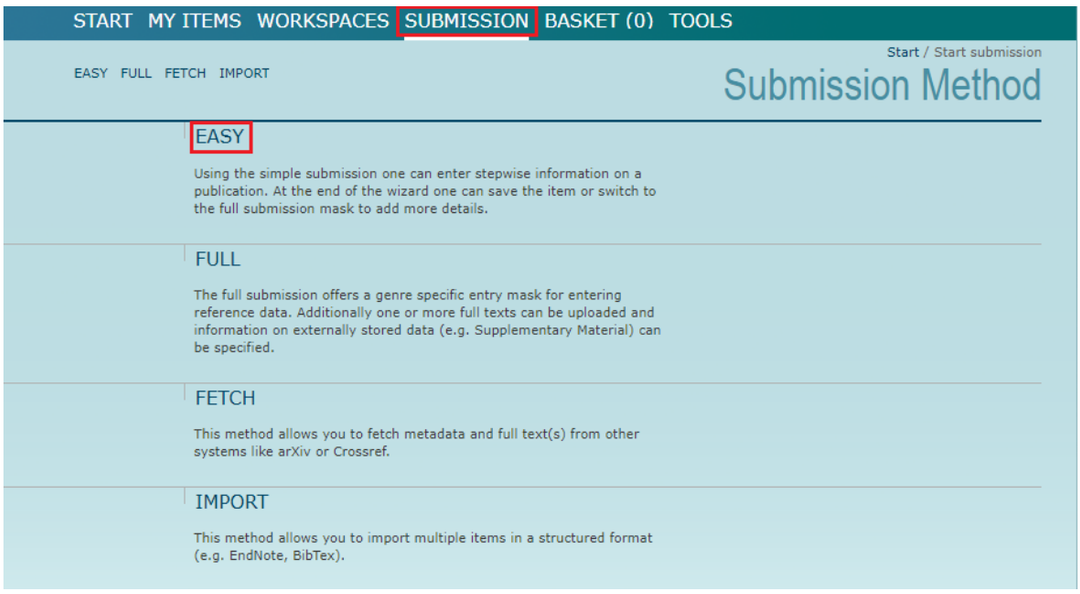
1. **Through the home page:**

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

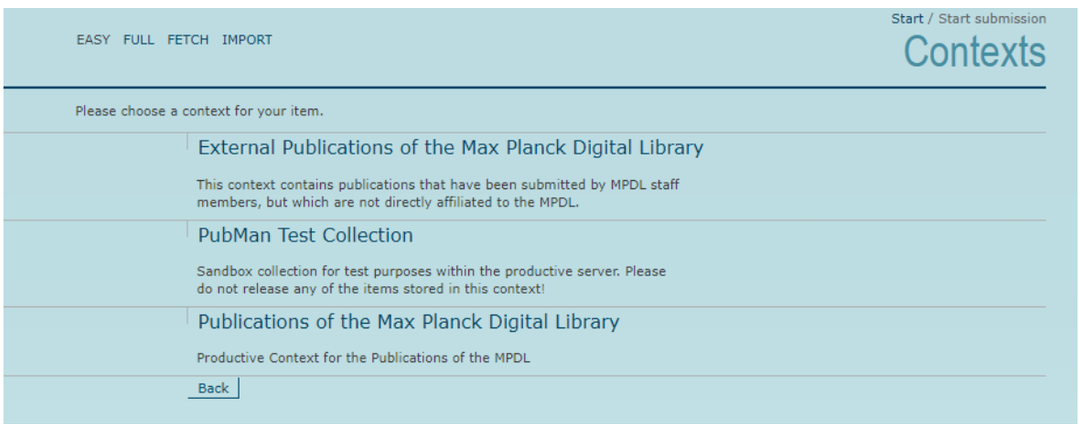


2. **Through the submission button**:

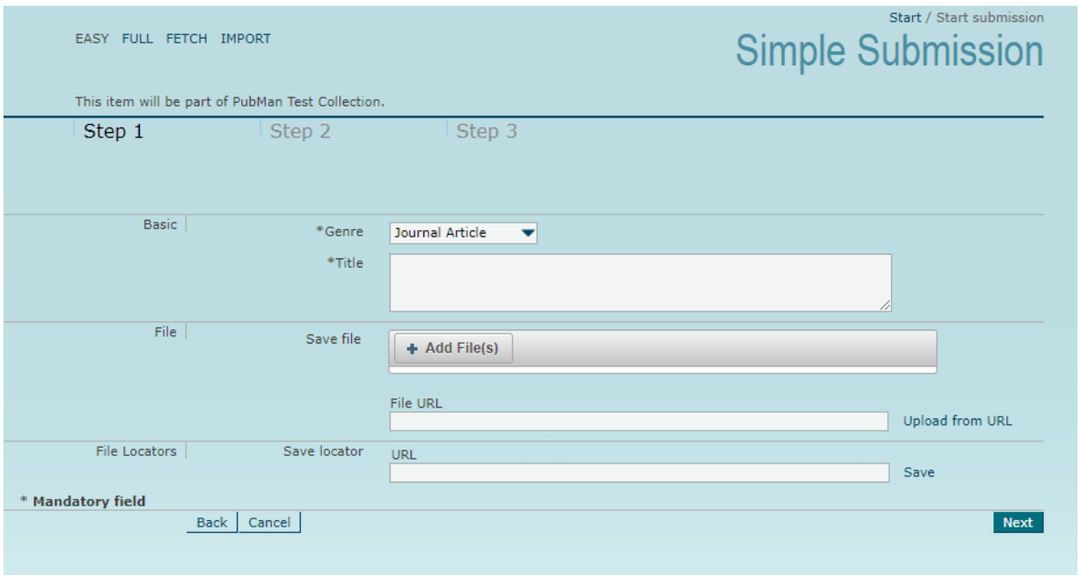
- Log in to PuRe.
- Click on the "submission" button in the navigation menu.
- The overview page of the different submission types opens. Select "easy".



- Select the context in which the publication should be entered.



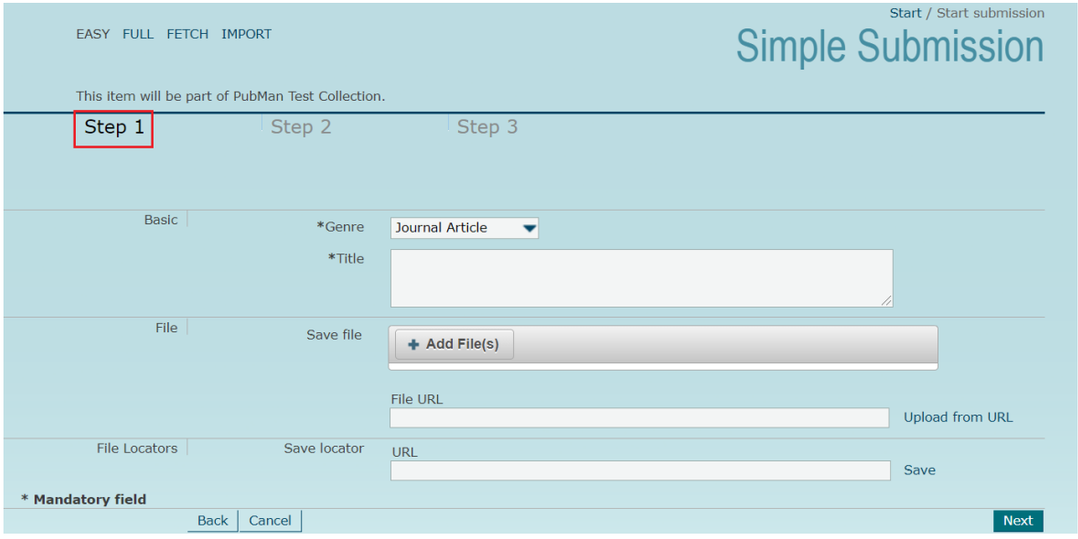
- Then the input mask of the simple submission opens.



10.3.2 Data entry in the simple submission

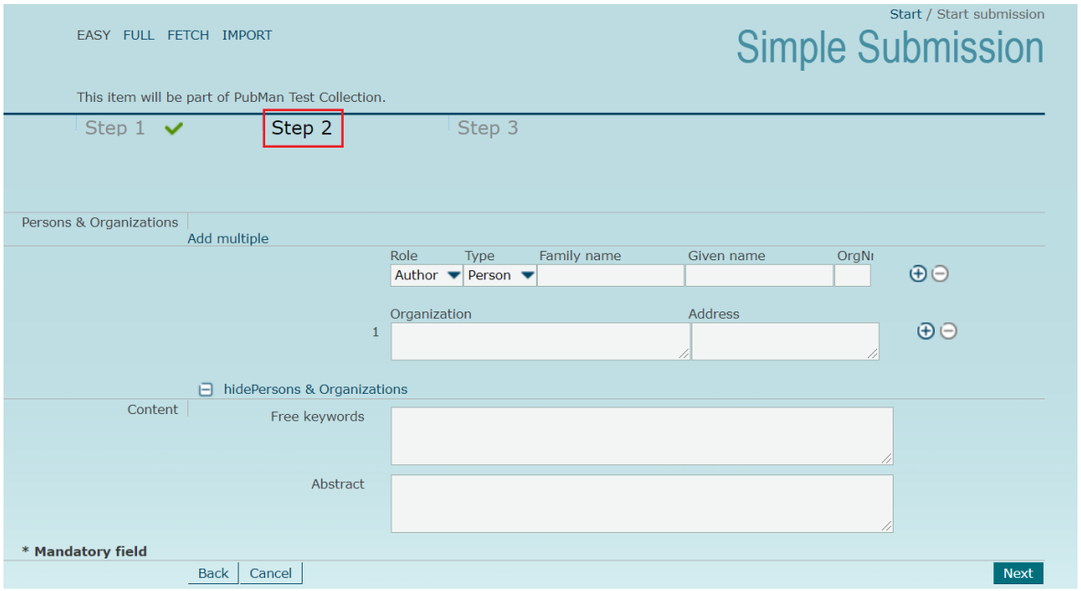
The simple submission mask involves three successive steps.

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".



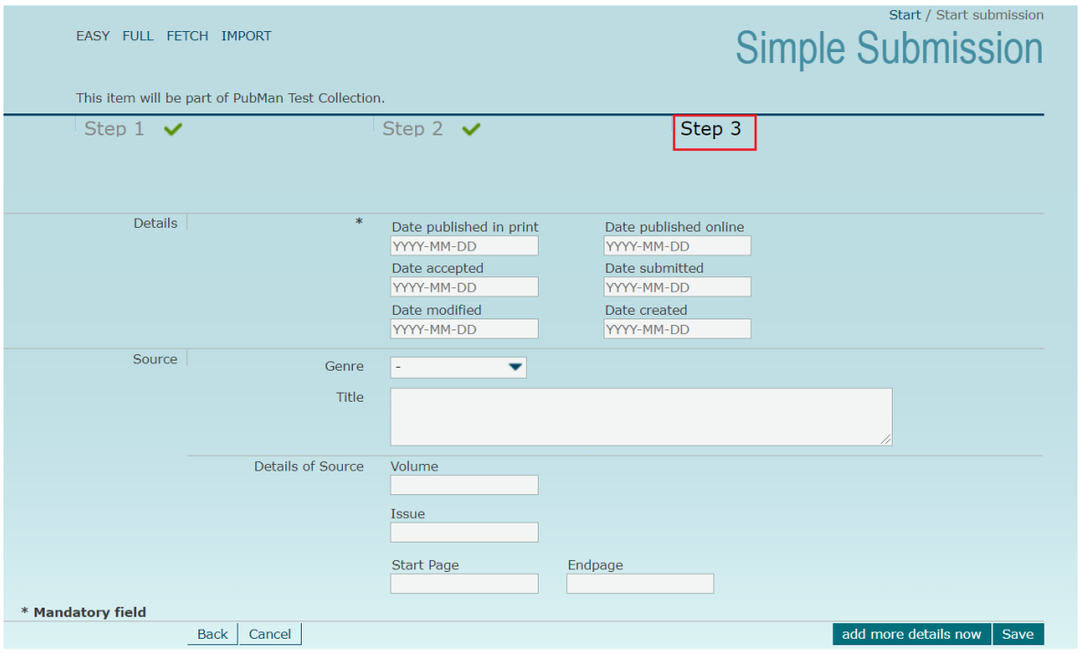
Go to step 2 by clicking on "Next".

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



Afterward, click on the "Next" button.

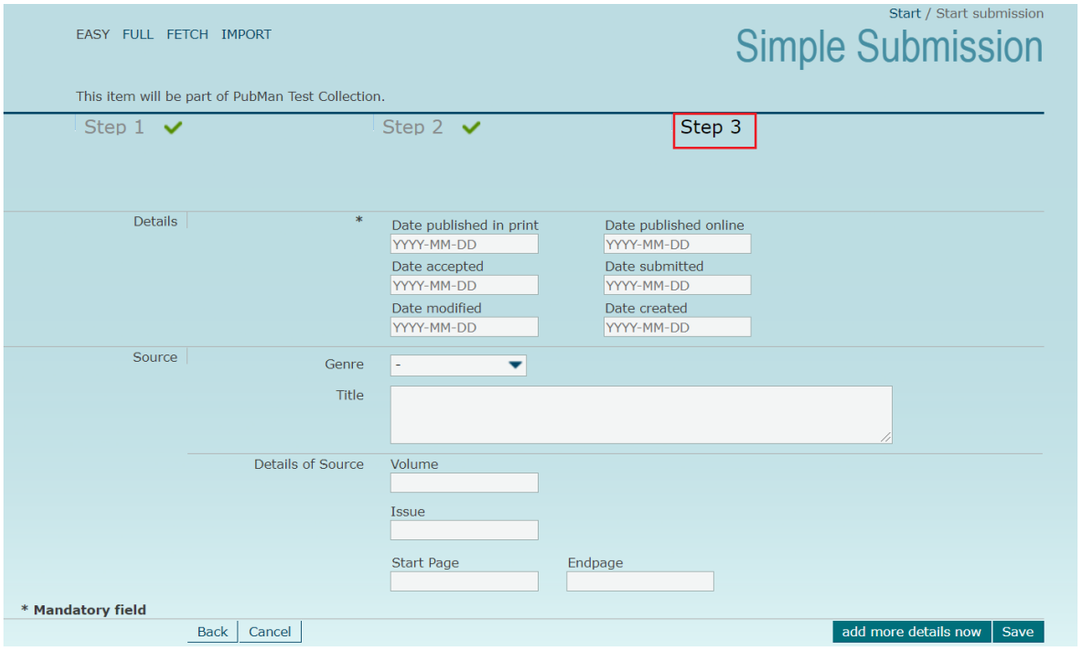
Step 3 of the simple submission appears. It combines the sections "Details" and "Source".



⚠ 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.



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 chapter "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.

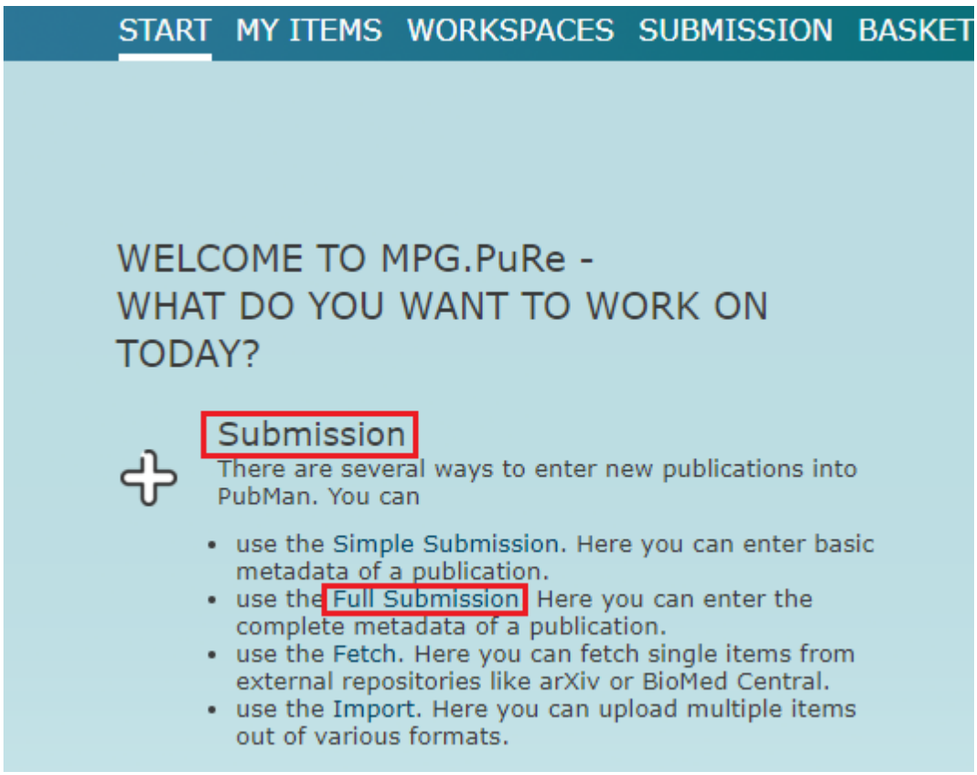
⚠ Attention: The data entry is only available if the user role "Depositor" has been assigned to the logged-in user.

10.4.1 Open the full submission

There are two ways to open the full submission:

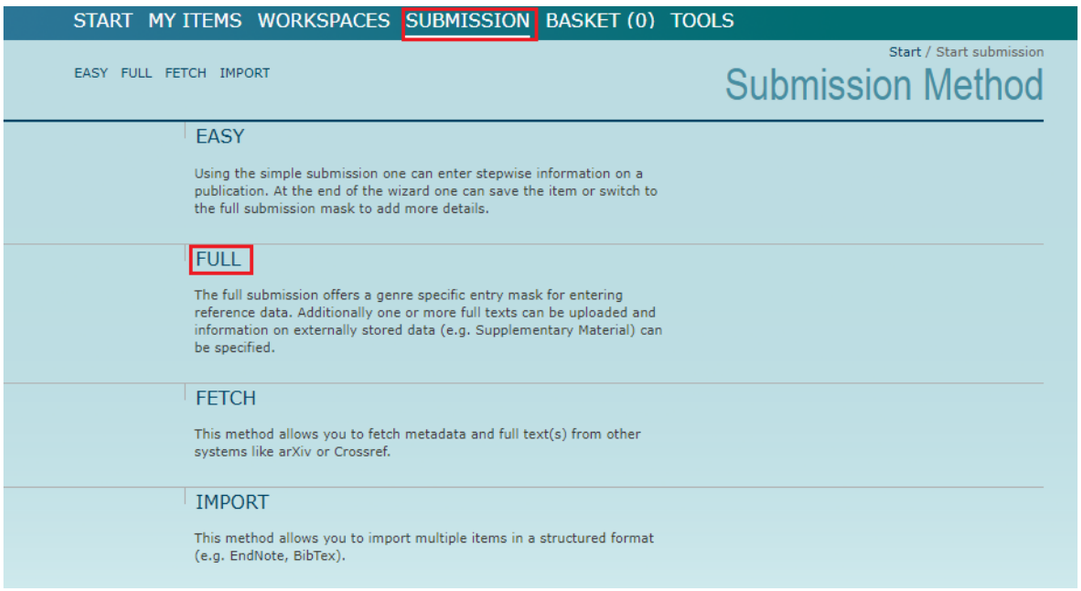
1. **Through the home page**:

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

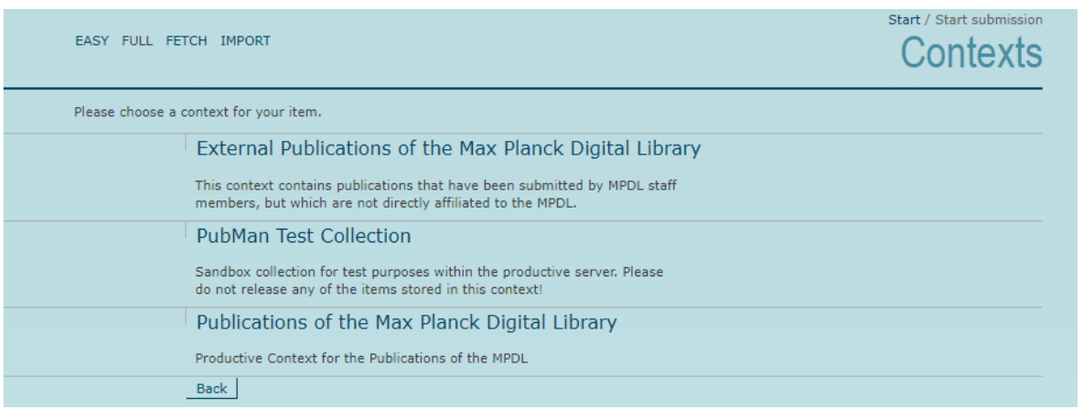


2. **Through the submission button**:

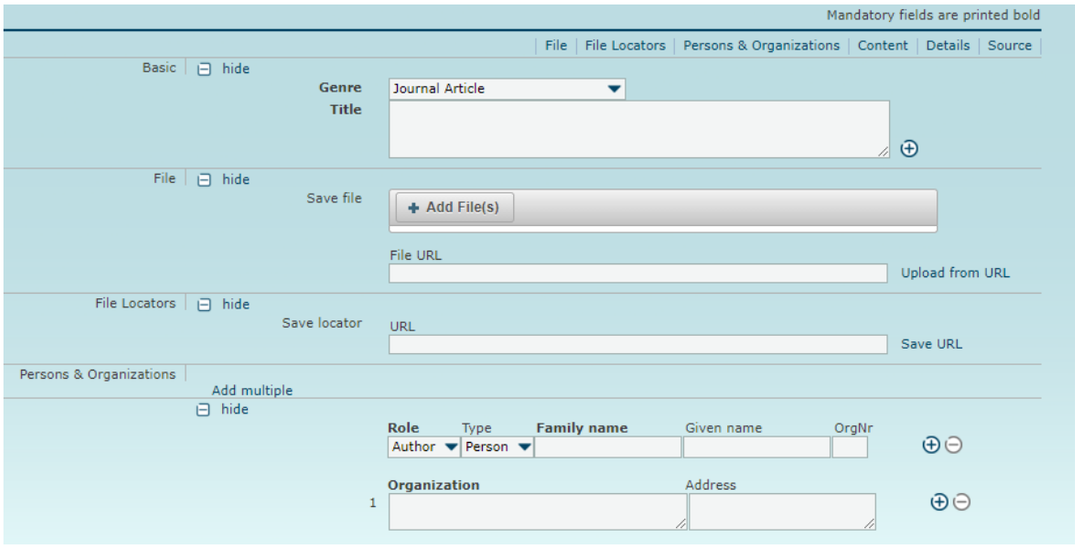
- Log in to PuRe.
- Click on the "submission" button in the navigation menu.
- The overview page of the different submission types opens. Select "full".



- Select the context in which the publication should be entered.



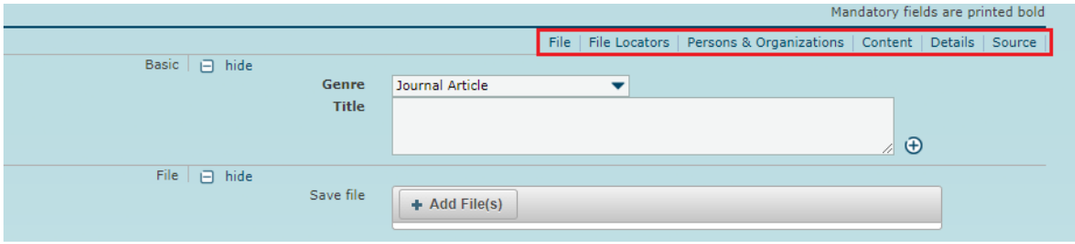
- The input mask of the full submission opens. It is divided into sections. All fields in bold are mandatory fields.



⚠ 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

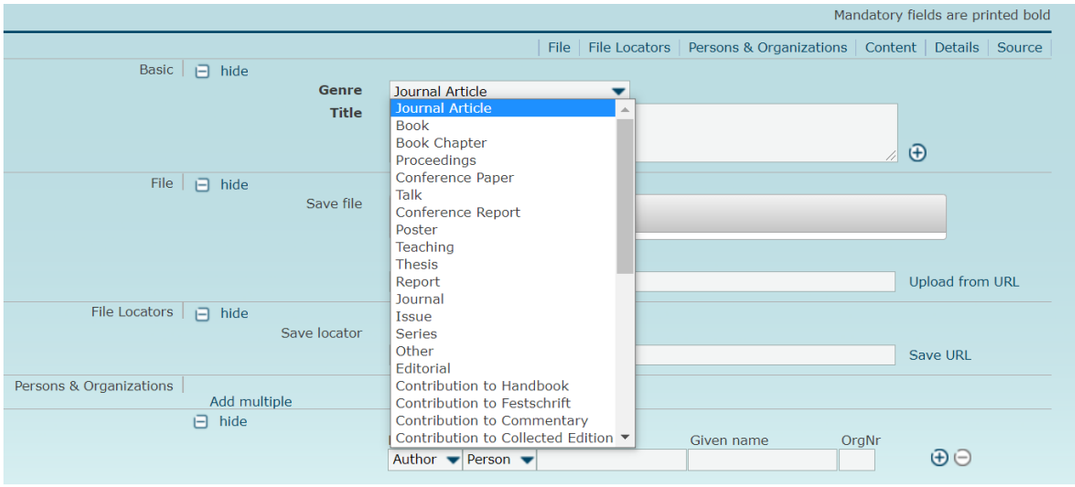
For easier navigation within the input mask, various links to the respective sections of the mask are available in the upper right corner.



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 -icon in the genre field and a drop-down menu appears.



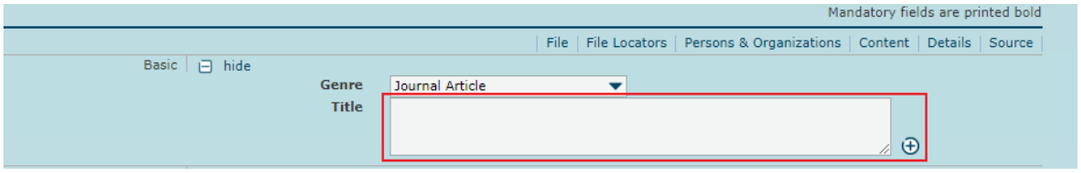
- Click on the required genre in the drop-down menu. The selected genre will be applied.

⚠ 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.

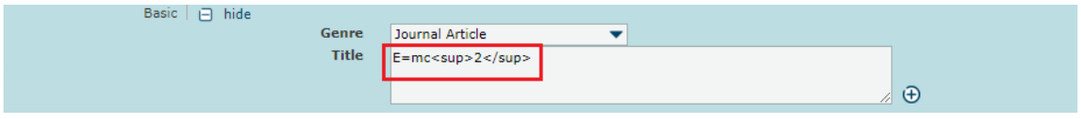


- Enter the title of the publication in the title field. The title will be displayed.

10.4.5 Enter title with superscript and subscript letters

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

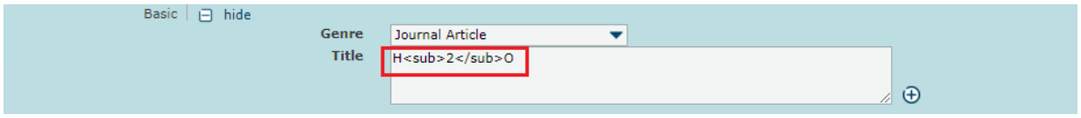
- Enter the title. Enclose the characters you want to superscript with the ^{and} HTML tags.



- After saving, the parenthesized characters are superscripted.

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

- Enter the title. Enclose the characters you want to subscript with the _{and} HTML tags.

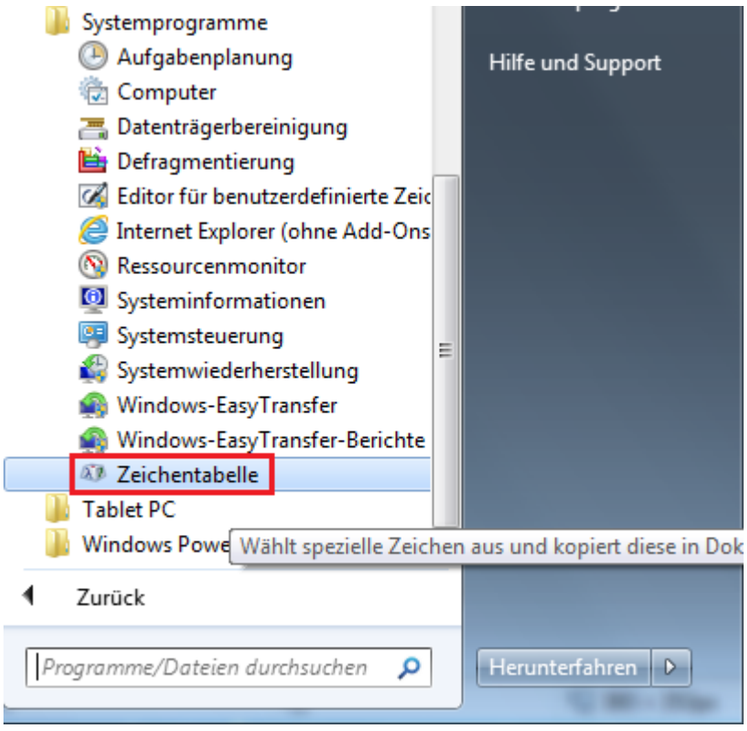


- After saving, the parenthesized characters are subscripted.

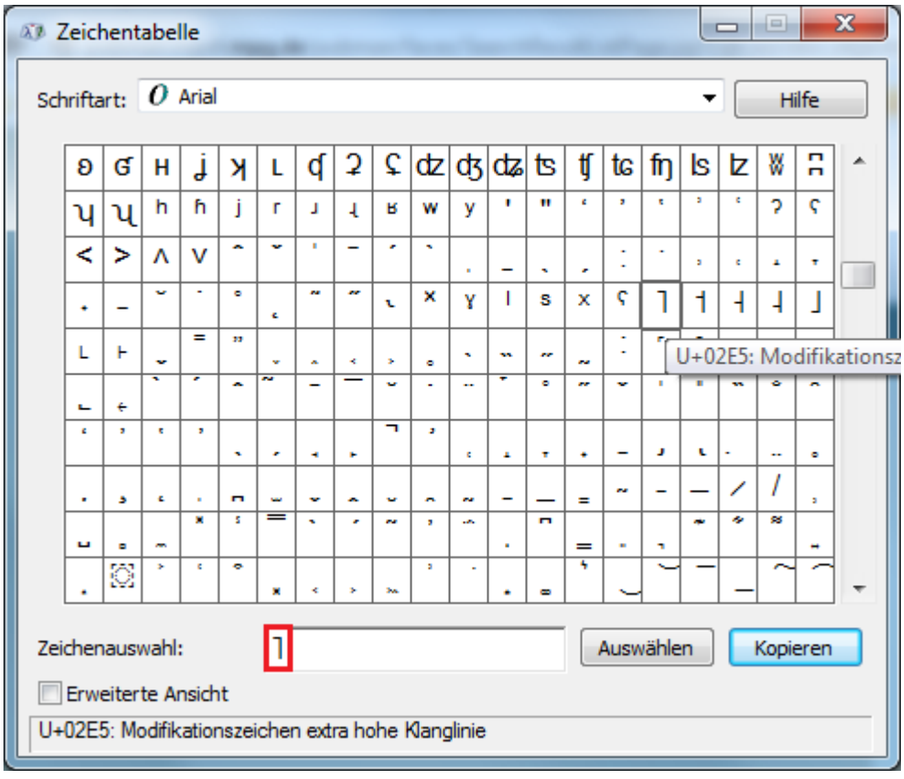
10.4.6 Inserting titles with special characters

To insert titles with special characters, proceed as follows:

- Open the character map e.g. in Windows

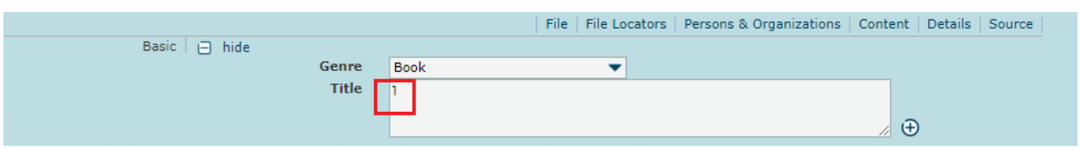


- Select the needed special character by double-clicking on it. The character appears in the "Character selection" field.



- 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.

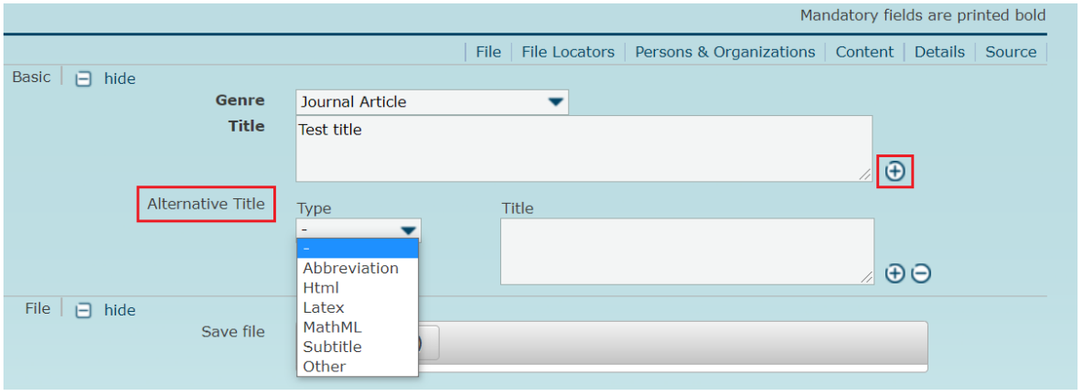


- Alternatively, you can use a character table from the Internet such as unicode-table.com.

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.

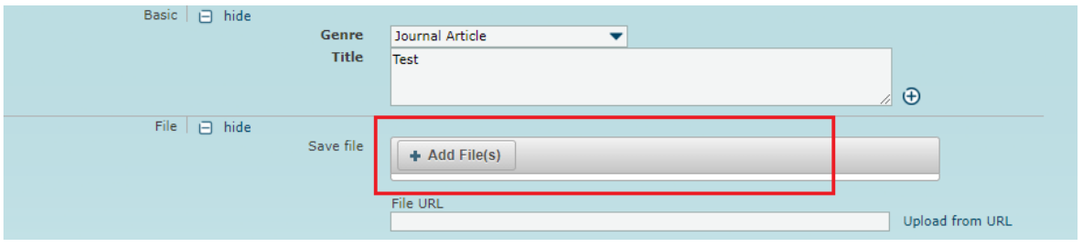


- Then select the required "Type" of field. The alternative title types are "Short title", "HTML", "Latex", "MathML", "Subtitle" and "Other".

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 chapter "Enter metadata for full text".



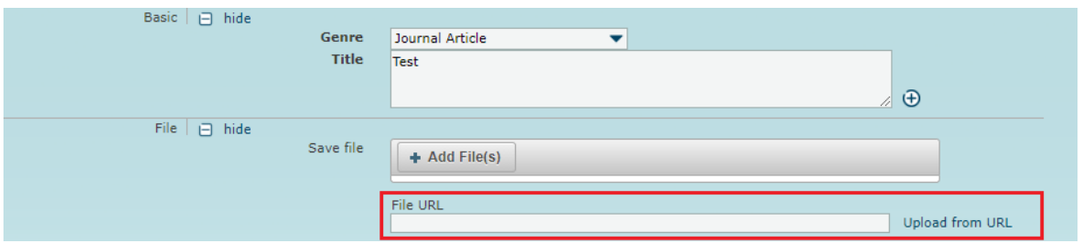
⚠ Attention: The file name can not contain a space. URLs as file names are allowed.

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.



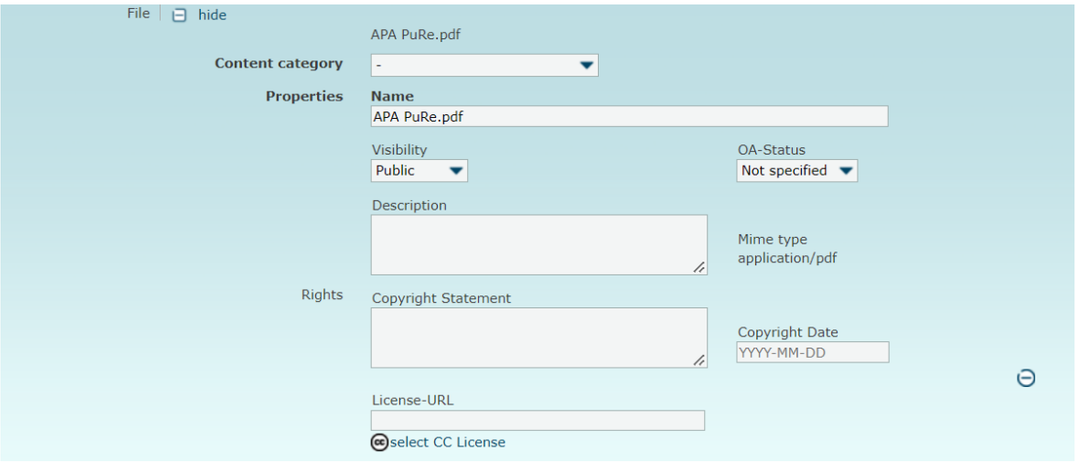
To do so, proceed as follows:

- 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.

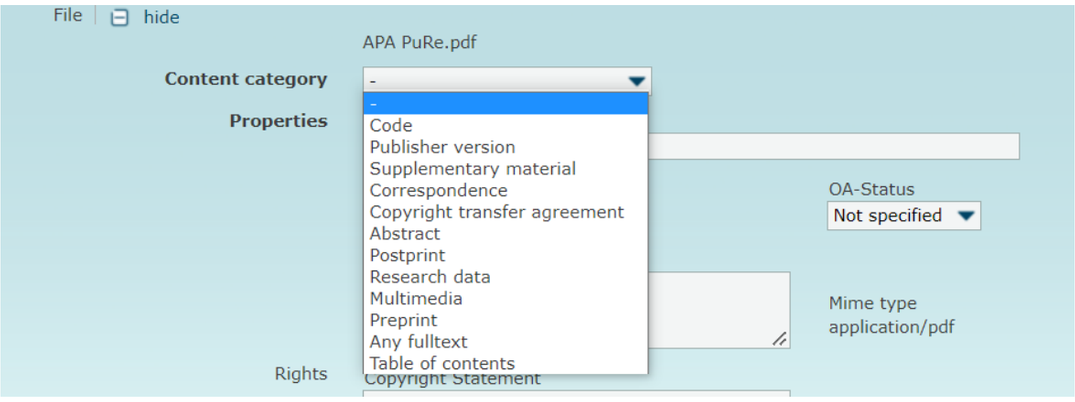
Attention: This function is intended to upload resources from the Internet from a specific URL but not to embed a URL. Therefore, the URL ends with a file format , such as .html or .pdf. If this is not the case, you will receive the error message "The file could not be downloaded. Reason: Invalid URL."

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.



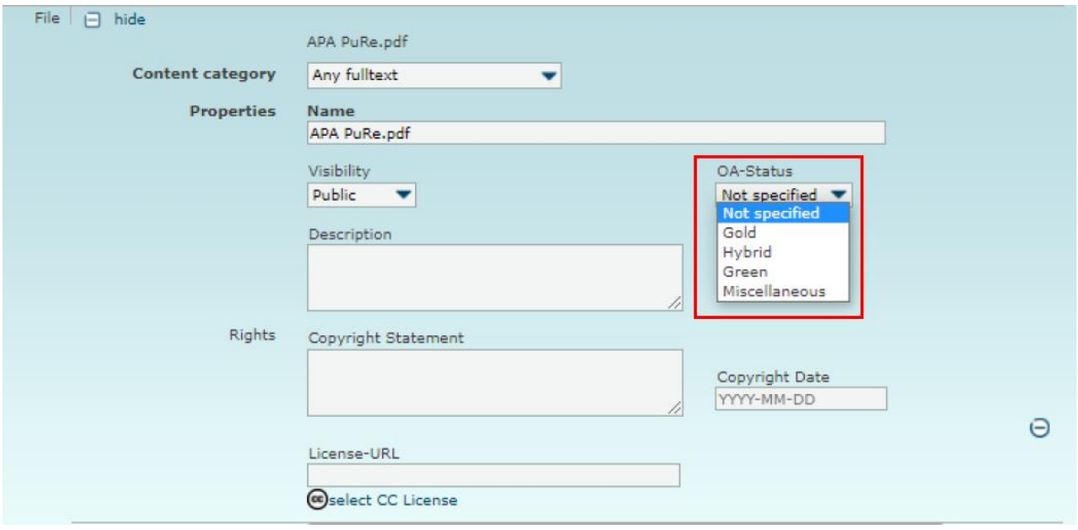
To specify the **content category** , click the -icon in the content category field. The drop-down menu is displayed. For a definition of each content category, see the following URL: http://colab.mpdl.mpg.de/mediawiki/ESciDoc_ContentCategories_VES.



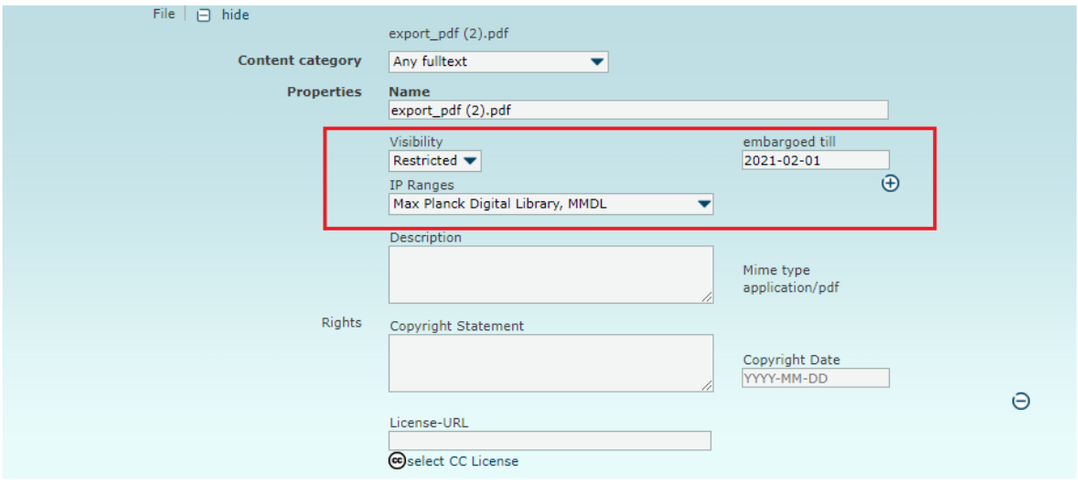
Click on the corresponding content category and it will be added to the field.

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 thechapter "Open Access Overview" .



- "**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.

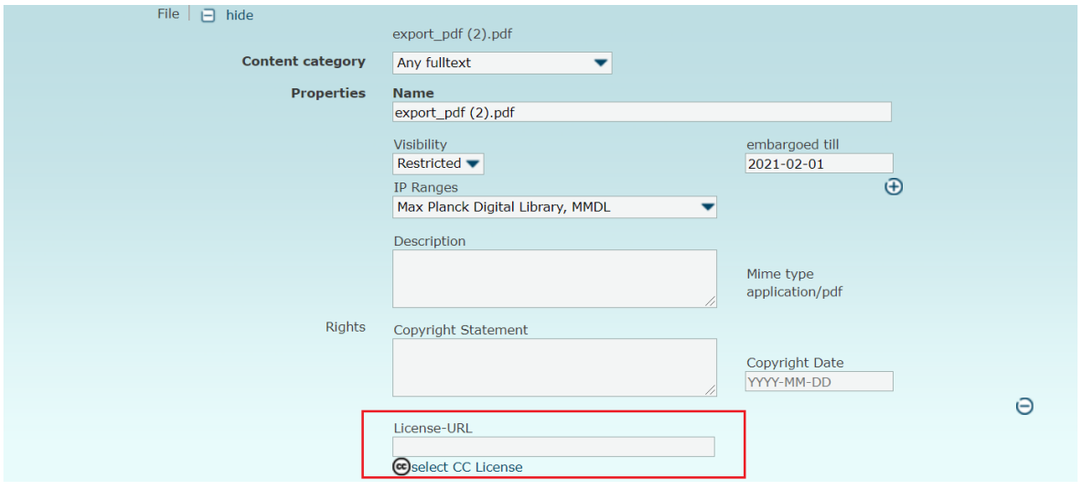


- Enter a description of the full text in the "**Description** " field.
- The system automatically fills the "Mime type " field. The mime type is a defined standard that classifies the type of data of the full text.
- The "**Copyright Information**" field is used to enter additional information about 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.

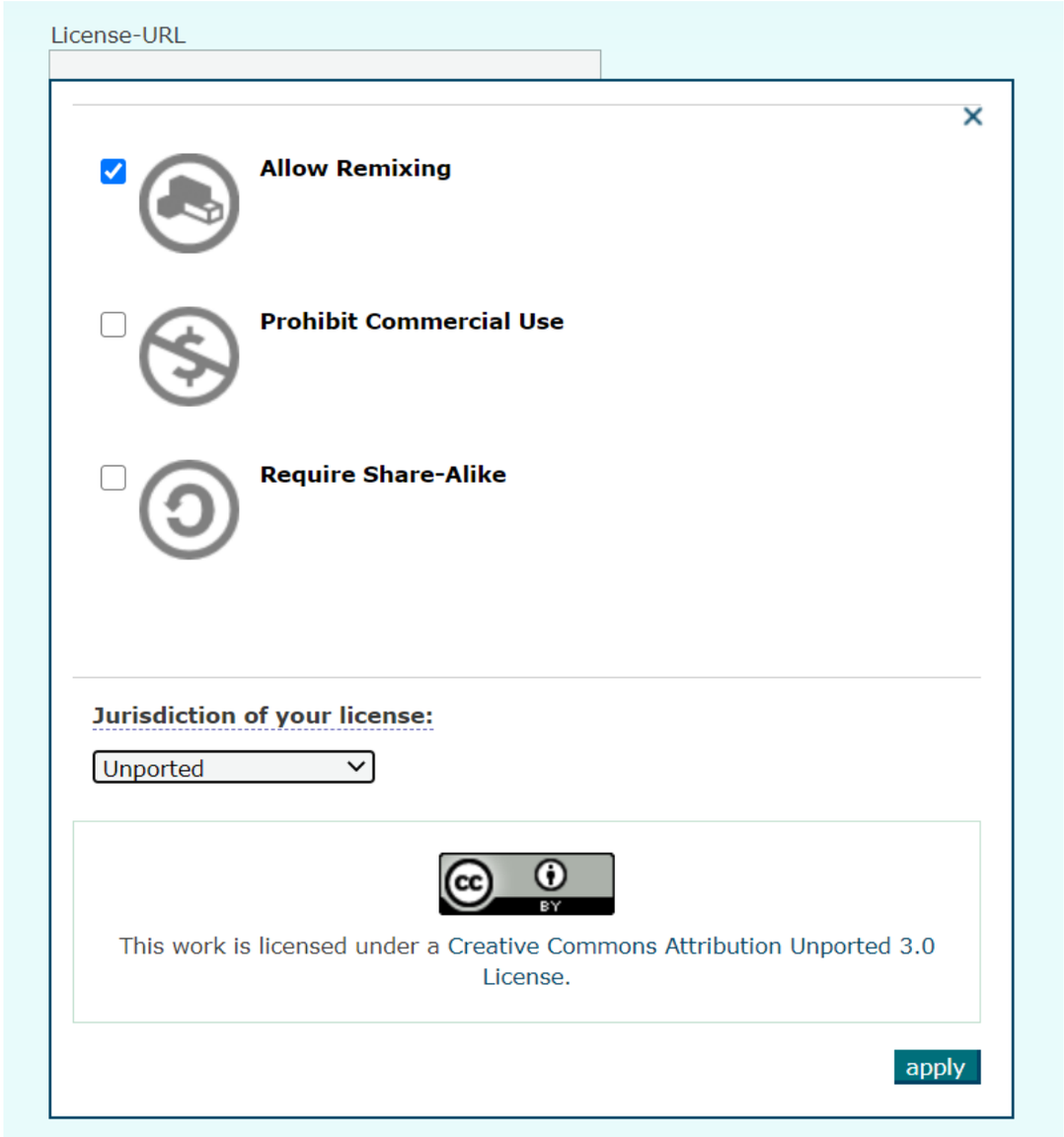
10.4.11 Full text licensing

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://de.creativecommons.org/. To add the licenses, proceed as follows:

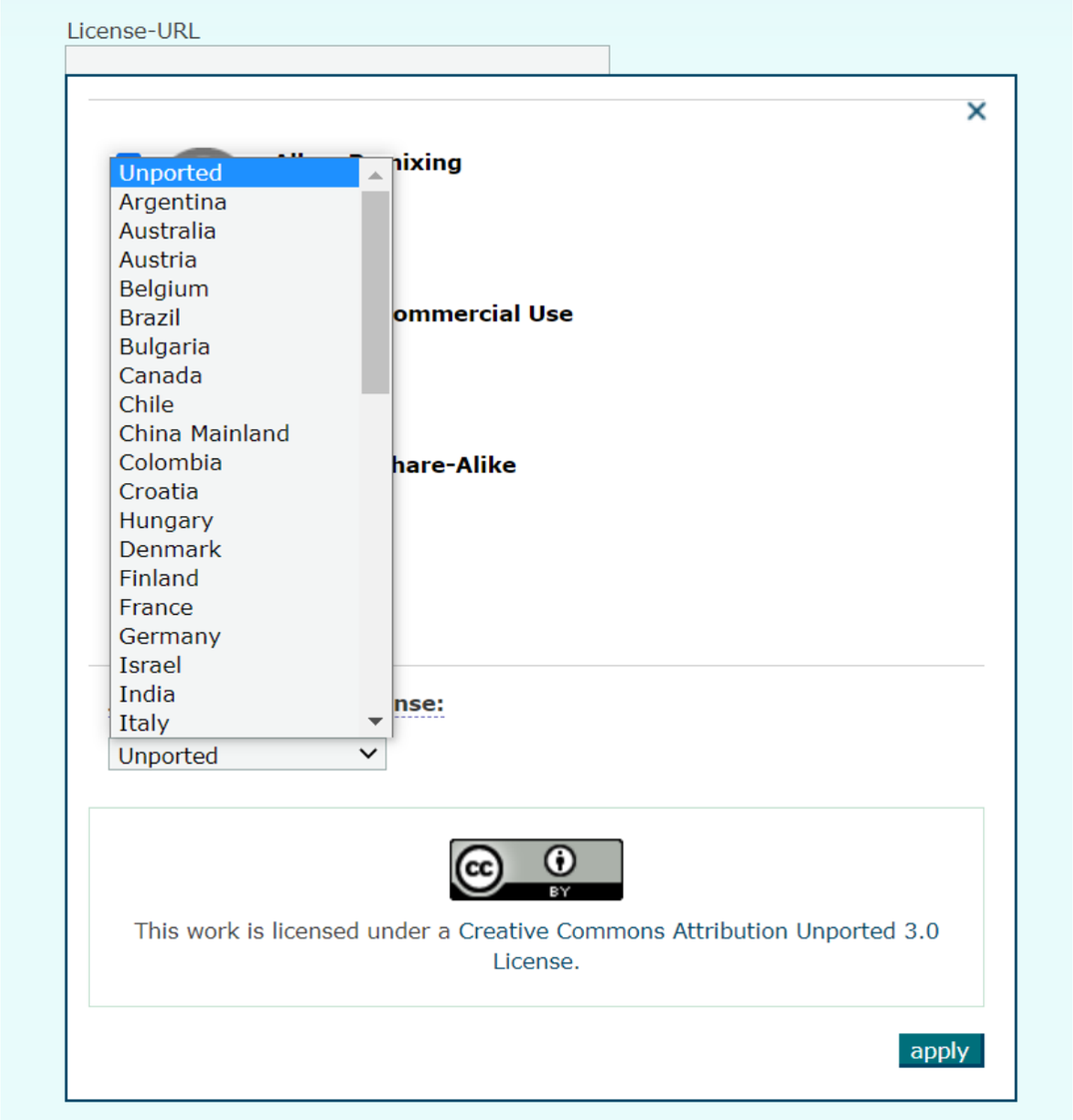
- Click on the "select CC License" button



- The Creative Commons license selection menu appears.



- 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.



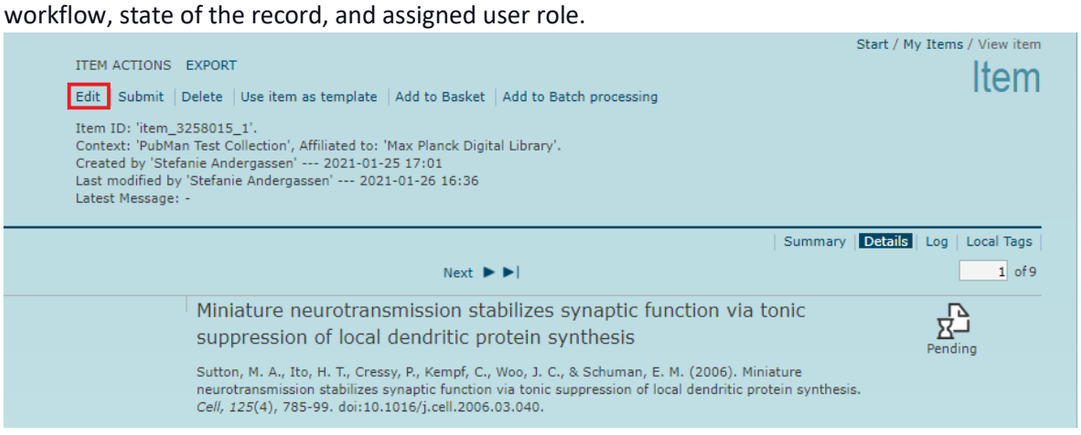
- Click on the country for whose jurisdiction the license is to apply.
- Click on the "Apply" button. The selected license will automatically be taken over into the "License" field. Click on the "Apply" button.

10.4.12 Remove full texts

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

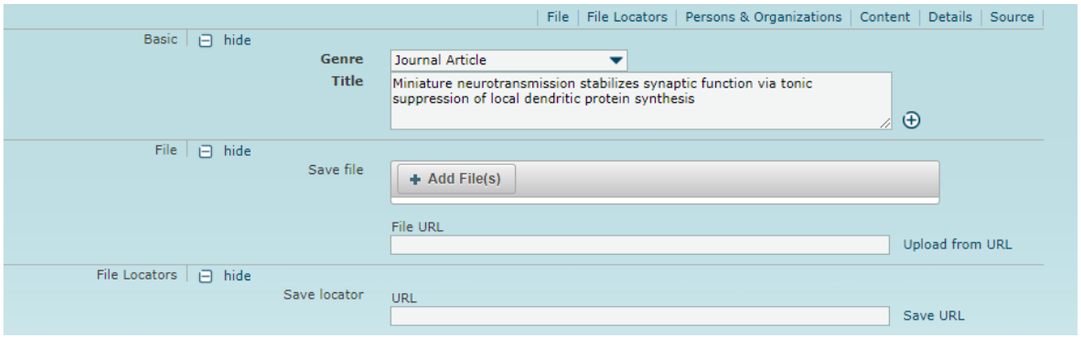
- Start by logging in to PuRe and locating the relevant record, for example, through search. It will be displayed as a search result.
- Click on the title of the record to open the detailed view.
- Then click on "edit", and the editing mask opens.

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



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

- The file will be removed.



- 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.

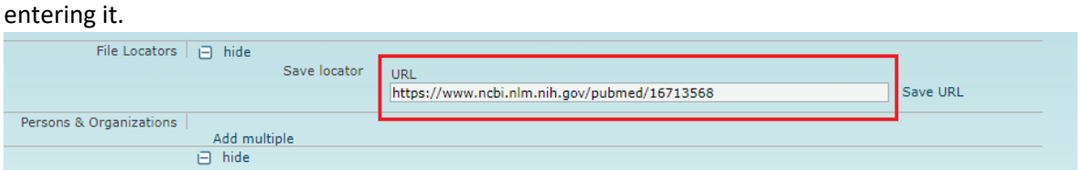
10.4.13 Add file locators

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.

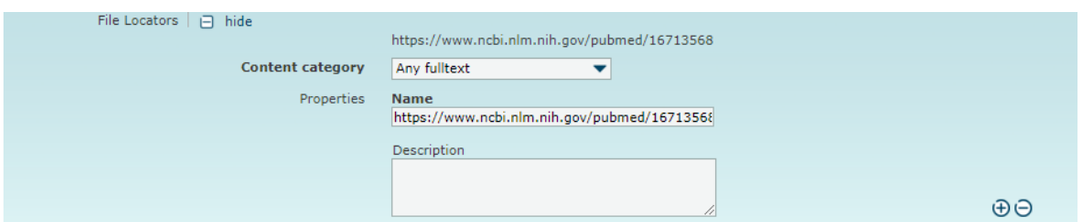
To do so, proceed as follows:

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

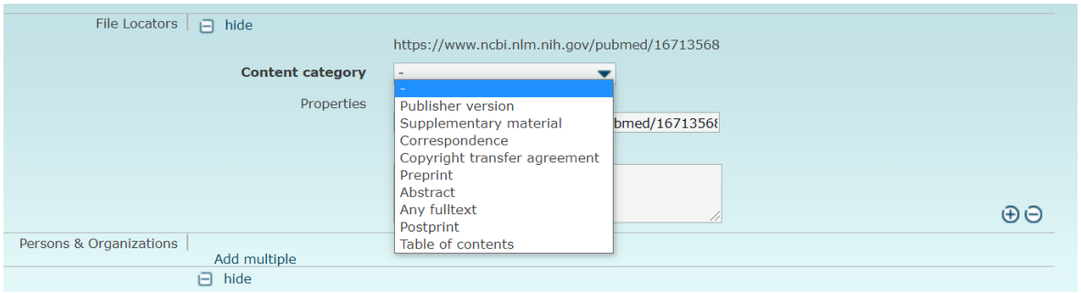
⚠ Attention: PuRe does not check the URL for validity. Make sure it is a valid URL before entering it.



Various fields for entering metadata are displayed.



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

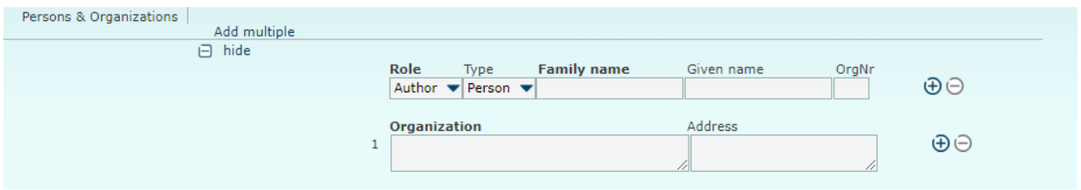


- Additionally, you can enter a description of the external reference.

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

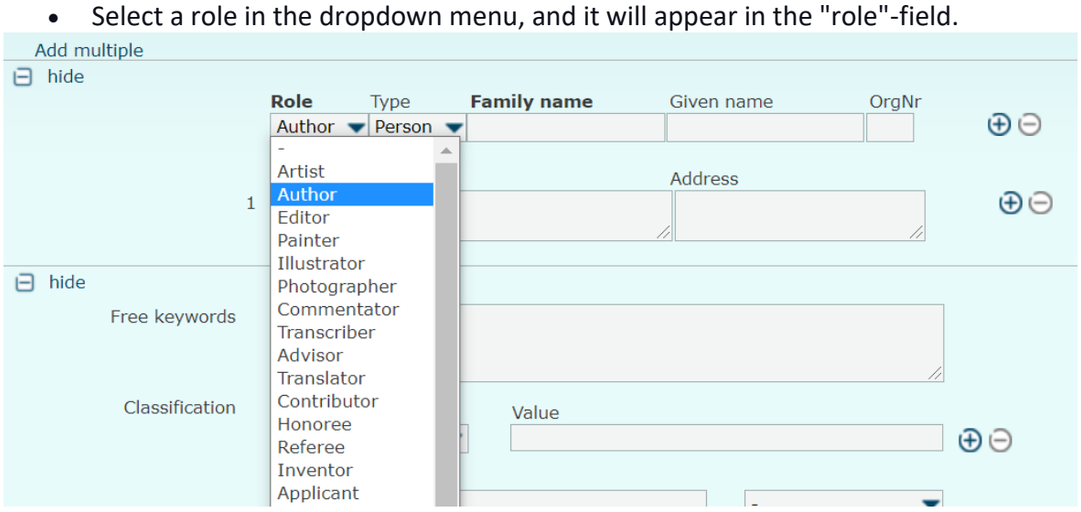
10.4.14 Add person as creator

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

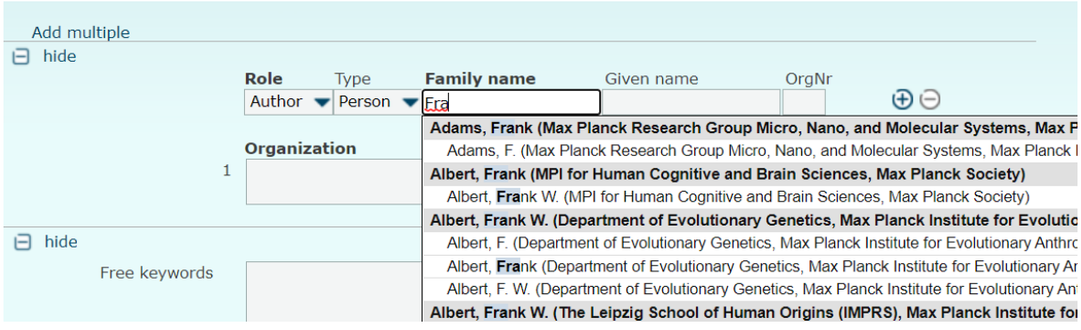


To add a person as the author, proceed as follows:

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

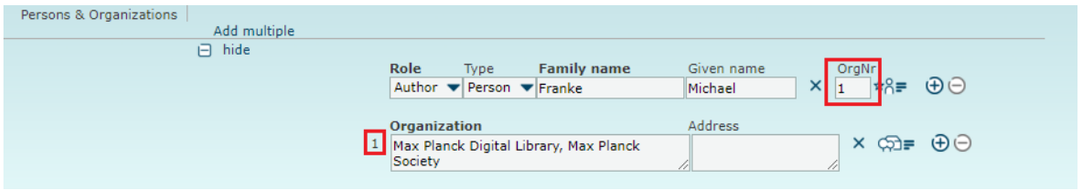


- The type "person" is set as default. To add the type "organization" instead, use the dropdown menu. See more information about how to add an organization in thechapter "Add an organization as affiliation of an creator".
- Add the last name. If you enter at least two letters, the autosuggest list appears.



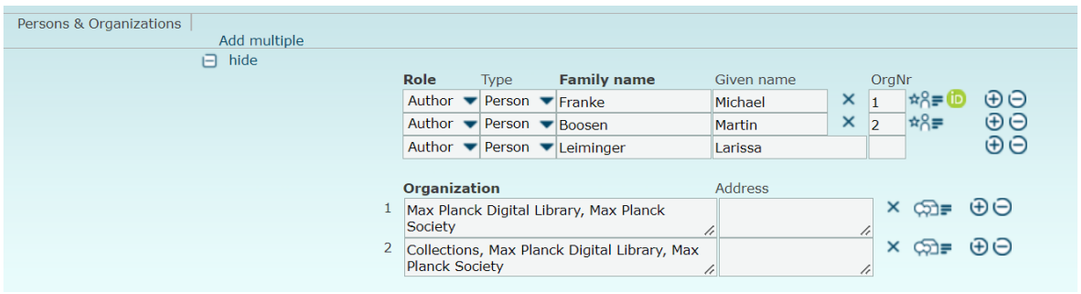
- If the person you are looking for is available in the autosuggest list, select it with a mouse click. The "Last name" and "First name" fields are filled automatically, as well the "Organization" field. The organizational data stored in CoNE is entered here.

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



- 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, seechapter "Add 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 chapters "Tools - CoNE" .

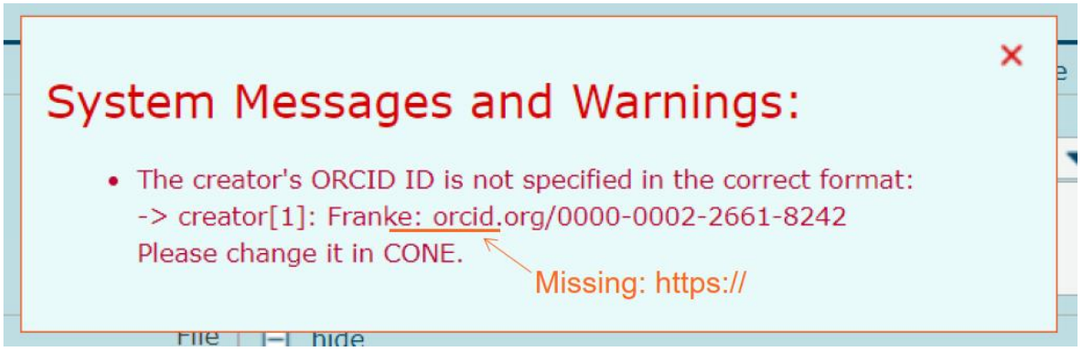


- The -icon appears on the right of the person line. Click on the icon to open the researcher portfolio. For more information about the researcher portfolio, see chapter "Search - Browse - Browse by person" .
- The organizations are automatically numbered, and the numbers are assigned to the respective 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 -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

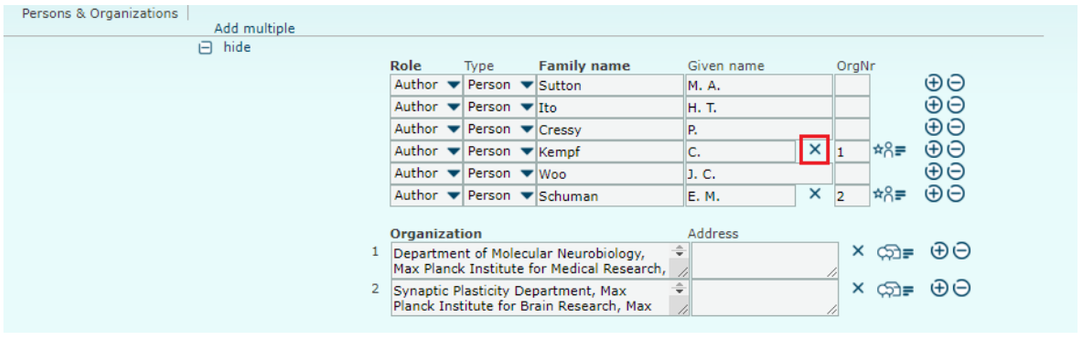
separately in CoNE before the data record can finally be submitted. You can check wheter all the information is correct before submitting the data record by first validating it.



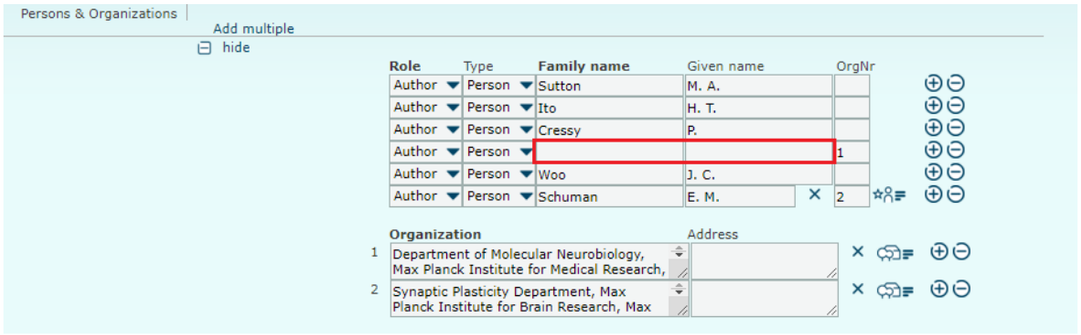
10.4.15 Remove person from entry mask

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

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



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



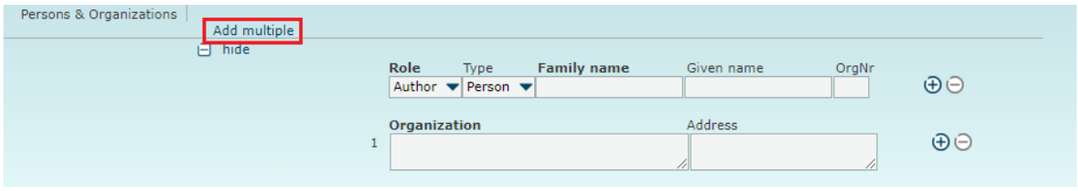
- Also delete the Organisation number in the OrgNR-field.
  - Now you can add another person or delete the blank entry field with the ⊖ minus-icon to the field's right.

10.4.16 Add multiple people as creators

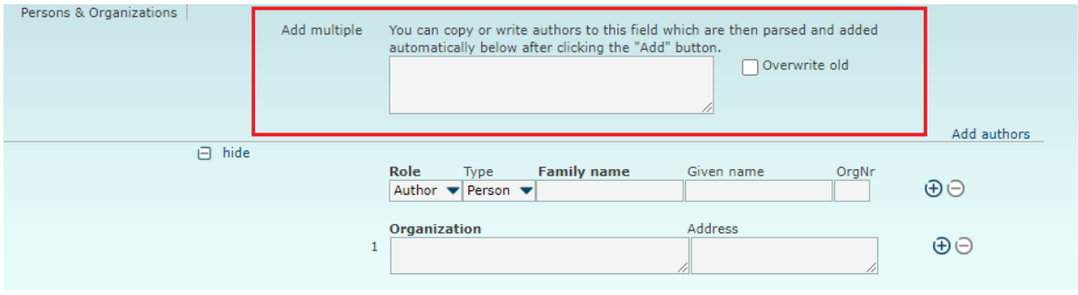
For the entry of publications with many authors, the function "add multiple" simplifies the work. The function is available in the "Persons & Organizations" section.

⚠ 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.

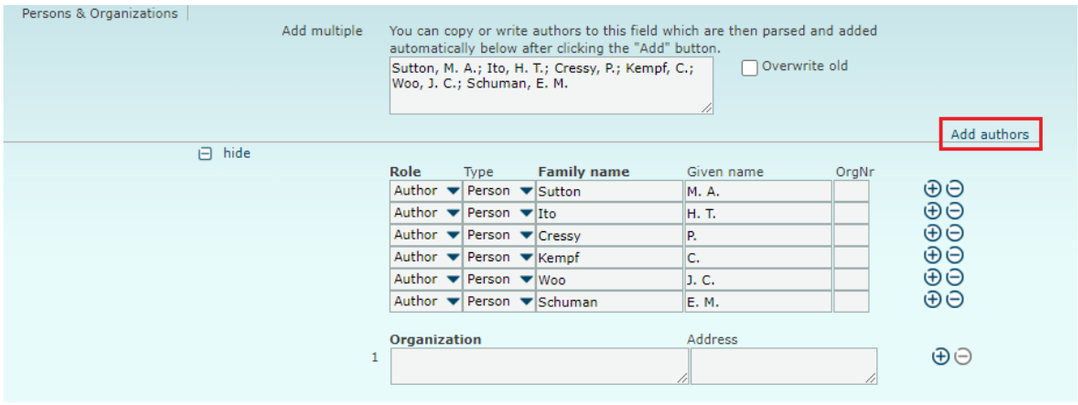
To use the "Add multiple"-function, proceed as follows:



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



- 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.



- 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:

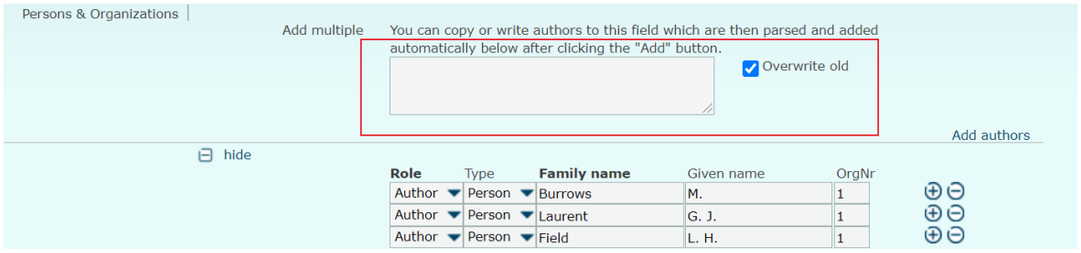
In PubMan, no more than approximately 1500 authors can be specified per item. If this limit is exceeded, saving or releasing the item is not possible.

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.

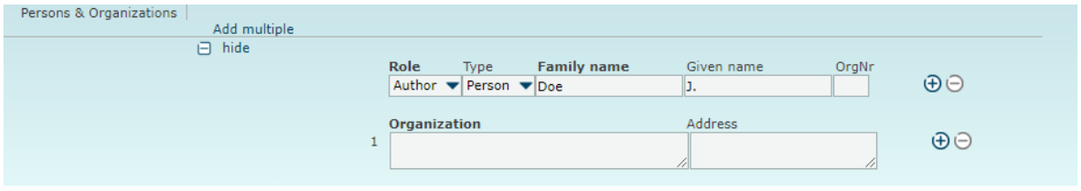
If the authors have already been added to the item, for example, by an import, they can be removed entirely in the function "Overwrite old":

- 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.



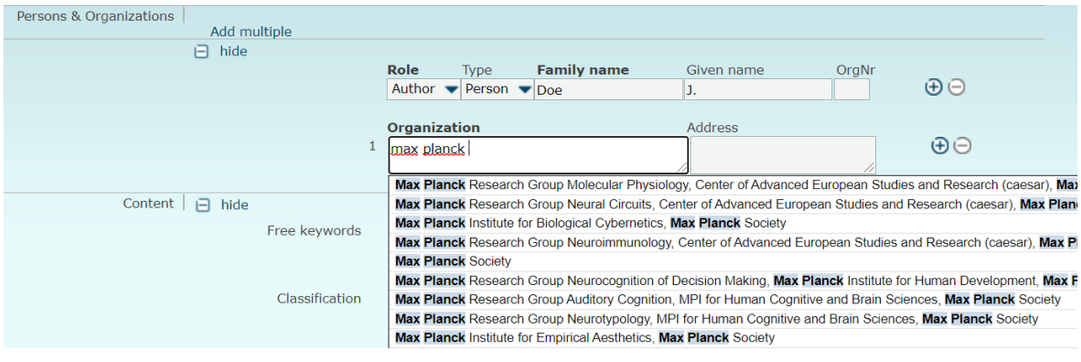
10.4.17 Add an organization as affiliation of an creator

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.



To add an organisation manually, proceed as follows:

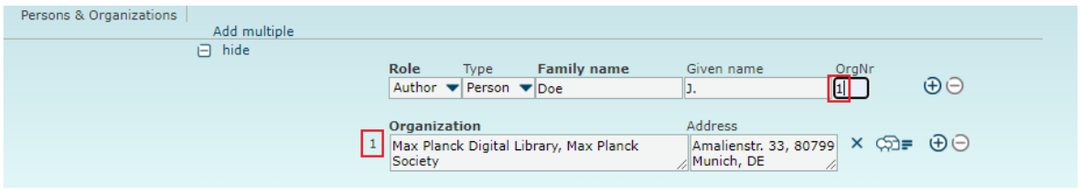
- Enter the organizational name in the field "Organization". After the second entered letter, an autosuggest-list of organizations appears.



- 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.



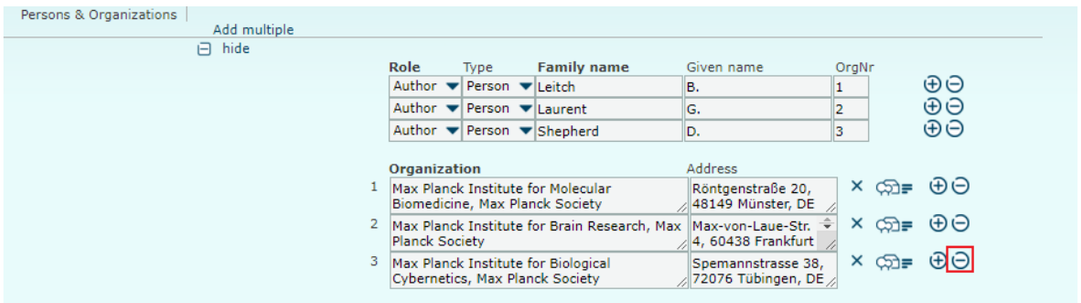
If you want to enter an organization that is not listed in the autosuggest list, enter it manually. Also, create a link using the organization number.

⚠ 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 PuRe-Support .

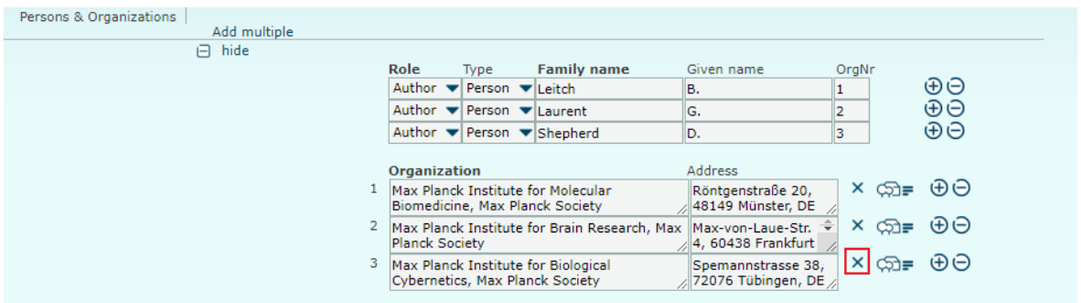
10.4.18 Remove organization from entry mask

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

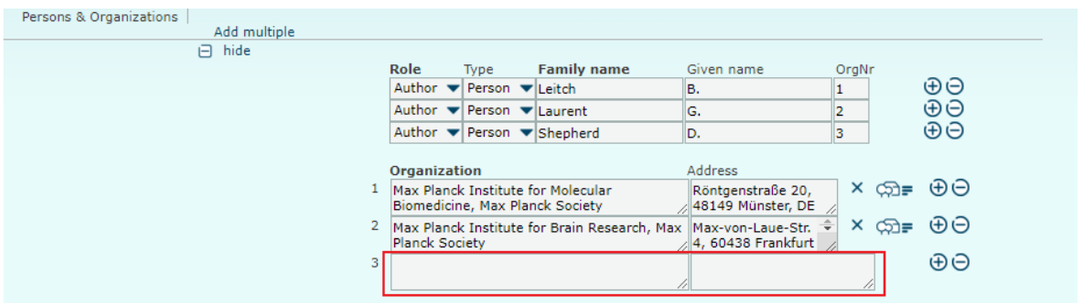
- Click on the ✕-icon next to the organization field.



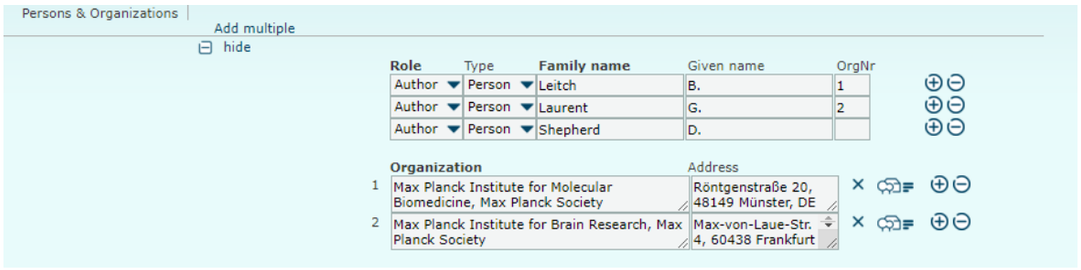
The "Organization" field will be cleared.



- Or remove the entire field by clicking on the ⊖-icon.



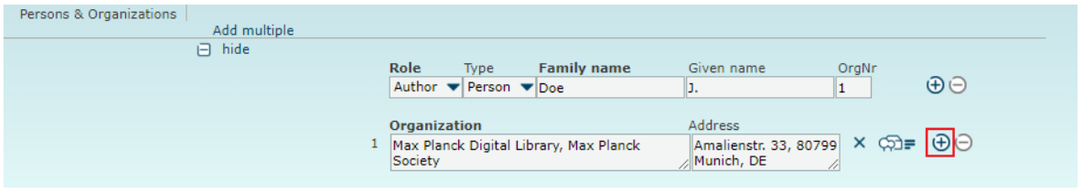
The line will be removed.



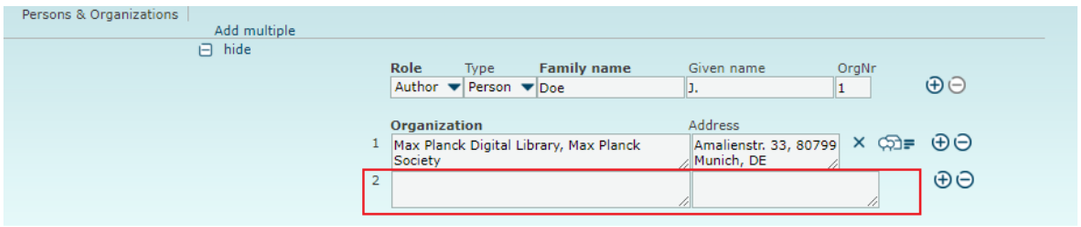
10.4.19 Link creators to multiple organizations

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:

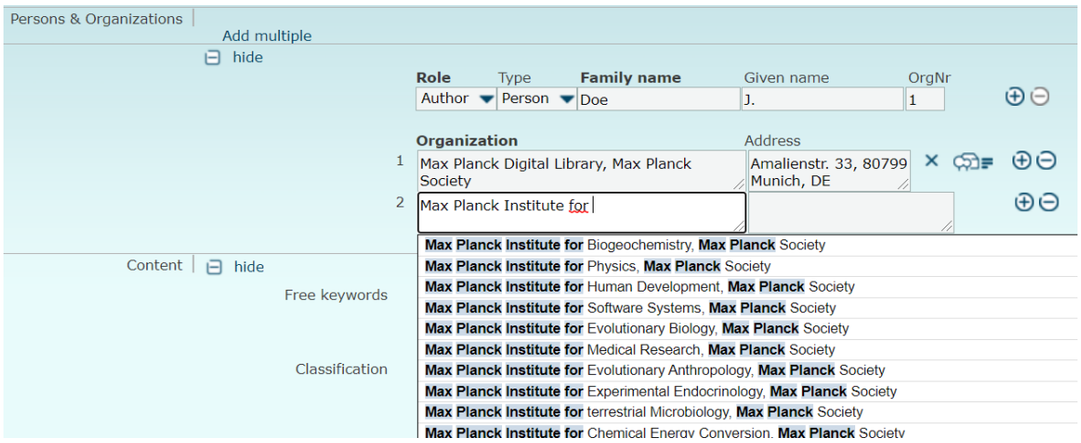
- Enter an author into the entry mask. For more information, see chapter "Add person as creator" . Name and affiliation will be inserted automatically.
- Add another "Organization" field by clicking on the plus-button to the right of the "Organization" field.



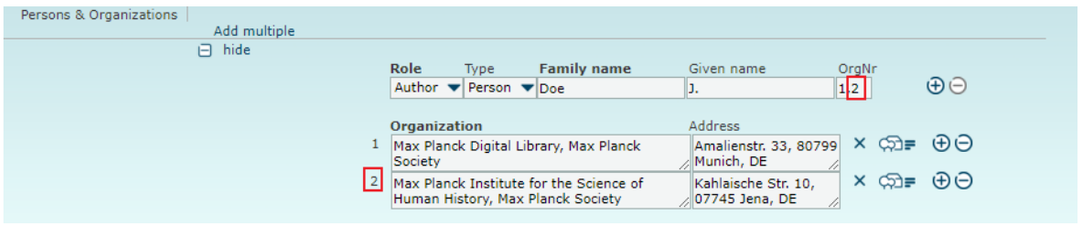
Another field will be added.



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



- 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.

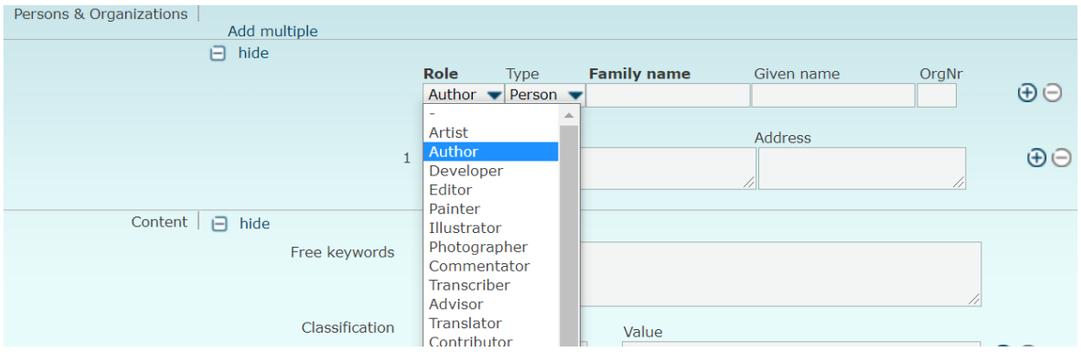


10.4.20 Add an organization as creator

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

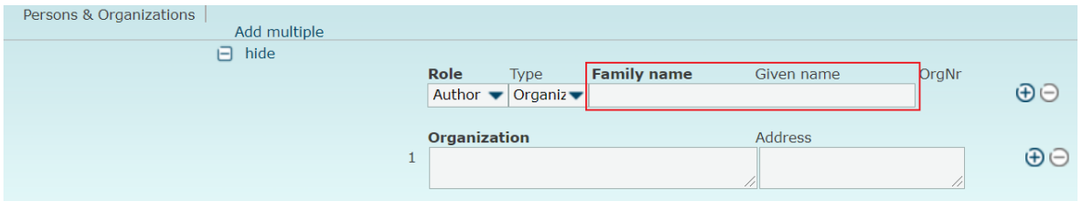
To add an organization as an author, proceed as follows:

- Click on the -icon in the "Role" field.

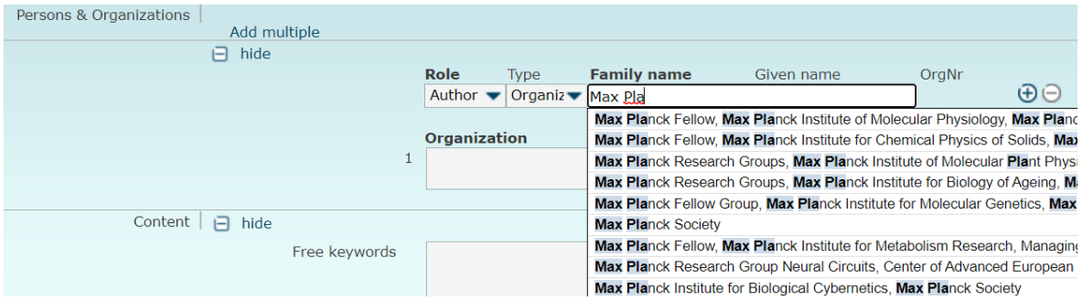


- All entries in the drop-down menu are displayed. Select a role for the organization by clicking on the appropriate entry. The selected role will be highlighted in blue.
- Click on the -icon in the "Type" field to open the drop-down menu.

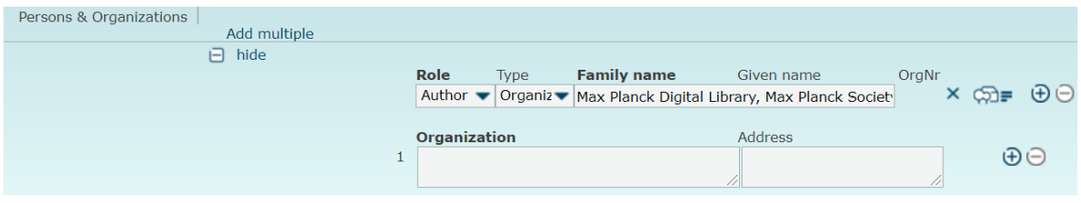
- Select the type "Organization". The entry fields for last name and first name change to one single input field.



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



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

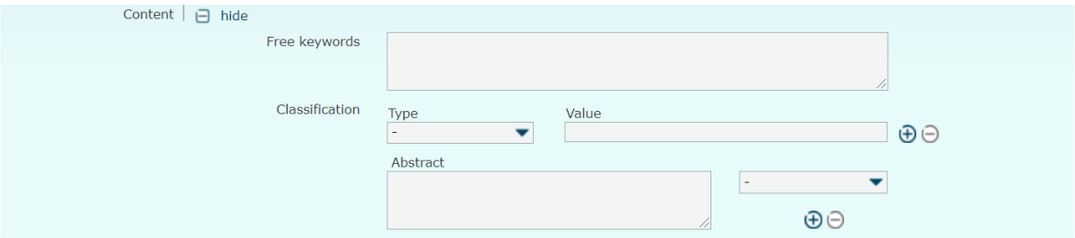


- The -icon appears behind the "Organization" field. Clicking on the icon opens the organization description.
- If you want to enter an organization that is not included in the autosuggest-list, enter the name in the entry field.

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

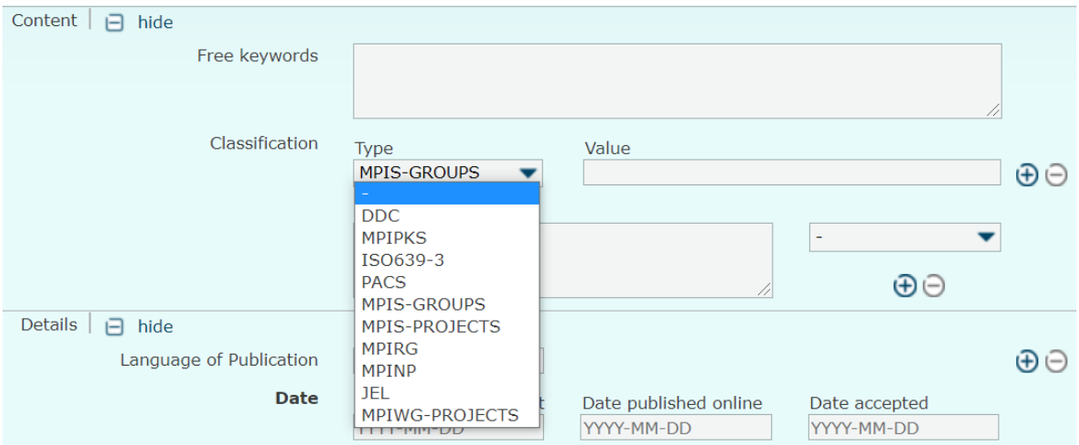
10.4.21 Add metadata to the content section

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

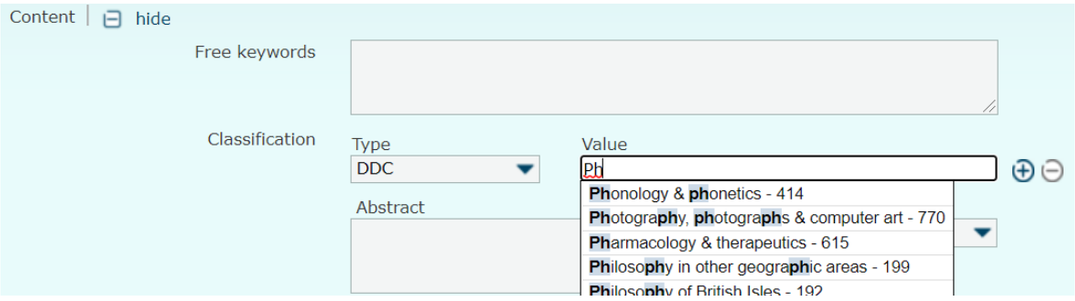


Proceed as follows:

- 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.



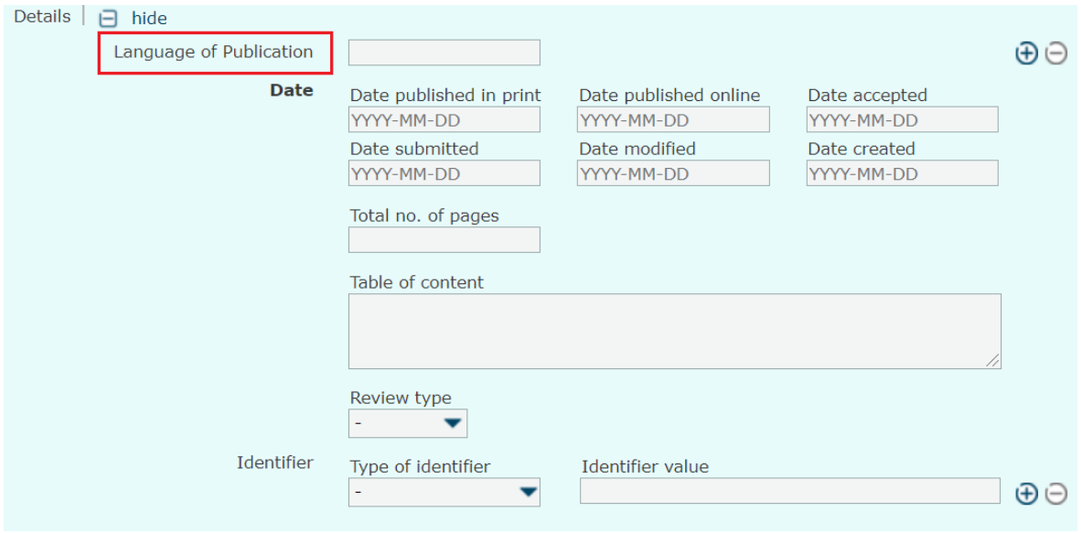
- Enter the value of the classification in the "Value" field. After entering the first two letters, the autosuggest-list appears.



- 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.

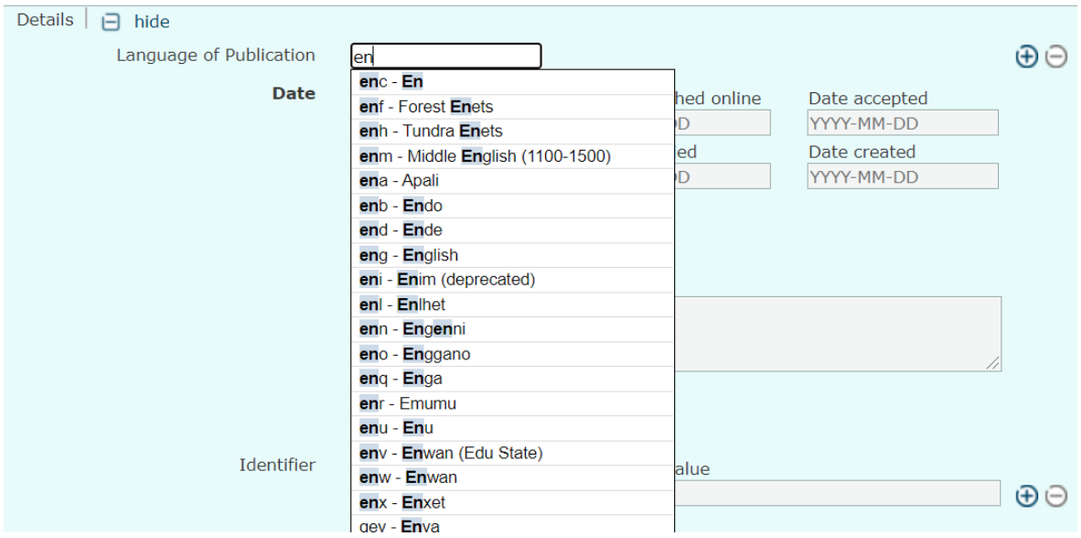
10.4.22 Add a language

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

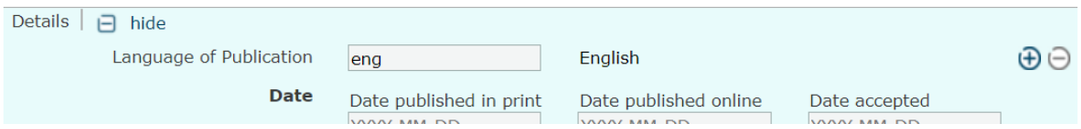


Proceed as follows:

- 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.



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



10.4.23 Add a date

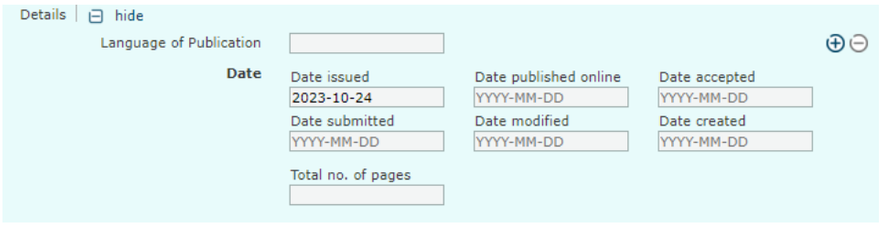
The date of a publication can be entered in the "Details" area. Publications go through different stages in the course of their publication. Therefore, corresponding fields for various dates are available.

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 chapter "Search - Search dates" .

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

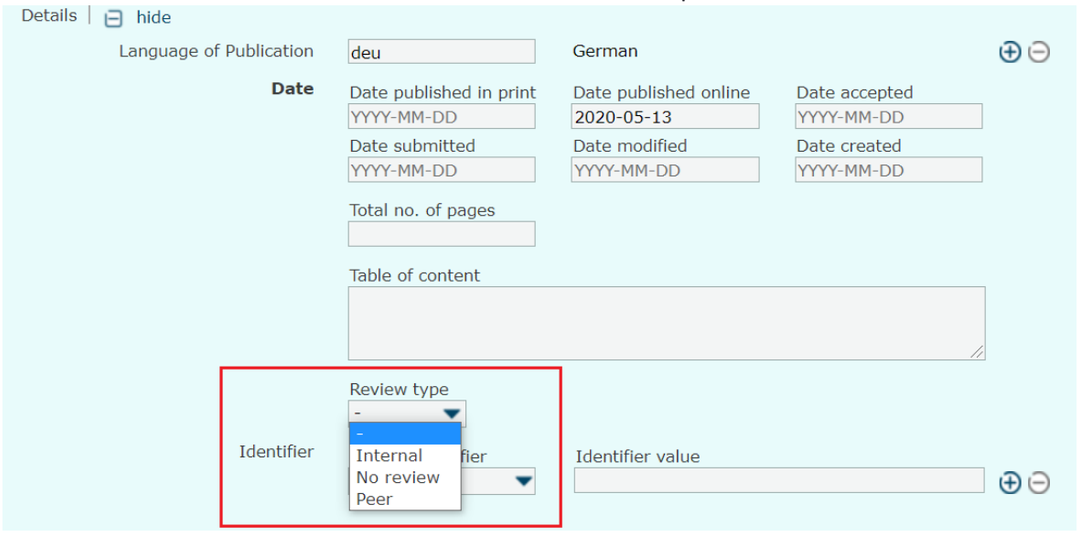
To enter a date, proceed as follows:

- 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".



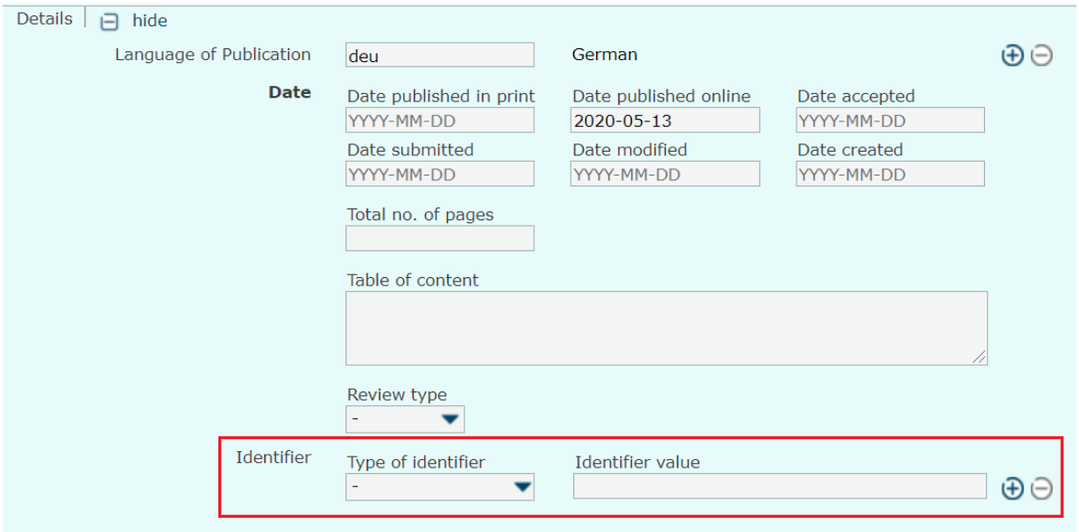
10.4.24 Add a review type

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.



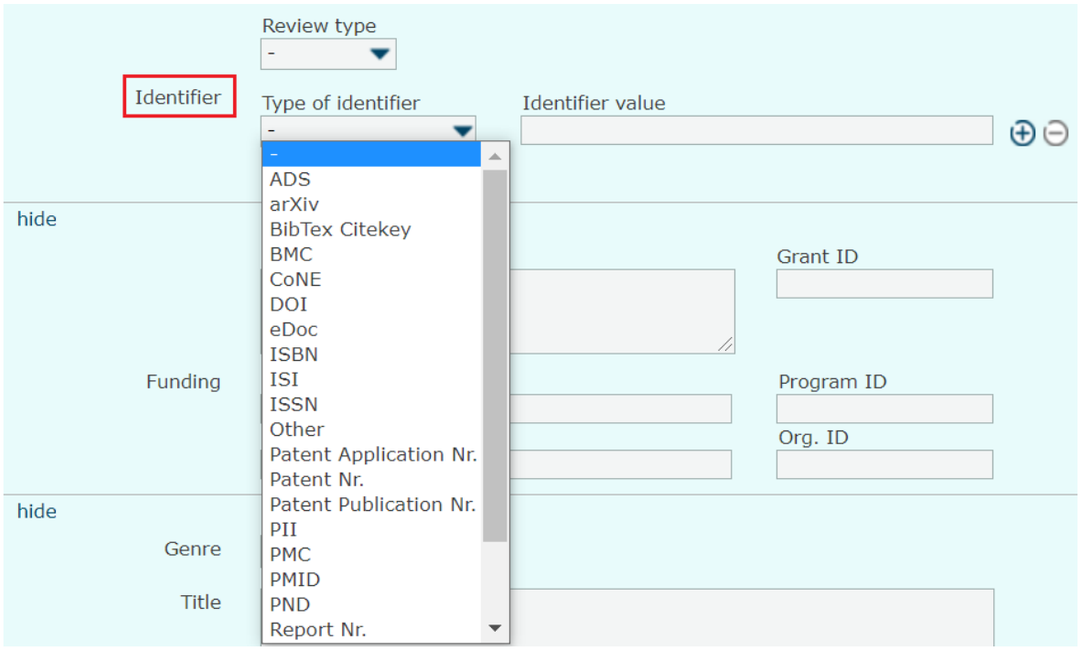
10.4.25 Add an identifier

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.



To add an identifier proceed as follows:

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



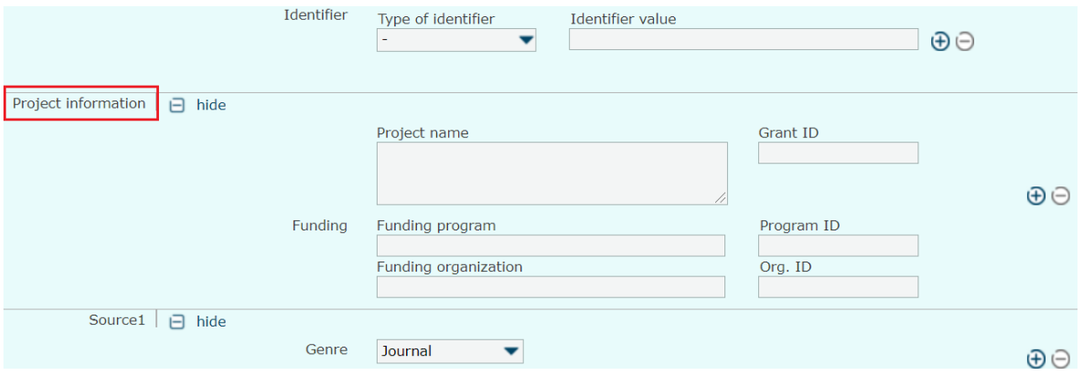
- Select the type of identifier.
- You can choose between: ADS,"Other", arXiv, BibTex Citekey, bioRxiv, BMC, ChemRxiv, CoNE, DOI, EarthArXiv, EdArXiv, eDoc, ESS OpenArchive, ISBN, ISI, ISSN, medRxiv, Patent Application Nr., Patent Nr., Patent Publication Nr., PII, PMC, PMID, PND, PsyArXiv, Report No., 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).

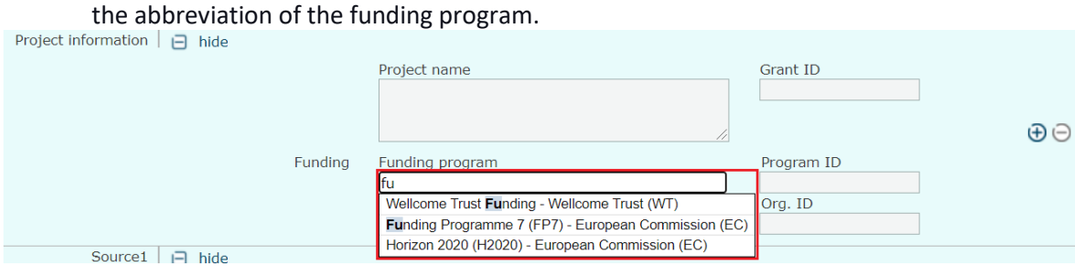
Note for Max Planck Society users: The repository OpenAIRE harvests PuRe-data via the OAI-PMH interface. Harvested are all datasets that have at least one public full text and one of the content categories "Any Fulltext", " Preprint", "Postprint" or "Publisher Version", or which have a project ID specified.



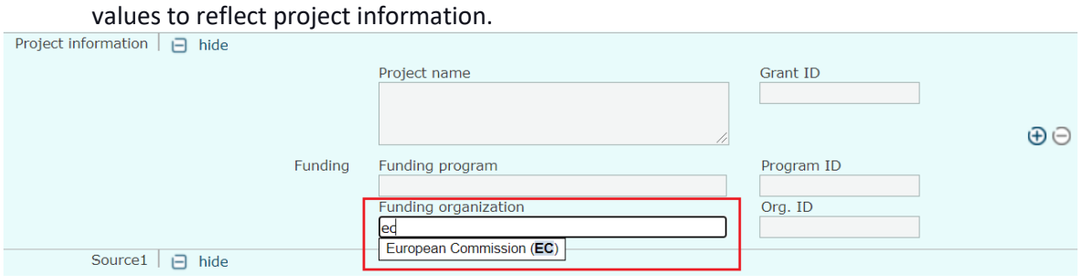
To add project information about a publication, proceed as follows:

- 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.

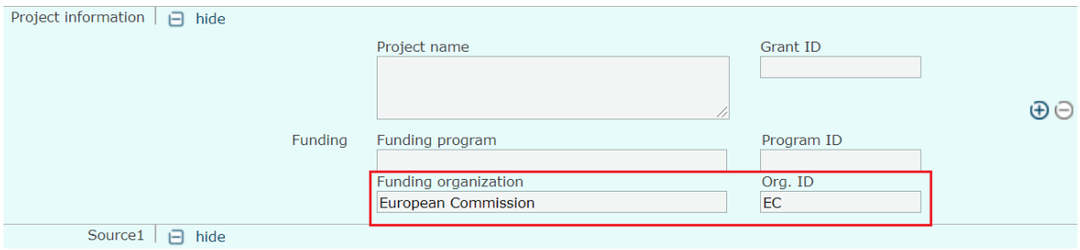
- An autosuggest list supports the "Funding program" field. After entering the first few letters of the funding program, the autosuggest list appears. Alternatively, you can enter the abbreviation of the funding program.



- 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.



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



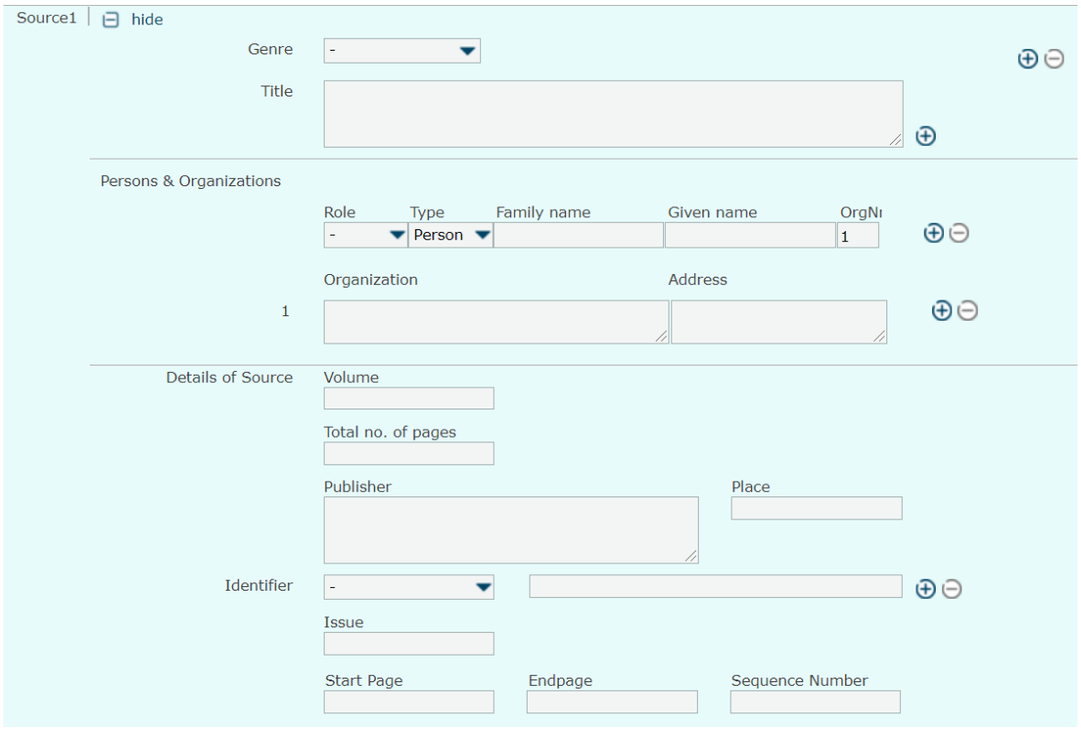
- The abbreviation of the funding organization will be entered in the "Org.-ID" field. This field is significant for OpenAIRE and will be filled automatically when the funding program or funding organization is selected.

⚠ 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.



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 chapter "Enter journal title of the source" .
- Enter the details of the source.

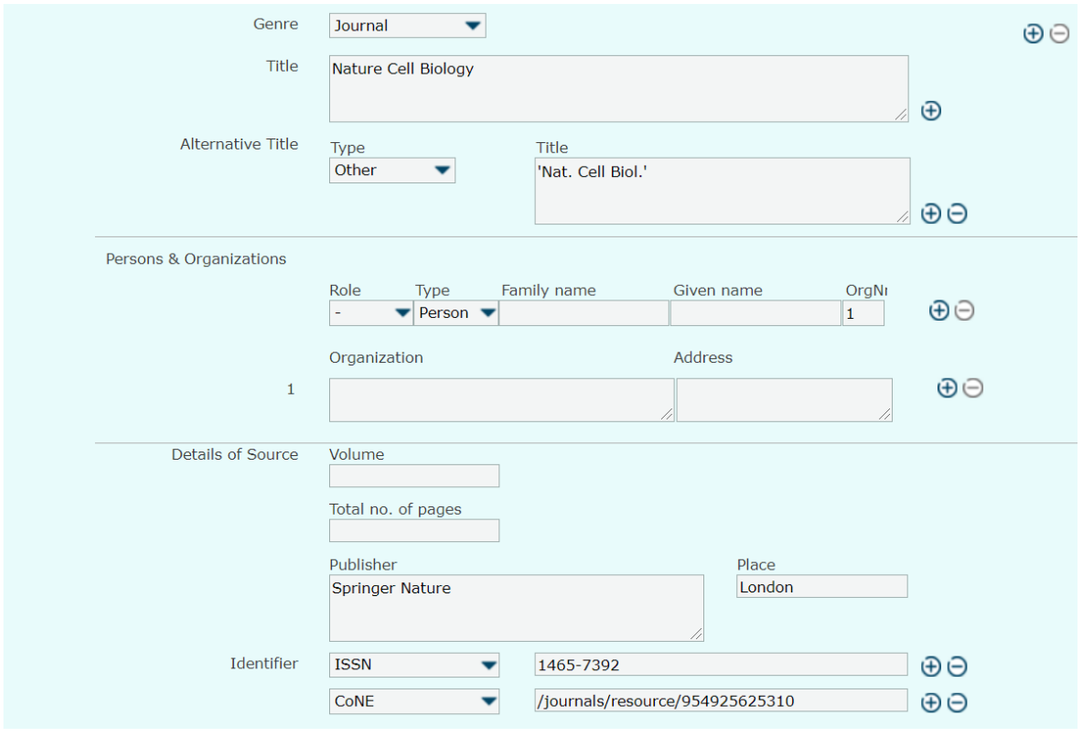
⚠ Attention: Some journals do not use page numbers and instead have so-called "E-Number" or "Sequence Number". It can be entered in the "Sequence Number" field.

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.

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



10.5 Fetch data

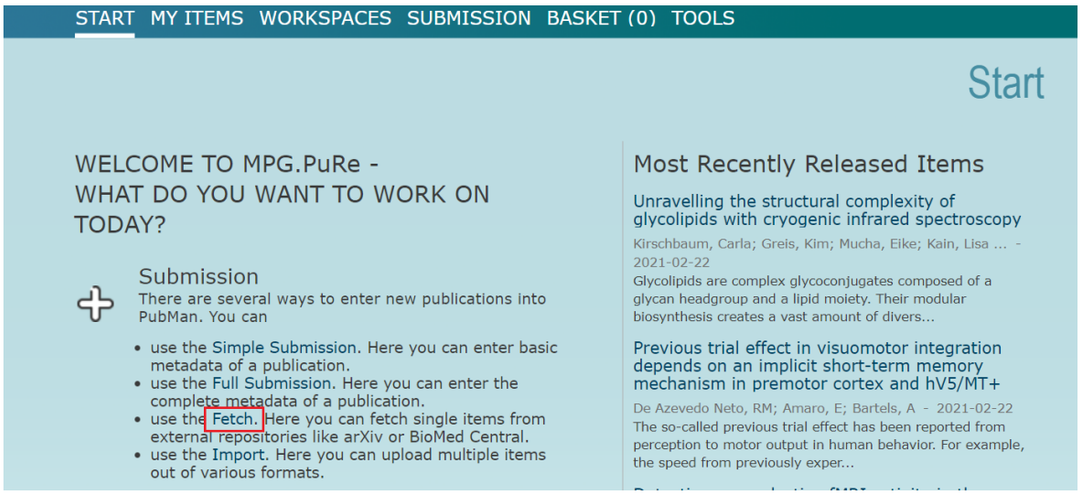
This function allows you to fetch metadata and full text(s) from other system like **arXiv** or **Crossref**.

⚠ 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.

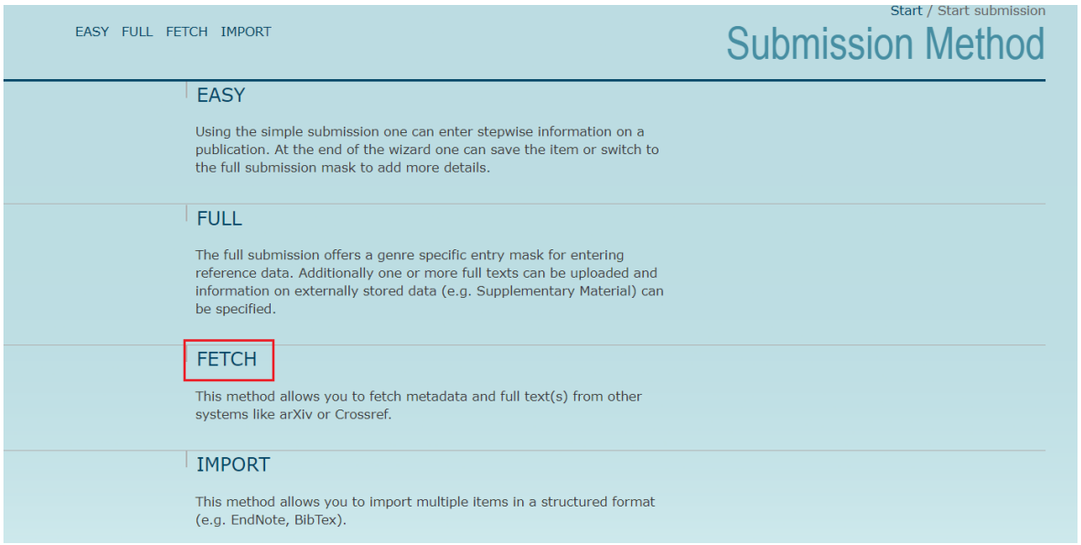
- If you have the required permissions, the "Submission" area for the data entry will appear on the start page.



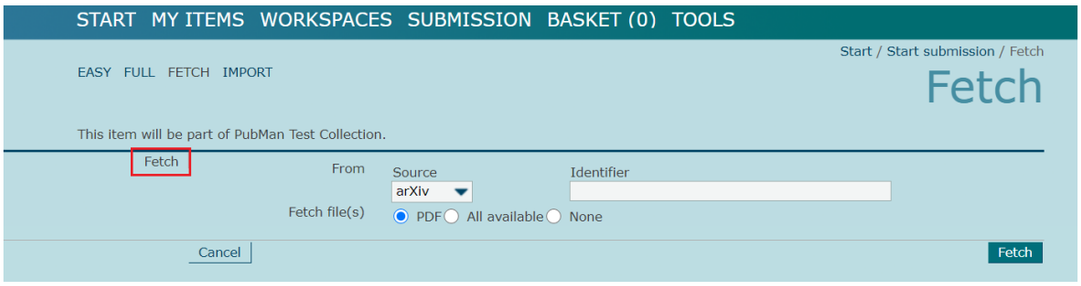
- Click on "Fetch". The enty mask or available contexts open.

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.



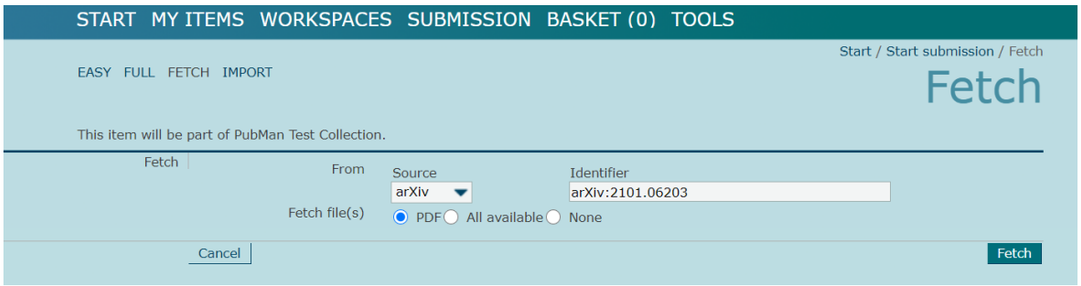
- Click on the "Fetch" button.
- In the next step, select a context in which the publication should be entered.
- You will then be directed to the "Fetch" entry mask.



10.5.2 Import single items from a server

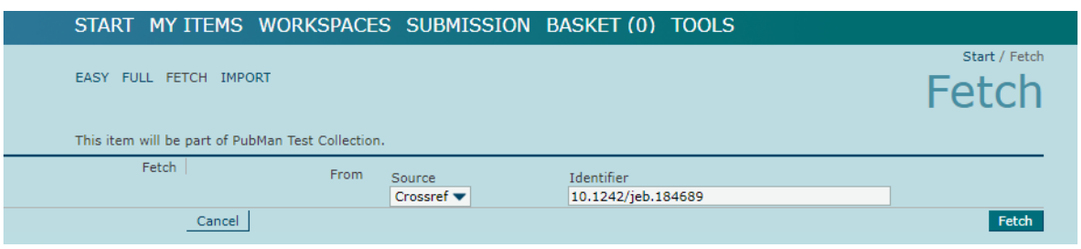
To import individual items from a server, proceed as follows:

- 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.



⚠ 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.



- 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
BMC_Xml	.xml
EndNote	.txt

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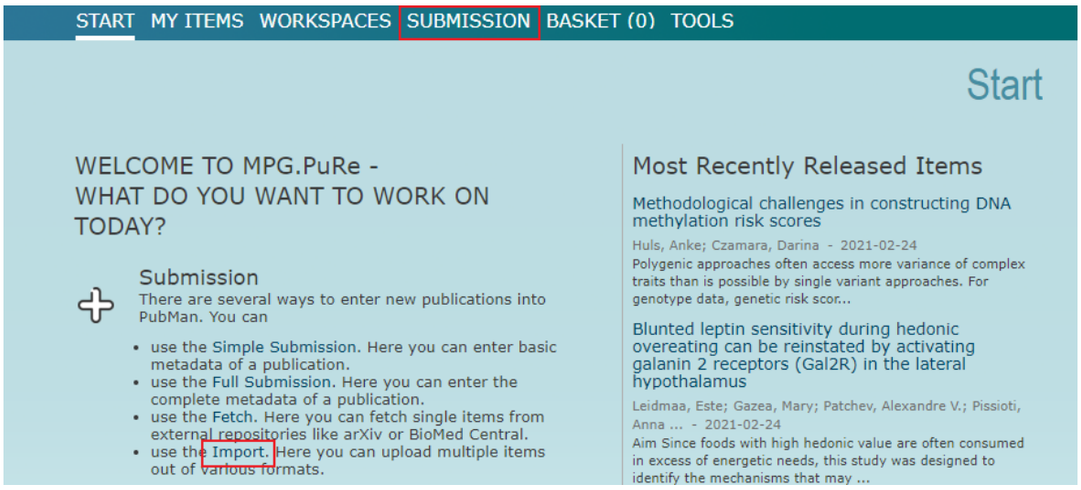
10.6.1 Open import

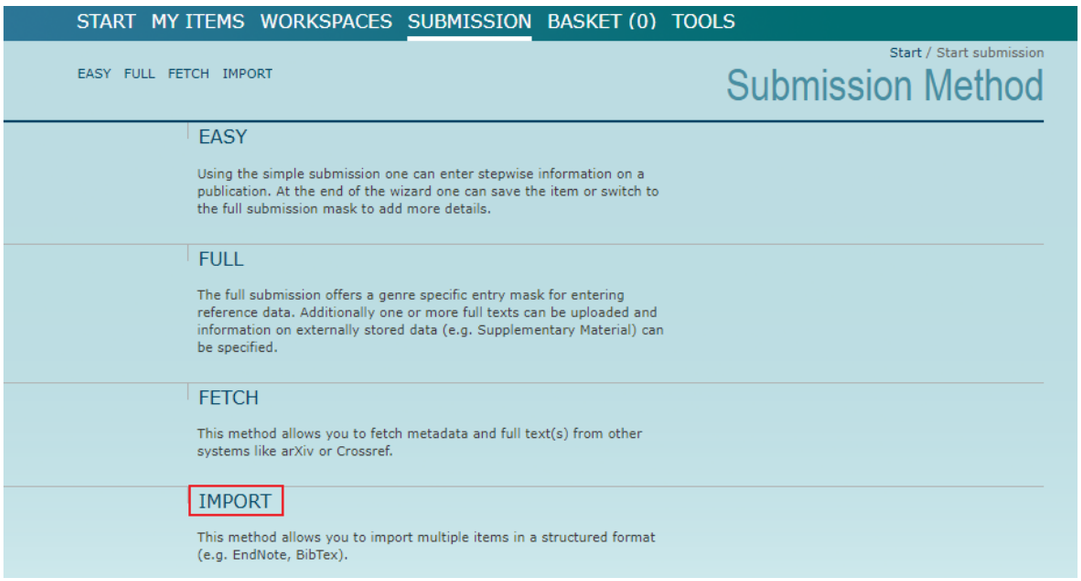
To open the import mask, procees as follows:

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



Or:

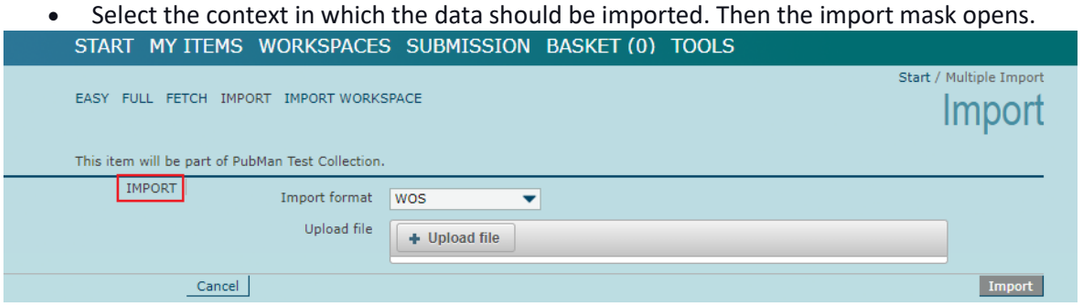
- After login, the import can also be opened via the "Submission" menu item in the navigation menu.
- The overview page of the submission opens. Then click on "Import".



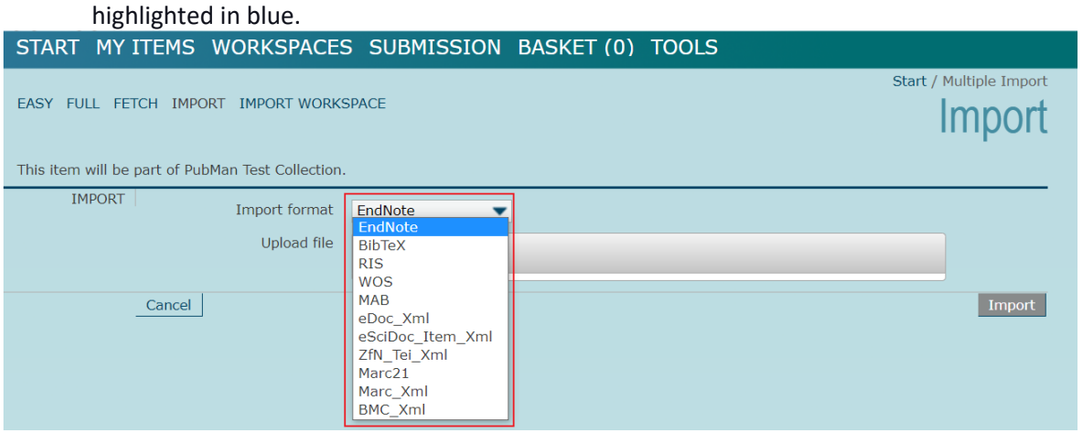
10.6.2 Import records

To import data from other systems, proceed as follows:

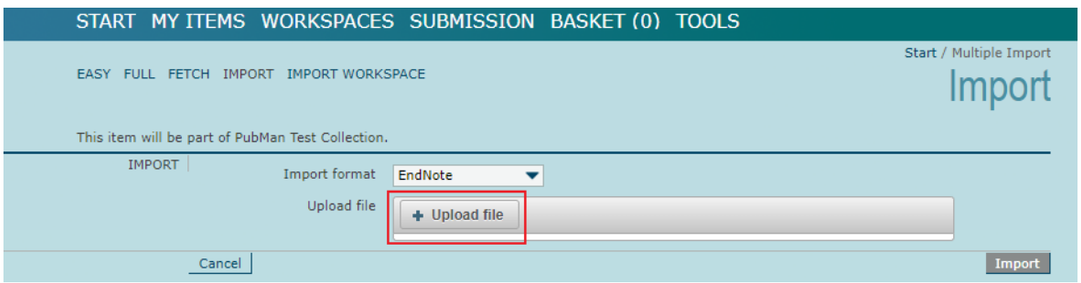
- Open the import function.
- Select the context in which the data should be imported. Then the import mask opens.



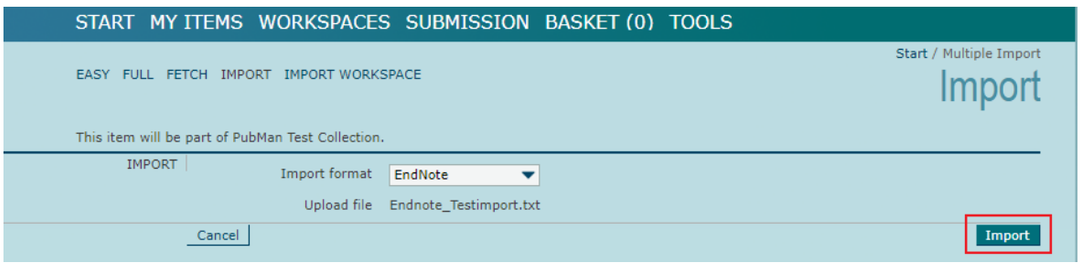
- Choose an appropriate import format in the dropdown menu. The selected format is highlighted in blue.



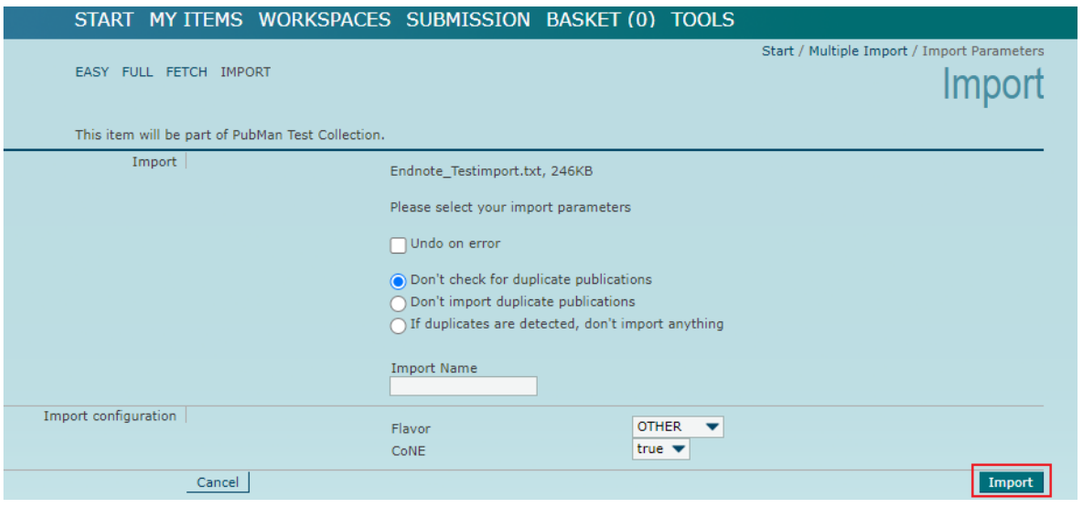
- Click on the "Upload file" button to select the file you want to upload.



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



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



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

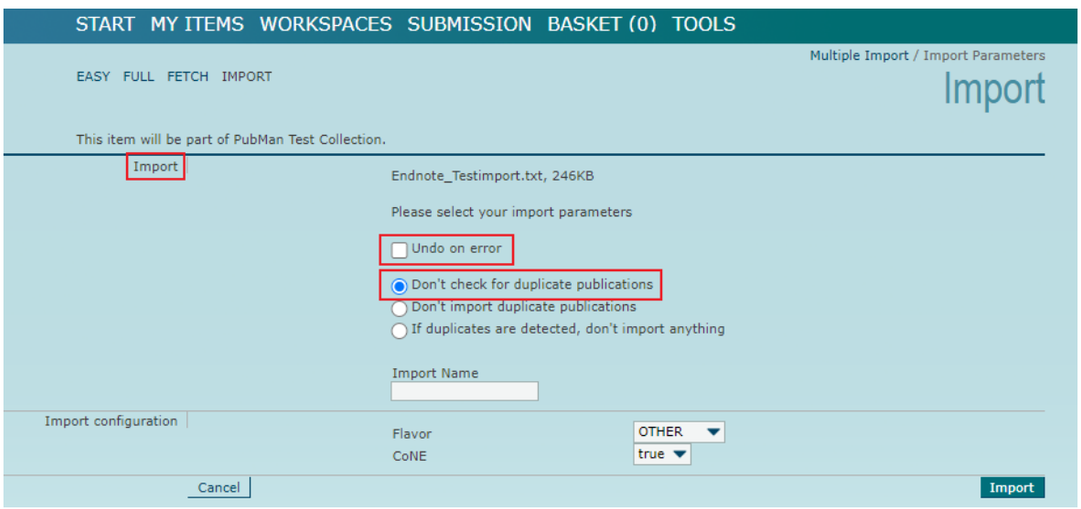
10.6.3 Specify settings for import

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.



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.

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.

⚠ **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.

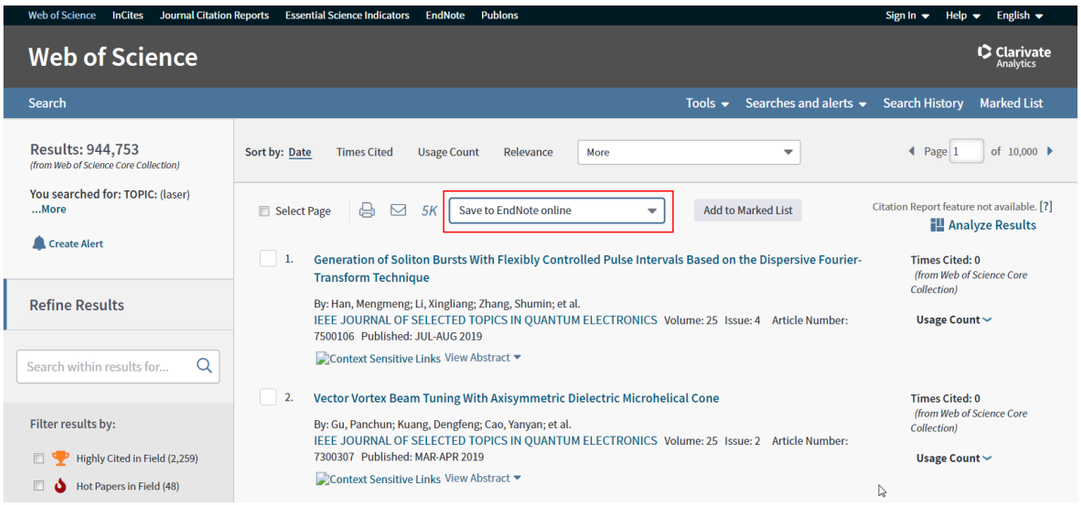
To set up the import configuration for the BibTeX format, proceed as follows:

- 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.

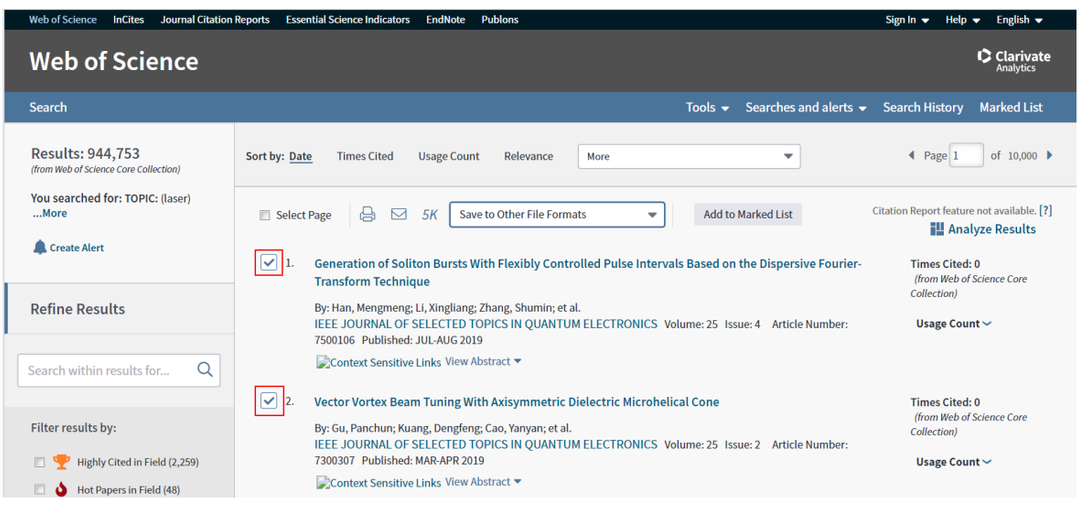
10.6.4 Export data from WoS for the PuRe import

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: http://apps.webofknowledge.com
- Perform a search in the "Web of Science" portal. A results list will be displayed.

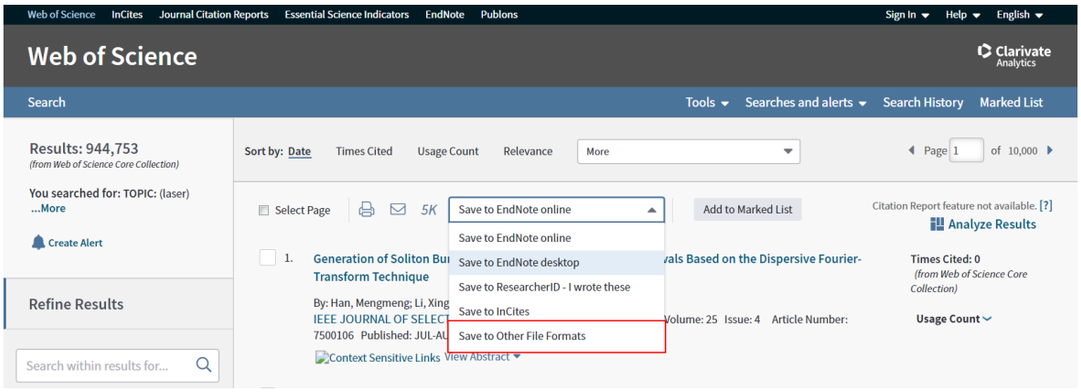


- Check the titles which should be exported.

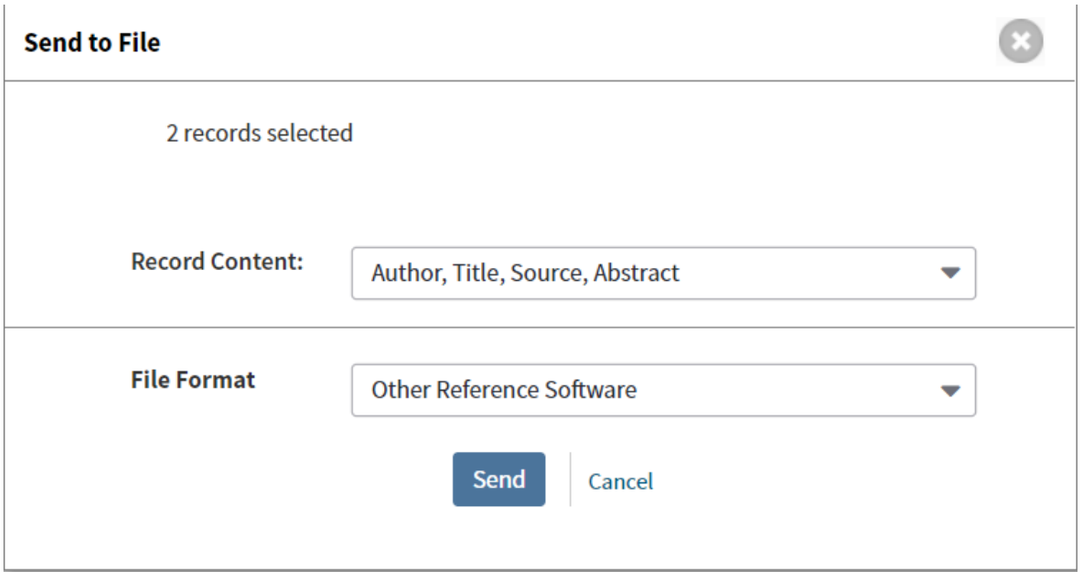


- Or export **all results** by specifying the export range in the next step.

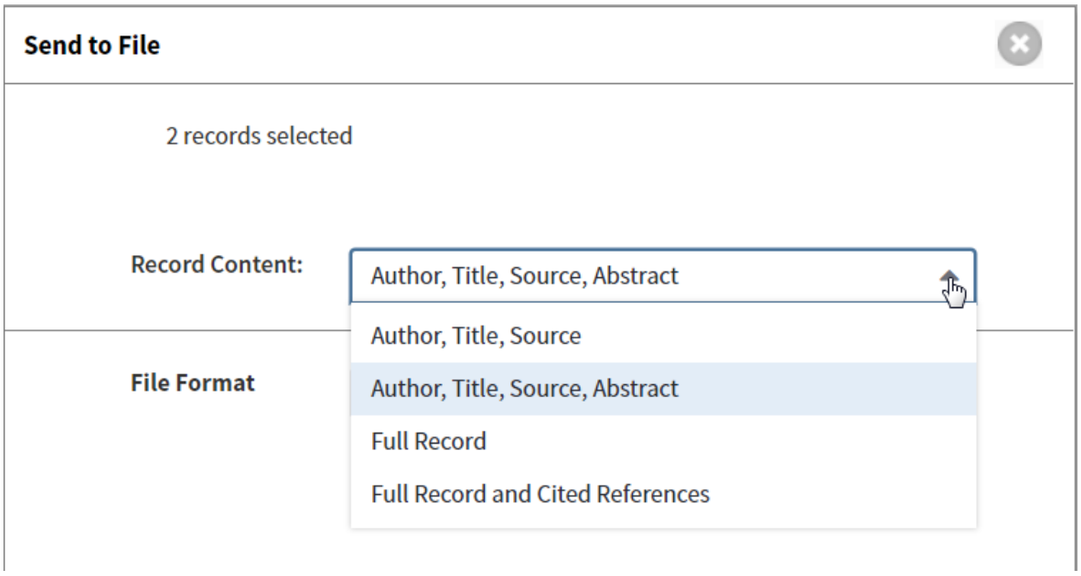
- Select the "**Save to Other File Formats**" option from the drop-down menu.



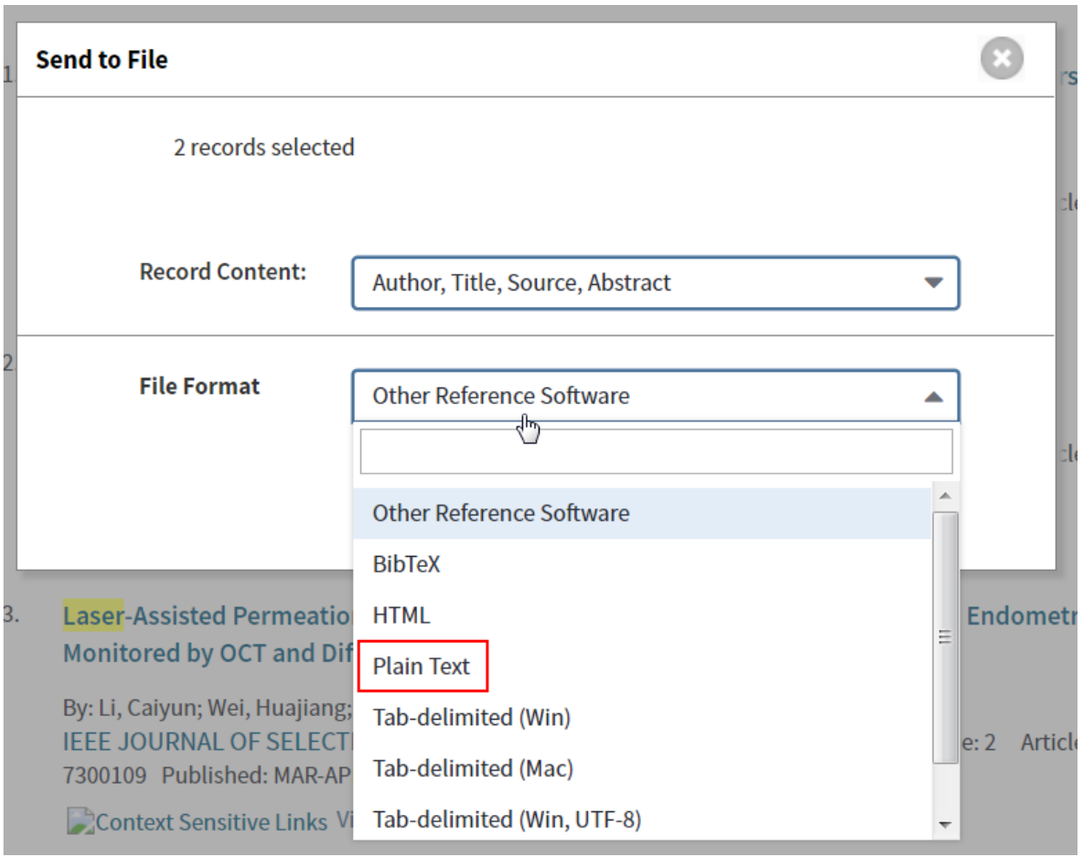
- Other **export options** are displayed to choose from.



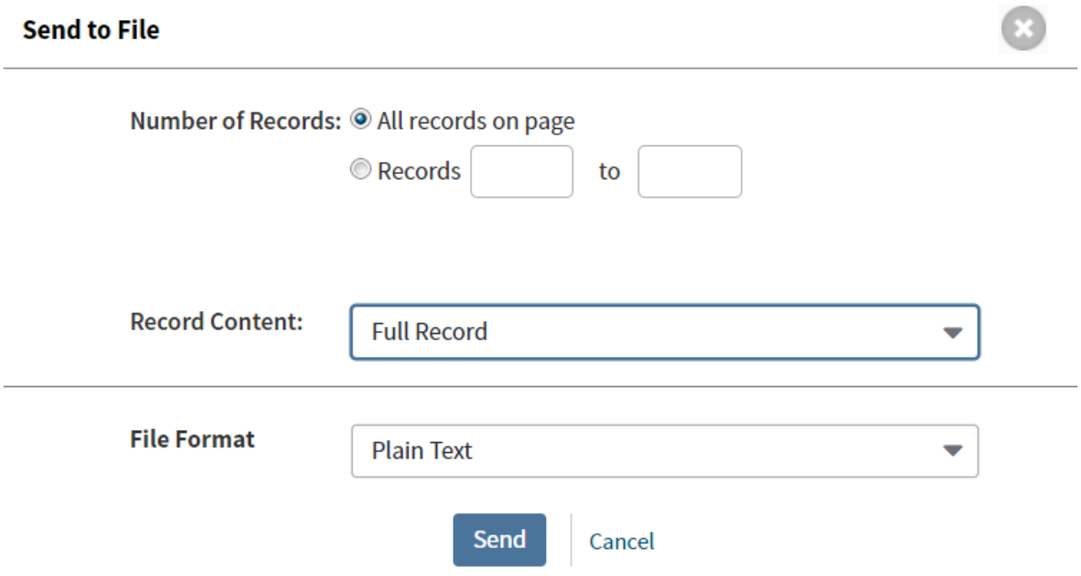
- In the "Record Content" field, select which **data** to export.



- In the "File Format" field, select the export format "**Plain text** ".



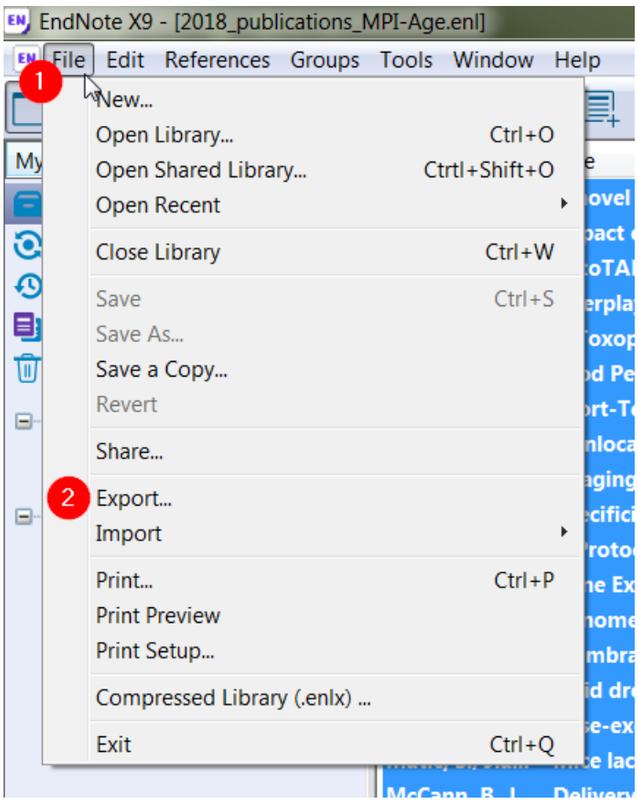
- Start the download by clicking the "**Send**" button.



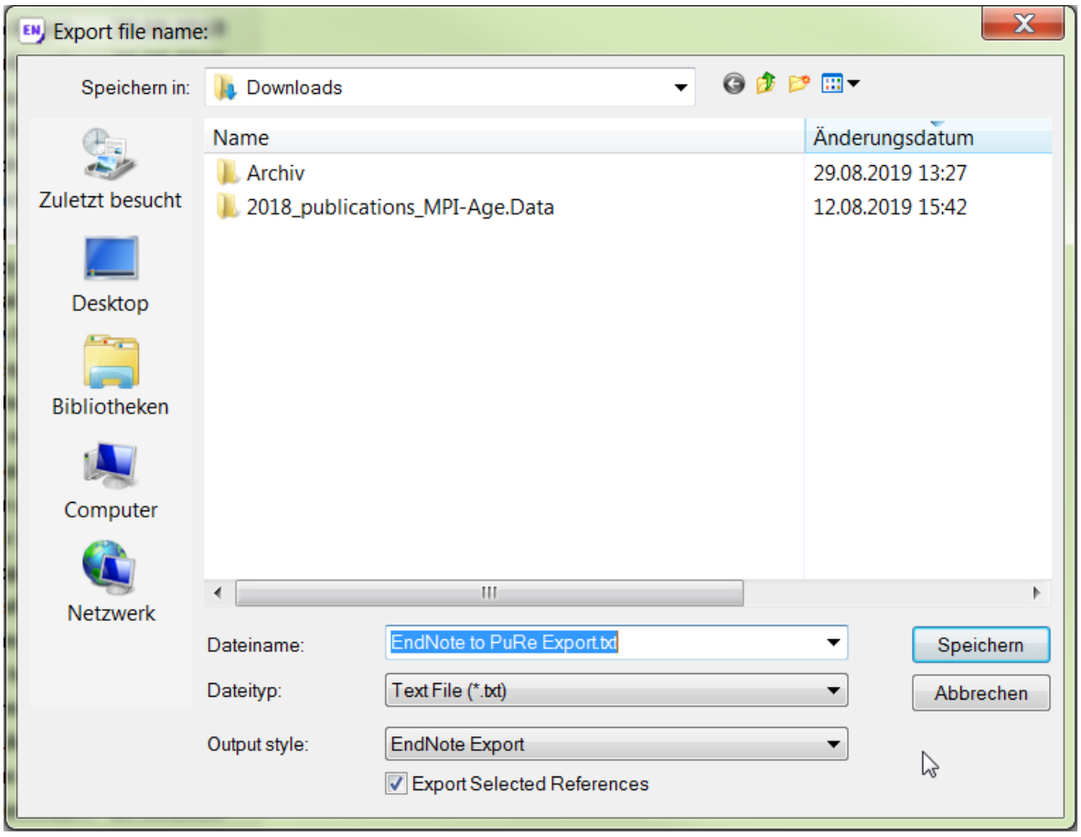
- The **download manager** of your browser opens.
- Select whether the file should be opened in the editor or saved on the computer. The file will be opened or downloaded.
- To import the data into PubMan, perform an import with the WoS file. For more information, see chapter "Import records" .

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.



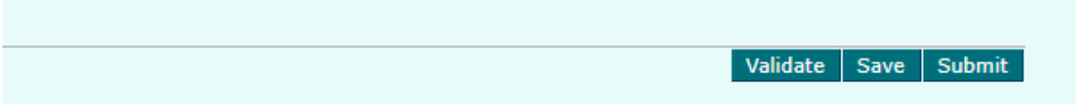
Here you select "Export...". The "Export file name:" window opens. Select where the file should be saved. Enter the file name and select the file type "*.txt" and the output style "EndNote Export".



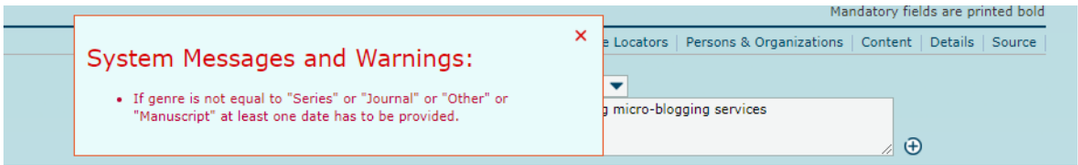
You can import the saved file in the "EndNote" import format. The further steps are described in the chapter "Import records".

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:



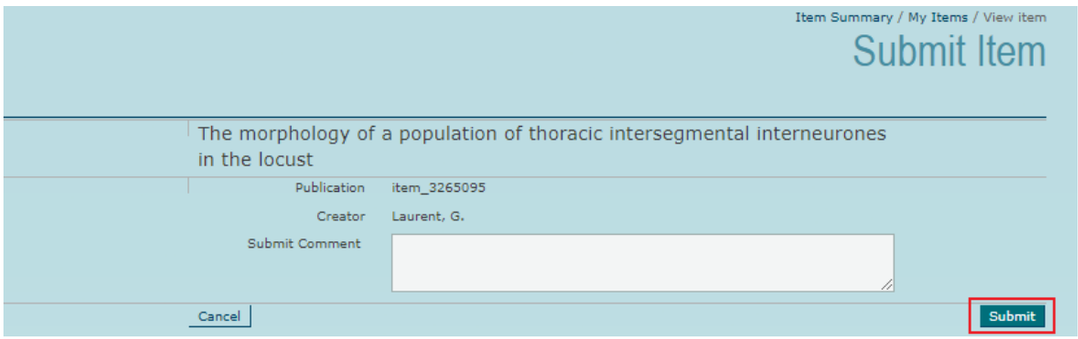
- **Validate:** The system checks the item for correctness. If the item is not valid, for example, if a mandatory field such as the date field is not filled in, a warning message is displayed. The item can still be edited in the same entry mask. Validation does not automatically save the item.



- **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 chapter "Workflow".

- **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 chapter.

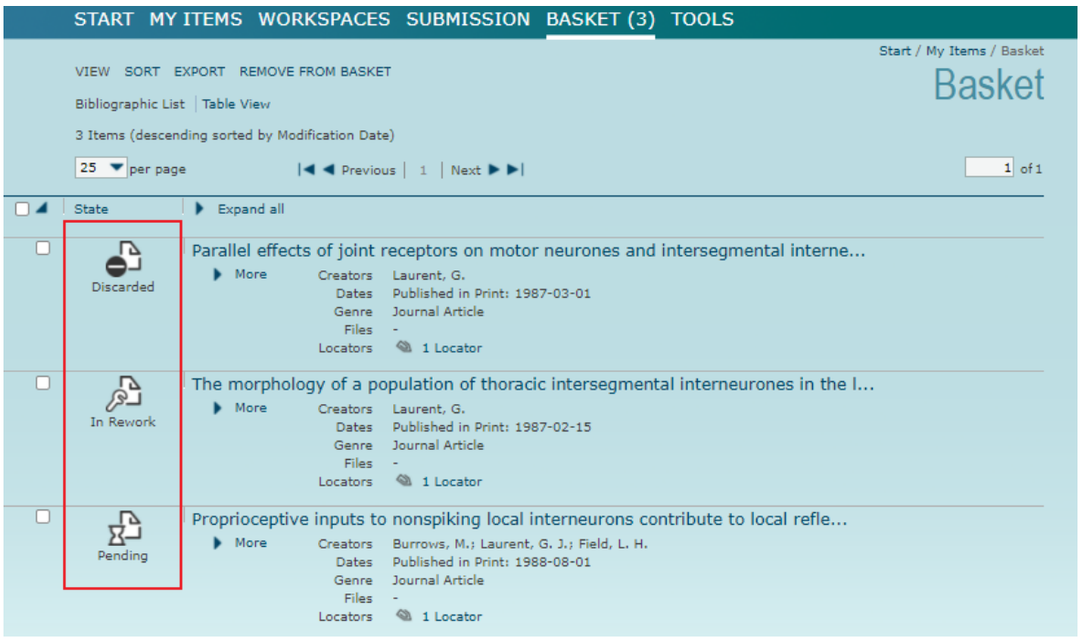


After entering the data in the simple entry mask, it is possible to change to the advanced entry mask by clicking on "Add more details now" or to save the item. The item is not automatically validated during the saving process.

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.

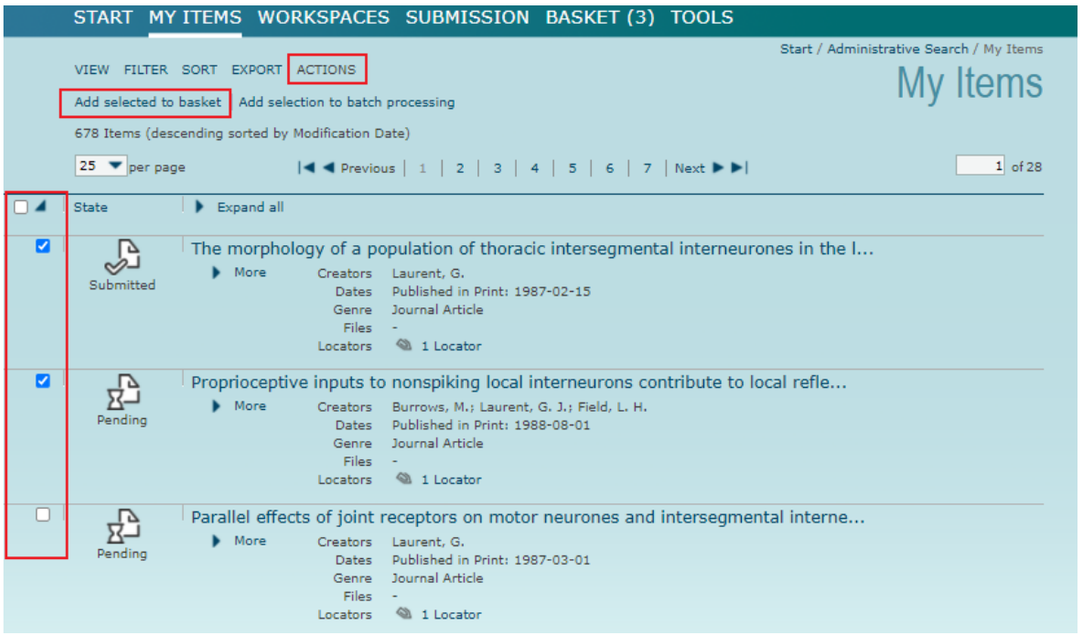
A maximum of 2800 items can be collected in the basket.



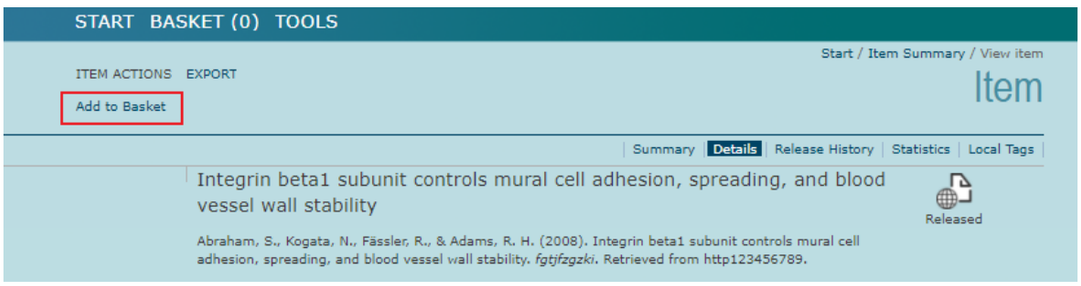
If an item from the basket is edited and released, then the item will be removed automatically.

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.



An item can also be added to the basket from the individual item view.

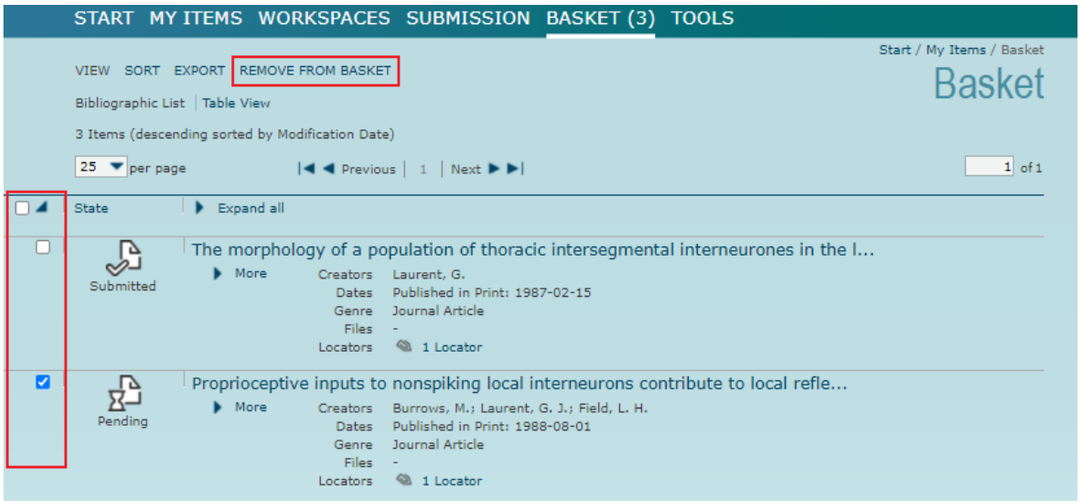


11.2 Open the basket

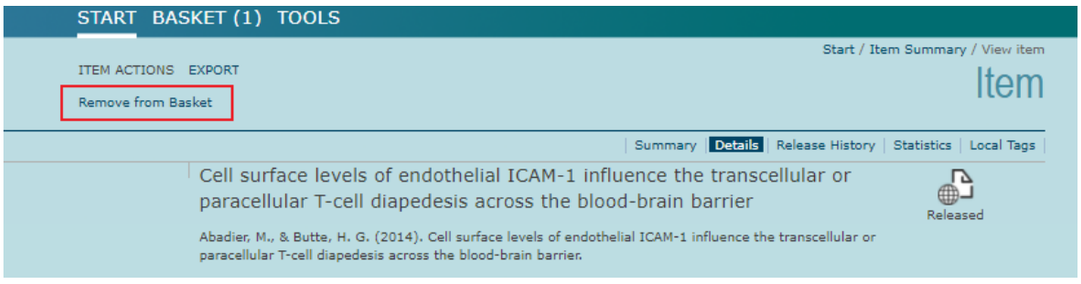
The basket can be accessed from any MPG.PuRe page - regardless of whether the user is logged in or not.

11.3 Remove from basket

You can remove items from the basket by checking the boxes to the left.



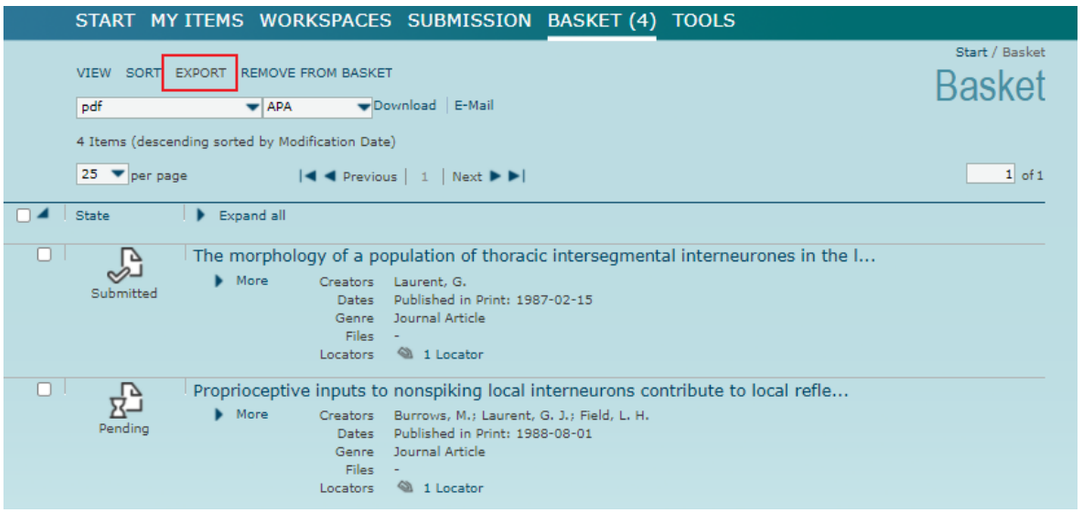
An item can also be removed from the basket in the individual item view.



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 chapter "List view -Export items from lists".



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 exporting from a list. A maximum of 5000 items can be exported at once, using the REST-interface.

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.

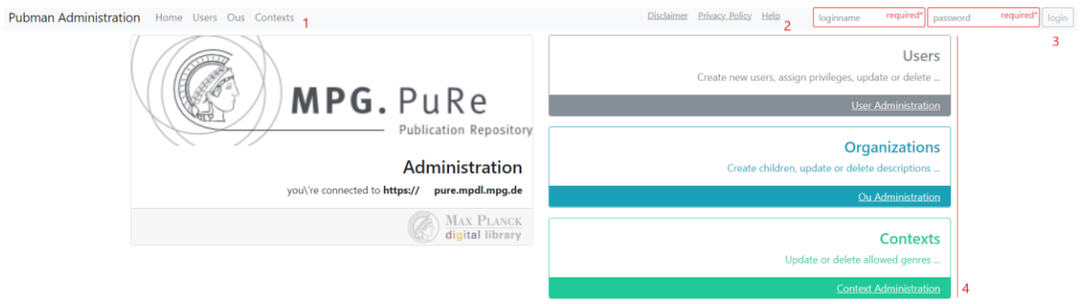
If you do not yet have the permission for the Admintool ("Local Admin"), please contact the MPG.PuRe Support .

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 MPG.PuRE Help page.

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

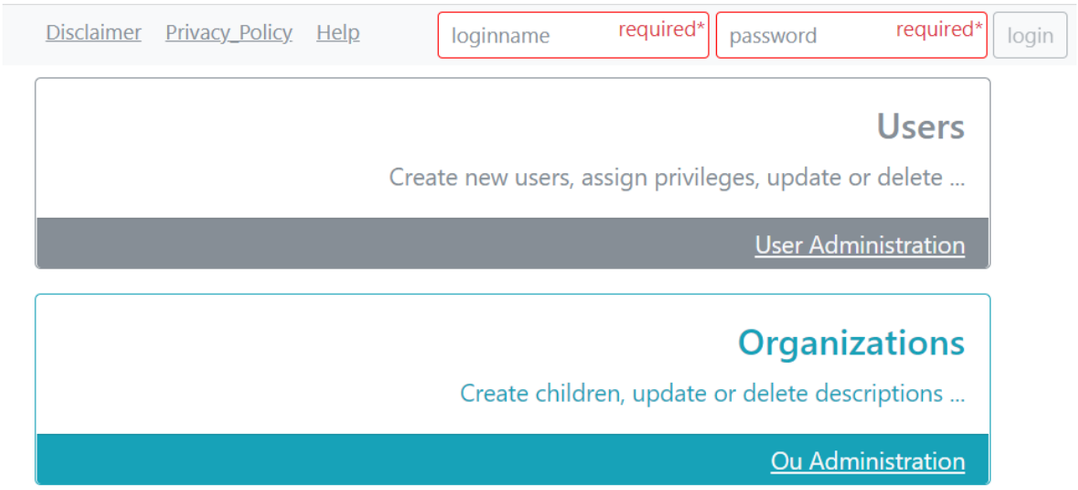
(2) Or directly by opening the link https://pure.mpg.de/admintool/home

12.1.1.2 Admintool Login

Use the login credentials from MPG.PuRe to log in to the Admintool.

Password changes set in MPG.PuRe are automatically applied to the Admintool.

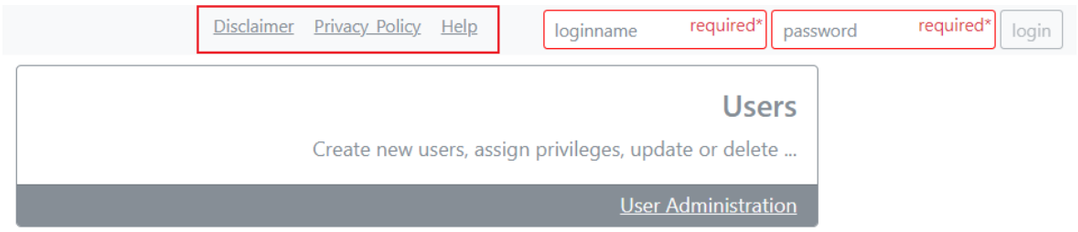
If you do not yet have the "Local Admin" permission for the Admintool, please contact MPG.PuRe-Support.



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.

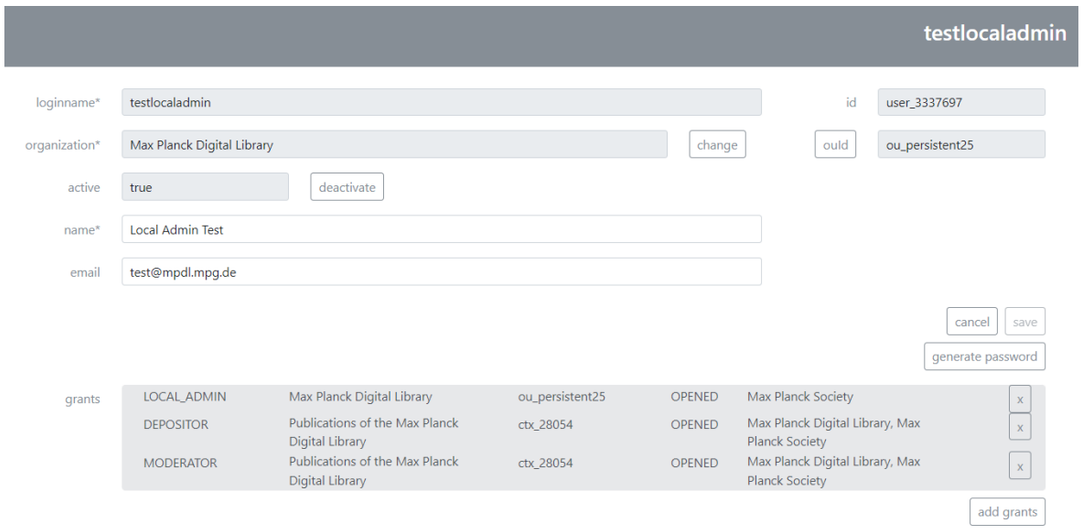
The "Help" function in the header redirects you to the MPG.PuRE Help page, where you will find, for example, the PuRe support contact details, the user manual or the FAQ.



12.1.2 Users

This section is used for the PuRe user administration. The function allows:

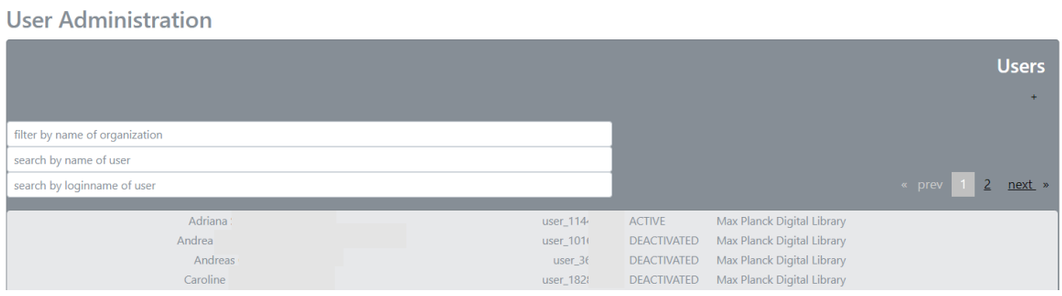
- Search for users
- Password reset
- Creation of PuRe user accounts
- Change information and permission of already created user accounts



12.1.2.1 Search for users

As a Local Admin, you can only search for users of your own organization (MPI):

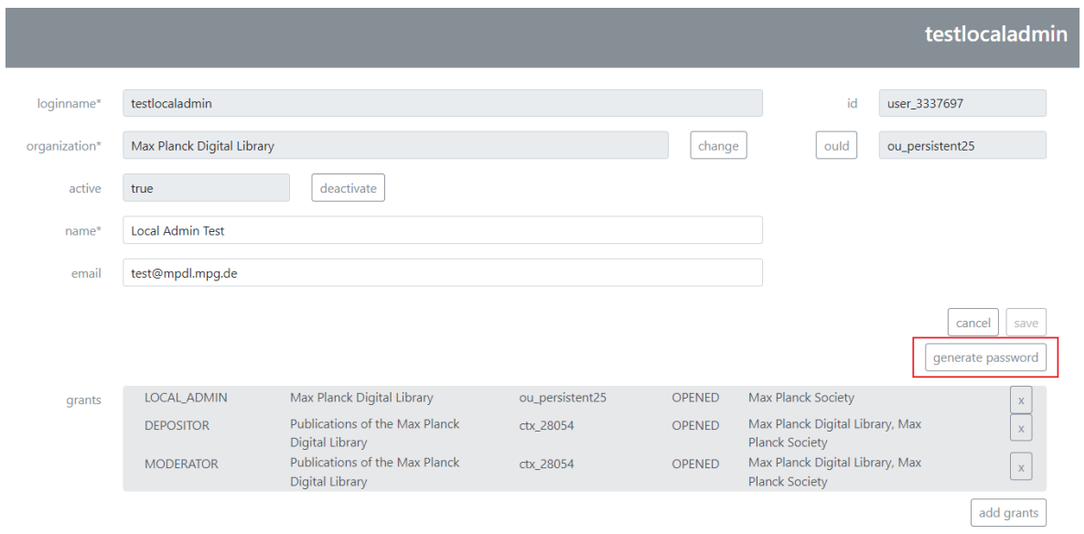
It is possible to filter for users within your organization and search by the user name and login name.
After typing in only one letter into the search mask, a suggestion list will be displayed.



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 chapter "Homepage - Change password" .



12.1.2.3 Edit user accounts

1 organization: Here you can change the affiliation to an organization (MPI) if necessary.

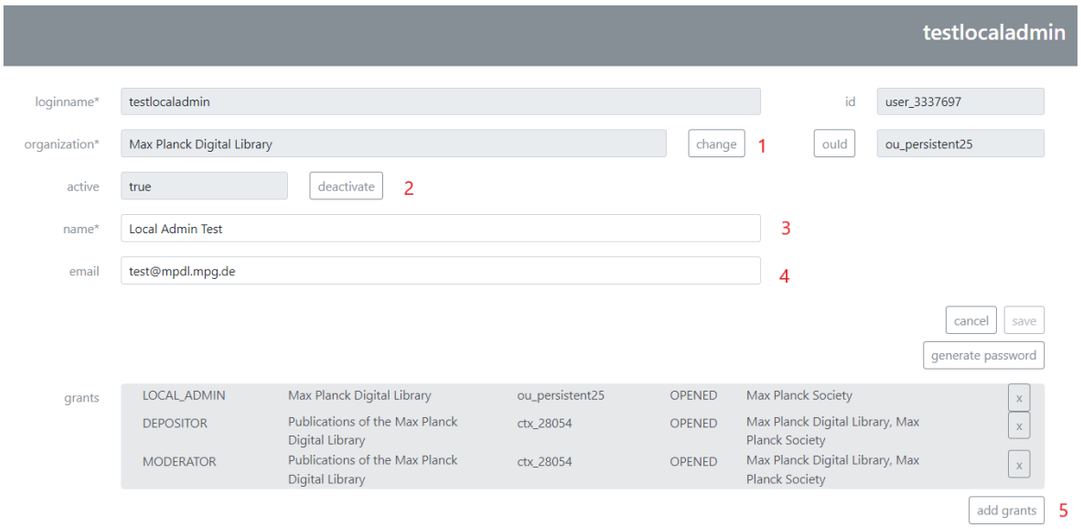
2 active : User accounts can be deactivated if they are no longer needed. In reverse, accounts can also be reactivated. Deleting an account is not possible.

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.

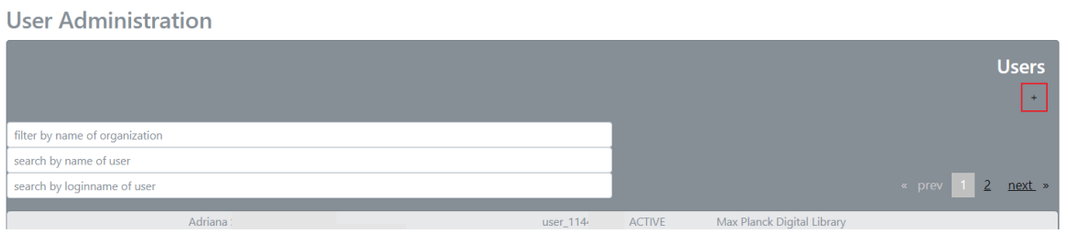
5 grants: In the "grants" section, permissions can be assigned and also removed (with "x"). The different permissions are also explained in chapter "Create user accounts" .

Click "save" after the changes to save.



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 "+".



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.

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.

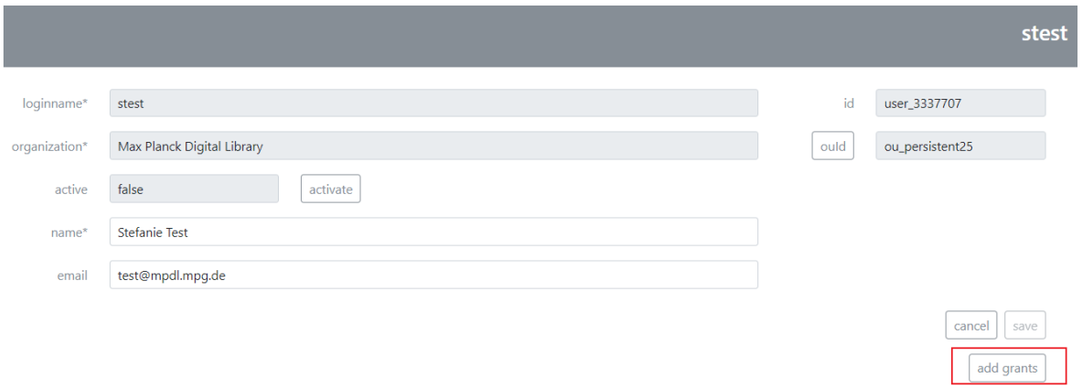
3 active: If you want the account to be active and usable immediately, please select "true". If you want to activate the account at a later point in time, please select "false".

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

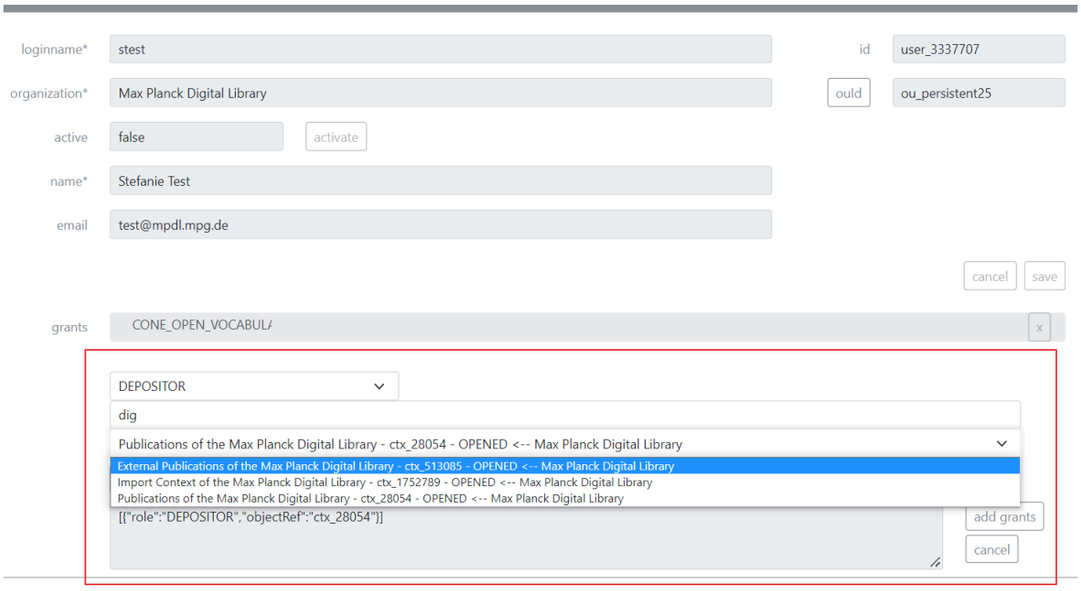
the header at the top right or in the details of your released items (only visible within your own organization).

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 in chapter "Homepage - Change password".



Now the button "**add grants**" is displayed with which you can assign permissions/rights.



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.

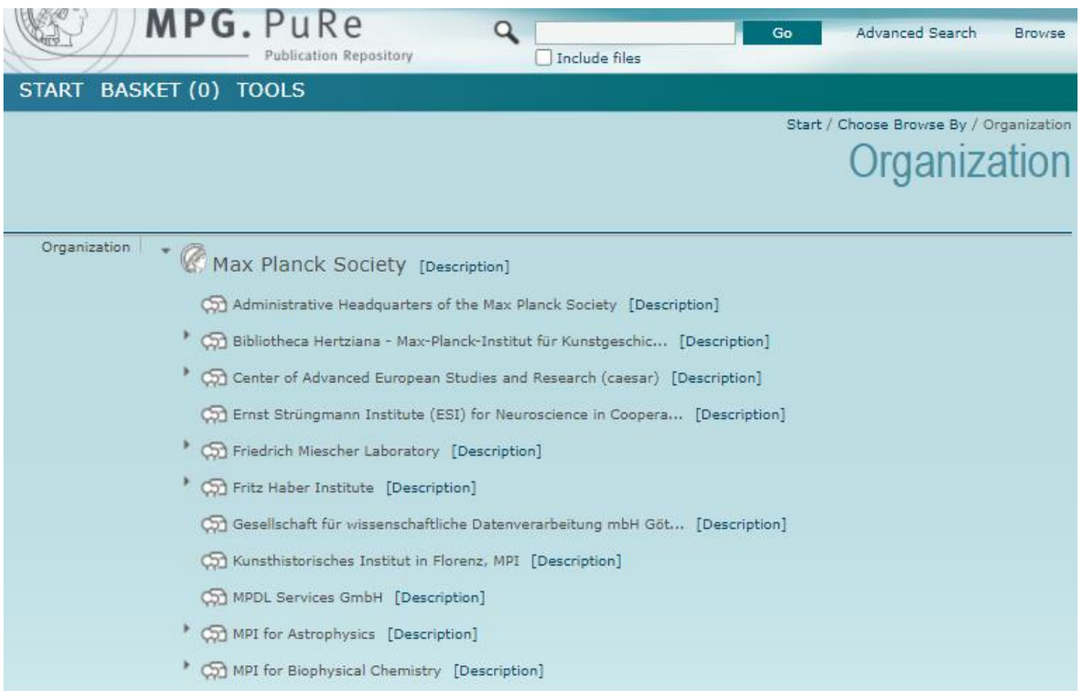
After assigning the grants, the creation of the user account is complete and you can send the login credentials to the new user.

12.1.3 Organizational Units (OUs)

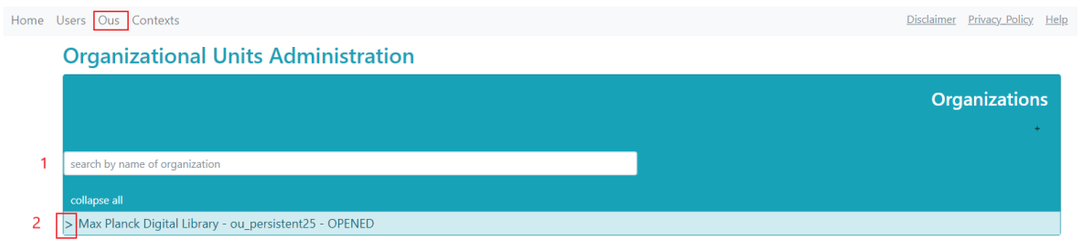
In PuRe, the affiliations that are entered in the publications are organized via "Organizational Units" (OUs). However, those OUs are managed in the Admintool. More about OUs can be found in the corresponding chapter.

The OU function in the Admin Tool allows you to:

- Search for OUs
- Create new OUs
- Rename OUs
- Close OUs
- Edit information about OUs



12.1.3.1 Search for OUs

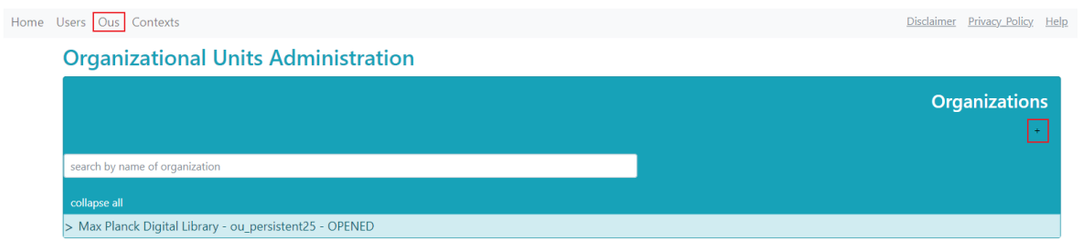


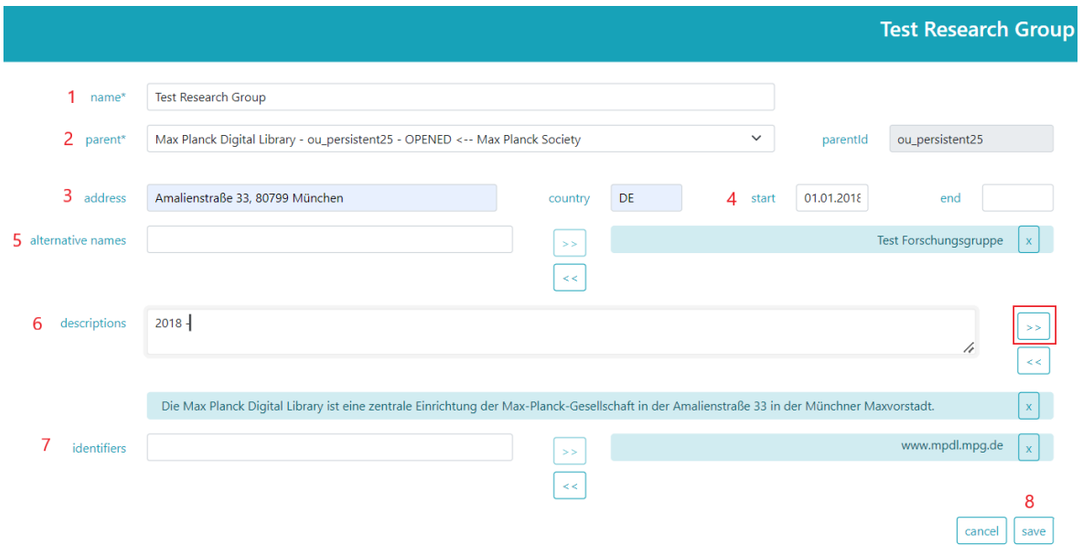
1 Search: Here you can search for specific OUs within your organization. The search field is supported by a suggestion list.

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 "+" .





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 not 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.

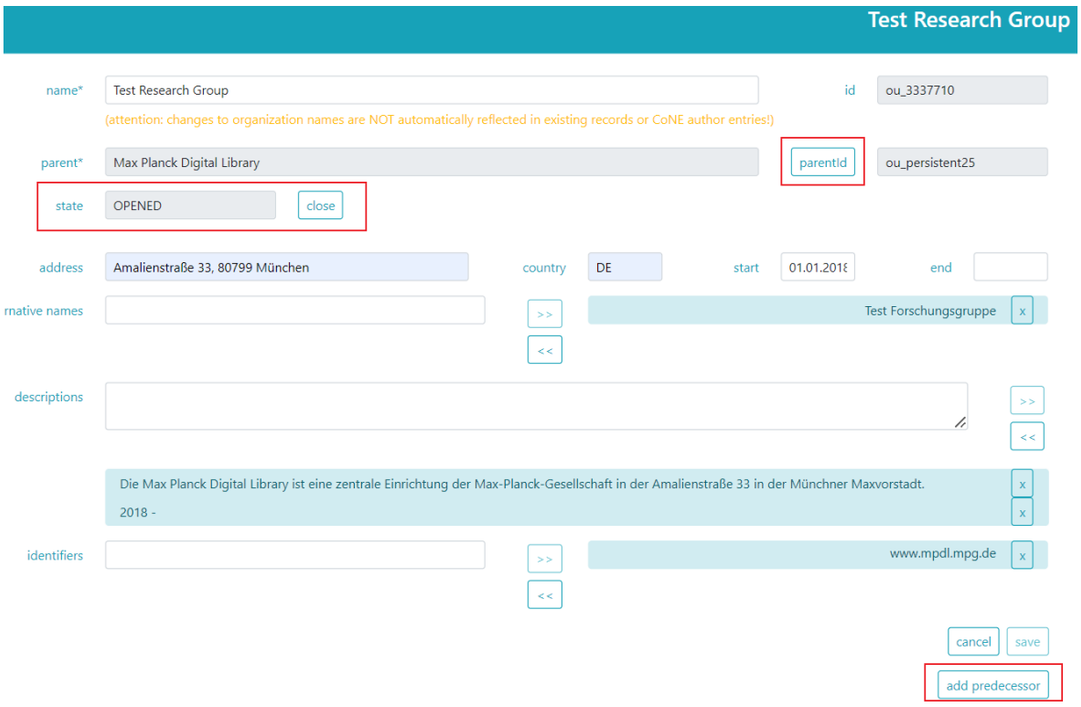
6 descriptions: You can add some more information about the OU in the "description" field.

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.

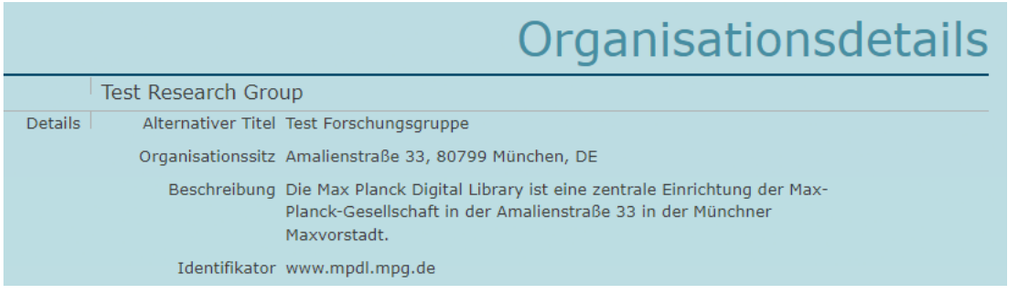
8 save: After entering the required data, you can finish with "save" or "cancel" the data entry.

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 closed in the OU tree structure in PuRe. OUs can no 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.



The publicly available organizational details of the sample organization are then displayed as follows:

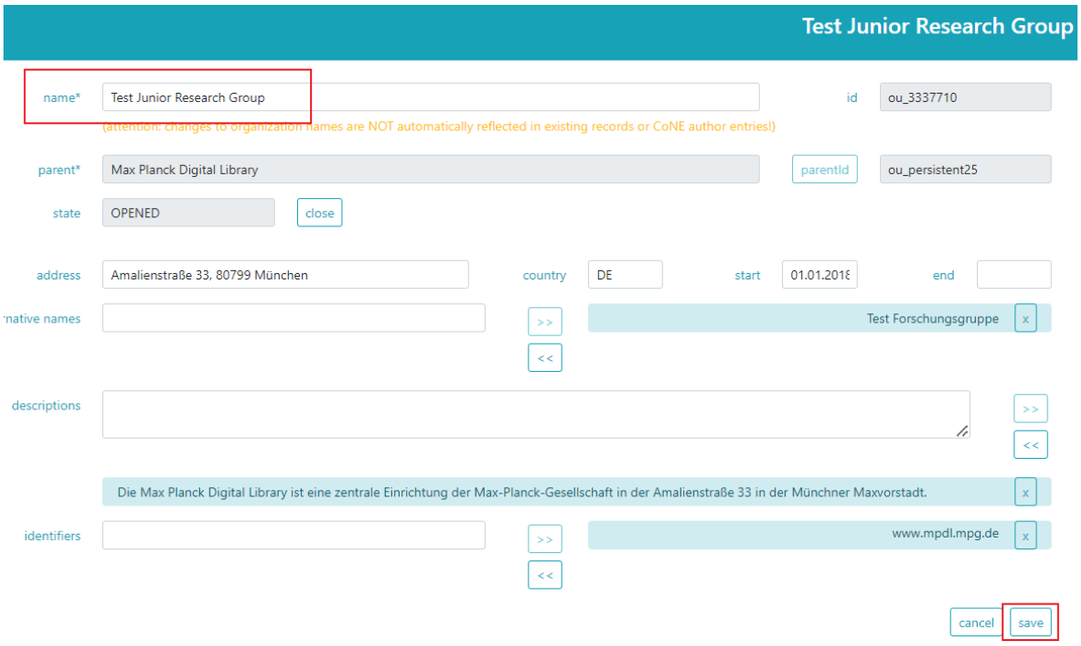


12.1.3.3 Change OU names

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.

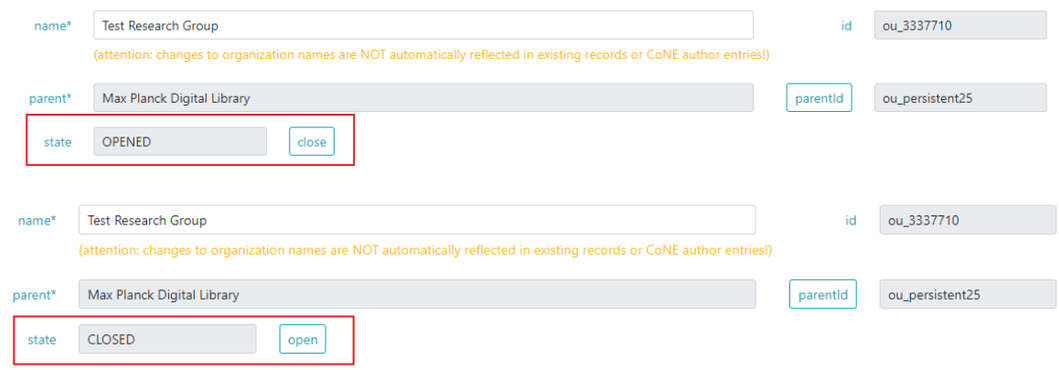
Usually, the former OU name should remain in the existing items, and the new, upcoming items should then be linked to the renamed OU. It has been proven helpful to adjust the author CoNE entries on a case-by-case basis manually. A list of CoNE authors to be changed can be generated by inserting the previous OU name into the following link https://pure.mpg.de/cone/persons/query?format=html&q="*max planck digital library*"&n=0 . Find more in chapter "CoNE - Generate CoNE-Lists".



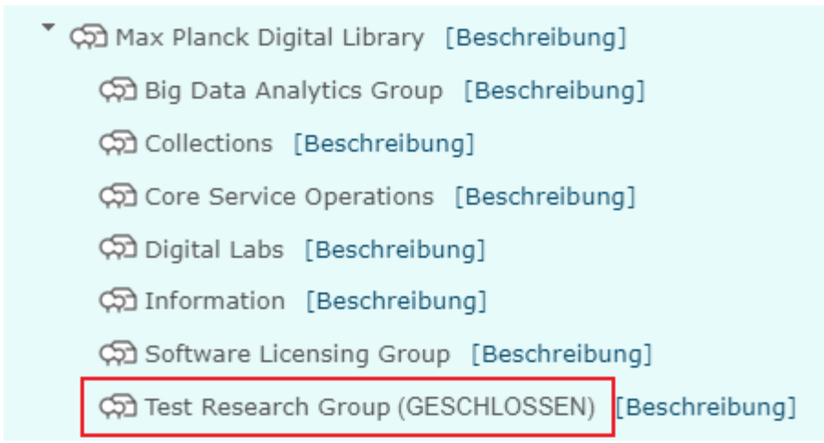
12.1.3.4 Close OUs

You can change the status of OUs to "closed" by clicking "close". OUs cannot be deleted.

Important: OUs in the "closed" status can still be linked to items and CoNE author entries.



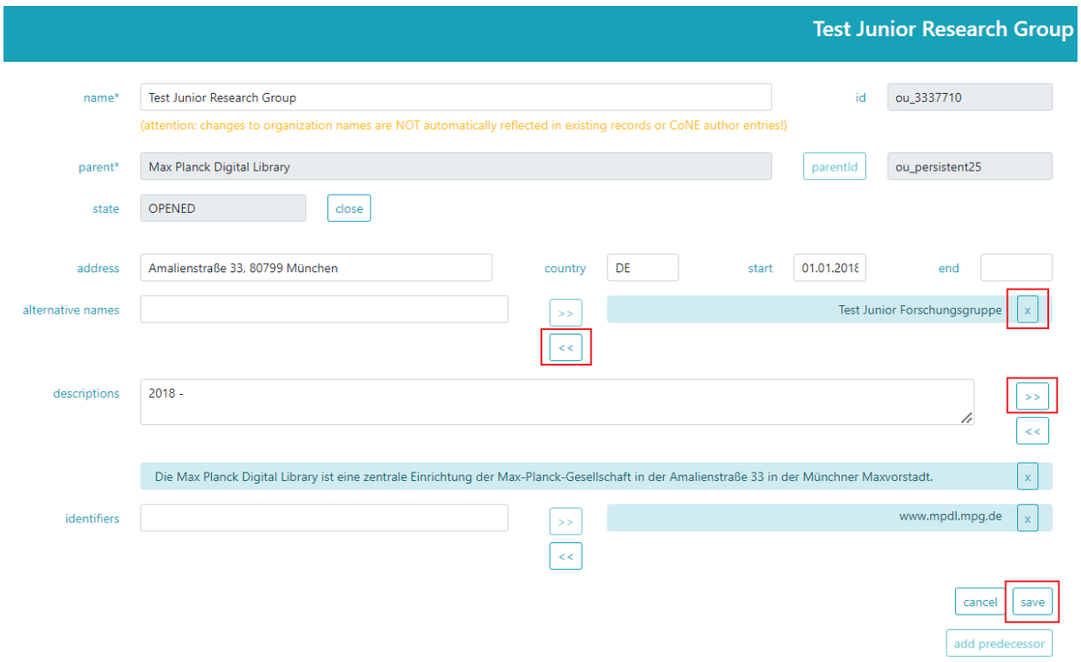
Also, in the OU tree structure in PuRe, the OUs are displayed as closed and are listed after the open OUs:



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".



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 chapter "Contexts & Workflows - Contexts" .

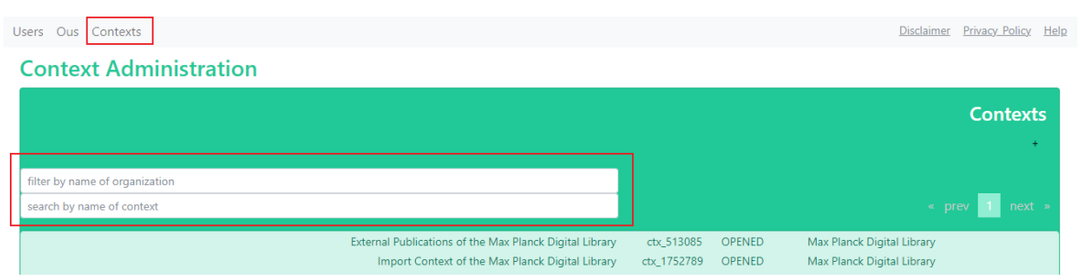
This function enables:

- 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

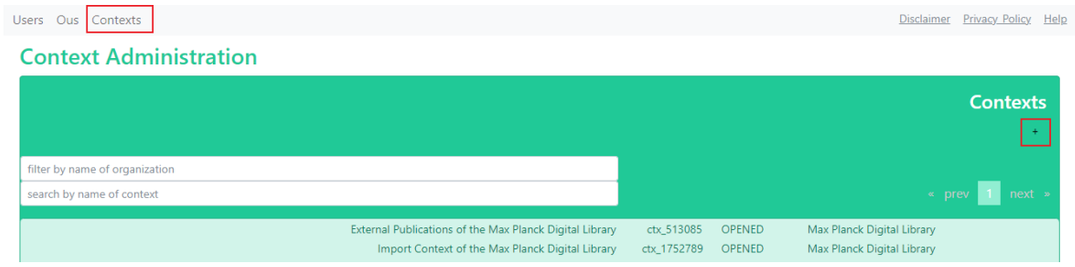
In the admintool, you can search for the contexts available for your organization (MPI).

- In doing so, you can filter by the contexts of the organizations
- Or search for a particular context with the specific name

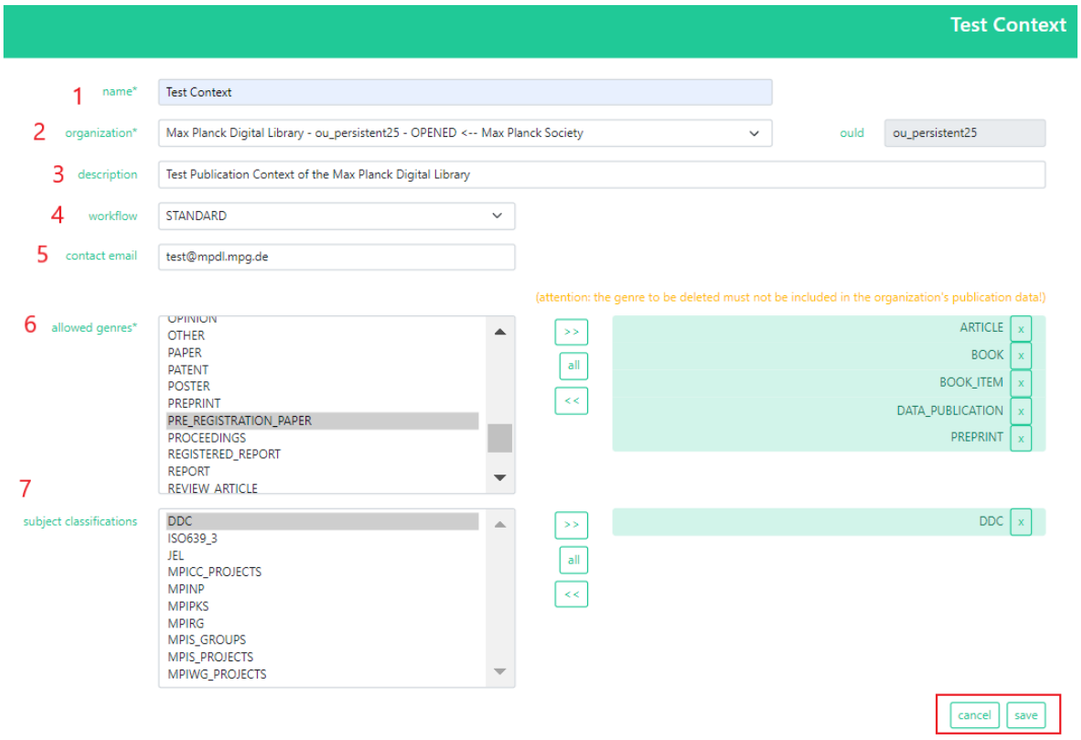


12.1.4.2 Create contexts

To add a new context, first click on the plus sign "+".



An entry mask will be displayed:



1 name*: This mandatory field specifies the name of the new context. Usually, there are the following for each institute:

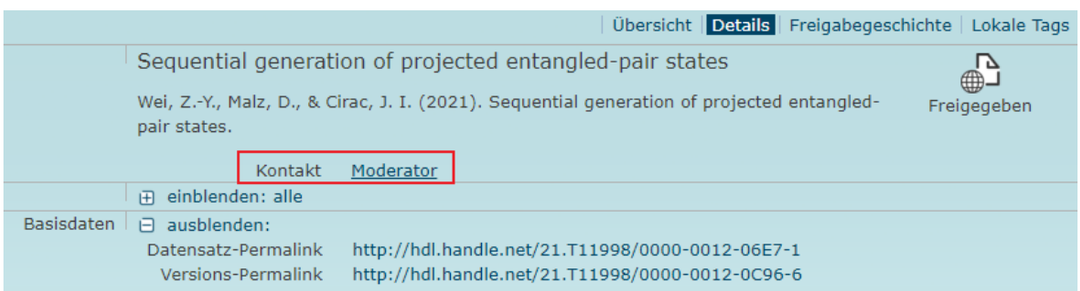
- a publication context: "Publication Contexts of the Max Planck Digital Library".
- an external context: "Non MPI Publications of the Max Planck Digital Library staff"
- and sometimes additionally an import context

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 chapter .

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.



6 genres*: At this point, the genres 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 classification for subject indexing can also be selected for publication entry in PuRe. Most of the classifications available are specific to certain MPIs.

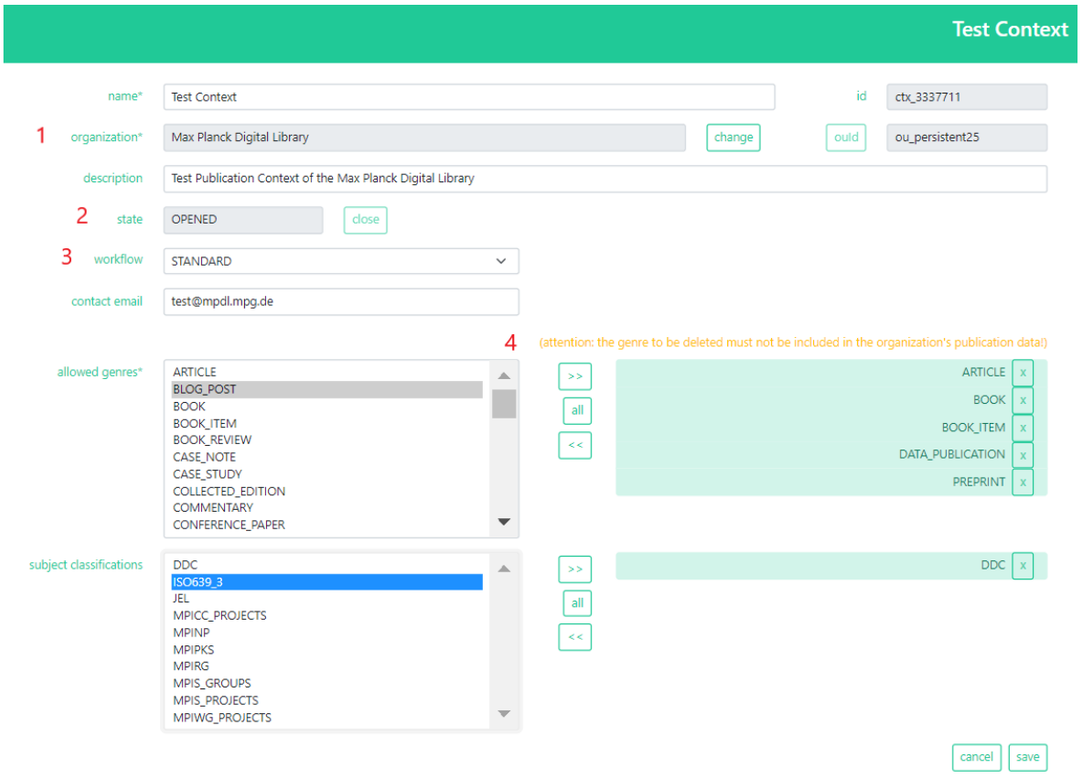
8 cancel/save: After the required data has been entered, it can be saved with "save" or the entry can be canceled with "cancel".

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.



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 workflow 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 (**C**ontrol **o**f **N**amed **E**ntities) 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 closed 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"

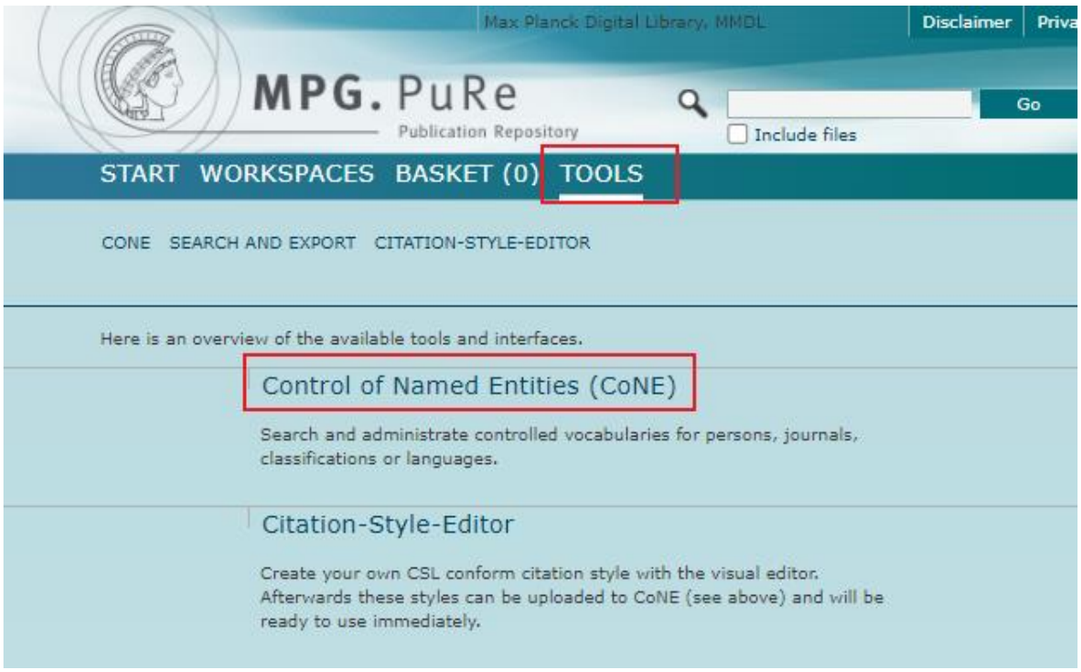
There are different permissions for editing open and closed vocabularies. Usually, PubMan users, including library staff, are only given rights to edit the open vocabulary.

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).



or:

2.

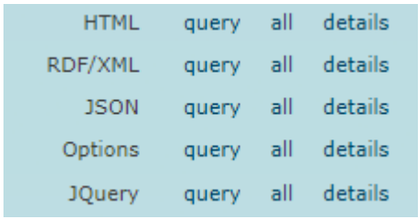
Open a new browser tab.
Enter the URL https://pure.mpg.de/cone/ in the input line of the browser. Confirm by clicking the Enter key.

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



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:
https://pure.mpg.de/cone/persons/query?format=html&q="***max planck digital library***"&n=0

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:
https://pure.mpg.de/cone/persons/query?format=rdf**&m=full**&q="*max planck digital library*"&n= 0

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.

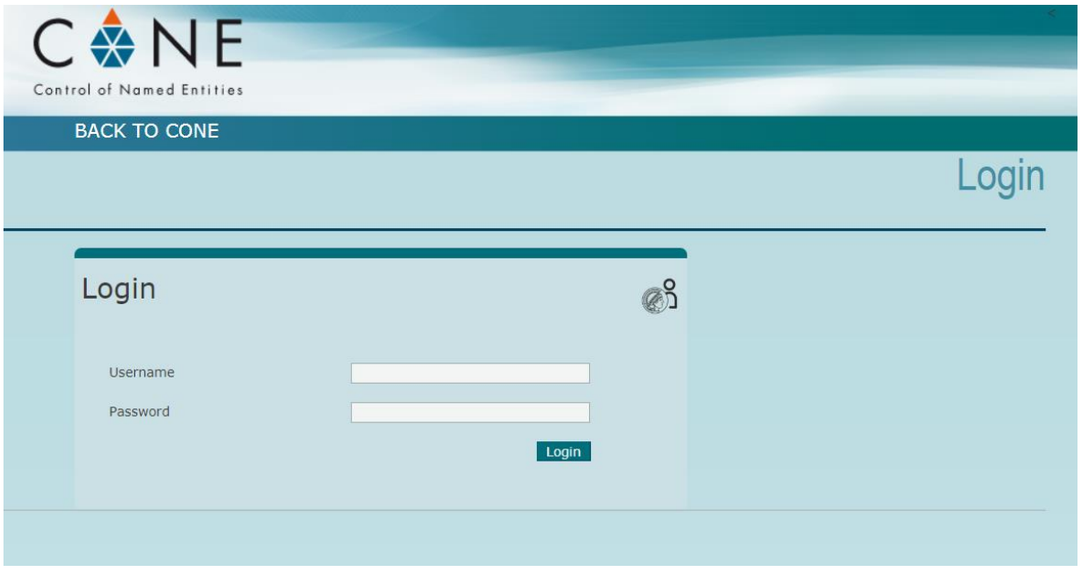
Attention: The account must have the user role "CoNE-Open-Vocabulary-Editor".

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.

The login mask opens.

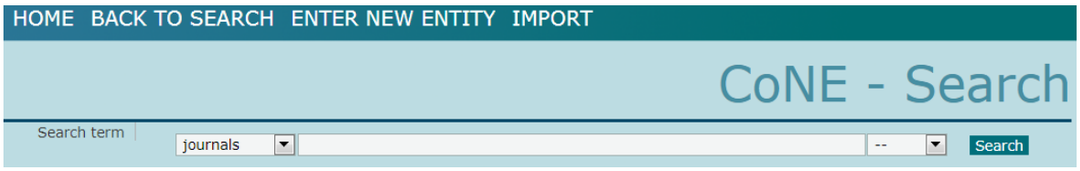


- Enter your PubMan login data in the "Username" field and the password in the "Password" field.
- Click on the "Login" button. The CoNE start page opens.

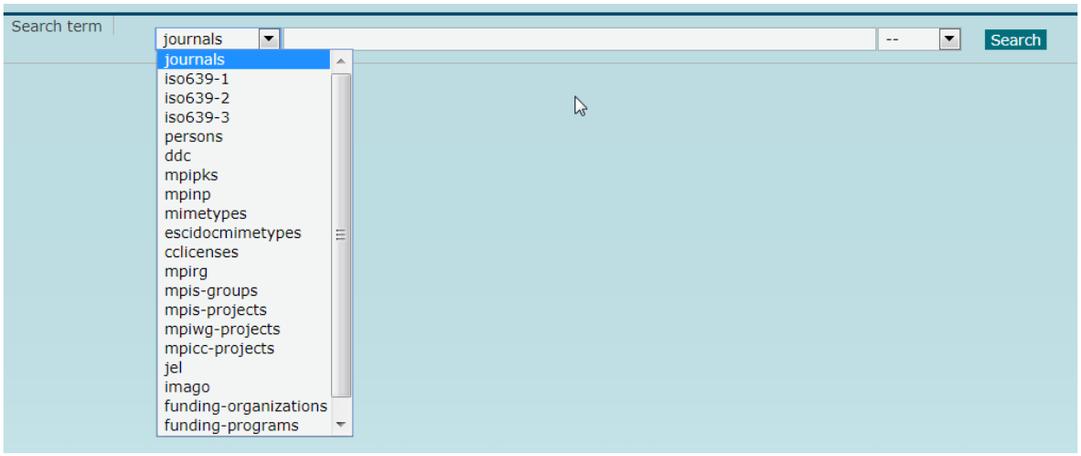
12.2.4 Search in CoNE

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.



- Select a search category from the drop-down menu.



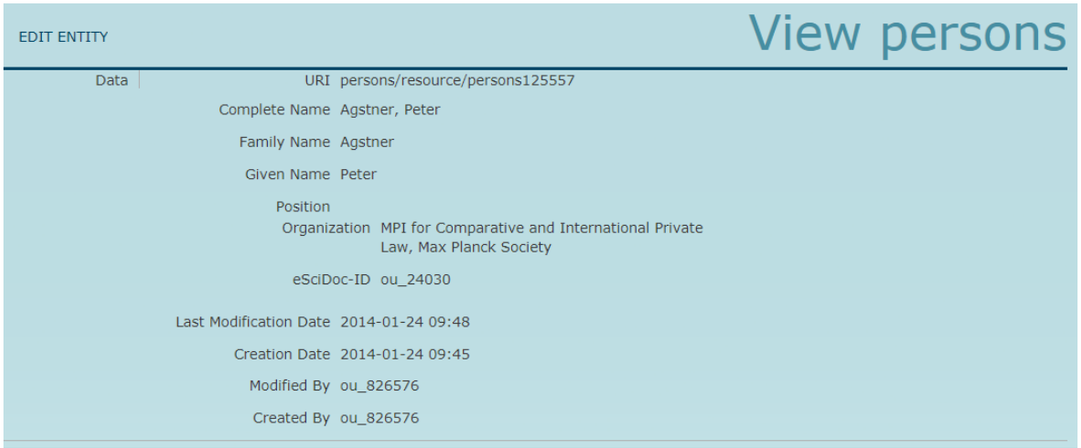
- Enter the search term in the search box.

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.

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.



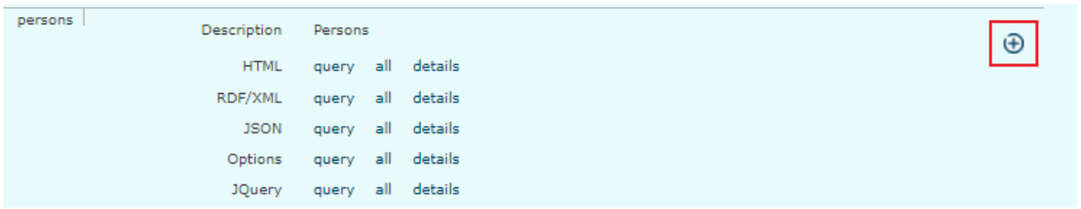
12.2.5 Add CoNE-Entities for Persons

Important: Each natural person should be recorded in CoNE with only **one** entry. Visit thechapter "Recommendations for working with CoNE" 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 the category "**persons** " and the entry mask opens.

or:



Click on the "+"-icon next to persons, to open the person entry mask.

All fields marked with an asterisk "*" are mandatory fields and must be filled in before saving. By clicking on the ⊕-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.

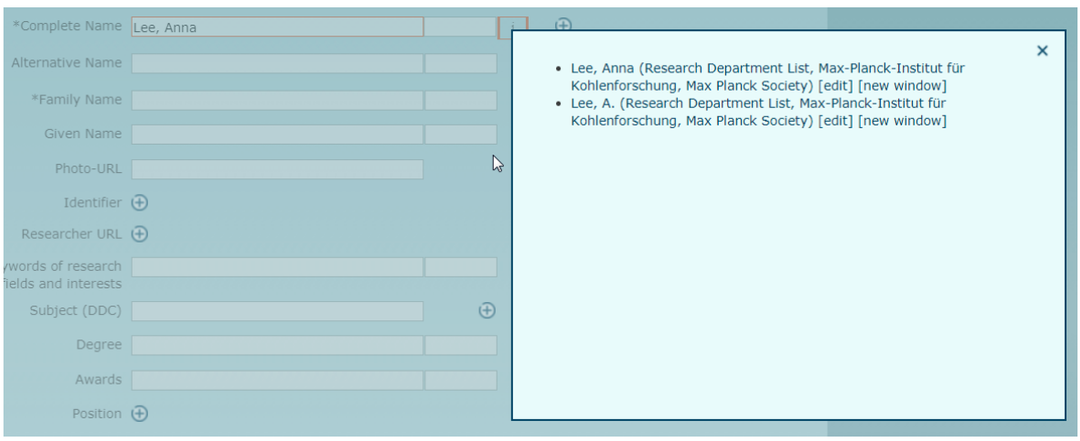
- After each entry of a name, PubMan will **check for duplicates.** The colored borders have different meanings:

green = this entry does not yet exist in CoNE.

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.

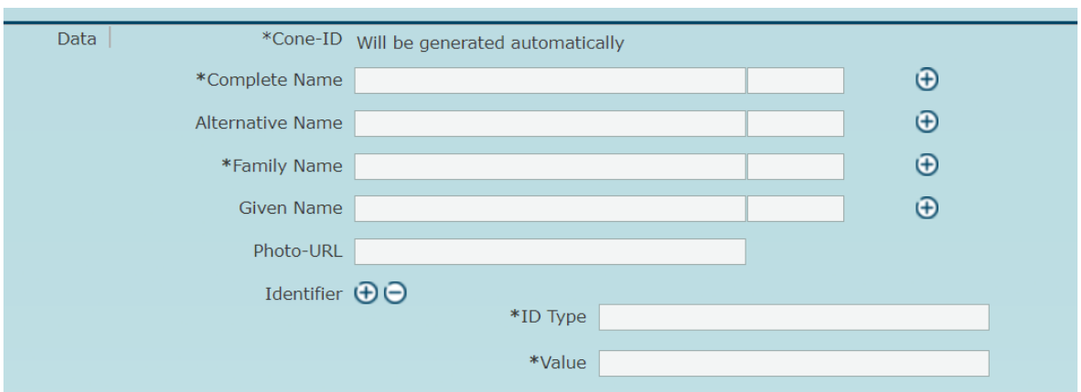
If you click on the "!" button behind an entry field, all existing entries containing the duplicate spelling will be displayed.



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.

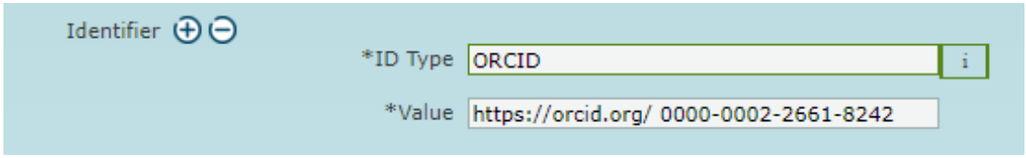


- For the "**ID Type** " you can choose between a number of predefined possibilities:
  - ORCID
  - ISNI
  - ResearcherID

- 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 PuRe Support Team.

- Enter the corresponding ID in the field "**Value**".



⚠ Attention: For ORCID IDs, the entire link including https://orcid.org/ must be specified. Each ORCID ID thus corresponds to the scheme https://orcid.org/XXXX-XXXX-XXXX-XXXX. The correctly specified ORCID IDs are clickable in the "Researcher portfolio".

⚠ 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 chapter "Workspaces - Batch processing - Actions - Change metadata".

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.

- 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".

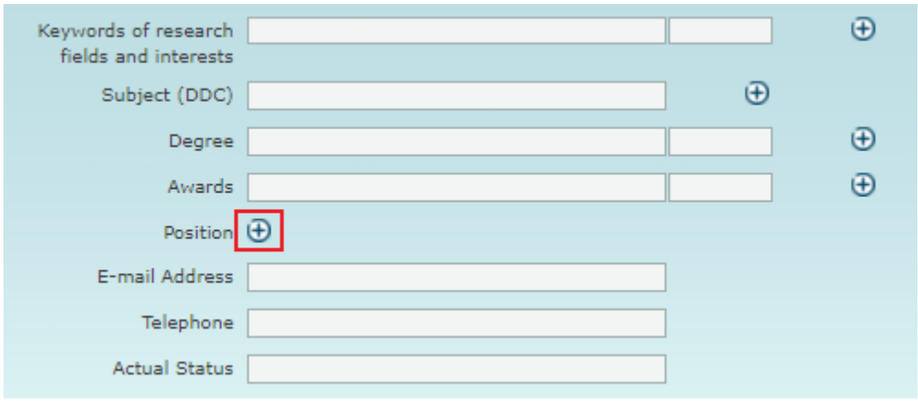
Enter keywords related to the person's research field in the "**Keywords of research fields and interests**" field.

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 Search in CoNE and Generate CoNE-Lists.

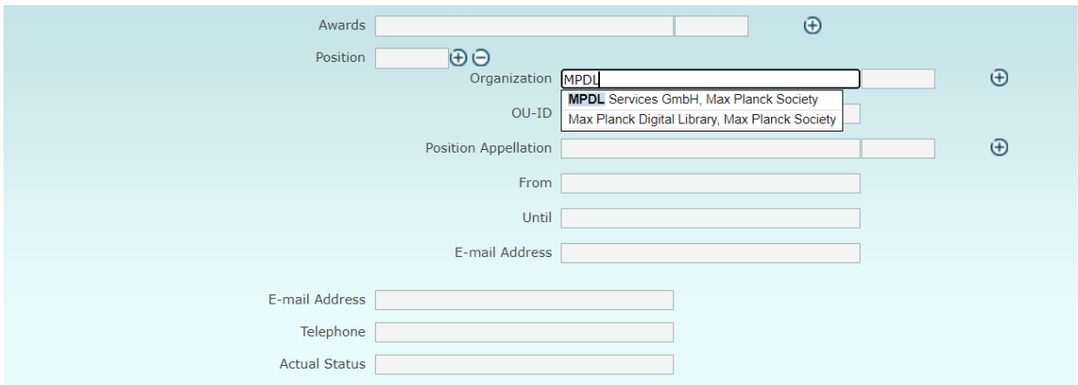
Enter the academic title of the person in the "**Degree**" field.

Enter the person's awards in the "**Awards**" field.

Open the entry fields for "**Position**" by clicking on the ⊕-icon to the right. Various metadata fields open:



Enter the name of the affiliation in the **Organization** field. If the affiliation was created as an Organizational Unit, an autosuggest list will appear.

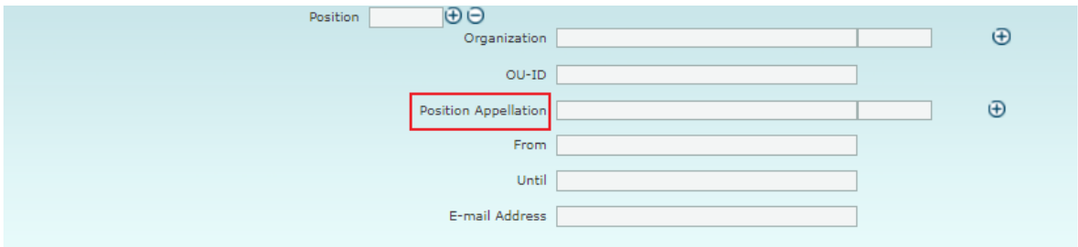


Select the name of the Organizational Unit. The OU ID is automatically entered in the **OU ID** field. If the affiliation was not created as an organizational unit, enter the name manually. In this case, the "OU-ID" field remains empty.

⚠ 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.



- 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-month-day" (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.

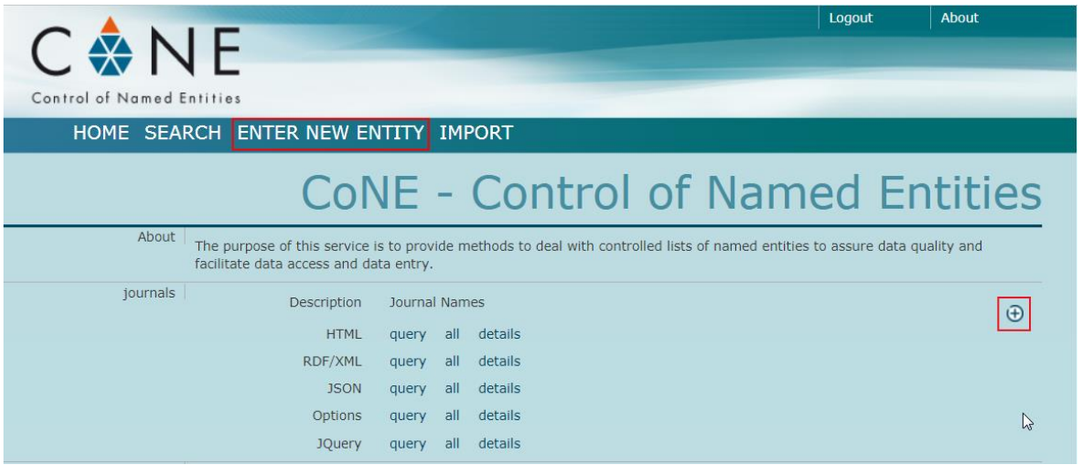
To do so, proceed as follows:

Open **CoNE** and log in.

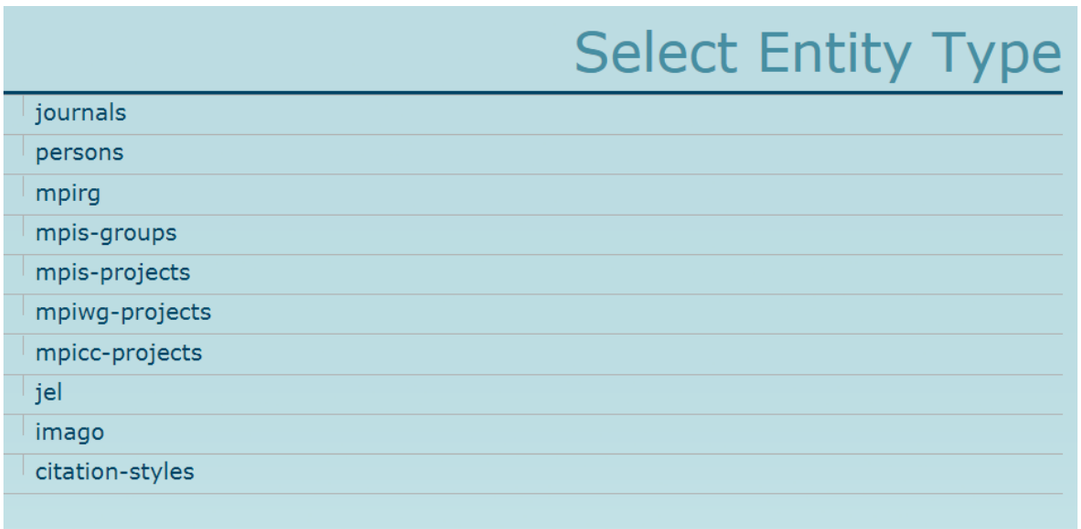
Click on the " +"-icon next to journals, to open the journal entry mask.

Or:

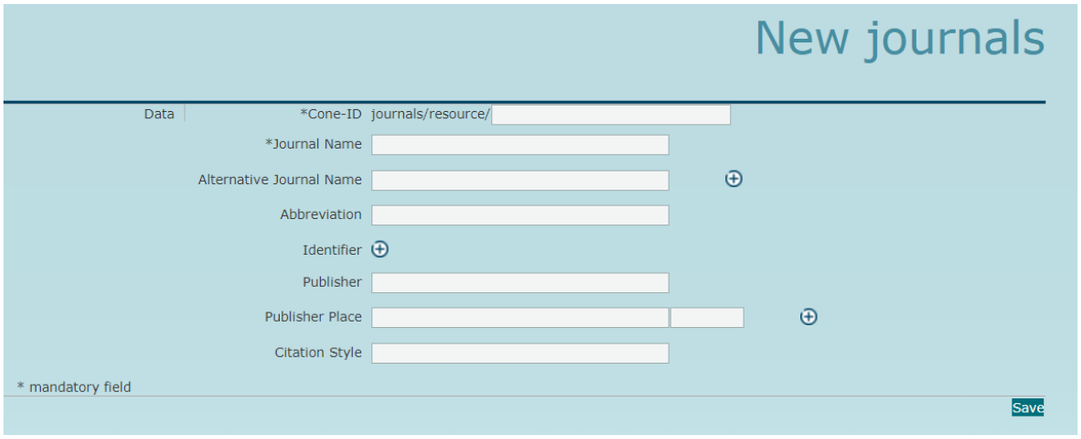
Click on the "**Enter new Entity**" link.



An overview with all categories opens. Click on "journals".



The **entry mask** opens:



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:

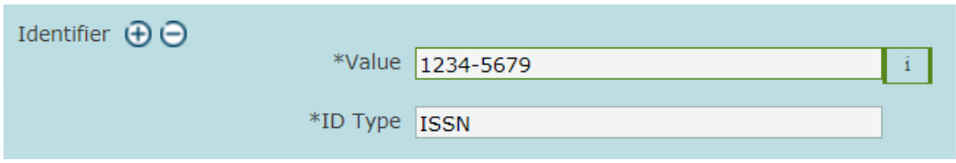
green = this entry does not yet exist in CoNE.

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 ⊕-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.



- If available, enter the publisher in the "**Publisher**" field.

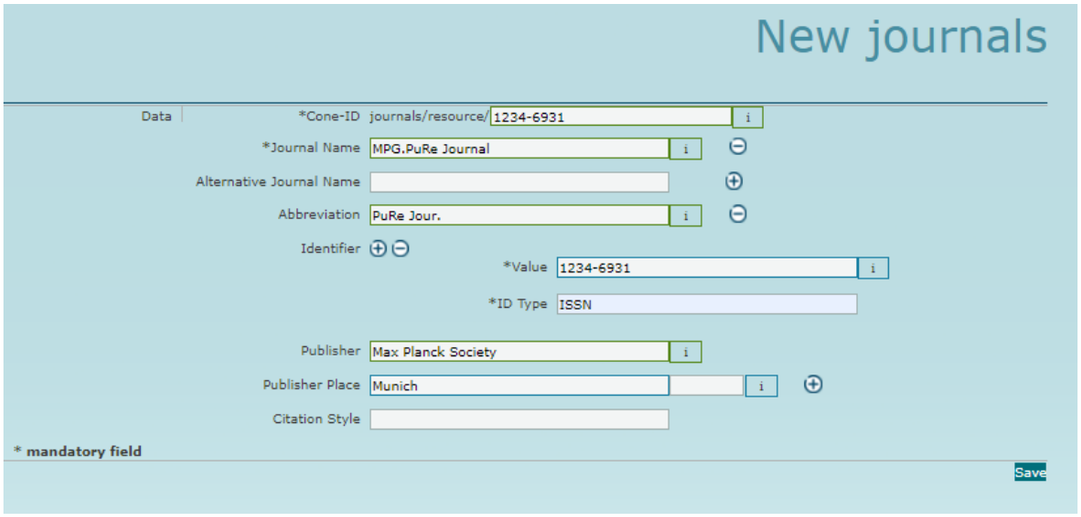
- If available, enter the publisher's location (and optional the postal code) in the "**Publisher Place**" field.

- 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.



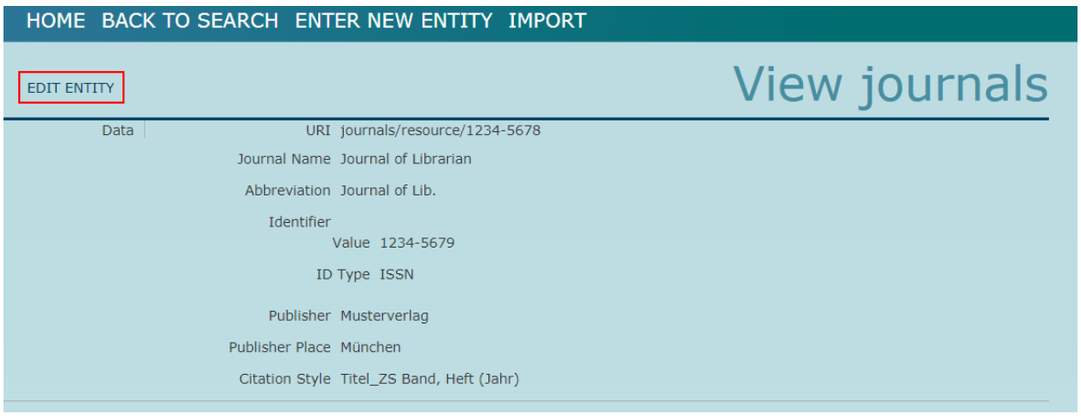
The created entry is displayed and can be searched from this point on.

Example of a finished journal entry:

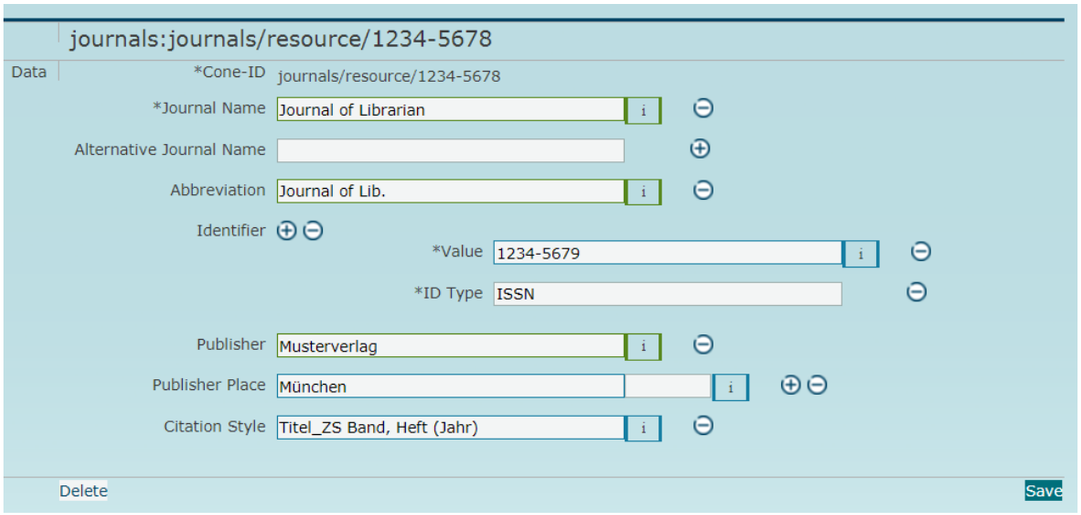
12.2.7 Edit CoNE-Entities

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.



- The entry mask opens.

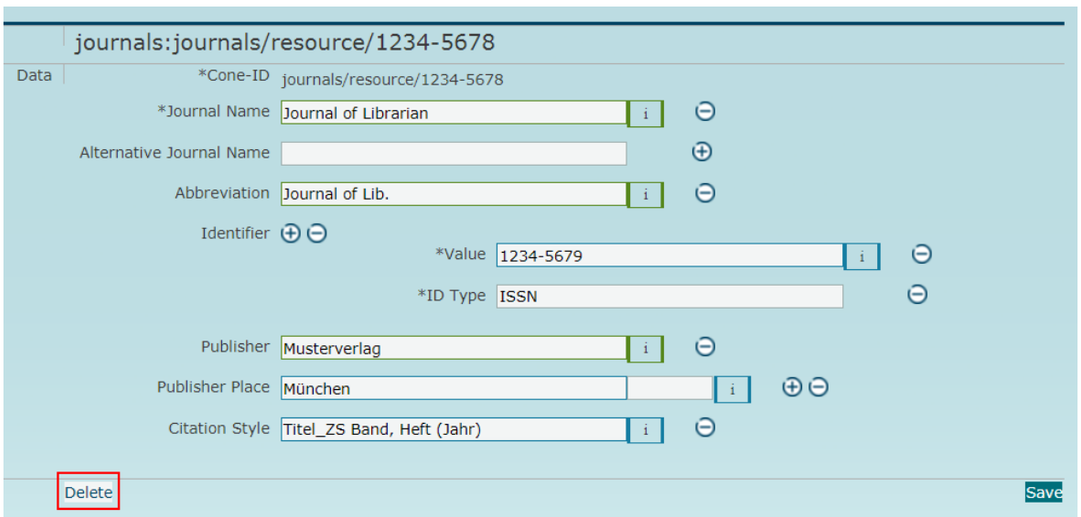


- Make the desired changes by clicking into the corresponding field. Existing content can be deleted and new data can be entered.
- Click on the "Save" button to save the changes.

12.2.8 Delete CoNE-Entities

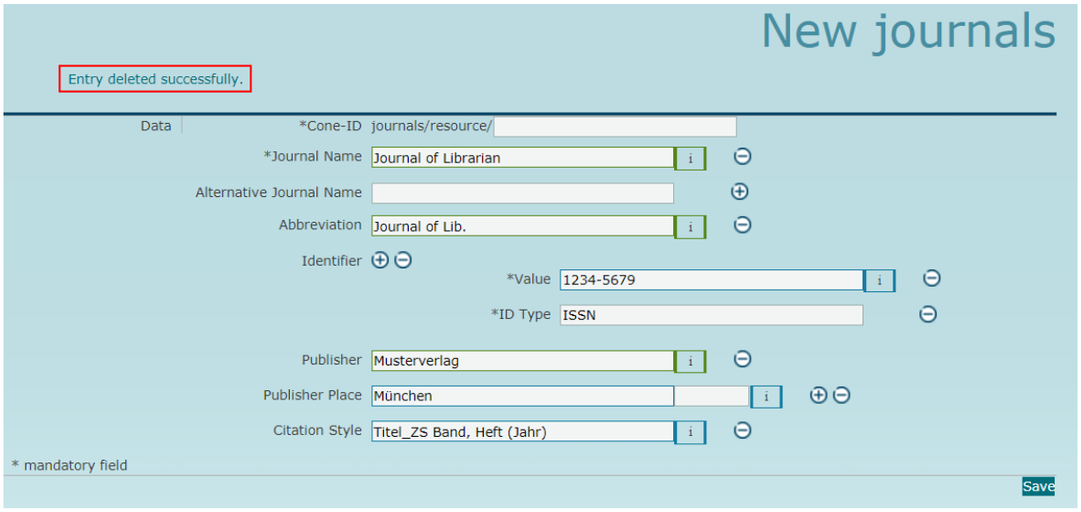
Proceed as follows to delete CoNE entries:

- 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.



- 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**.



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 ZDB .
- 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: https://pure.mpg.de/rest/.

Other tools, like Swagger, can also use the REST interface. Here you can find the for PubMan configured Swagger: https://pure.mpg.de/rest/swagger-ui.html

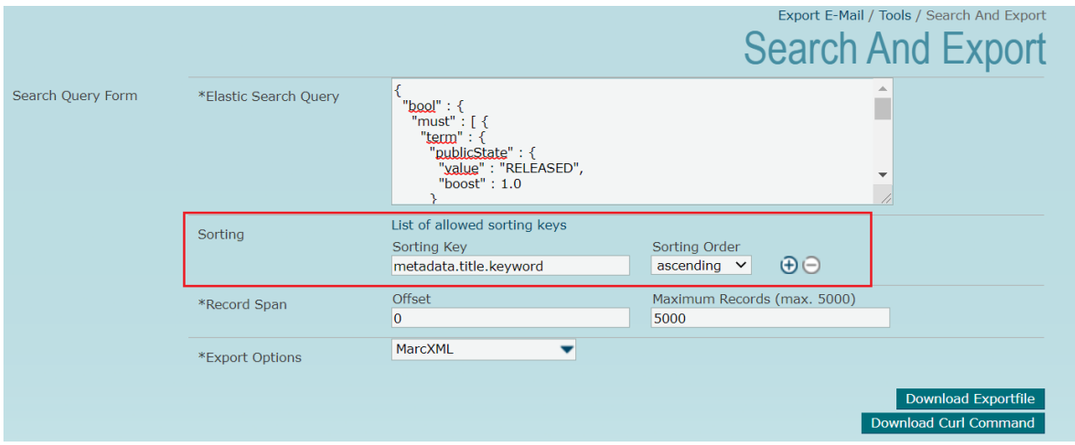
To find more documentation about the interface follow: https://colab.mpdl.mpg.de/mediawiki/INGe_REST_API_Documentation

12.3.1 Perform export via REST

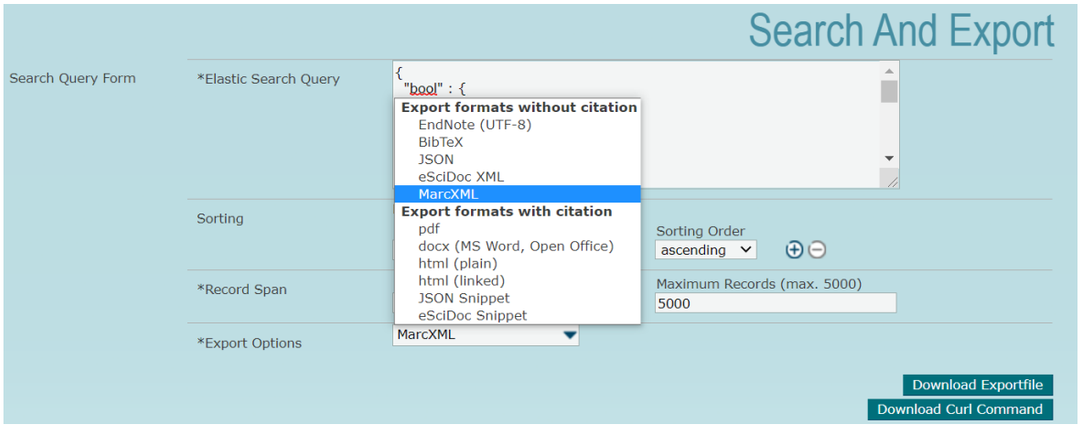
The REST interface can be accessed directly from PuRe through the "Search and Export" interface.

To export data from PuRe, proceed as follows:

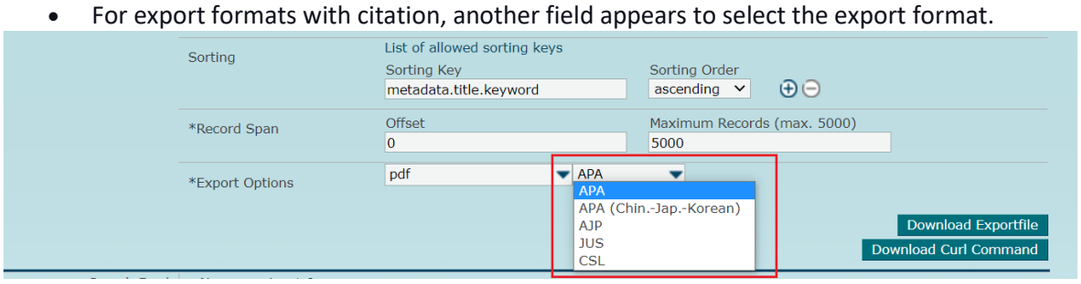
- Perform an advanced search. For more information see: Open the advanced search
- Insert the search query into the REST-interface. For more information, see Insert query in REST-interface
- Specify other settings for the export in the "**Sorting**" section. In the "Sort key" field, you can use a sorting 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 chapter .
- 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.



- 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** “.

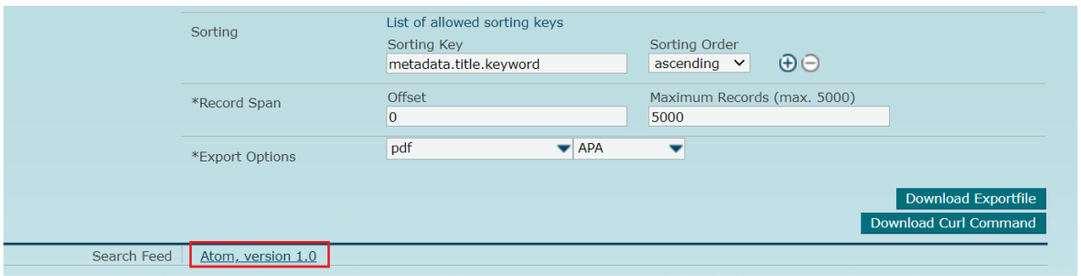


- For export formats with citation, another field appears to select the export format.



- 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".



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 search 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.

- **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.

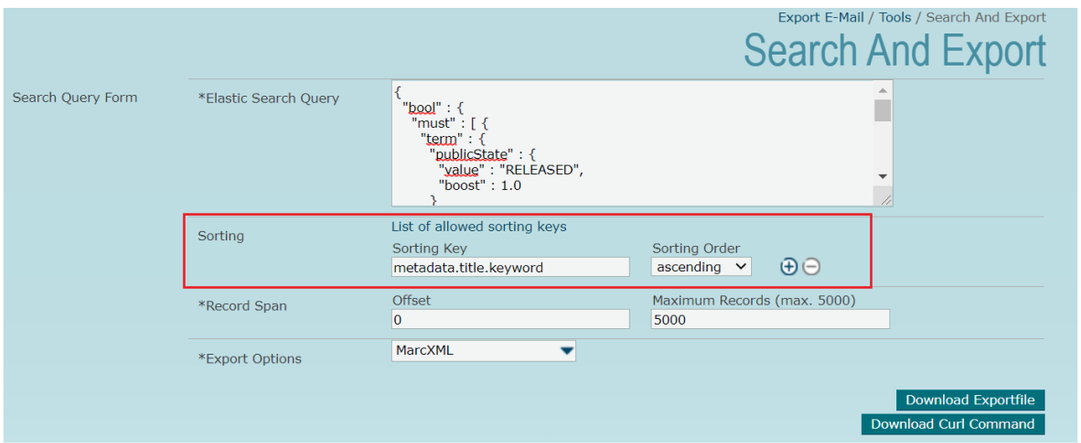
Note for users of the Max Planck repository: The list of available citation styles can be found here: INGe-REST sorting key

- 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"}},{"sort-metadata-dates-by-category" : {"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":{"versionState":{"value":"RELEASED","boost":1.0}}},{"bool":{"should":[{"term":{"metadata.creators.person.organizations.identifierPath":{"value":"ou_persistent25","boost":1.0}}},{"term":{"metadata.creators.organization.identifierPath":{"value":"ou_persistent25","boost":1.0}}}],"adjust_pure_negative":true,"boost":1.0}}],"adjust_pure_negative":true,"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.

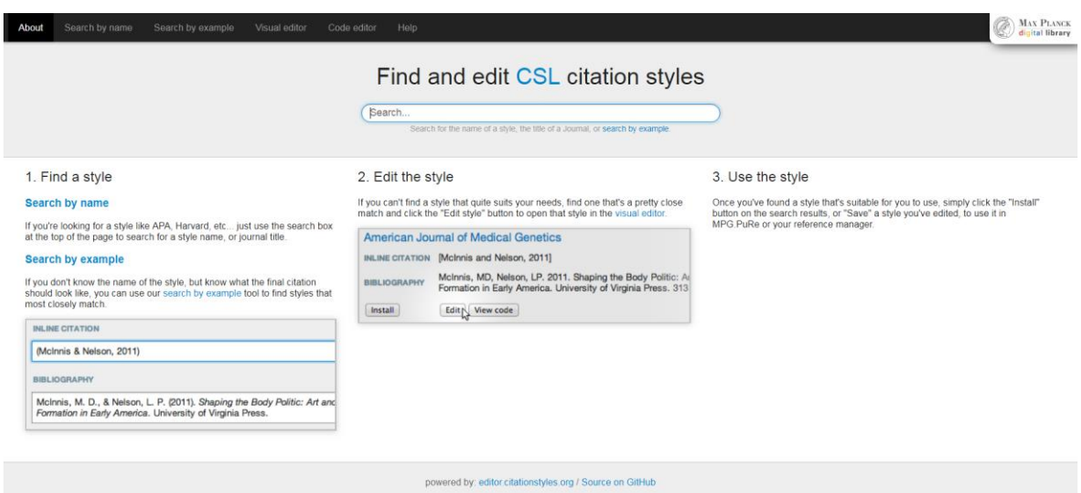
Attention: Please take care not to copy any spaces in front or behind the command.



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: https://pure.mpg.de/csl-editor/about/.



12.4.1 Video tutorials

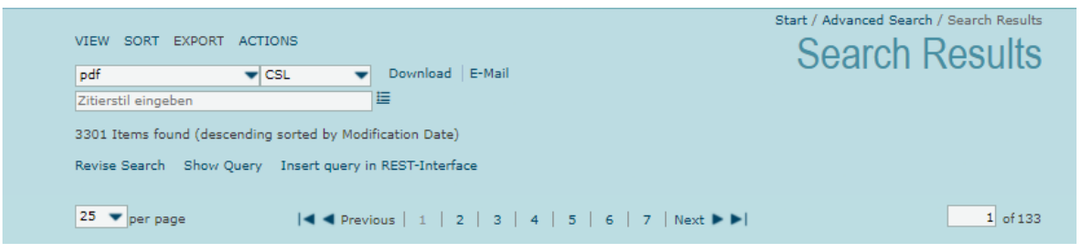
To get an insight into the features of the CSL editor, we recommend the following videos (in German): Most videos are in German, but by clicking on "settings" , "subtitles" and "automatically translate", subtitles in English are available.

- A Citation Style Editor webinar for Citation Style Language (CSL) (90 minutes): https://www.youtube.com/watch?v=NDnf0o80dwg
- An introductory video for the Citation Style Editor (in German): https://www.youtube.com/watch?v=tOkCKX-i0sA (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): https://www.youtube.com/watch?v=IKq8eqRxqR0
- 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): https://www.youtube.com/watch?v=TZD6vmXOofM

Tip: English subtitles for German videos: By clicking on "settings" , "subtitles" and "auto-translate -- 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 ready-to-use standard styles (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 REST interface .

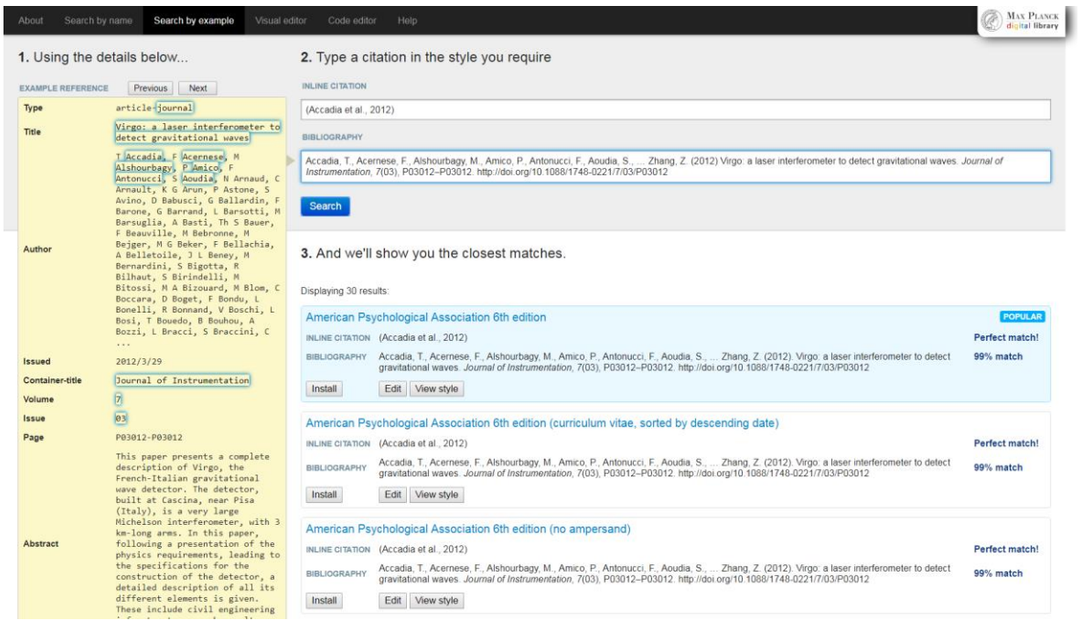


12.4.3 Creation of a new style in CSE

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

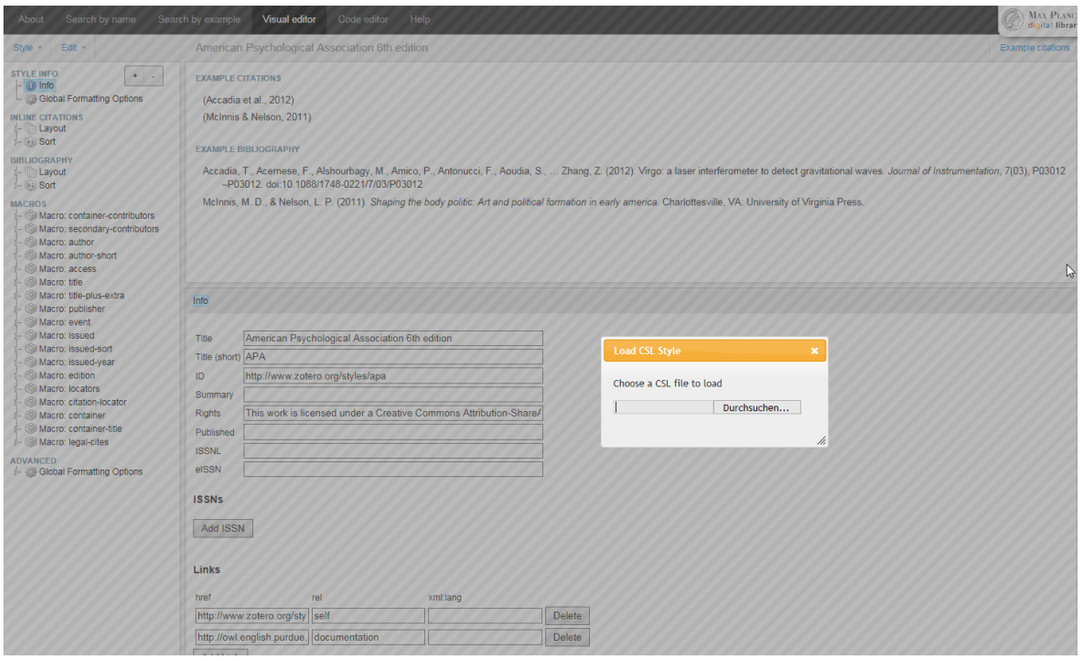
To find a suitable style, the "**Find a style**" function is available in CSE. You can search for the name of a style or use an example to find a style that already meets many of your requirements. You can adapt the suitable style by clicking on "Edit". This will take you to the "Visual Editor ". Here, in the "EXAMPLE REFERENCE" area, you can click on the segments you want to customize and make the adjustments.



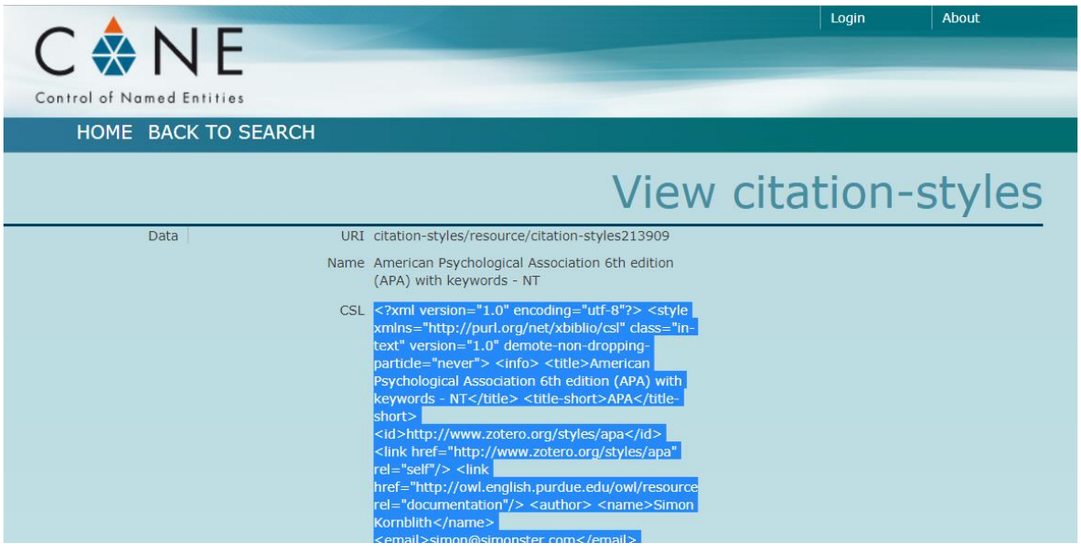
12.4.5 Open a custom style in CSE

There are several ways to open a style in CSE:

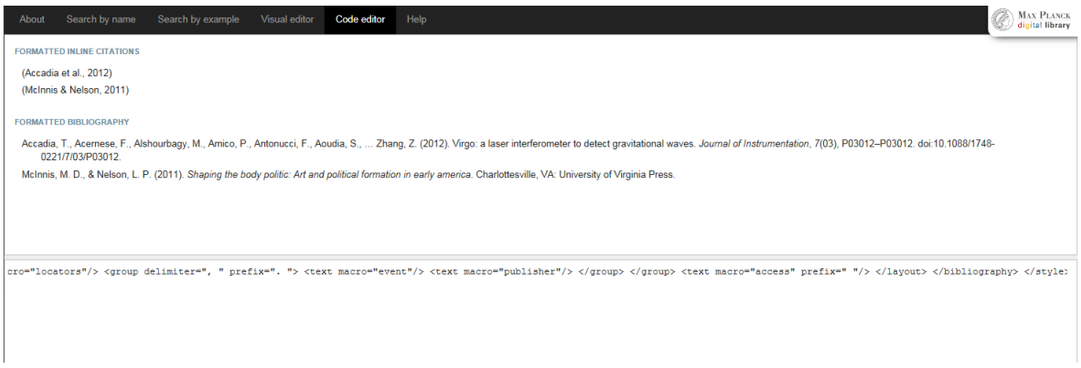
1. If you store your citation styles on your desktop, just click on "Style" in the Visual Editor of the CSE, then "Load Style". Then click on "Browse", select your folder and open the style you want to edit.



2. If you do not store your citation styles on your dektop, retrieve them from CoNE. (The ready-to-use 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 "citation-styles" 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 "code editor" in CSE and delete the current code. Then copy the CSL code from CoNE into the code editor.



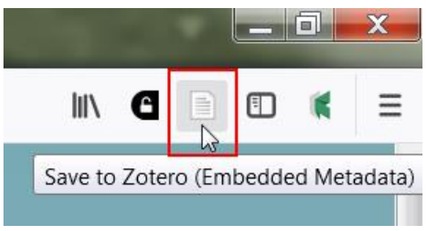
Then go to the "Visual Editor" where you can edit the style as usual.

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.

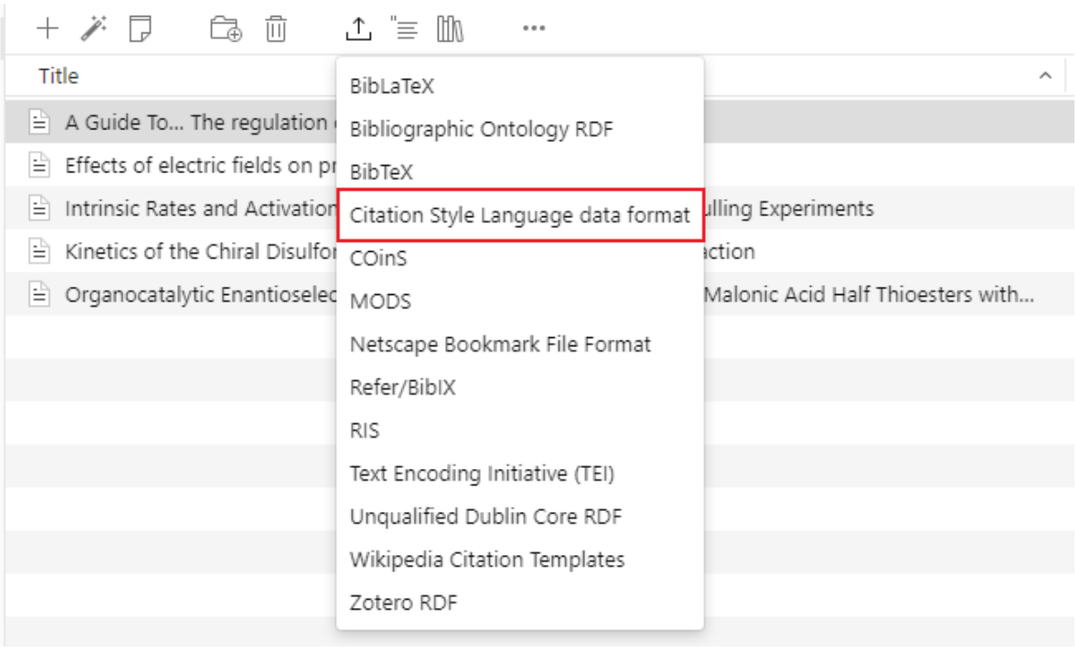
12.4.6 Add examples to the CSL editor

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.

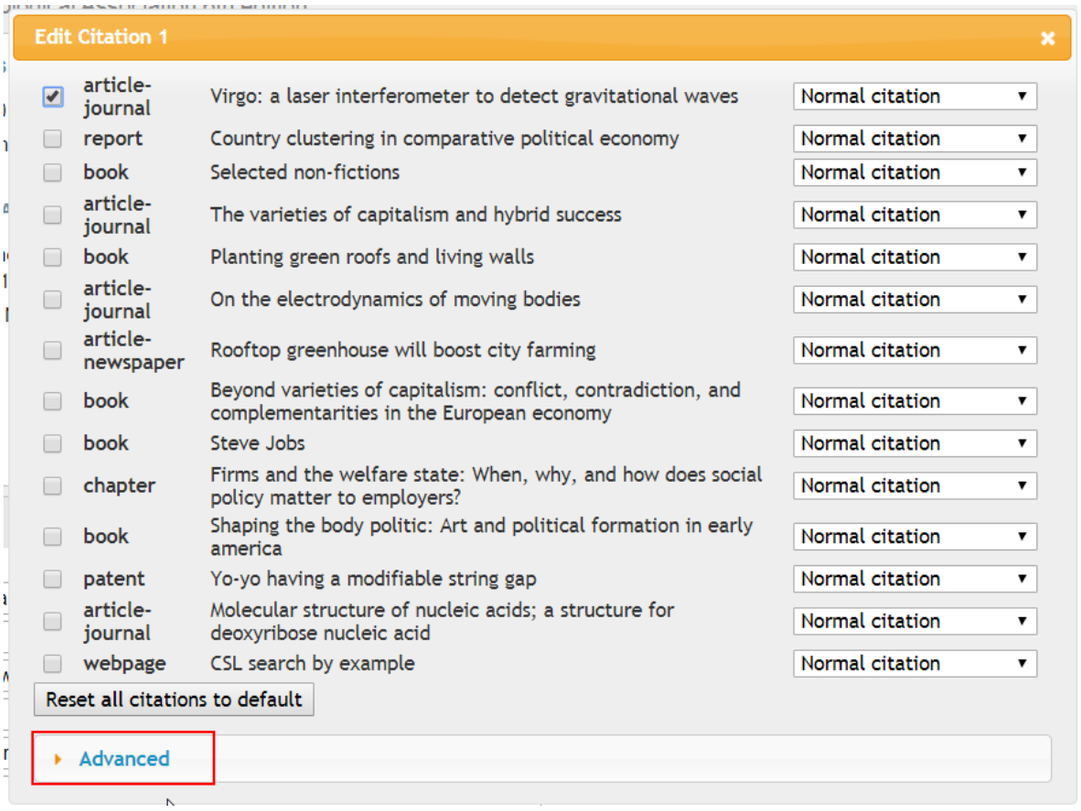


- Export the selected entry to Zotero by a right-click on the entry.

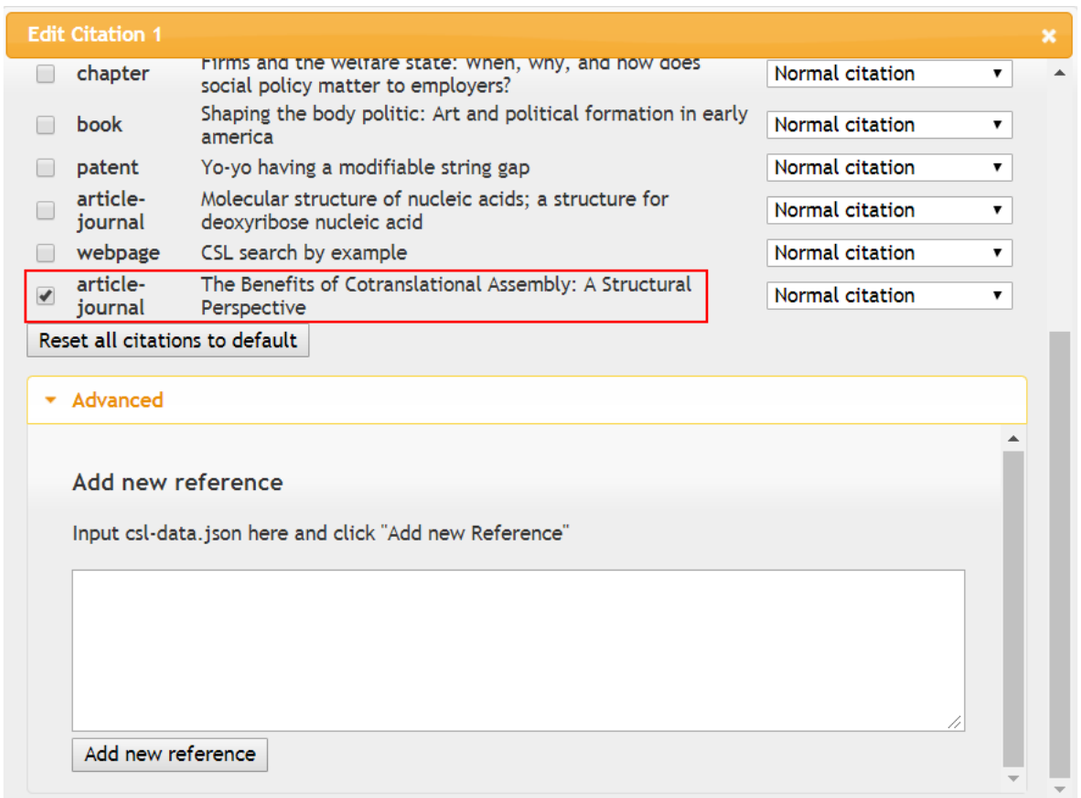


- Then export the entry in the format CSL JSON - in Zotero available as "**Citation Style Language data format**".
- Save the export file on your desktop and open it in an editor.
- Copy the code.
- Open the CSL-Editor: https://pure.mpg.de/csl-editor/visualEditor/
- Open e.g. "Citation 1" of "Example citations" in the right corner.

- Then go to "Advanced".



- 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.



- The added sample remains in the CSE until the cache is cleared.

12.4.7 Modify a style

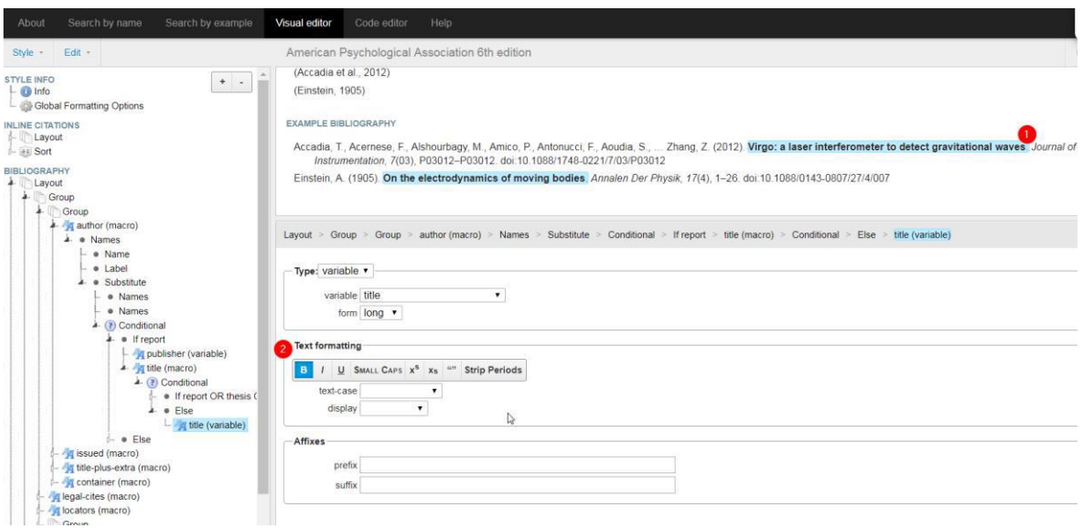
Before you can use a style edited in CSE, the following steps must be completed:

In the following chapters you will find some examples on how to modify styles.

12.4.7.1 Format a variable

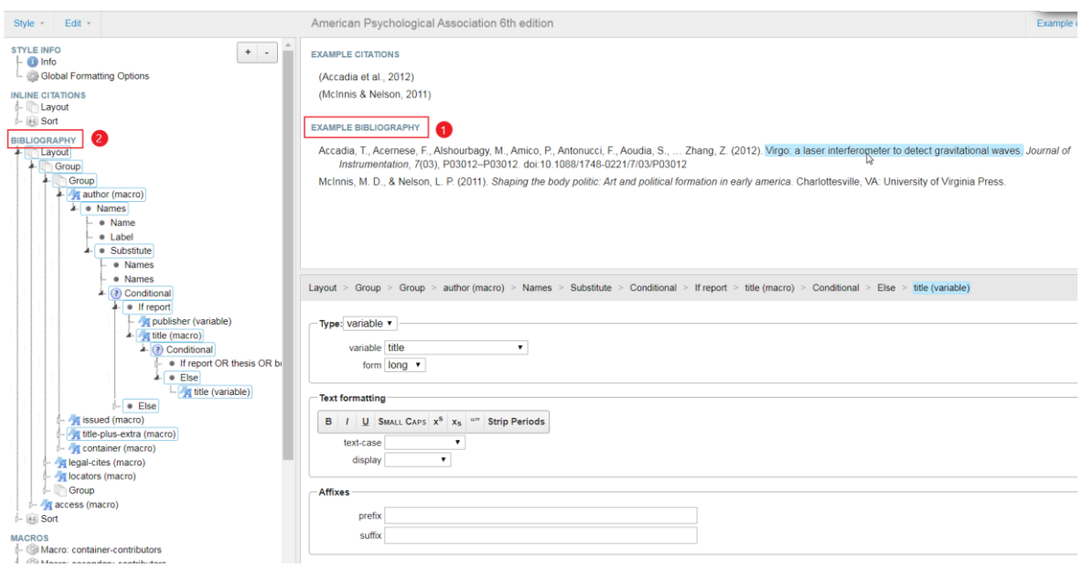
In the Visual Editor, click on the variable/text (see number 1) you want to format.
In the following example, it is the title.

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".



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).



In "Text formatting", you can set the formatting. For example, for *text-case* you can choose from seven options:

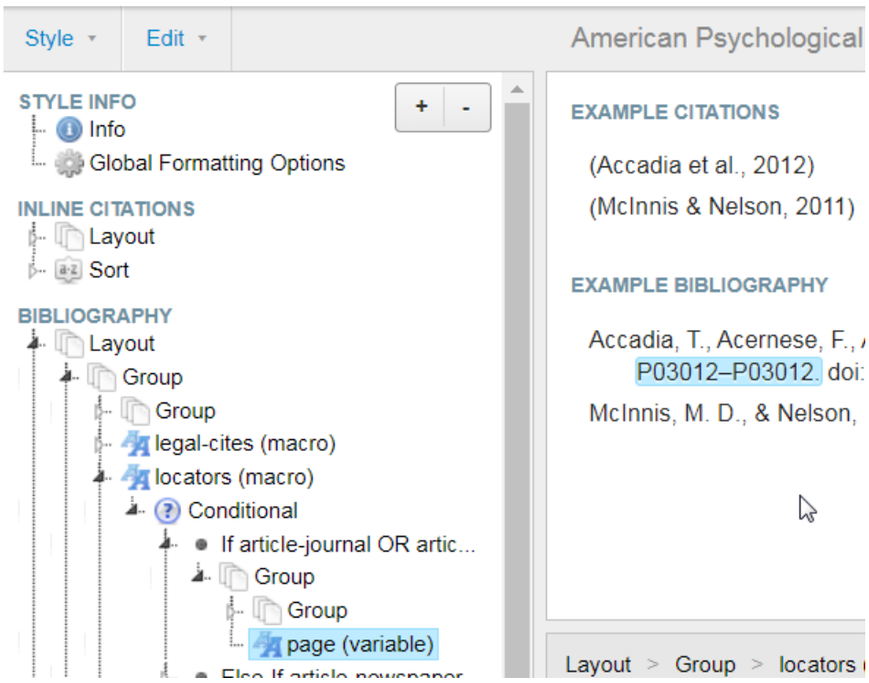
- Empyt field = The title will be used as entered in PubMan.
- lowercase = virgo: a laser interferometer to detect gravitational waves.
- uppercase = VIRGO: A LASER INTERFEROMETER TO DETECT GRAVITATIONAL WAVES.
- capitalize-first = Virgo: a laser interferometer to detect gravitational waves.
- capitalize-all = 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

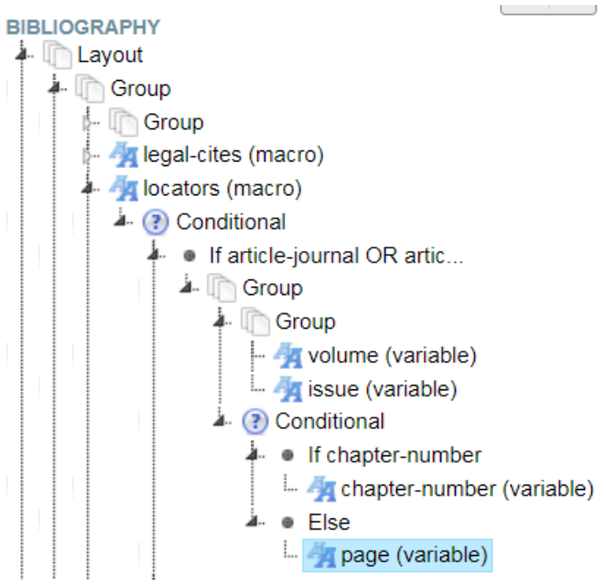
In order to add a new variable, the corresponding name of the variable in the CSE is needed. For example, if the sequence number should be displayed, then first search in the field-mapping-table for the variable in which the article number is defined.

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.)
106		startpage-endpage	page
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.

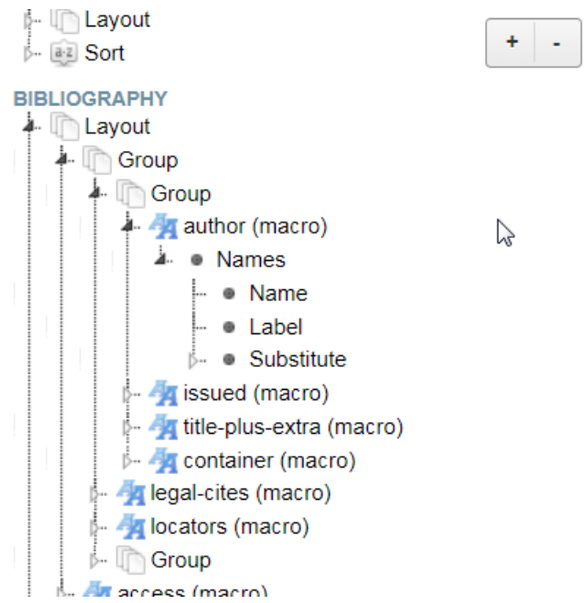


You can find the style for this example under: *American Psychological Association 6th edition_NT_example_page+chapternumber*.

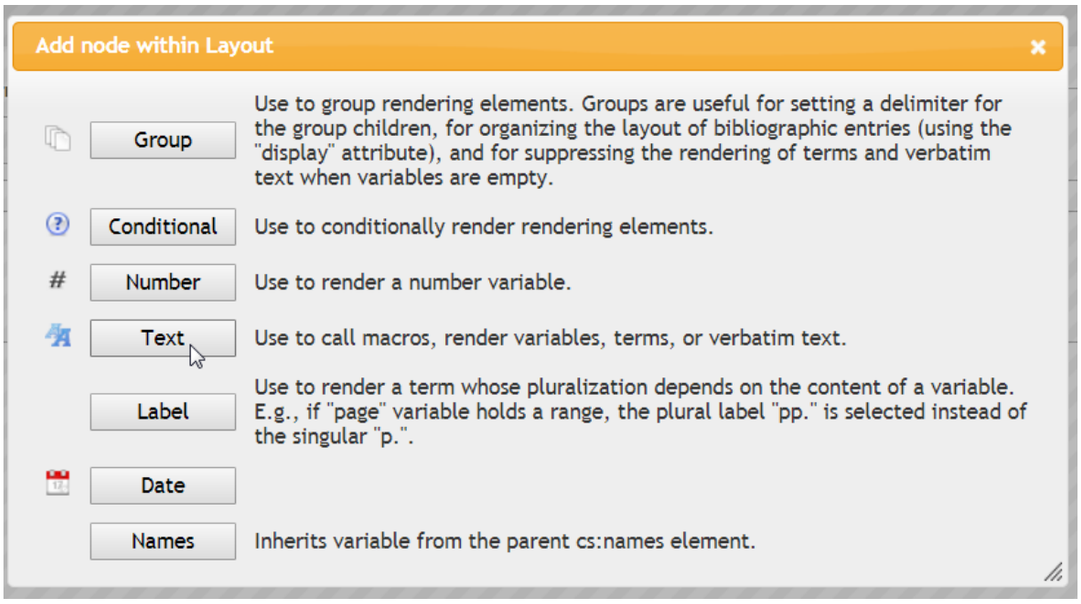
12.4.7.3.1 Add keywords variable

To add another meta field, proceed as follows:

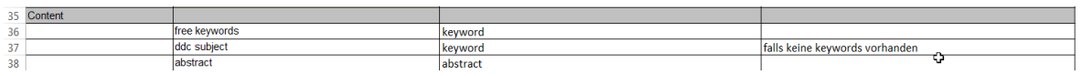
For example, if you want to display keywords, find the appropriate section in the "Bibliography" tree and click on the plus-icon:



Then select "Text":

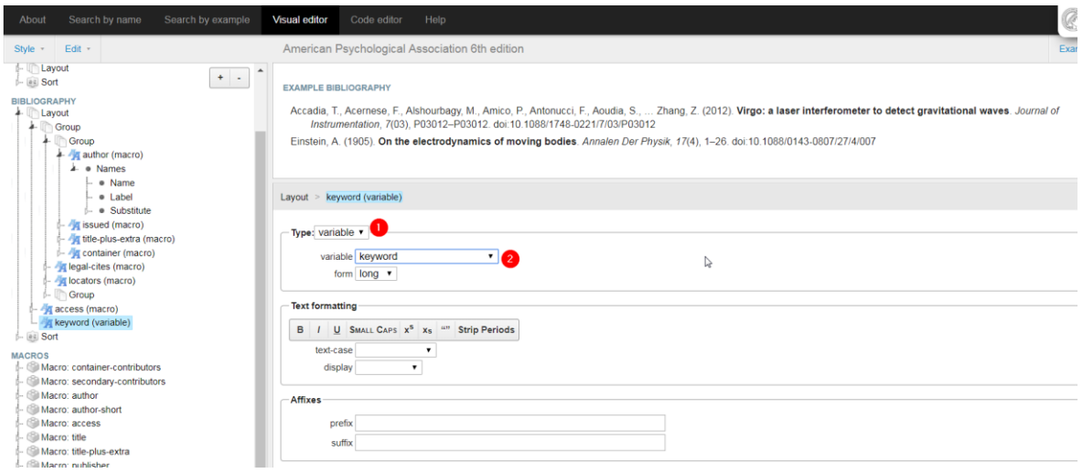


To select the correct variable in the "Type"section, first check the field-mapping to find out which variable is used to display keywords. Of course, the variable "keyword" is intended for the display of keywords. Here is the corresponding section of the field-mapping:



35	Content			
36		free keywords	keyword	
37		ddc subject	keyword	falls keine keywords vorhanden
38		abstract	abstract	

Now select the "Type variable" (No. 1). Then, select the "variable keyword" (No. 2):



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 field-mapping table , 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
8. arXiv
9. 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*

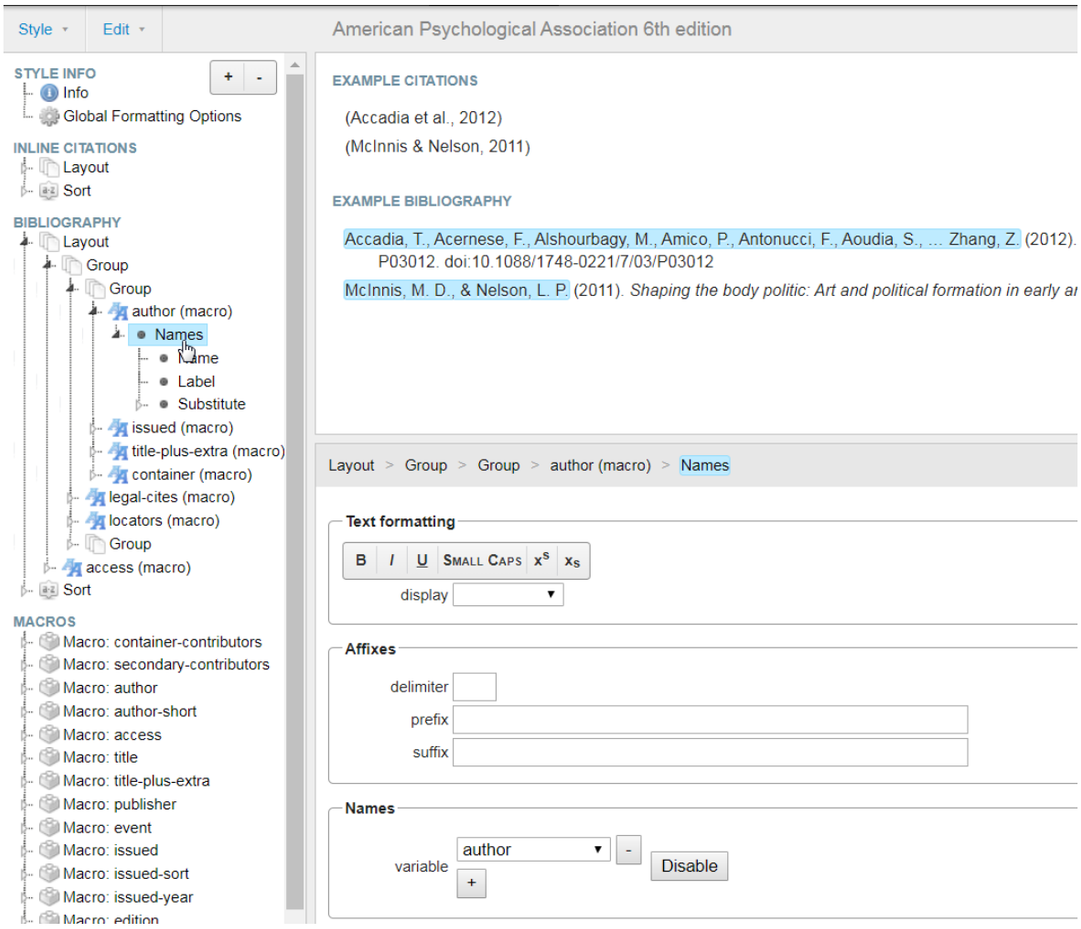
In case you want to display the URL variable, it will be displayed in the following order: Locator (type: Any Fulltext, Post, Pre, Publisher Version), PubMan-File (public + type: Any Fulltext, Post, Pre, Publisher Version); Identifier URI (first entry).

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.

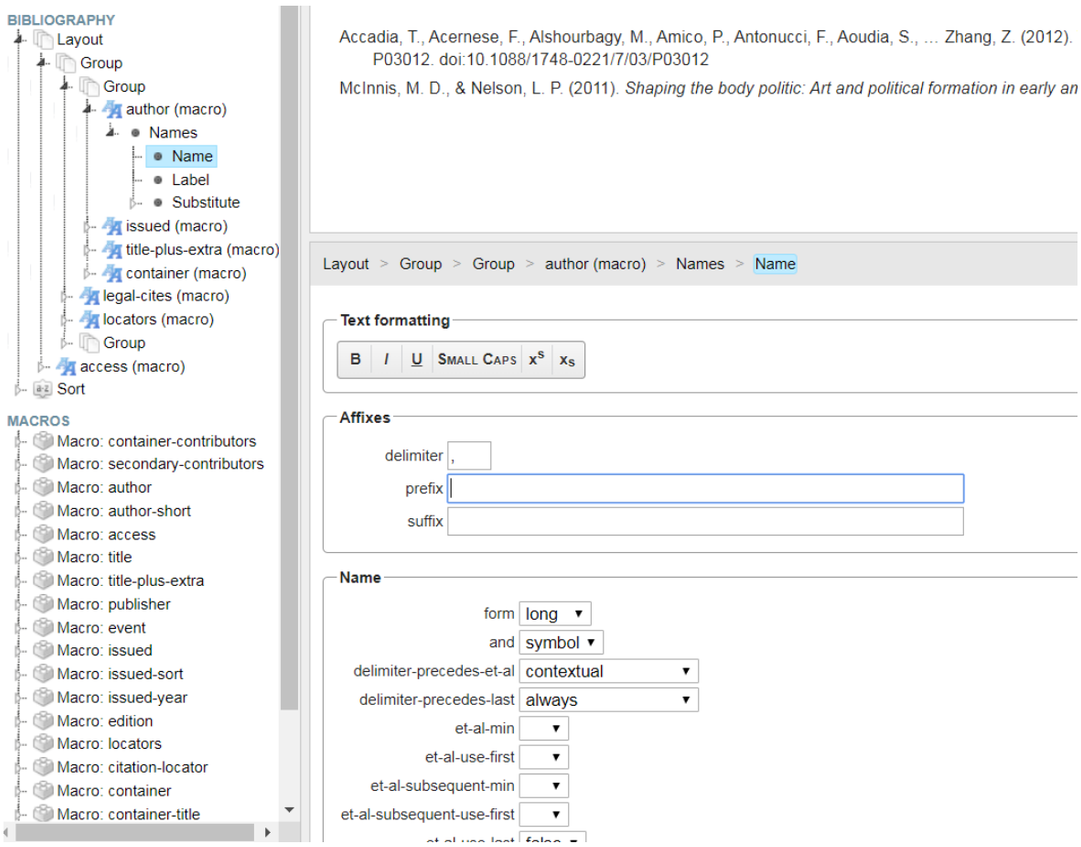
12.4.7.4 Modify the display of authors

There are several ways to display authors:

In the section "Names", you can enter prefix and suffix, change the display to bold, etc.



You can also define what and how it will be displayed.



Setting	Description	Output
form	Here you can specify whether	- long: Accadia, T., Acernese, F., Alshourbagy, M., Amico, P., Antonucci, F., Aoudia, S (2012). Virgo: a laser interferometer to detect gravitational waves. *Journa* *Instrumentation*, *7*(03), P03012–P03012. doi:10.1088/1748-0221/7/03/P0

	all parts of the name should be displayed: - long = The entire name is displayed - short = Only the last name is displayed - count = The number of authors is displayed	- short: Accadia, Acernese, Alshourbagy, Amico, Antonucci, Aoudia, … Zhang. (2012 interferometer to detect gravitational waves. *Journal of Instrumentation*, P03012. doi:10.1088/1748-0221/7/03/P03012 - count: 7. (2012). Virgo: a laser interferometer to detect gravitational waves. *Journal o Instrumentation*, *7*(03), P03012–P03012. doi:10.1088/1748-0221/7/03/P0
and	Defines the separator between the second-last and the last name. - text = "and" - symbol = "&" - null = No separator is shown.	- text: McInnis, M. D., and Nelson, L. P. (2011). *Shaping the body politic: Art and poli in early america*. Charlottesville, VA: University of Virginia Press. - symbol: McInnis, M. D., & Nelson, L. P. (2011). *Shaping the body politic: Art and politic early america*. Charlottesville, VA: University of Virginia Press. - null: McInnis, M. D., Nelson, L. P. (2011). *Shaping the body politic: Art and political early america*. Charlottesville, VA: University of Virginia Press.
delimiter-precedes-et-al	This defines when the *name delimiter* (defined in the Global Formatting 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.

	contextual = The *name delimiter* is used only for name lists truncated on two or more names. - always = The *name delimiter* is always used. - never = The *name delimiter* is never used. - after-inverted-name = The *name 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 *name-as-sort-order* set to *first*.	
delimiter-precedes-last	This defines when the *name delimiter* is used between the second-last and the last name of a non-truncated name list. Only works if text or	- contextual: Hancké, B., Rhodes, M., & Thatcher, M. *conflict, contradiction, and complem* New York: Oxford University Press. McInnis, M. D. & Nelson, L. P. (2011). *Sh* - always: Hancké, B., Rhodes, M., & Thatcher, M. *conflict, contradiction, and complem* New York: Oxford University Press. McInnis, M. D., & Nelson, L. P. (2011). *Sh* - never: Hancké, B., Rhodes, M. & Thatcher, M. *conflict, contradiction, and complen* New York: Oxford University Press. McInnis, M. D. & Nelson, L. P. (2011). *S*

	symbol is selected for "and" (second line). If "and" is not set (= null) the *name delimiter* is used. - contextual = The *name delimiter* is used only for name lists with three or more names. - always = The *name delimiter* is always used. - never = The *name delimiter* is never used. - after-inverted-name = The *name 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".	- after-inverted-name: Hancké, B., M. Rhodes & M. Thatcher Press. McInnis, M. D., & L. P. Nelson. (2011).
et-al-min	If the number of names matches or exceeds the	- et-al-min = 5 und et-al-first = 4: Accadia, T., Acernese, F., Alshourbagy, M., Amico, P., et al.

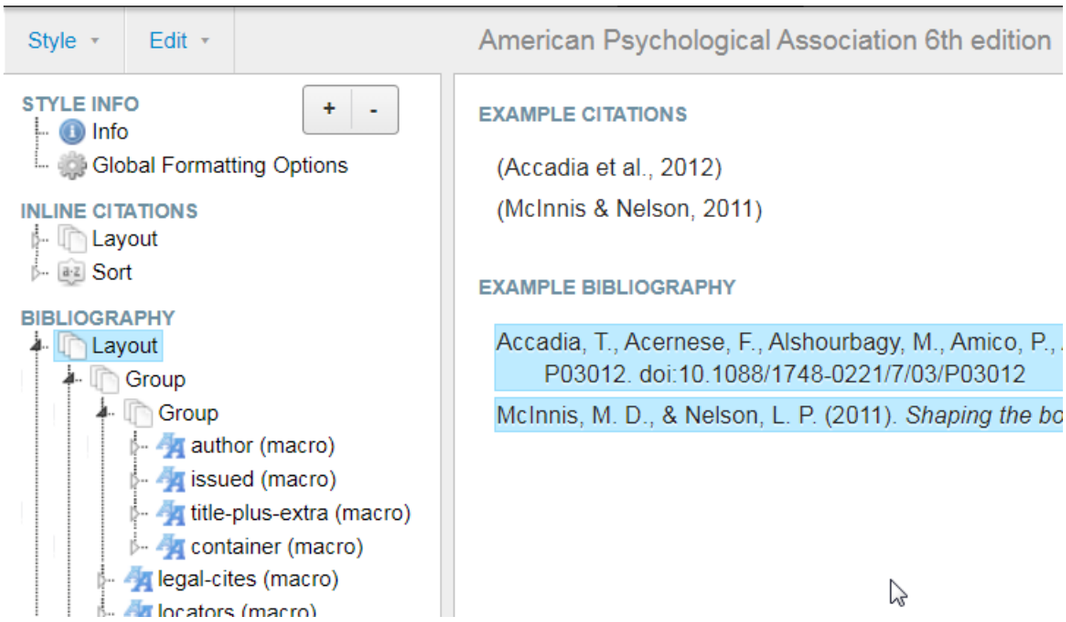
	number entered in et-al-min, an "et al" or "..." is inserted. The first names defined in *et-al-use-first* are then displayed. If *et-al-min* is smaller than *et-al-use-first*, then all authors are displayed.	
et-al-use-first	Here you select how many authors are displayed before "et al" is entered.	
et-al-subsequent-min/et-al-subsequent-use-first	If used, the values of these settings replace the values of *et-al-min* and *et-al-use-first* for subsequent 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., Arnau

	by the last name.	
initialize	If the value is "true" (default value), then the first names are displayed abbreviated with initials. With "false" the first names are fully displayed, if they are entered.	- true: McInnis, M. D., Nelson, L. P. (2011). *Shaping the body politic: Art and political early america*. Charlottesville, VA: University of Virginia Press. - false: McInnis, Maurie Dee, Nelson, Louis P. (2011). *Shaping the body politic: Art an formation in early america*. Charlottesville, VA: University of Virginia Press
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"), hyphenation of the initials can be set with the global option *initialize-with-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.

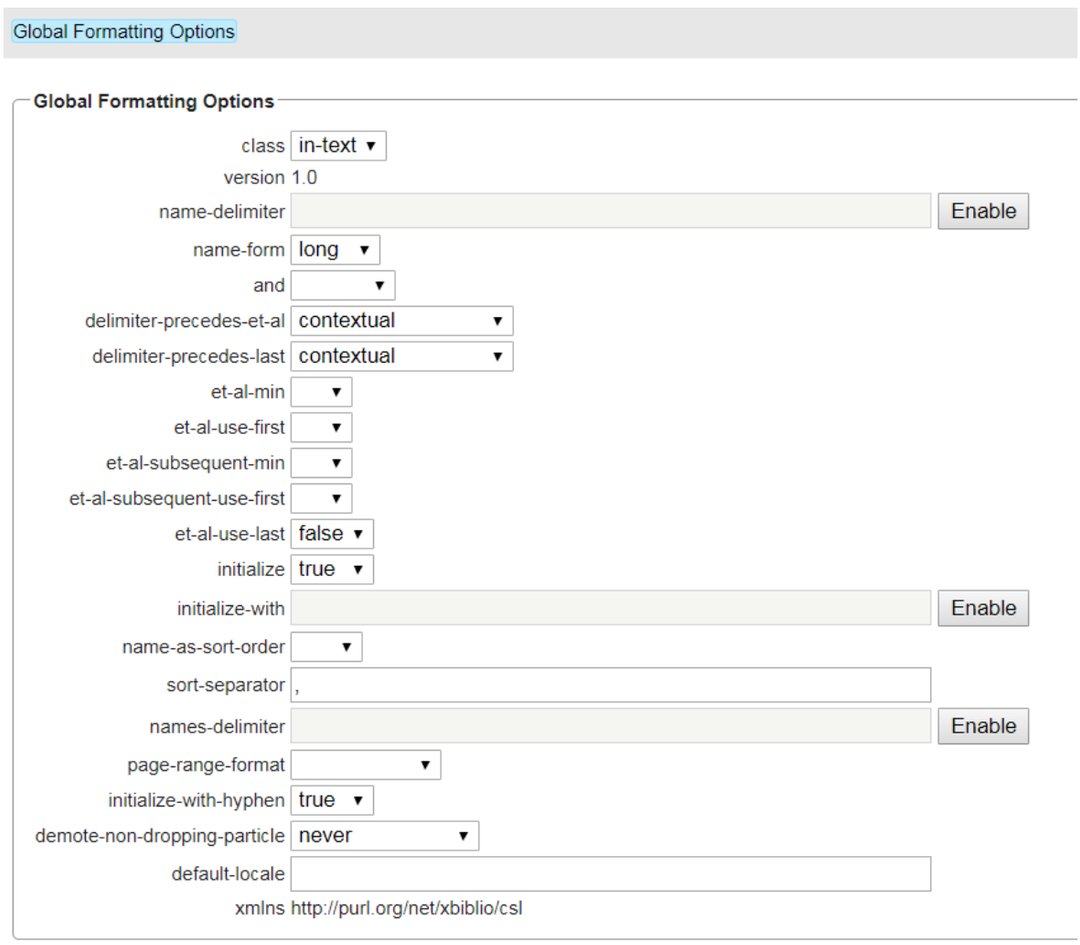
	last name. The attribute has three possible values: -null = The order is: first name last name. - first = This setting results in "last name, first name" for the first author. - all = All names are changed to "last name, first name".	
sort-separator	Sets the separator for name components that have changed positions due to sort order by *name-as-sort-order*. The default value is ", " ("McInnis, Maurie Dee"). As with sort-order, this setting affects only names written in the Latin or Cyrillic alphabets.	- disabled: McInnis, Maurie Dee, Nelson, Louis P. - ". " McInnis, M. D., Nelson, L. P. - "." McInnis, M.D., Nelson, L.P. - ", " McInnis, M. D., Nelson, L. P. -"; " McInnis; M. D., Nelson; L. P.

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.



Settings	Description	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 Modify the display of authors	
and	See chapter Modify the display of authors	
delimiter-precedes-et-al	See chapter Modify the display of authors	
delimiter-precedes-last	See chapter Modify the display of authors	
et-al-min	See chapter Modify the display of authors	
et-al-use-first	See chapter Modify the display of authors	
et-al-subsequent-min	See chapter Modify the display of authors	
et-al-subseque	See chapter Modify the	

nt-use-first	display of authors	
et-al-use-last	See chapter Modify the display of authors	
initialize	See chapter Modify the display of authors	
initialize-with	See chapter Modify the display of authors	
name-as-sort-order	See chapter Modify the display of authors	
sort-separator	See chapter Modify the display of authors	
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 specification. - chicago = e. g. "321-28" - expanded = e.g. "321-328".	- none: Campbell, J. L., Pedersen, O. K. (2007). The varieties of capitalism and hybrid *Comparative Political Studies*, *40*(3), 307–332. doi:10.1177/001041400628 - chicago: Campbell, J. L., Pedersen, O. K. (2007). The varieties of capitalism and hybrid *Comparative Political Studies*, *40*(3), 307–32. doi:10.1177/001041400628 - expanded: Campbell, J. L., Pedersen, O. K. (2007). The varieties of capitalism and hybrid *Comparative Political Studies*, *40*(3), 307–332. doi:10.1177/00104140062 - minimal: Campbell, J. L., Pedersen, O. K. (2007). The varieties of capitalism and hybrid *Comparative Political Studies*, *40*(3), 307–32. doi:10.1177/001041400628

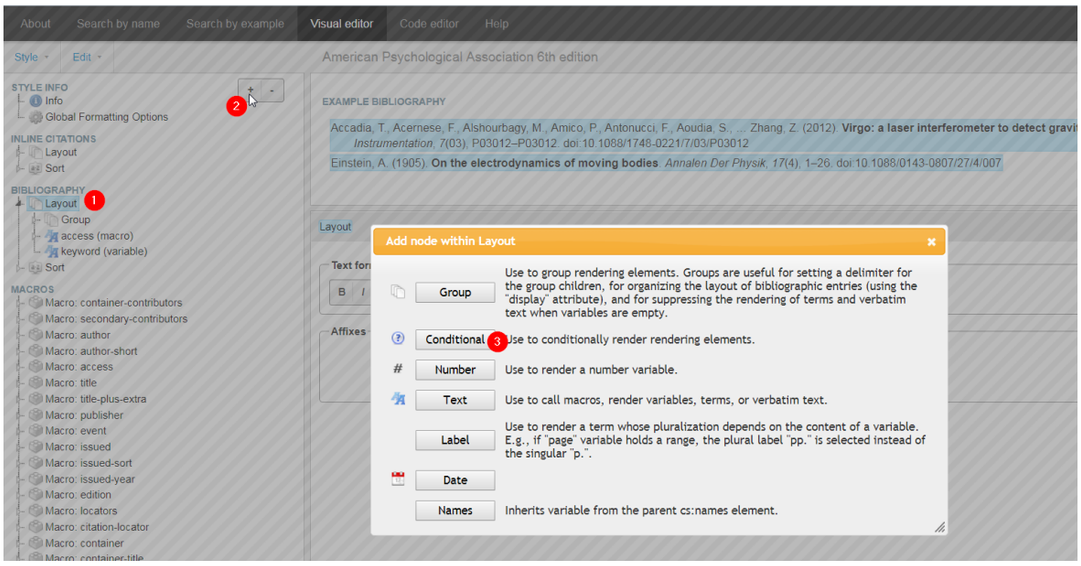
	- minimal = e. g. "321-8" - minimal-two = e. g. "321-28" - null = Displays the page numbers as entered. If the attribute is not set, page ranges are displayed without reformatting.	- minimal-two: Campbell, J. L., Pedersen, O. K. (2007). The varieties of capitalism and hybrid *Comparative Political Studies*, *40*(3), 307–32. doi:10.1177/001041400628
initialize-with-hyphen	Specifies whether compound first names (e.g. "Jean-Pierre") should be initialized with a hyphen ("J.-P.", value = "true", default) or without ("J.P.", value = "false").	- true: Arcoragi, J.-P. - false: Arcoragi, J. P.
demote-non-dropping-particle	Defines the display and sorting behavior of non-dropping-particle (e.g. "van den", "von der" etc.) in names with preposition. The sorts from the CSE are not applied in	- display-and-sort: Malsburg, C. von der. or Laat, S. W. de, Tertoolen, L. G. J. - never: Von der Malsburg, C. or De Laat, S. W., Tertoolen, L. G. J. - sort-only: Von der Malsburg, C.

	PubMan. Allowed values: - display-and-sort (default) = Dropping (e.g. "de") and non-dropping-particle are attached. - 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*.	
default-locale	Sets a default country for style localization. The value must be a country code. Examples: - en-GB - de-DE - en-US These codes are used to locate citations and bibliographies, and consist of localized	- de-DE: instead of "et al" "u. a." will be used Accadia, T., Acernese, F., u. a. 2012. Virgo: a laser interferometer to detect gravitat *Instrumentation*. 7(03):P03012–P03012. DOI: 10.1088/1748-0221/7/03/P03012. - en-GB/en-US: "et al" will be used: Accadia, T., Acernese, F., et al. 2012. Virgo: a laser interferometer to detect gravitat *Instrumentation*. 7(03):P03012–P03012. DOI: 10.1088/1748-0221/7/03/P03012.

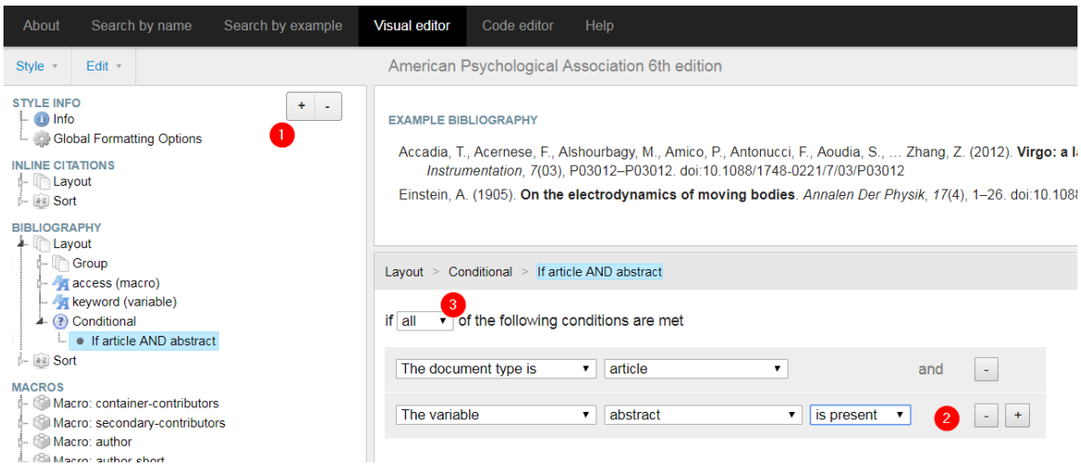
	terms, date formats, and grammar rules.	

12.4.7.6 Add conditionals

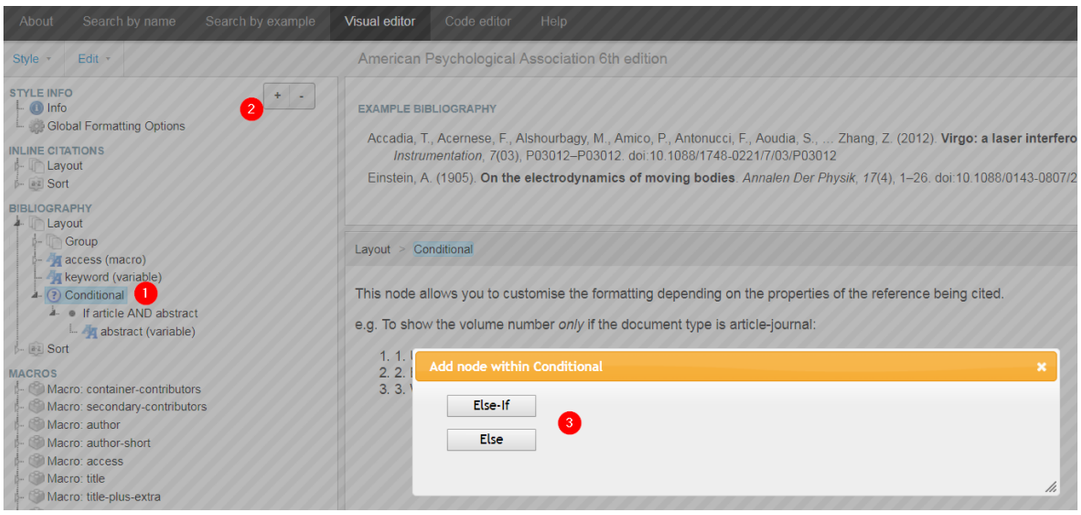
For example, if you want to display a metadata field when certain conditions exist in the dataset, do the following:
Select an appropriate position. In the example, the position below "keyword" is selected. To add a "conditional" there, click on "layout" and then on the plus sign:



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.



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 "Add keyword variable ".
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):

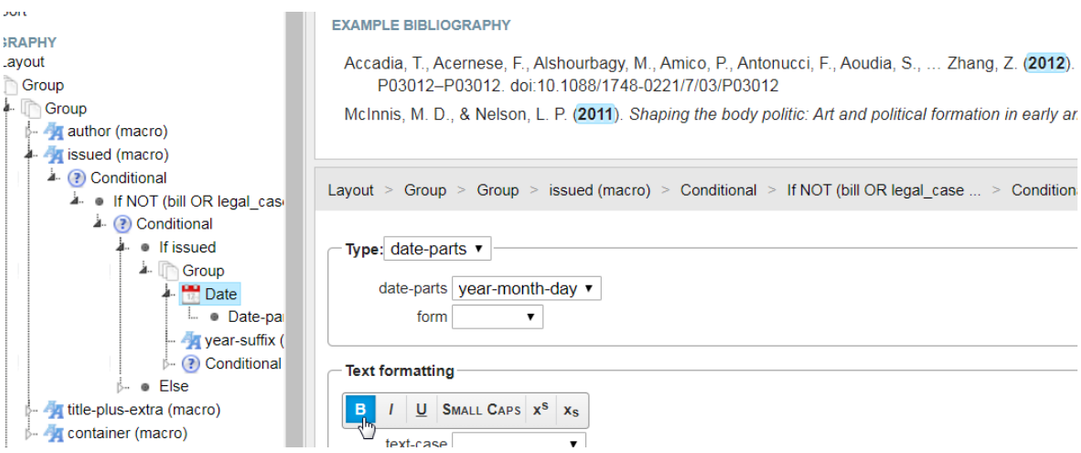


Here you can proceed as with the settings for "if".

12.4.7.7 Modify the publication year

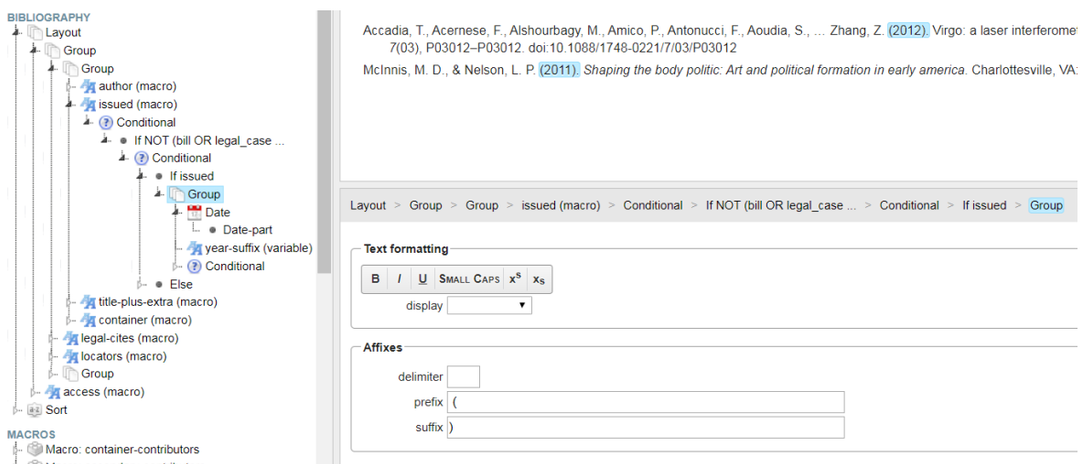
12.4.7.7.1 Display the year in bold

Display the publication year in **bold** by selecting the year in the example and then choose bold in the section "Text formatting":



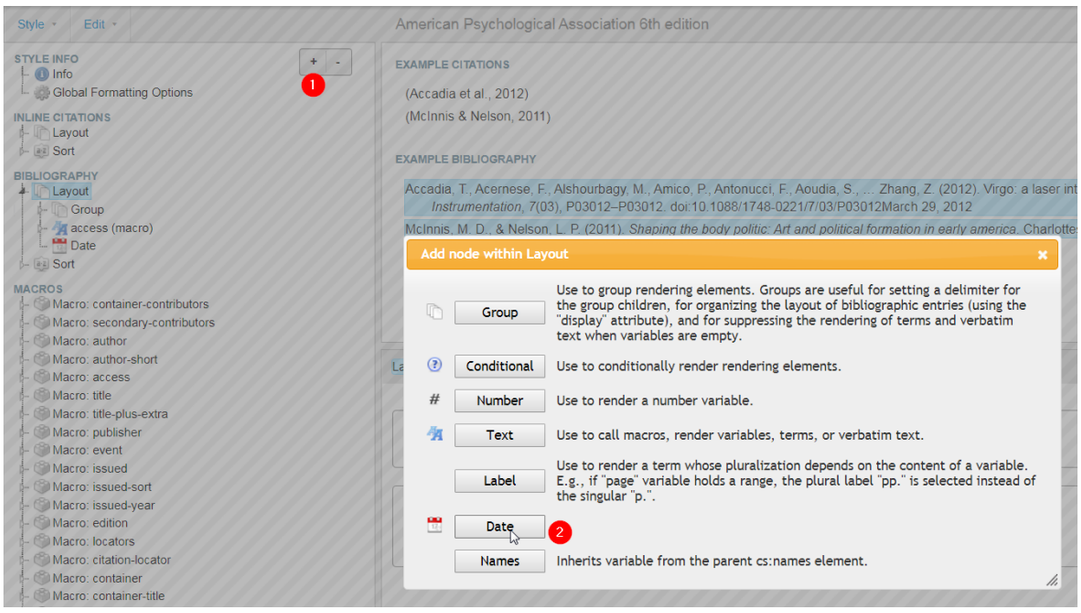
12.4.7.7.2 Display the year without parentheses

To exclude the parentheses before and after the year, remove the parentheses in the prefix and suffix of the year in the *Group*:

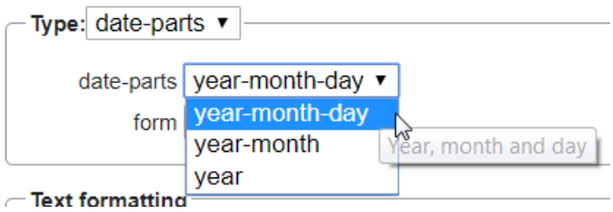


12.4.7.7.3 Date-parts

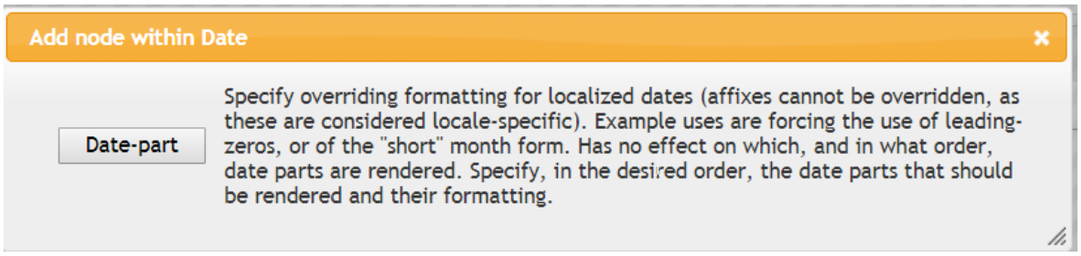
If you want to display a date, select the *Date* field at "add node".



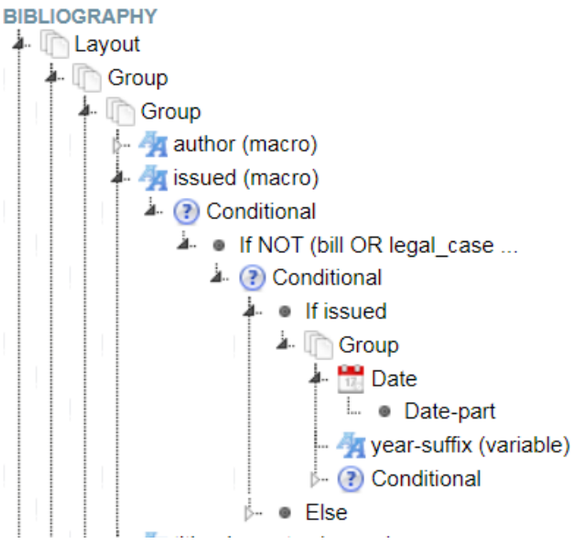
Then select which *date-parts* should be displayed.



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".



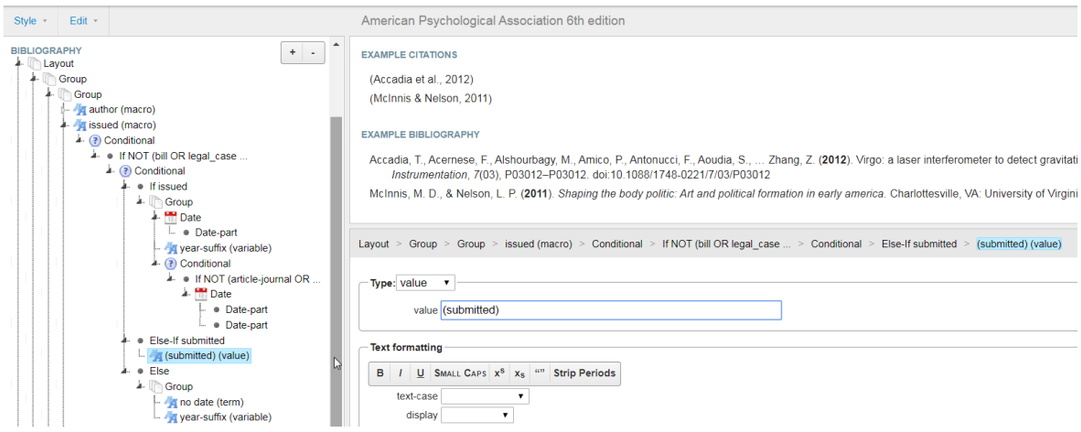
The output appears as the already existing APA style setting:



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:



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).*

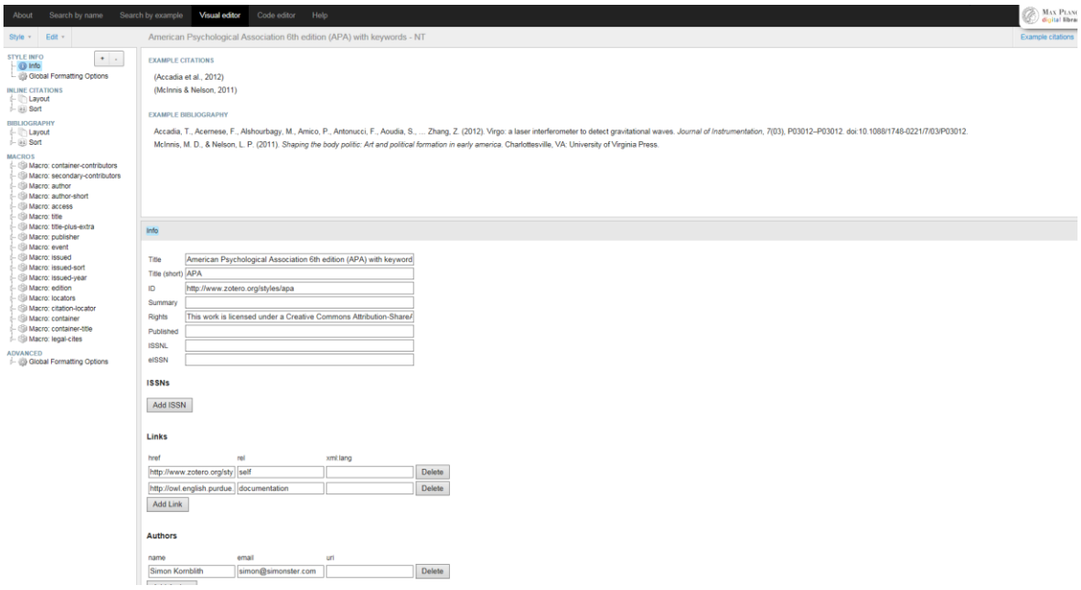
12.4.7.8 Limits of the CSL

Additional spacing between lines 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 not possible to generate content related queries. 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".



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"

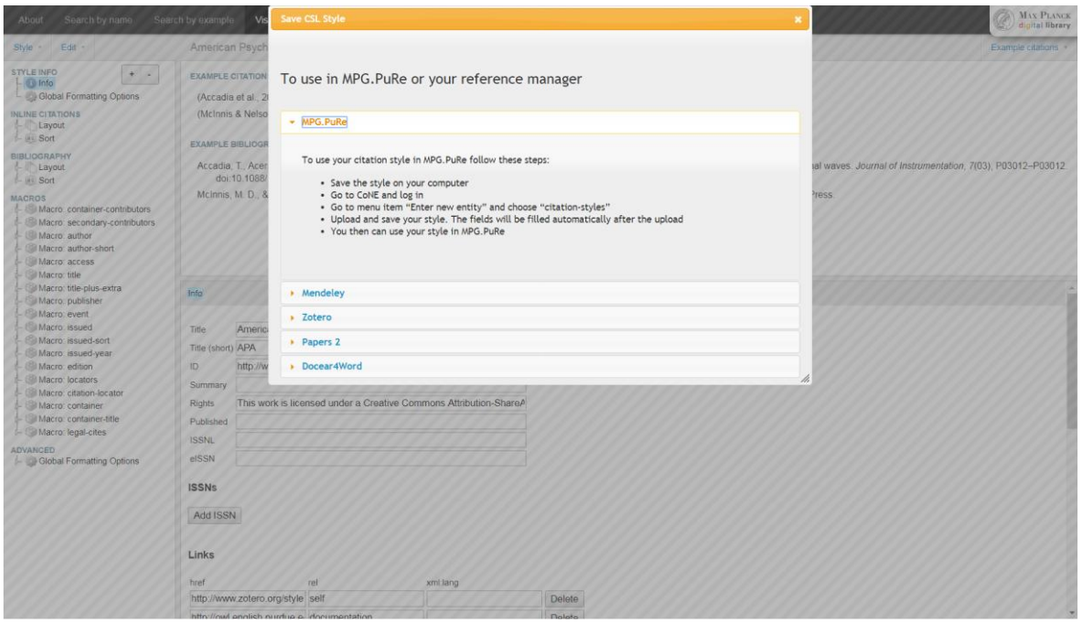
or respectively

"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.



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:

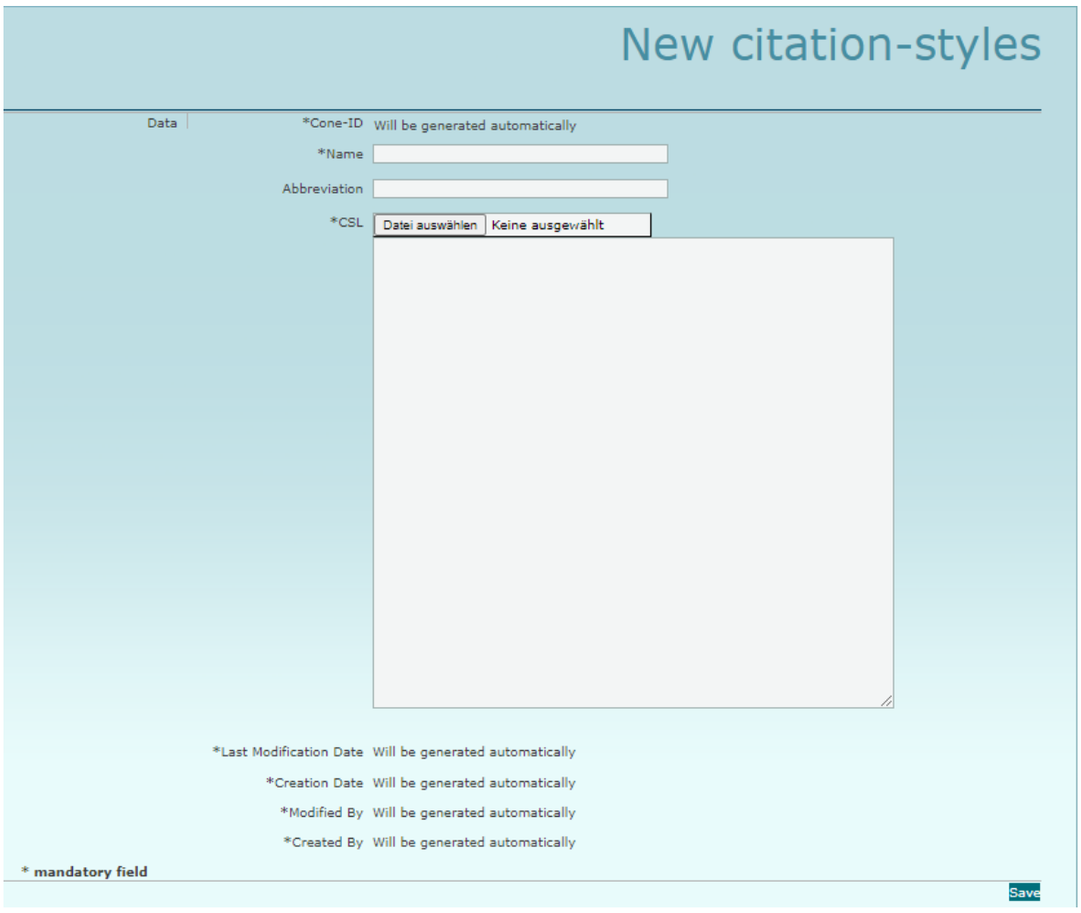
- In the CSL editor, switch to the code editor.
- Copy the entire "code".
- Open CoNE and create a new citation style.
- Copy the "Code" into the CSL field.

There is also a screencast (without audio) available:
https://subversion.mpdl.mpg.de/repos/smc/tags/public/PubMan/Support-Erkl%C3%A4rungsvideos/CSL-Stil_speichern.wmv

Alternatively, the "code" can also be saved locally on your computer.

12.4.10 Add a style to CoNE

Log in to CoNE and select the menu item "Enter new entity" and then "citation-styles". The entry mask for a new citation style opens.



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.

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 chapter "Basket - Export from the basket".

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 chapter "Tools - REST-Interface - Perform export via REST".

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 -

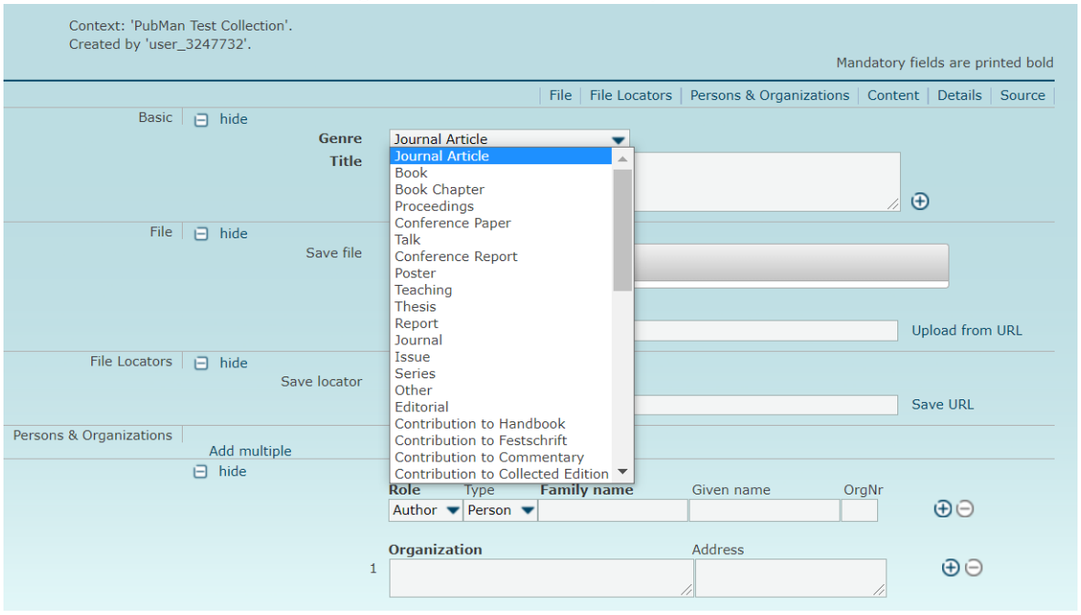
and therefore your MPI - are populated in the CMS. By just filtering by Organizational Units (OUs), display of duplicate items from other institutes are very likely.

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.

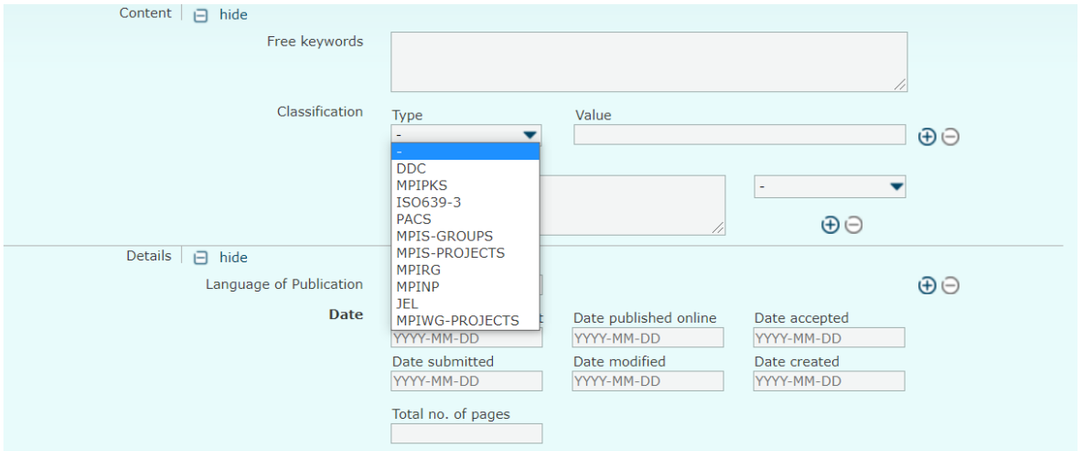


An overview of the available genres can be found in the Genre Overview. If you want to extend or minimize your selection, please contact the PuRe support.

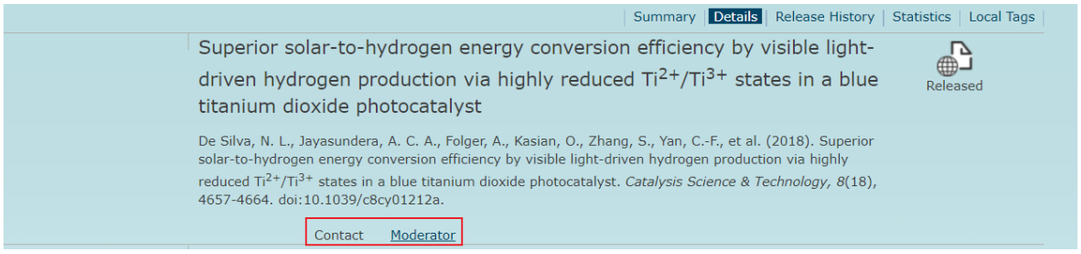
2. **Classifications:** You can add different classifications to your contexts. For example:

- DDC
- ISO639_3
- JEL
- customized classifications

When a classification is available for the context, you can select it in the content area:



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":

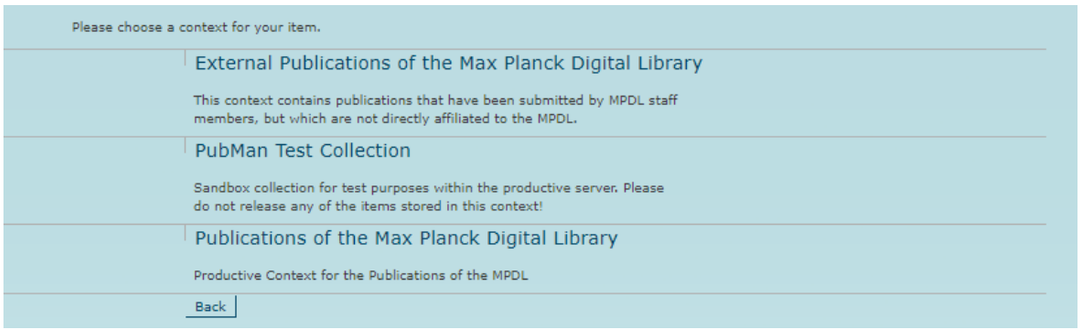


4. **Publication workflow:**

Two workflows are available: Simple and Standard. For more information, please see the following chapter "Workflows".

Contexts in practice

Before entering a publication, it is necessary to select the context to which the publication should be linked.

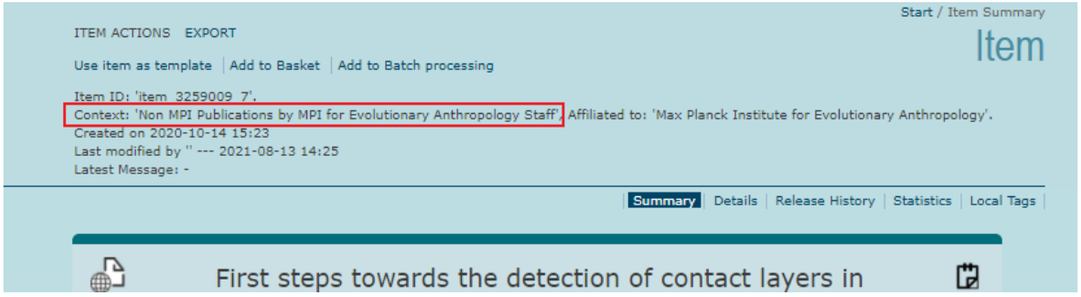


Contexts and rights

To enter items in a context, you need to have depository rights 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 Batch processing function.

Context visibility

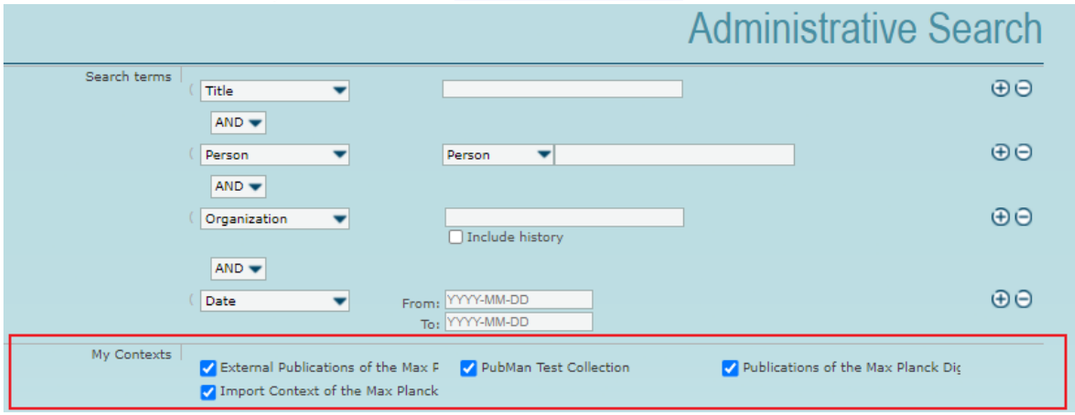
Contexts are not visible to external users. Only logged-in users can see in which context an item is saved.



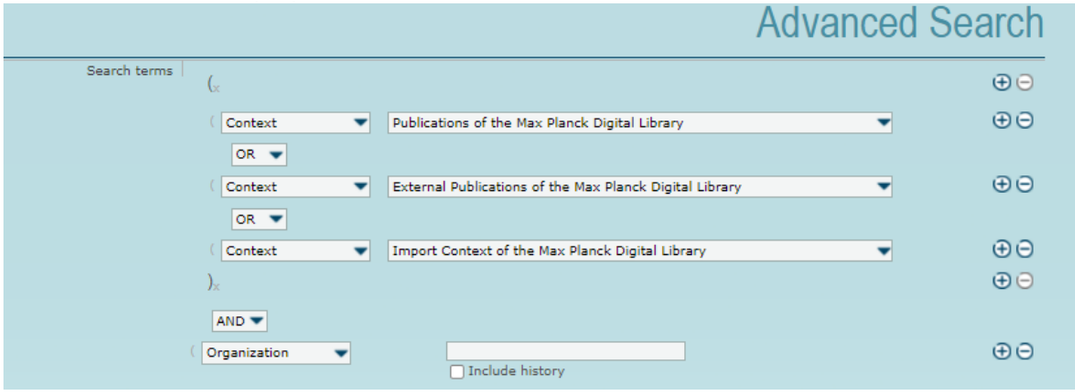
Contexts in search

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 chapter "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 administrative search . You can deselect them.



If you want to retrieve a publication list with all items of your MPI by using the advanced search , you should add the context search term. A query with brackets and the search operator "OR" are recommended for this purpose:



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**.

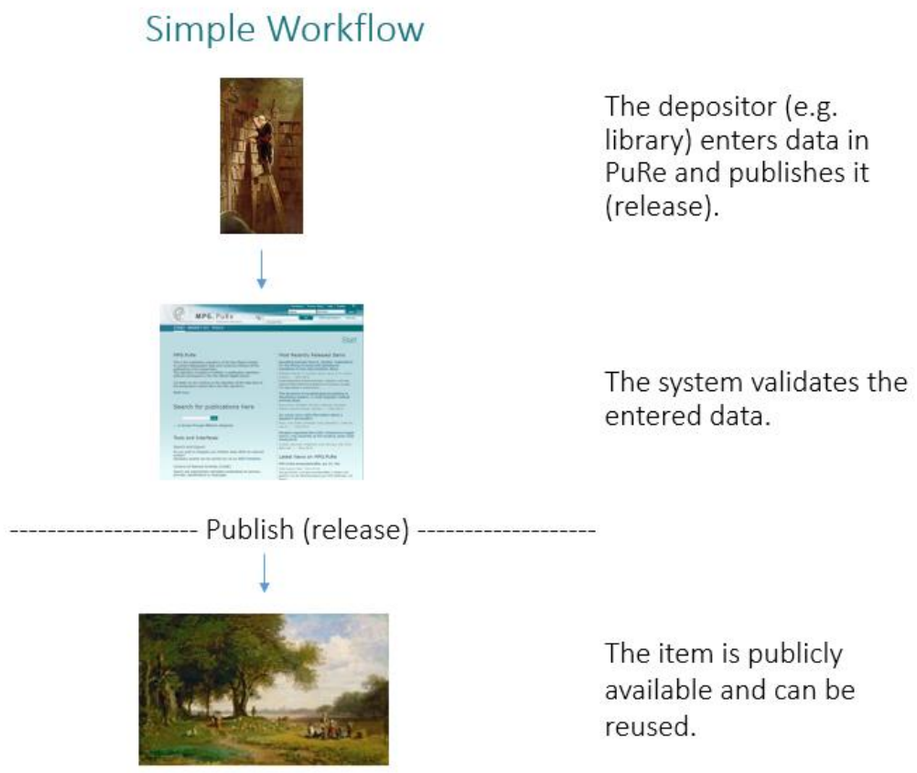
14.3 Workflows

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.

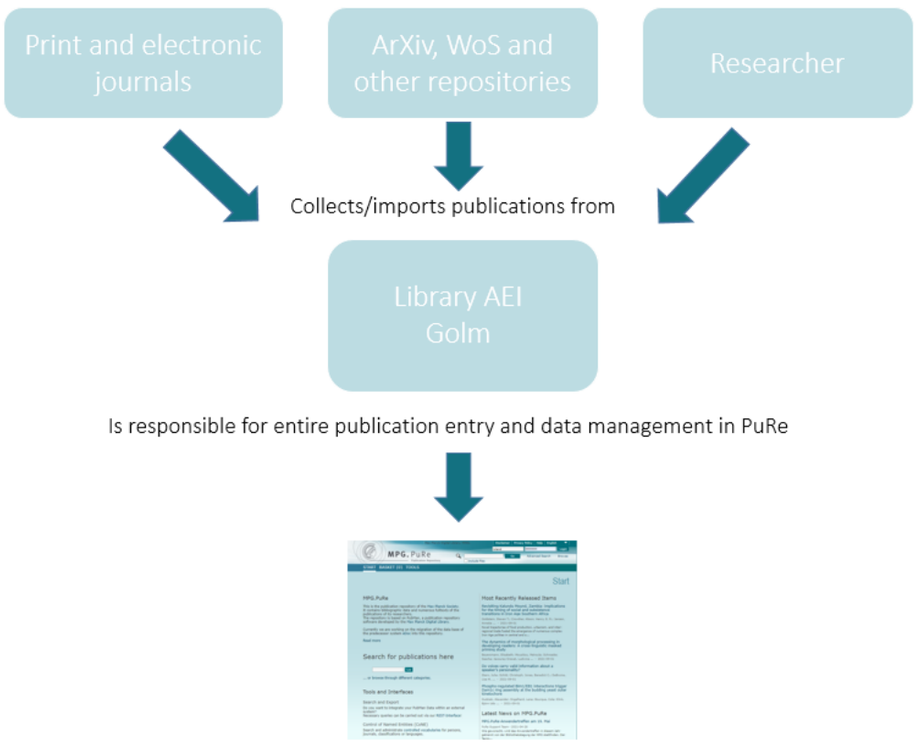
14.3.1 Simple Workflow

The Simple Workflow is well designed for institutions where one or a few people enter data, for example, in One Person Libraries (OPLs).

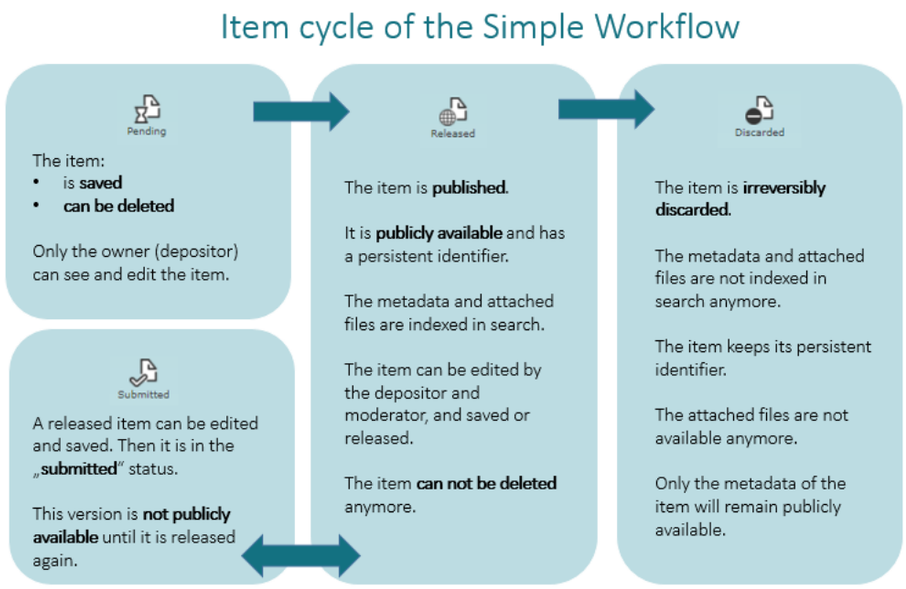
A library in the "Depositor" role enters data in PuRe and immediately publishes the dataset (release). Before the dataset is published, it is validated by the system.



An example for a simple workflow:



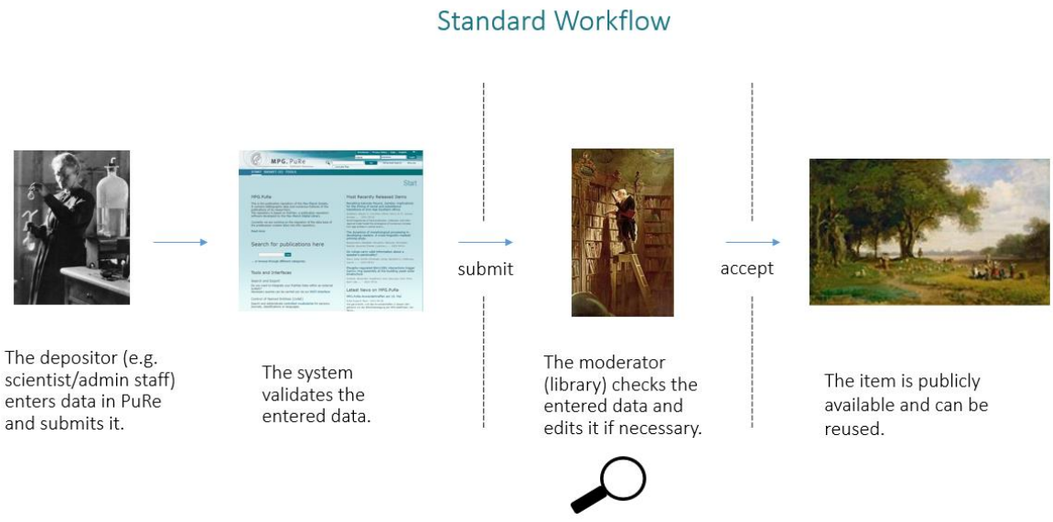
In the Simple Workflow, items can go through the following cycle:



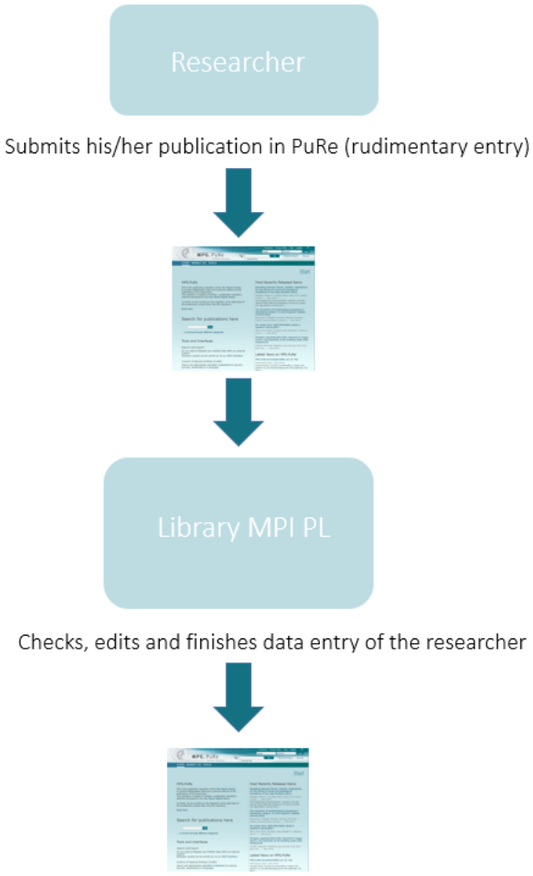
14.3.2 Standard Workflow

The standard workflow is designed for libraries or institutes where many people enter publications into PuRe, and the librarians check those entries before publishing.

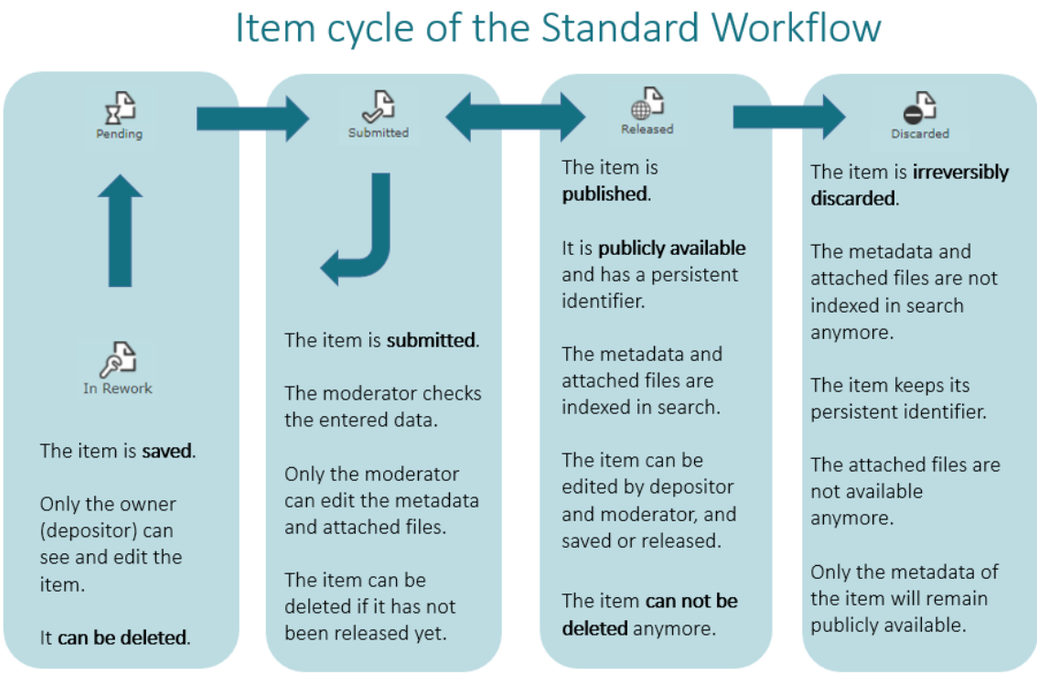
For example, scientists/administration staff or other colleagues enter data in the role "Depositor" and submit it for approval (Einstellen/Submit). The depositors themselves do not have the authorization to release the publications. The library checks the entries in its role as "Moderator" and modifies 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.



Here is an example of an institute with a Standard Workflow:



In the Standard Workflow, items can go through the following cycle:



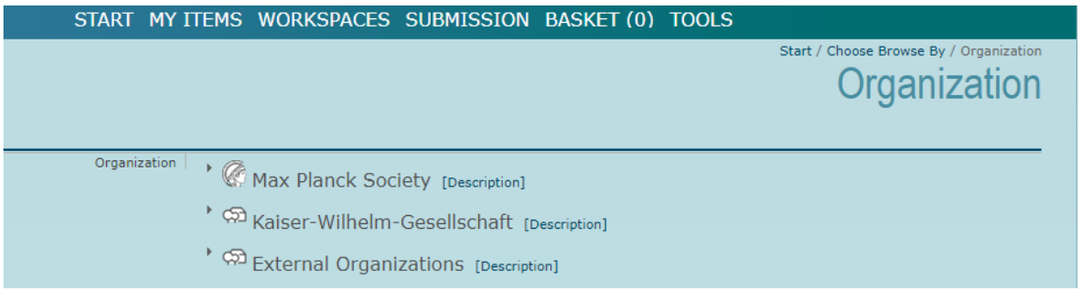
15. Organizational Units (OUs)

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 Browse function .
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



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.

15.2 Hierarchy

Each institute can choose whether and which subgroups and departments are created. There are two kinds of hierarchy to distinguish:

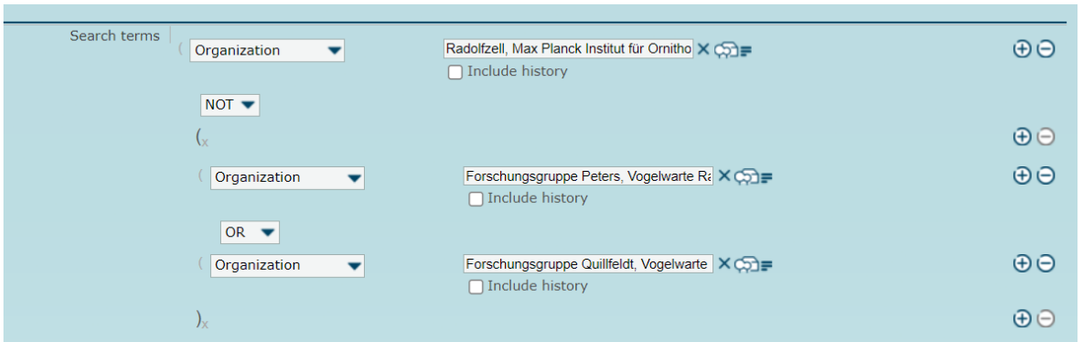
Some institutes decide for a **flat hierarchy**, which means all departments/groups are subordinated to the institute. Here is an example of a flat hierarchy:

Other institutes decide for a **leveled hierarchy** - a tree structure with sub-departments/groups. Here is an example:

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:

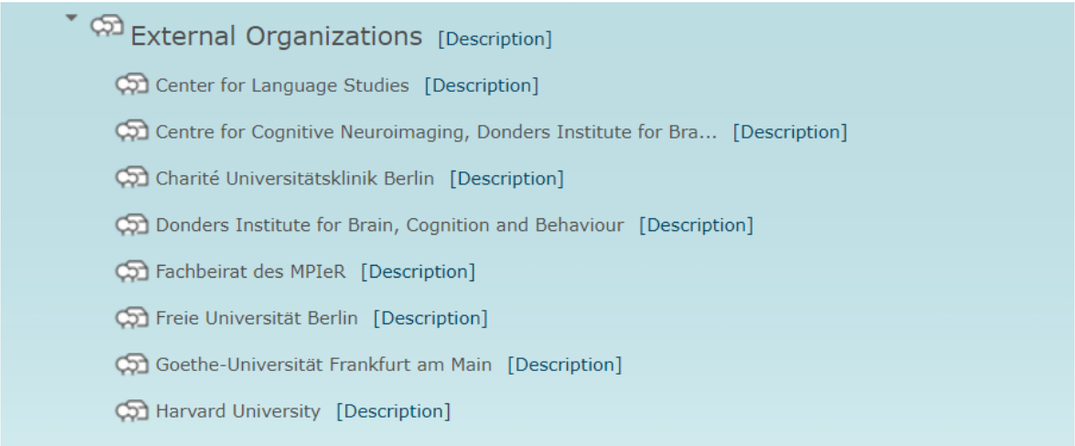
- Vogelwarte Randolfzell
  - **NOT**
  - **(**Forschungsgruppe Peters
  - **OR**
  - Forschungsgruppe Quillfeldt**)**

This means, when you search for an OU, the children (in this case, the OUs below it) will be searched as well.



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.

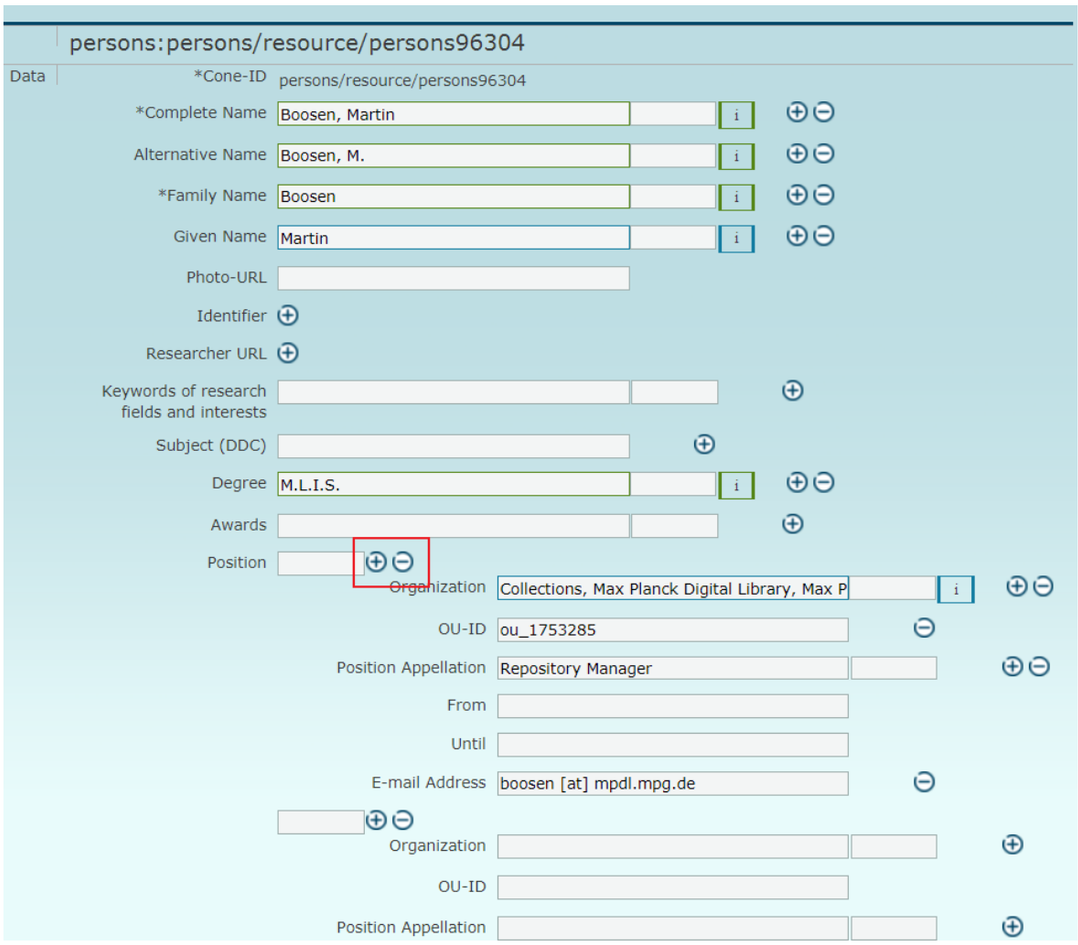


15.4 Rename OUs

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 CoNE 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.



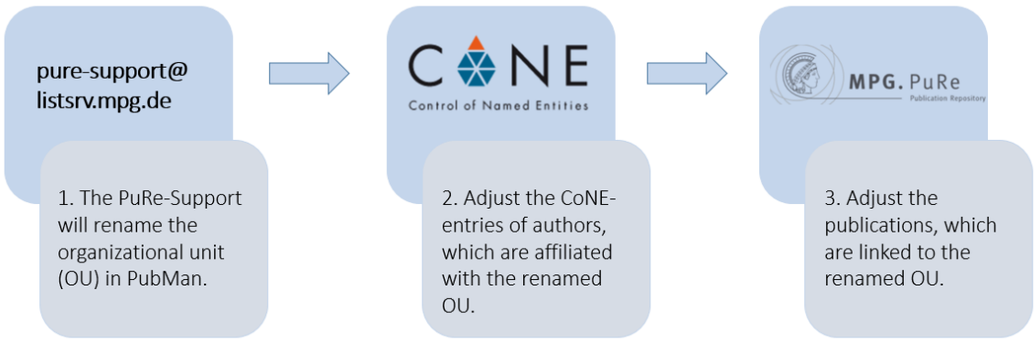
Depending on the agreement with the department/group management, the publications with the old affiliation entries sometimes need to be adjusted retroactively. If this is the case, then each PubMan entry must be edited manually and the affiliation must be replaced in each item. You can

find information on how to enter an affiliation in chapter "Submission - Full submission - Add an organization as affiliation".

In some cases, the previous OU name should remain in the PubMan entries. Then you do not need to change anything in the items.

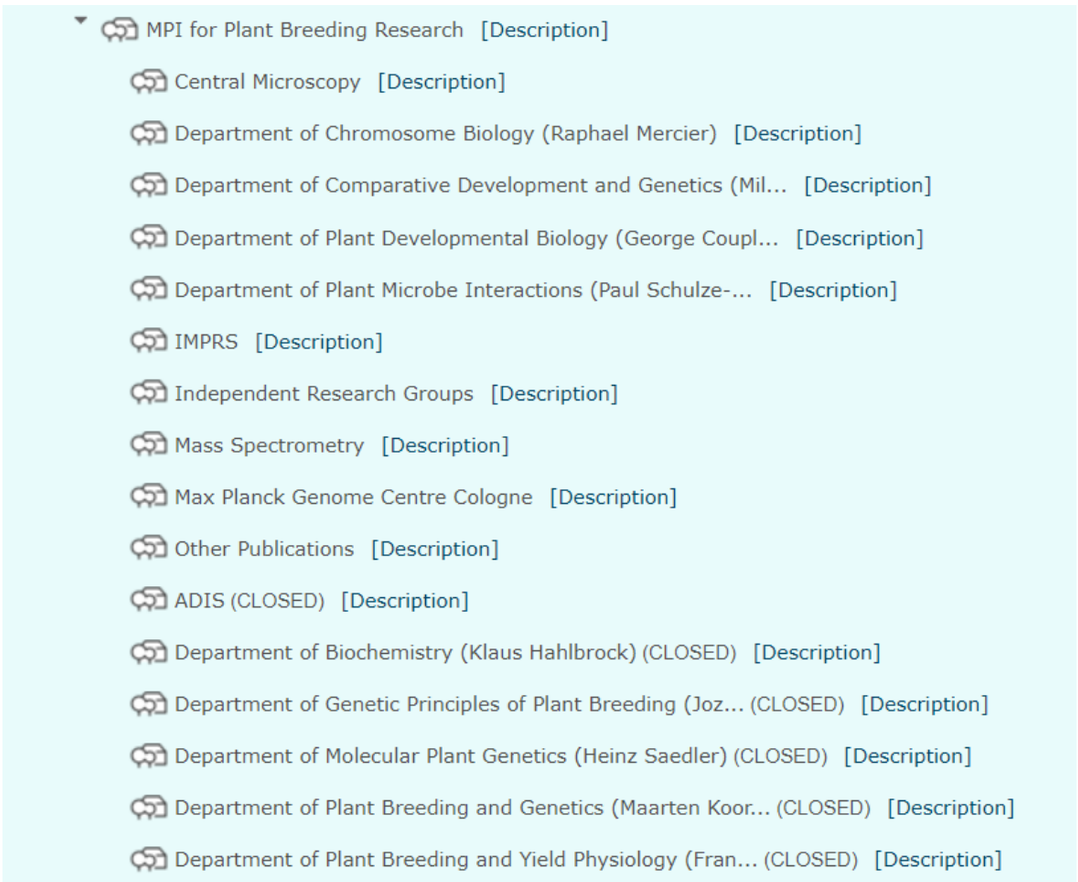
Since the OU-ID is entered in both the old and the new affiliation, all entries will be found in the **search** . Because when an OU is renamed, the OU-ID doensn't change.

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.



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 Rename OU . For instance, the CoNE author entries need to be adjusted and depending on the case also the previous publications.

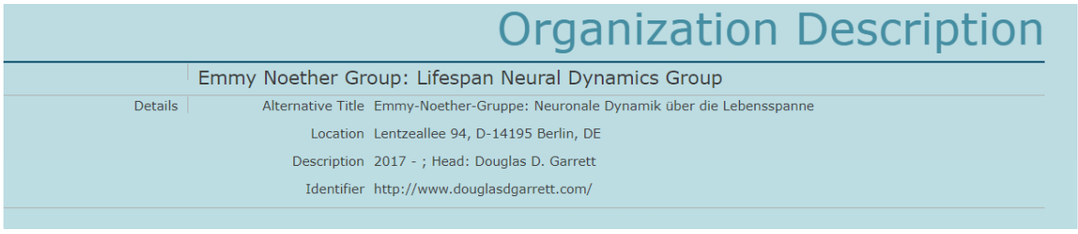
15.7 Create new OU

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.

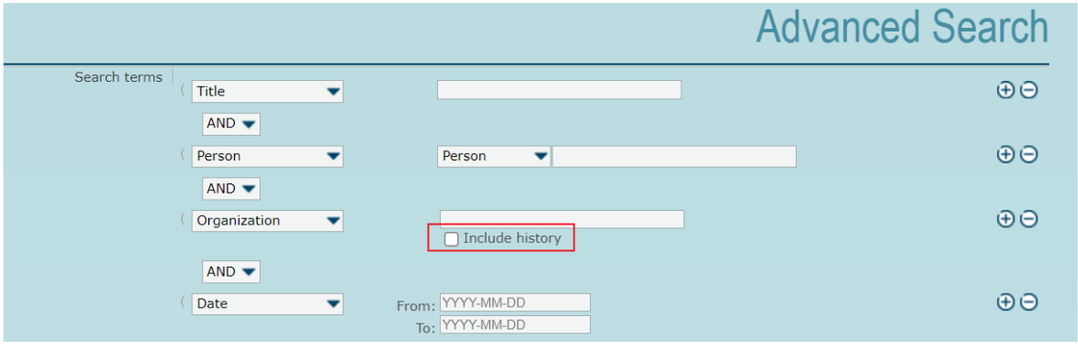
Please provide the following information of the OU (mandatory fields are printed in bold):

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:



The predecessor and successor of the OU can also be specified. This information can be used for the search:



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

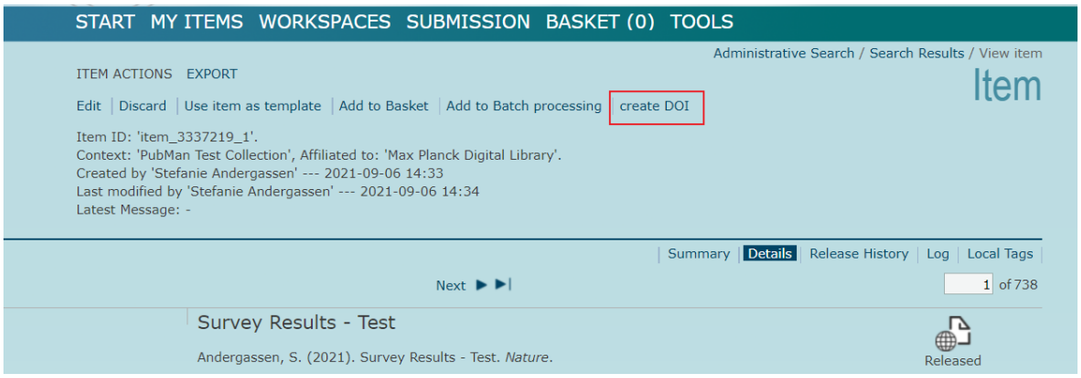
For the public file, the following content categories can be selected:

- Any fulltext
- Preprint
- Postprint
- Publisher version
- Code
- Research data
- Multimedia

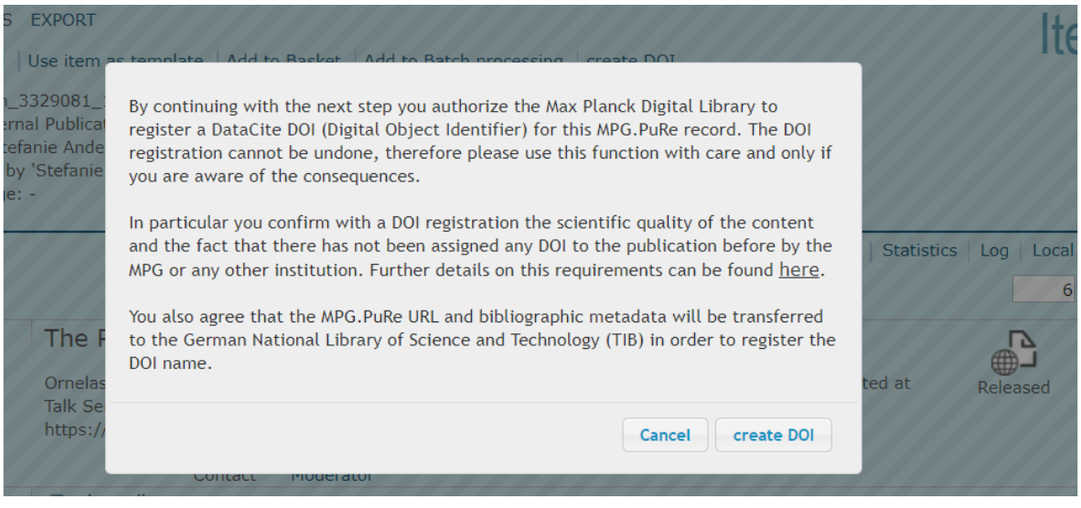
(Excluded from the DOI assignment are: Supplementary Material, Correspondence, Copyright transfer agreement, Abstract, Table of contents)

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.



Click on the "Generate DOI" and a window with a warning appears:



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

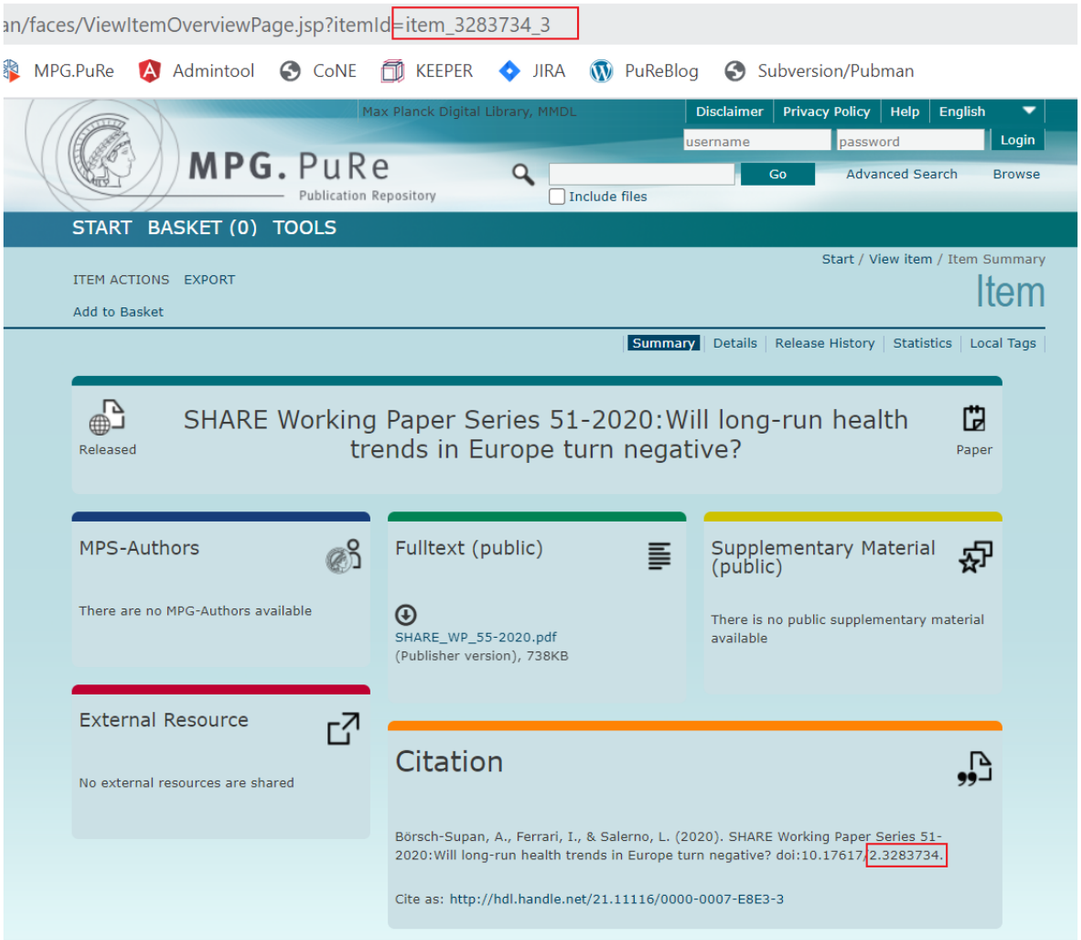
- Affiliations of the authors
- Date with prioritization: Date published in print, Date published online, Date accepted, Date submitted, Date modified, Date created and Event date
- Publisher

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 prefix **10.17617/2.** and the item ID (without the version number).



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.

OpenAIRE: 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.

CoRE: 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.

OpenDOAR: 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
  https://pure.mpg.de
- MPG.PuRe Blog
  https://blog.pure.mpg.de
- CoNE
  https://pure.mpg.de/cone/
- CSL Editor
  https://pure.mpg.de/csl-editor/about/
- MPG.PuRe Users Mailing List
  https://listsrv.mpdl.mpg.de/mailman/listinfo/pure-users
- YouTube PubMan Channel
  https://www.youtube.com/channel/UC64tYCVVKatqH8aPUCKILwg/videos
- OAI-PMH Schnittstelle
  Base-URL: https://pure.mpg.de/oai/provider
  Overview: https://pure.mpg.de/oai/
  Retrieval-form: https://pure.mpg.de/oai/oaisearch.do
- Sitemap
  https://pure.mpg.de/pubman/sitemap.xml
- REST
  Base-URL: https://pure.mpg.de/rest/
  Overview: https://pure.mpg.de/rest/swagger-ui.html
  Documentation: https://colab.mpdl.mpg.de/mediawiki/INGe_REST_API_Documentation

19. Glossary

Term	**Explanation**
MPG	**M**ax-**P**lanck-**G**esellschaft - Max Planck Society
MPG.PuRe	Publication repository of the Max Planck Society. An instance of the PubMan software.
PubMan	**Pub**lication **Man**agement - Open Source Repository Software
INGe	**I**nfrastructure **N**ext **Ge**neration - Technical Framework for PubMan since 2018
eSciDoc	Technical Framework for PubMan until 2018

CoNE	**C**ontrol **o**f **N**amed **E**ntities - Controlled Vocabulary Management Tool
OU	**O**rganizational **U**nits - Individual elements of the institute structures
handle	Permanent link