

Open Access for the REF: RPS search settings

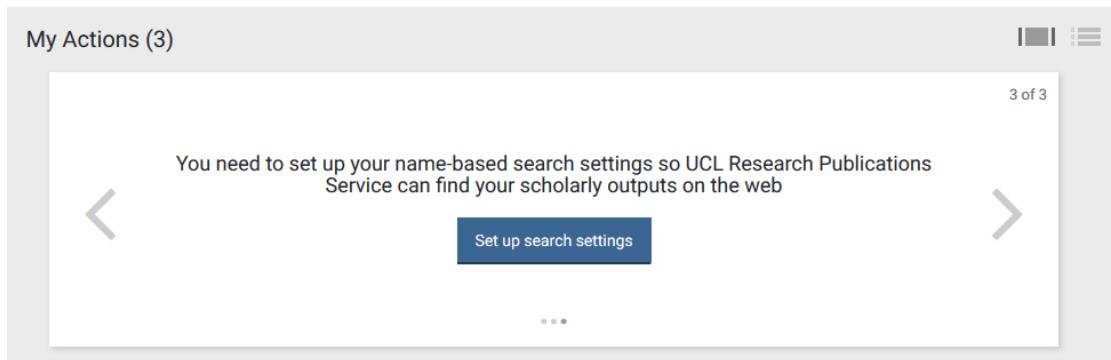
The open access policy for the next REF applies to articles and conference papers accepted after 1 April 2016. All researchers must upload their papers to UCL's Research Publications Service (RPS), **or they will not be eligible for the next REF**. Contact the Open Access Team (open-access@ucl.ac.uk) if you have any questions.

In some disciplines, RPS finds records of papers in databases like Scopus and Web of Science, based on your RPS search settings. After finding a publication, RPS will either put it in a pending list for you to manually review and 'claim', or it will claim it for you automatically after recognising identifiers such as your email address, or ORCID ID (see our 'Automatic publication claiming' guide for more details; all RPS guides are available here: <https://ucl.ac.uk/library/open-access/guides>). This guide will help you set up and configure accurate name-based searching for your publications in RPS.

Please note: RPS will send you email notifications when you have publications in your pending list to review. You should not rely on these notifications as reminders to upload, as they may be sent after the deadline for uploading the paper to RPS has passed (papers must be uploaded within three months of acceptance, although an exception is permitted where they are uploaded within three months of first online publication). Notifications will **not** be sent for outputs that are automatically claimed. Instead, check your publications list frequently and upload your final manuscript as soon as it is accepted. Publication details retrieved by RPS after publication will be merged with manually created records.

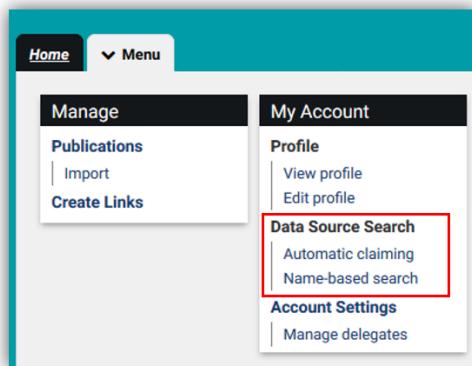
To turn on and set up searching in RPS:

1. Log in to RPS at <http://rps.ucl.ac.uk>
2. Check the 'My Actions' section under the welcome message – scroll through by using the arrow buttons. If you see the following message, searching is turned off:



Click on the 'Set up search settings' link.

If searching is already switched on, you can update your settings by clicking on the 'Menu' tab then the Name-based search under the 'My Account' header:



3. In the 'Name variants' section, add all variations of your name that appear in your published papers, in all formats your publishers use, e.g.
 - Smith, Jonathan Andrew
 - Smith, Jonathan A.
 - Smith, Jonathan

- Smith, Jon A.
- Smith, J. A.
- Smith, J.

Use the LAST NAME, FIRST (Initial or full name), as above. Do not use first name first as this may result in the wrong publications being retrieved.

You can use the author identifier tool in Scopus, available here:

<https://www.scopus.com/freelookup/form/author.uri> to check name variants.

4. Use the Plus (+) and cross (x) symbols to add and remove name variants:

The screenshot shows a web interface for managing name variants. At the top, it says "Name-based search terms" and "Name variants: * (last name first)". Below this is a text input field containing "Bracey, A.". To the right of the input field are two buttons: a red arrow pointing right and a green plus sign (+). Below the input field, the name "Bracey, A." is listed. Further down, there is a note: "Use the format 'Smith, A. G.'. This format clearly distinguishes your last name and each of your initials." Another note below it says: "Add all combinations of your last name and initials under which you publish. The system will then convert the supplied name to the exact formats best required when searching each data source. Do not use the format 'Andrew Smith' or 'AG Smith'. Always write your last name first, followed by a comma." At the bottom, a small note states: "If a name variant is only used by one online database, you can customise this setting in the relevant section of this page."

5. In the 'addresses' section, add all variations of your institutional affiliation that might appear in your published papers (including previous institutions, if you wish), e.g.

- UCL
- University College London
- Univ Coll Lond
- Institute of Neurology
- ION
- Newcastle

If there is an identifiable postcode for your institute, you could consider entering it in this section.

6. Scroll to the bottom of the page and put a tick in the 'Search by name' column next to the databases that you want RPS to search. If in doubt, select them all.

Keep 'Simple mode' selected (as below) for each - 'Advanced mode' is not recommended. Click save:

Source-specific name-based search terms

Looking for your ORCID or figshare settings? They have been moved to the [Automatic Claiming page](#). This page now only shows data sources whose data supports name-based searches.

	Search by name	Simple mode	Advanced mode	Use default search terms (simple mode only)
> arXiv Manage arXiv Author Identifier	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
> CINII EN	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
> CINII JP	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
> DBLP	<input checked="" type="checkbox"/>	<input type="radio"/>		<input checked="" type="checkbox"/>
> MLA	<input checked="" type="checkbox"/>	<input type="radio"/>		<input checked="" type="checkbox"/>
> PubMed	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
> Scopus Manage Scopus IDs	<input checked="" type="checkbox"/>	<input type="radio"/>		<input checked="" type="checkbox"/>
> Web of Science Manage ResearcherID	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>

[Save](#)

7. Unless you have a very common name (and so need to restrict your searches further), you are strongly advised **not** to add any search terms other than your name variants and institution.
8. If RPS is returning too many publications because you have a common name, contact UCL Open Access Team for advice: open-access@ucl.ac.uk.

See our FAQs for more on the REF OA policy: <http://ucl.ac.uk/library/open-access/faqs>

More UCL OA guides are available: <http://ucl.ac.uk/library/open-access/guides>

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