UCL Guidance for Node Administrators on Researchfish

Researchfish (www.researchfish.com) is an online system used by major research funders to capture outputs, outcomes and impacts from research that they have funded.

Award PIs are provided with a Researchfish account through which they must upload outputs and attribute them to the award(s) that they have arisen from.

In addition to the Researcher interface, Researchfish have provided an interface for Research Organisation Administrators to view and manage the awards attributed to their institution.

Some staff in Research Services and Office of the Vice-Provost (Research) have administrative access to all UCL award data. Additionally, the university uses Nodes in Researchfish to enable local access to groups of awards.

This document provides a description of the use of Nodes at UCL and guidance on how to use the administrator interface to access and check award data in Researchfish.

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1. Introduction to Nodes

UCL uses the Node functionality in Researchfish to group awards according to a high-level UCL organisational structure. This is currently:

- Centres for Doctoral Training (DTP/DTCs)
- UCL Department of award PI (equivalent to Division/Institute in SLMS)

Each node is assigned an administrative contact (who may add other contacts).

Node administrators are then able to:

- View and export data on all awards within their node
- Monitor award data accuracy and PI compliance with reporting

2. Becoming a node administrator

The main administrative contacts for each node are the relevant CDT or Department/Division Manager.

If you think you should have access to a UCL Researchfish node as part of your role, please contact the relevant CDT or Department/Division Manager.

If you are not sure who to contact, or you are a CDT/Department Manager and think you should have access (or need to change the main node administrator details) please contact vpro.researchfish@ucl.ac.uk.

Accepting node administrator invitation

When you are added as a node contact in Researchfish you will receive an email inviting you to register:

If you already have a Researchfish account registered to your UCL email address, please use this to log in (green button). Otherwise you can set up a new Researchfish administrator account (blue button).
3. Logging in and navigating the administrator dashboard

Go to https://eval.researchfish.com/

Log in with your username and password.

You will be presented with the administrator dashboard screen, which has a number of tabs and links. The most useful are highlighted here:

**eVal: award portfolio**

This is where you can access your award portfolio, export data, and manage administrative contacts. This will be covered in more detail in section 4 onwards.

**Our Members: viewing funder submission periods**

The current and previous submission (also called reporting) periods are listed for the funders that use Researchfish. Use the orange buttons to view funders by type.
Help & Support

Researchfish Help & Support has a number of webinars and videos (generally geared towards researchers). Contact details for Researchfish can be found under the “None of the above” option highlighted.

4. Viewing and exporting awards

Log into Researchfish and navigate to e-Val. The e-Val dashboard will display a summary of all the awards in the node that you have access to.

Click on the “awards” tab.
1. Click “show awards” to obtain a list of all the awards in your portfolio.

Alternatively use the filters to narrow the search results. Begin typing in each field and a list of suggested terms will appear. Multiple terms can be included to build a search.
2. Filter by award title or funder’s award reference number
3. Filter by funding body
4. Filter by PI name
5. Filter by other terms e.g. Category (if in use for your node)

Then click “show awards”. A table of awards is provided on-screen.
1. Change the information viewed in the on-screen table
2. Change number of awards listed in on-screen table
3. Copy information from on-screen table to clipboard
4. Download a csv file of all award information. All awards (within the search terms, if any have been used) and data in all columns will be downloaded regardless of what is shown in the on-screen table.

5. Checking the accuracy of award data

It is important to ensure that the information held in Researchfish for each award is accurate.

For Research Council awards there is a data checking window prior to each reporting period where node administrators will be able review the award data and report any required amendments.

The information that should be checked in particular is:

1. **PI Email address**
   Wherever possible this should be a UCL email address.

2. **Response Code**
   A response code is added to each award in Researchfish and defines whether a submission is required for that award in the next reporting period, as follows:
<table>
<thead>
<tr>
<th><strong>Response Code</strong></th>
<th><strong>Definition</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>A submission is expected this year. This is also the default code that is inserted for the award should there be no other code supplied.</td>
</tr>
<tr>
<td>2</td>
<td>No submission is expected this year, for example due to the researcher having long term maternity/paternity leave. There is a one year exemption for the submission.</td>
</tr>
<tr>
<td>3</td>
<td>There will be no further submissions expected for this award. The researcher is no longer active or is retired, or the grant ended more than five years ago.</td>
</tr>
<tr>
<td>4</td>
<td>There is an expected submission for this award, however the researcher no longer works for your organisation (so no action is required at your organisation)</td>
</tr>
<tr>
<td>5</td>
<td>No submission is expected for this award, submission is still possible but is optional.</td>
</tr>
</tbody>
</table>

Particular attention should be given to checking the data (including response code) for awards with response code 1 as they require a submission in the next reporting period.

**Making amendments to award data**
If any amendments are required to award data, e.g. email address or response code, please follow these steps:

1. Download the .csv/.xlsx file of the awards
2. For each award that requires an amendment, use a blank cell in the relevant row to detail: i) the change required (e.g. "request response code change to code 2"); ii) a brief explanation (e.g. "PI will be on maternity leave during next reporting period").
3. Send the spreadsheet to vpro.researchfish@ucl.ac.uk. Central support will liaise with RCUK to request the amendments on behalf of all nodes.

**6. Monitoring compliance during reporting periods**

Node administrators can use the “Award” tab in Researchfish to view the activity of the PIs within their node in accessing their Researchfish account and submitting research outputs.

<table>
<thead>
<tr>
<th>Funding End Date</th>
<th>End of Submission Period</th>
<th>Reporting Node</th>
<th>Last Accessed</th>
<th>Last Submitted</th>
<th>Response Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>30 Sep 2015</td>
<td>17 Mar 2016</td>
<td>Test Node</td>
<td>Never</td>
<td>Never</td>
<td>1</td>
</tr>
<tr>
<td>30 Sep 2014</td>
<td>17 Mar 2016</td>
<td>Test Node</td>
<td>Never</td>
<td>Never</td>
<td>1</td>
</tr>
<tr>
<td>30 Sep 2014</td>
<td>17 Mar 2016</td>
<td>Test Node</td>
<td>7 Mar 2016 18:36</td>
<td>Never</td>
<td>1</td>
</tr>
<tr>
<td>30 Sep 2014</td>
<td>10 Mar 2016</td>
<td>Test Node</td>
<td>Never</td>
<td>Never</td>
<td>1</td>
</tr>
</tbody>
</table>

Last accessed: date the PI last logged into their Researchfish account.
Last submitted: date the PI last submitted Research outputs data for the award.

It is strongly encouraged that this capability is used at a local level to monitor activity during reporting periods and to follow up with PIs who have not submitted a report where this is required (response code 1).
7. Exporting research outputs data

Access to a node enables you to export the research outputs data that has been reported for all of the awards within the node.

Log in and navigate to e-Val, then click on the “Export” tab.

1. Dropdown menu of the different common research outcome categories. Each outcome category must be downloaded separately. A full list of outcome categories and types of research output that can be reported under each category can be found at https://s3.amazonaws.com/rf-downloads/Outputs+overview_February2016.pdf.
2. Report can be filtered by research funder only.
3. Tip - it is a lot quicker to download the csv file than the xlsx file.

8. Advice, tips and limitations of Researchfish nodes

- Each node can be accessed by more than one person. The administrative contact can add other users as node administrators. However, we recommend that the number of contacts for each node in Researchfish is kept to a minimum because each subsequent administrator has the same access level as the first, including the ability to add other users, which could result in reduced control over access to the data.
- A workaround to allow multiple people to have access to the same node is to set up a shared mailbox (with a general password) as a node contact.
- Each contact (email account) can only have access to one node, therefore it is not possible for e.g. one PG administrator to access more than one node in Researchfish. Data should be shared as the exported Excel file where necessary.
- There is currently no information in Researchfish on the department/division/faculty of each award (other than the node to which they are assigned). It should be possible in future to add further metadata to provide a level of granularity within nodes, e.g. of sub-department within Division/Institute.
9. Contact and support

For technical support with using Researchfish:
support@researchfish.com

Or Researchfish has a live chat facility: https://eval.researchfish.com/helpwiz/contact

For internal support e.g. changes to nodes or award data
Vpro.researchfish@ucl.ac.uk

Please note that due to volume of queries during reporting periods it make take some time to respond.

UCL
Last updated: Oct 2016