Pure

Edge Hill University

Applications for Funding

This guide is for personal users.

Contents

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

- This user guide explains how to use Pure to:
  - o Seek approval to apply for external research funding
  - o Apply for internal research funding

- You will also need to refer to the relevant funding scheme guidance, whether internal or external.
- Pure does not connect to any funder submission systems. It is specific to approval within the University.

What you will need

- You will need to input metadata including:
  - Title and description of your proposed research
  - Your collaborators (internal/external)
  - The funding scheme to which you are applying
  - The amount you are asking for
  - Other relevant information you can provide
- You will also need to attach documents including:
  - The application form for the funder
  - Costing from the Research Office (external applications)
  - Budget
  - Data management plan (if applicable to the funder)
  - The funding scheme guidance (external applications)
  - Other relevant documents

Creating an application

- Click **+ Add content**, select *Application*. Choose a type and sub-type.
- You should complete as much as possible to ensure a complete record and aid decision-making.

Title & description

- **Title** is the one you intend to submit to the funder.
- **Short title** and **acronym** are optional but allow you to quickly identify the application on the applications summary screen and in searches.
- The **description** will be a short summary/abstract of the proposal.
- You have not applied by this stage, so ignore **Add ID...** .

Applicants

- You will automatically appear as an applicant.
- Add internal or external co-investigators as necessary by clicking **Add person...** .
- A **role** is required for each person (PI or Co-I). Affects milestones for internals after an award has been created.
- **Academic ownership** and **planned researcher commitment** are recommended to help make clear how the award is split between investigators.

- Affiliation on the application should **always be the person's home organisational unit** (internal) or their organisation (external people).
  - o If more than one affiliation is offered (e.g. a research centre), select or deselect the **additional** ones as appropriate **for this application**.

Application managed by

- **Managing organisational unit** determines the application approval route and on whose reports the application appears. It should always be your home department i.e. not a research group/centre/institute.
  - o EHU co-investigators named on the application can view the record after you first save it, edit it until it is sent for pre-approval, request its return or abort it.
  - o If you save the application to the *Draft Proposal* stage, any of you can send it to the *Pre-approval* stage, but the approval route still depends on the managing organisational unit.
  - o You can only change the managing organisational unit to one you are affiliated with in Pure, so ensure the correct person creates the application record in the first place if you have a desired approval route.

Collaborative partners

- If the award will be shared with external organisations, choose *yes* and Add collaborator... . Do not enter people in this section.
- Search for the external organisation/create it if it does not exist in Pure.
- EHU is the lead partner by default but you can change this by clicking Mark as lead .

- **No value ▾** lets you specify whether the partner organisation is a joint applicant (co-investigator) or project partner (any defined role other than co-investigator).

Funding details

- **Ignore** *Funding opportunity*. Skip to the *Fundings* section.
- Click on **Add funding...** to add the details of the funding you are seeking.

Funder details

- Click **+⌂** at the top and type the funding organisation's name.
  - **Internal applications**: search *Edge Hill University* or *EHU* and select the University. Do not create a new external organisation.
  - **External applications**: search for the organisation or create it only if it does not already exist in Pure.
- **Ignore** *Higher Education Statistics Agency (HESA) Types* and *REF income source classifications*. We will complete those.
- **Funding project scheme (research programme)** is the name of the target external funding scheme.

Amount

- Select whether the application is for **financial** or **non-financial** (in-kind) support.
- *Applied amount in applied currency* is only needed if applying for funds in a currency other than GBP.
- **Applied amount** is always needed. This is the amount expected regardless of how the funding is split between EHU and any collaborators. It could be the full amount, or it would be a percentage of it if fEC is applicable.
  - The Research Office will complete:
    - Institutional contribution
    - Institutional fEC
    - fEC%
- Collaborative applications only: use **institutional part** to break down the funding between EHU and each collaborating organisation.

Life cycle

- Add the expected start and end dates.

Documents & links

- **Add document...** allows you to attach files.
  - Check the funding scheme guidance to identify which are necessary but you will need to attach your application form, costing and budget for the pre-approval step.

- **Add link...** allows you to add any web links appropriate to the application. Include a description so it is clear what the URL is for.

Submission date

- **Leave this for the Research Office**. It is the actual submission date, not the intended submission date.

Related content

- You can link the application to other content in Pure – projects, applications, awards and ethical reviews – by clicking on the icons and searching for relevant records.
- If relating to additional applications or awards, you can only relate it to certain types.

Keywords

- **Keywords** help you, your department and the Research Office identify applications that contain terms or subject matter of interest.

Visibility

- See the Content Visibility guide for more information.
- Generally, only Pure users named on the application, approvers, the Research Office Administrators of Applications and people with reporting rights for the organisational unit will be able to view details of the application.
- Other Pure users will be able to view very limited information.

Content record visibility

- New application records are set to *Confidential* by default while they travel through the approvals workflow.
  - o This means nobody else outside those in the workflow can see that the application exists in Pure.
- After submission to the funder, visibility will be set to *Backend* and we will remove the application form and costing attachments.
- We can only leave visibility as *Confidential* if there is a clear requirement from the funder, or if the application is not approved by the University for submission to the (external) funder.

Document visibility

- Individual documents are set to *Backend* by default, but application documents will never be publicly accessible.
- Because other Pure users could access documents through the Pure backend, confidential documents will only be added to records that are set to *Confidential*.

The approvals workflow

- Approval is granted entirely within Pure, meaning you do not have to send hard copy documents or e-mail attachments around the University.

- Your area may have its own decision-making processes outside Pure, so it may not be your head of department who clicks 'approve' in Pure. Contact a relevant person in your area if you have questions about this.

- Only one EHU applicant submits the application in Pure so only their department and faculty will be included in the approvals workflow.

- By submitting the application to the workflow in Pure, you are confirming that any EHU co-investigators have been cleared to participate by their respective heads of department.

- A key benefit of Pure is that, once you submit your application to the approvals workflow in Pure, you can follow its progress through the workflow.
  - Either look for its *Application approval route* on your applications summary screen.
  - Or open the application and click on the footer to *Show the full approval route*.
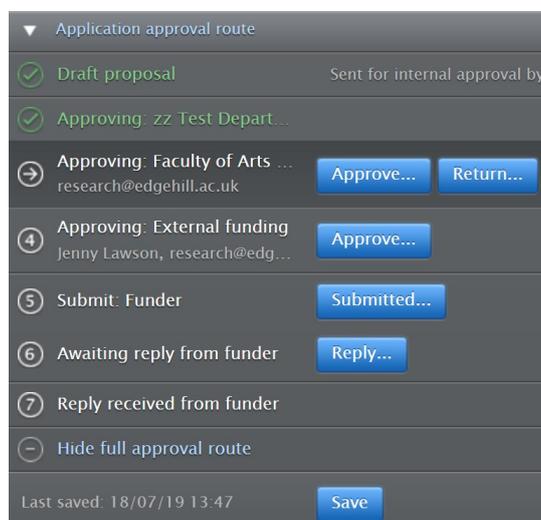
- There are four broad steps in the approval route:

External funding: you can only apply to the funder when the application has completed all approval steps.

Returning an application to the start for changes

- If an approver requires changes to the application, they can return it to you.
- If you realise that you need to amend your application after submitting it to the workflow, you can click **Return...** to retract it.

> Returned applications must go through each approval step again, so it is best not to submit it to the workflow if you know it is not ready.

Comments and peer reviews

- You can add comments and request peer reviews while it is in the *Draft proposal* or *Pre-approval* step without having it returned to you.
- You cannot do this after the application enters the departmental approval step.
- You can view the application and any comments added by approvers at any stage.

Aborting or deleting an application

- If you wish to **cancel/withdraw an application** that has already been submitted to the workflow (even if returned to you by an approver):
  - Click **Abort...** at the bottom of the window.
  - Include a reason for the record when prompted for a comment:

> **Only** use ❌ to delete an application that has **never** entered the workflow.

Use your application to create a new application

- After the application workflow has been completed, opening the application in editing layout ✎ will give you the option to create another using this one as a template.

Create another application based on this application.
Save and create another application...

  - You may get the option to select a different application type.
  - You will get the option to select which metadata to copy over.
  - Documents will not be copied.

- Alternatively, clicking 📑 in the window footer will create an exact copy of the application. It will be the same type, and all documents will be copied over. This option does not allow you to choose which fields to copy.

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