Pure

Edge Hill University

Facilities & Equipment

This guide is for Editors of Facilities & Equipment

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Contents

- Pure enables the University to showcase its facilities and equipment to the world, making them discoverable through the public-facing [research portal](#).
- Your Pure editor role means you are the only person in your area with the rights to create or edit facilities & equipment metadata records.

What Are Facilities & Equipment in Pure?

- Broadly, they are resources that:
  - Enable research in your area.
    - They can be [linked to other content in Pure](#) to illustrate this.
  - Are not commonly available elsewhere.
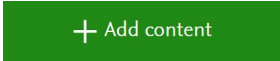 - Your area **should** showcase externally.

- e.g. a selling point for your department, faculty or the University, or the result of a significant investment by the University.
  - o Your area **may want** to promote for external/internal use and as part of collaborations.
- **Equipment** is an item of specialist research equipment. This might *also* be listed on the University's capital asset registers.
- **Facility** is a place or a collection of different types of equipment, provided for a particular purpose.

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.

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 **+ Add content**, 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 to the audience.

Details

- Optional.
- Click **Add details...**.
  - o **Name** can be the same as the title (above) or it can be something more specific e.g. a model number.
  - o **Add ID...** 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.
    - If you create a new manufacturer you only need to do it once and it will appear in search results next time you need it.

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

People

- Optional. You can [associate internal (academics only) and external people](#) to the record using `Add person...`.

> **Only** ever associate a person to the record if they have **direct responsibility** for the resource, **not** if they are simply a user of it.

- Any people you add will have one of two **person roles** assigned in relation to the resource. You can change the person role if necessary.
  - **Manager** is the default role. Makes strategic/policy decisions about how the resource is used e.g. research lead or Head of Department.
  - **Operator** has operational responsibility for the resource.

> Do not use `Create external person` to add a missing internal person to the record.

Managing organisational unit

- Determines which unit the resource appears against in Pure reports.
- You can only set this to an organisational unit to which your Editor of Facilities & Equipment role applies.

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:
  - `Add email...`. This should always be an EHU e-mail address, and we recommend using a shared/departmental mailbox.
  - `Add links...` to link to further information about the resource hosted outside Pure. You can add any combination of:
    - Website – the resource's webpage on the EHU website.
    - Brochure/Documentation – a link to a file or page on the EHU website or eShare that contains information about the resource.

- Booking/Management – how someone can book the resource.
    - **Available for loan/booking** tells people whether it is possible to book the facility and, if so, whether this is just for internal bookings or if it extends to externals.
- Beyond those, you can add the following as appropriate:
    - [Add contact person…] lets you name a contact person.
        - If including a contact person, it must be an internal with a person profile in Pure i.e. academic.
        - If you associated a person in the earlier section, they will already appear here, but you can change or remove this.
    - [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.
    - [Add phone number…] with no country code.

Photo

- You can add photographs of the resource for display on the portal.

> Pure is not a multimedia repository so its storage is limited. Large files/multiple files should be hosted elsewhere with links added as per the previous section.

Hierarchy

- If this resource is the child to another facility/equipment record in Pure, you can select that parent resource here to make the relationship known.

Keywords

- Keywords can help find the record in searches.
- Select a topic from the list to open free text keyword fields where you can add more specific, custom keywords.
- Avoid overly generic free text keywords (e.g. research, equipment).

Relations

- After you have created the facility/equipment record in Pure, researchers can easily relate certain other content types to it (e.g. from inside their research output or overall project record).
- Or you can add relations to other records from within the facility/equipment record itself as an editor.
- Adding these relationships will help visitors to the portal find the resource through those related records, and vice versa.

- It can also help you track what your facilities and equipment have been used for across the University.

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 but you should set it to *public* eventually.
- More information is in a [standalone user guide on content visibility](#).

History & comments

- You can use the [*History and comments* section](#) to record notes that your co-editors and the RO can view.
- Any comments you add here are permanent – they cannot be edited or deleted by anyone.