

## Award Milestones

*This feature is available to personal users and certain Pure Editors.*

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When a funding award record has been created, you can add milestones to it.

We may also have assigned some award-specific milestones by the time you gain access to the award in Pure.

### Layouts

Once you have [located the award you want to view](#), switching from reading layout  to editing layout  lets you see additional detail on your milestones.

### Milestone types

Milestones come in two general types:

- Academic milestones can be assigned to PI or Co-I award holders.
- Administrative milestones can be assigned to your faculty's Editors of awards or the Research Office Administrator of awards.
- See *Responsible roles*, below.

### Viewing & editing rights

- [Award holders](#) can view all milestones but can only create and update academic milestones.
- Users with the role of [Editor of awards](#) or Administrator of awards can view, update and create academic milestones **and** administrative milestones.
- Nobody else will see your milestones.

## Responsible roles

- Milestones are not assigned to a named person but to everyone who shares the role you specify for that milestone, such as:
  - o PI = all PIs named on the award (EHU Pure users only)
  - o Co-I = all Co-Is named on the award (EHU Pure users only)
  - o Editors of award = all holders of this role in your faculty
  - o Administrator of award = all holders of this role in the Research Office.
- This means everyone who shares the specified role for that award will receive any e-mail reminders that are set for the milestone.
- There are more administrative roles available to select on a milestone than are in use at Edge Hill.
  - o If no user holds the role selected, there will not be anyone named at the bottom of that milestone's listing in the editing layout:

Today 9/07/19 Administrative

Test responsible role

To show when a role **\*\*IS NOT\*\*** in use in EHU's Pure.

Complete Edit -

Today 9/07/19 Administrative

Test responsible role

To show when a role **\*\*IS\*\*** in use in EHU's Pure.

[TestAdminFaculty](#)

Complete Edit -

## Reminders

- Milestones can be set to send e-mail reminders – you can set as many or as few as you want per milestone leading up to its deadline.
- For academic milestones, only the PIs or Co-Is who are personal users on Edge Hill's Pure will receive e-mails; external collaborators will not.

## Edit a milestone

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.

- When in an award record, find the milestones section, click on  against it and then click *Edit* against the milestone you wish to edit.
- You get two options in the *Edit milestone* pop-up editing a milestone that you do not get when creating a new milestone:
  - o A checkbox to mark the milestone as complete.
  - o Add document...
    - There is a document visibility setting but nobody can see this file unless they have access to open the award record itself.

- You cannot edit these files after you save them but you can delete them and upload replacements.
- Your co-investigators, faculty Editor of awards, and the Research Office may have added milestones so please do not substantially alter or delete these without checking first.
  - Exceptions to this are attaching files or marking the milestones as complete.

Edit milestone

**Name \***

Test milestone

**Description**

Description of the milestone goes here

**Milestone type \***

Academic ▼

**Responsible role**

PI ▼

**Deadline**

09/07/2019

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**Send email reminders**

**Email reminders**

Week ▼

before
-

---

**Status and attached files**

**State**

Complete

**Attached file(s)**

## Create a milestone

### As an award holder

- Click on  .
- Complete the short form.
- Enter as much detail as you can but the only mandatory field you can edit is the *Name* of the milestone.
- The rest of the fields are optional but recommended.

## As an Editor of awards

- Click on **Add milestones...**.
- Select an existing template (if available) or **+ Add custom milestone**.
- Complete the form that appears for each milestone.
- Enter as much detail as you can but the only mandatory fields are:
  - o *Name* of the milestone
  - o *Responsible role* of whoever the milestone applies to.
- The rest of the fields are optional but strongly recommended.
- You cannot add documents at this stage but going back in to edit a saved milestone will give you this option.

Editors or Administrators of awards may choose to assign parallel/overlapping milestones to ensure a task is completed e.g. administrative milestone for the editor to remind the PI to report to the funder 2 weeks before the PI's own reporting milestone.

*Guide updated 05/08/2019*