

# Managing Awards Records for Your Faculty

*This feature is only available to certain Pure Editors.*

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Once funding has been awarded (and you/the applicant have notified the Research Office of the outcome if external funding), we will create an award based on the application. You can then update the details, including:

- Add job code(s)
- Add/customise the milestones associated with the funding
- Adjust the budget if necessary

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

## Layouts

Once you have [located the award you want to view](#), switching from reading layout  to editing layout  gives you additional abilities such as [adding comments to the record](#).

## Workflow

An awards workflow is in place which allows you to approve the record metadata before we validate it. Award holders do not need to do anything with the workflow.

Table 1: Edit rights available to each Pure role at each workflow step

Role	1. Entry in progress	2. For approval	3. Approved	4. Validated
<b>Award holder</b>	Full edit rights	Full edit rights but should not use	Academic milestones only	Academic milestones only
<b>Editor of awards (faculty)</b>	Full edit rights	Full edit rights	Full edit rights	Milestones (all) only
<b>Administrator of awards (RO)</b>	Full edit rights	Full edit rights	Full edit rights	Full edit rights
<b>Usage</b>	Never	External awards only	External awards only	Internal & external awards

- Award holders do not **need** to edit anything other than academic [milestones](#), but they will **be able** to edit the record while it is in the *For approval* step, if they happen to see it in that step.
- You may wish to remind the award holders not to edit anything other than milestones, even at this stage.

### Workflow notifications

Depending on the user's Pure account settings:

- The award holder will receive a notification if the award enters the *Entry in progress* step. There is no reason to use this step.
  - **If the faculty is managing the award**, you will need to notify the award holders by e-mail that there is a new award record after moving the record to the *Approved* step.
  - **If the Research Office is managing the award**, we will notify the award holders by e-mail that there is a new award record after moving the record to the *Validated* step.
- The Editor of Awards (you) will receive a notification if the award enters the *For approval* step. You can also set up notifications for *Entry in progress*.
- The Administrator of Awards (Research Office) will receive a notification if the award enters the *Approved* step.

Notifications are sent each time the record enters a given workflow step i.e. moving back and forth along the workflow will result in repeated notifications.

## Internal awards

No action is required of you for internal awards, so we will move these straight to the *Validated* step upon creation.

## External awards



- We will save the new record to **Status: For approval**, so you know it is available for you to check.
- All Editors of Awards for your unit will receive the same notification, so you need to agree who needs to act on it. [Filters are a useful tool for this.](#)

[1 Award](#) is waiting to be pushed to next workflow step

- By moving the record to **Status: Approved**, you confirm you have completed your checks and updates and the record is ready to be *Validated* by the Research Office.
- After validation, the award record will become read only. This helps ensure accurate reporting.
  - You can the award holders can still [create and edit milestones](#).
  - All awards should be *Validated* at some point in the life cycle – even those managed by the Faculty.
  - In the unlikely event you later need to make changes to metadata or files, we can move the record back to *Approved* for you.

### Fields you **may** need to edit before approving

Some of the information will have been carried over from the related application, some will have been added by the RO, and some fields will be empty. Check the [History & comments](#) section to see if there are any special instructions relating to any of these fields.

- Nature of activity type.
- Titles and acronyms.
- Description.

- IDs – input the job code as *Job account number* if not already added by the Research Office. Add others as appropriate.
- Award holders, if any have changes have been authorised by the funder since the application was approved in Pure and the award created.
- Funding. We will have added a budget here which you can update with any funder-authorised changes since the award was created.
- Award life cycle – expected start/end dates; actual start date where known.
- [Milestones](#) – editors can add/update both academic and administrative milestones at any stage. Award holders can add/update academic milestones.
- Files and links.
- Relations to other content in Pure. Simply click the relevant icon, start typing the content title and select from the results.
- Keywords

The award will already be related to the application that led to it. If relating to other applications or awards, you can only relate it to certain types.

### Fields you will **not** need to edit

The Research Office will update these.

- Award type.
- Status.
- Managing organisational unit – this determines who can report on it. It should always be a department, not a research institute, centre or group.
  - You have awards reporting rights for all departments in your faculty, but each department needs to report on their own applications as well.
- Award date.
- Time tracking – not in use.
- Award visibility (see below).

### Award budget

- We will add a budget in Pure when creating an award record.
- This is a summary budget to give the award holder ready access to an overview of their planned expenditure.
- The budget displayed in Pure is not detailed enough for formal reporting to funders and other bodies.
- The award holder cannot save any changes to the budget in either the *Approved* or *Validated* workflow step, even if they see an edit button.
- You cannot save any changes you make to the budget in the *Validated* workflow step, even if you see an edit button.

At present, Pure will not display actual expenditure against the award although this is currently being investigated.

## Visibility

- There is a user guide on general [content visibility](#).
- Only Pure users named on the award, the faculty Editor of Awards, reporters with access to awards for the unit, and the Research Office Administrators of Awards and system administrators will be able to view full details of the award.
- Other Pure users will be able to view very limited information.

### Content record visibility

- The award record is set to *Public* by default, but complete award metadata records will never be publicly accessible.

### Funding visibility

- This is set to *Public* by default.
- The only award metadata that *can* be made public is funder name and amount, and these can **only** be made publicly visible **if**:
  - This *Funding* section of the award is set to *public*, **and**
  - The award content record itself is set to *public*, **and**
  - The award record is related to a publicly visible project record in Pure.
- It is only as part of the related project record that these limited details will be publicly visible, under a heading of *Funding*.

### Document visibility

- Individual documents are set to *Backend* by default, but award documents will never be publicly accessible.
- However, other Pure users could access documents through the Pure backend, so we will not upload confidential contracts to Pure.

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