

Facilities & Equipment

This guide is for Editors of Facilities & Equipment




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What Are Facilities & Equipment?

- Pure allows the University to showcase its facilities and equipment to the world, making them discoverable through the public-facing research portal.
- For the purpose of Pure, these resources can be defined as:
 - o Enabling research in your area.
 - o Not commonly available elsewhere.
 - o Something your area wants to showcase and possibly promote for external (and even internal) use and collaborations.
 - o **Equipment** is an item of specialist research equipment. This may or may not *also* be listed on the University's capital asset registers.
 - o **Facility** is a place or a collection of different types of equipment, provided for a particular purpose.

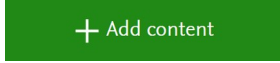
- Facilities and equipment can only be created or edited by users who hold the Pure user role of Editor/Administrator of Facilities & Equipment or system Administrator.

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

Edit an Existing Record

- To edit an existing record, go to Editor > Facilities/Equipment, [locate the record](#) and click to open.



Create a New Record

- Click , select *Facility/Equipment*. Choose a type.
- It will open a content editor window.

Title & description

- **Title** is the display name of the resource you are adding.
- The **description** will be a short summary explaining the nature of the resource.

Details

- Optional.
- Click  .
 - o **Name** can be the same as the title (above) or it can be something more specific e.g. a model number.
 - o  lets you add certain IDs such as item serial number. This information is not publicly visible.
 - o **Acquisition date** is when the resource came into use
 - o **Decommission date** is when its availability did or will end. This information is not publicly visible.
 - o Add the **value**, if known. This information is not publicly visible.
 - o **Manufacturers:** [add internal and external organisations](#) as necessary.
 - You only need to create a new manufacturer once. It will appear in search results next time.

If an equipment record relates to a type of equipment (e.g. a model), you can add multiple *details* entries to list each individual item of that model (e.g. serial number) on the same record, instead of giving each item a separate equipment record.

Persons and organisations

Organisational unit

- You need to [associate at least one internal organisational unit](#) to the record.

- o This will be the internal organisational unit that owns the resource – normally the department.
- o You can add external organisations here too, but only if they have some element of ownership that needs to be specified.

People

- You can also [associate internal \(academics\) and external \(if applicable\) people to the record](#), although this is optional.

Only associate a person to the record if they have **direct responsibility** for the resource, **not** if they are simply a user of it. Doing so will link the resource to the internal person's Pure profile.

- Any people you add will have one of two **person roles** assigned in relation to the resource. You can swap the person role if necessary.
 - o **Manager** is the default role. Makes strategic/policy decisions about how the resource is used e.g. research lead or Head of Department.
 - o **Operator** has operational responsibility for the resource. Must be a staff member who **already** has a Pure person profile i.e. academic.

Managing organisational unit

- Determines which unit the resource appears against in Pure reports.
- Normally a department. **Never** a research group/centre/institute.
- You can only set/change this to an organisational unit to which your Editor of Facilities & Equipment role applies.
- It may be pre-populated depending on the organisational unit (or person) association you set, above.

Access to facility/equipment

- Use this section to add the contact details for enquiries about the resource.
- You can save the record without any but, as a minimum, you should:
 - o . This should always be an EHU e-mail address, and it is advisable to use a shared/departmental mailbox.
 - o to link to further information about the resource hosted outside Pure. You can add one each of:
 - Website – on the EHU corporate site.
 - Brochure/Documentation e.g. on the EHU website or eShare.
 - Booking/Management – how someone can book the resource.
 - o **Available for loan/booking** tells people whether it is possible to book the facility and, if so, whether this is for internal users or if it extends to externals.
- Beyond those, you can add the following as appropriate:
 - o lets you select a named contact person.

- This may be pre-populated if you associated a person, above. You can change or remove this contact person.
- If including a contact person, it must be an internal with a person profile in Pure i.e. academic.
- o **Add address...** allows you to enter the physical address using one or both of:
 - The *Geo location* co-ordinates available from Google Maps or similar.
 - The address in **Structured** or **Unstructured** format.
 - Any one of these will generate a Google Map on the portal with a pin in the location you specified.
- o **Add phone number...** with no country code.

Photo

- You can add a suitable photograph of the resource for display on the portal.

Hierarchy

- The *existing* parent facility/equipment record for the one you are creating.

Keywords

- Try to avoid overly generic terms (e.g. research, equipment).

Relations

- You can relate the record to other content in Pure by clicking on the icons and searching for the relevant records.

The relationship between the resource and any **projects** that made use of it is especially useful because it allows people to find the resource through the project and the project through the resource.

- Researchers could add these relationships themselves from within the other content e.g. when they have created a project. Approaches may vary by department.

Visibility

- The default setting is *public*. It will be published to the portal as soon as you save the record. You can save to *backend* if you are not yet ready to publish.
- More information is in a [standalone user guide on content visibility](#).

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