# Research Organisations' User Guide

Administrator Level (Full Access - RO Full) &  PI Submission Tracker Access (RO Lite)

This guide provides guidance and detailed instruction on navigating the Administrator Level Access and includes links to demonstration videos.

If you would like information on planning and preparation of a submission period, please see our 'Submission Period Plan & Prep' Document.

## Contents

## Administrator Level Access & PI Submission Tracker

[PI Submission Tracker Access (RO Lite) Overview Video](#)

## Creating an Account

In order to use Researchfish, you will need to accept an administrator invitation (this could be from an existing account holder for your organisation or from a Researchfish member of staff). Once you have logged in to your account, you can access e-Val from the top of any page. This will provide you with various tools.
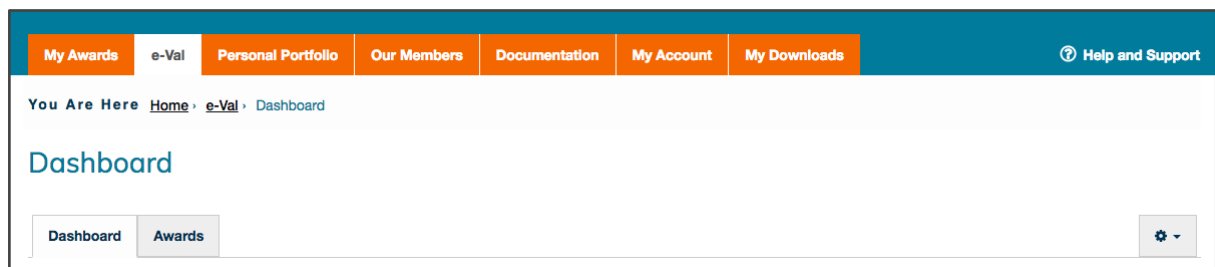


## Dashboard

Dashboard allows you to see a quick breakdown of all awards where a list of data labels enables you to view them by the Funder, Location, Award and award holder name. Clicking each data label expands further information allowing you to drill down to more specific details.

For example, In the PI section there is also a 'Last Accessed' Section, which informs you of the last time the award holder logged into the website.
Or if you expand 'Awards', it will provide you with the information associated with each award such as the Name, Response Code or Value.

If any of these awards are in a submission period, they will also be colour coded based on their submission status.

Blue - Not currently in an active submission period, no submission expected at this time

Red - Currently in a submission period, but not yet submitted (please check the response code to identify if a submission is mandatory)

Green - In a submission period and already submitted.

| Funder | Primary Location | | Award | PI | Open submissions | | Historical submissions | |
|---|---|---|---|---|---|---|---|---|
| 1 funder | 17 locations | | 346 awards | 267 PIs | 7 of 48 (14.5%) | | 20 of 346 (5.7%) | |

| Funder ↔ | Primary Location ↔ | Award ↔ | PI ▶ | | Open submissions ↔ | Historical submissions ↔ | Last Accessed ↔ |
|---|---|---|---|---|---|---|---|
| 1 funder | 2 locations | 5 awards | | | Not in submission | 0 of 5 (0%) | Never |
| 1 funder | 1 location | 1 award | Yeates, Dr Katie | | 0 of 1 (0%) | 0 of 1 (0%) | Never |
| 1 funder | 1 location | 1 award | Harries, Mr Neil | | 0 of 1 (0%) | 0 of 1 (0%) | Never |

| Award | Name | Funder | Primary Location | Submitted | Start | End | Response Code | Value | Last Accessed |
|---|---|---|---|---|---|---|---|---|---|
| NH/159159/1 | TEST ACCOUNT | St Frances Trust | Test Research Organisation | No | 11 May 1936 00:00 | 11 May 2045 | 1 | 1 GBP | Never |

## Awards

[Searching for Awards Video](#)

"Awards" allows you to locate specific awards. You can search by *award reference, award title, funder, or award holder name.*

> *Tip* - Searching without entering any search criteria will return all awards.

Information on each award is displayed in columns, such as award holder details, funding start and end date, etc. You can use the "Change Columns" button to determine which columns are enabled.

> *Tip* - Use this page to identify which award holders are required to submit, and which have not yet done so.

### Searching for an Award

You can search for awards by specific variables, there are multiple ways to consider, once found this is where you are able to manage your awards. Short descriptions of each search field are listed below.

- Award(s): Search by award ID or award title, auto lookup will search for your award as soon as you start typing, click your award to select it from the list.
- Funder: Search for awards based on the Funding Organisation.
- Researcher or Primary Investigator (PI): Search by name of the award holder.

Underneath the three default fields, you also have the option to 'Add a Search Term'

- Award Type: [Capital/Infrastructure, Fellowship, Research Grant, Studentship, Travel, Other]
- Discipline:  [Arts & Humanities/Generic/Life Sciences/Physical Sciences/Social]
- Submission Status > Submitted/Not Submitted
- Never Accessed
- Date added to Researchfish > Select Dates

*Tip* Not found your awards? Check with the funding organisation that they have enabled 'Data Sharing'.

You can enter multiple search criteria at once.

## Administrator Level (RO Full):

- Category: This allows you to search for awards that you have assigned to specific categories. (How to create Categories here)
- Reporting Node: Search for award based on assigned node (How to create Nodes)
- Response Codes

What are Response Codes?

Response codes are a status or code of an award, determined by the funder to specify the requirements for each awards submission expectation. Research Organisations can refer to these to follow up with their award holders.

| 1 | A submission is expected this year |
|---|---|
| 2 | No submission is expected this year. The award holder has a one year exemption as a result of long term leave e.g. maternity/paternity. |
| 3 | No further submissions are expected against this award – the award holder is retired/no longer active in research and/or the grant ended more than five years ago. |
| 4 | The award holder is expected to make a submission, but is no longer at your organisation. This award does not contribute to your organisation's compliance statistics and you are not expected to follow up with them. |
| 5 | Optional/Non Mandatory Submission requirement. |

## Change Columns

The awards table has a default number of headers displayed. You can change which columns are presented to you via the 'Change Columns' button shown at the top of the list of awards.

This will allow you to select the criteria you want for the most relevant information to you.

You can select from:

| Compliance Monitor (RO Lite) | | + Administrator Level (RO Full) |
|---|---|---|
| ● Title | ● Primary Location | ● Reference |
| ● Value | ● Funder | ● Reporting Node |
| ● Funding Start Date | ● Last Accessed | ● Categories |
| ● Funding End Date | ● Last Submitted | ● Submission Deadline |
| ● PI (award holder) | ● Response Code | |
| ● PI Email | ● Action | |

## Free Text Search

Above the table of awards, on the right side of the page, there is a search box to insert free text if you want to further narrow your search, for example to show all awards that display the word 'computer' type this in the search box and all relevant awards with this keyword will display.

Add search term...

Last Updated: 03:00:15 PM

Show Awards     Save Search     Download Award Details (RHT)

Change columns

Show [ 10 ] entries                                                                 Search: [          ]

## Save your Search

If you are going to be using the same search criteria multiple times, it may be useful to save this search to use again later. Simply click 'Save Search' and it will remember it as your default search the next time you access this page. You are also given the option to rename (by clicking on the name and re-typing) or remove the search.

> *Example* - To view all awards who have not yet submitted, with a response code 1.
> 'Add Search Term' > 'Submission Status' > 'Not Submitted'
> 'Add Search Term' > Response Code > 1
> 'Show Awards'

Download Award Details

Download the list of awards details as a CSV file using the 'Download Award Details' button. You can use this list to suggest any changes you might want to inform the funder about.

If you require Word Docs of each of the awards and their outcomes, you can do this by following the Bulk Update & Edit instructions.

Administrator Level (RO Full) - Further download requirements can be specified here.

Administrator Level (RO Full) - Bulk Updating & Editing Awards

You can bulk update your awards and assign them categories or nodes in one go. (see settings to create categories or nodes). You can also download the Data report documents.

1. Run a search for the awards you want to assign the category/node to (or download)
2. Use the checkboxes on the left or use the 'Select All' checkbox at the top of the list
3. Select 'Choose Action' dropdown menu shown at the bottom of the table and choose from the selection e.g. 'Alter Category' > [Category name] > 'Save'.



Settings: ⚙

User Accounts

User Accounts allow you to send administrator invitations to other people you wish to assist you overseeing your organisation on Researchfish.

Add New Users by selecting 'Add a New Administrator', to allow them an insight of your organisation

- Full Access - This role grants full access to the system - read and write data. Full access users can amend permission roles of other users, create more users or delete old ones.
- Non-admin access - This role grants only read-only access, and the recipient cannot edit award data such as categories or nodes
- Upload Access - In order to use the Eval Data Uploader, you will need to be an RO Admin with 'Upload' access.
- Content management - This role enables the user to edit the details that appear for your organisation on the Our Members page
- API Access - The API User role must be selected if users wish to access Researchfish data using the Application Programming Interface (API). Contact support@researchfish.com for details of how to use the API

## Organisation Details

This page allows you to include your organisation details such as your **Primary/Web Contact Details** which allows other members of the Researchfish community to contact you (such as other RO's or Funders.)

You can upload your organisation logo to be displayed in areas where your details are displayed.

You can also provide any organisation details and your website.

If you wish to learn more about the additional functionality of Administrator Level (RO Full) and how it may benefit your organisation, see *'Administrator Level'*, in the following pages or contact enquiries@researchfish.com or details on our website.

## Administrator Level (RO Full) Includes:

## Categories

This enables you to add and edit categories that are used to filter/group together specific awards.

To add a category:

- Select 'Add New Category'
- Enter the name, type of category (e.g. select one value, select multiple values) and the names of the values.
- Choose to save the category or save and add awards (where you will be redirected to the awards tab). (See *Awards* on how to bulk apply your Categories).

Node Management

A Reporting Node allows a department administrator access to e-Val, but they can only see awards assigned to their particular node.

Nodes, or Reporting Nodes, allow a particular section or department of an organisation to be able to view and report on only the awards that are relevant to them, as opposed to viewing the data for the entire organisation.

Nodes are created by the 'Add a new node' button. Create your Node name, and fill out the details of the Node admin. They will then receive access to any particular awards that have been assigned to that Node.

## Administrator Level (RO Full) Extras

Uploads

Publication Uploader Video

Interoperability blog: https://www.researchfish.net/single-post/2017/12/01/Researchfish-Interoperability-with-University-CRIS-Systems

Eval Data Uploader Guidance Document

Activity

[Monitoring award holder Activity Video](#)

Select the Outcome type of the activity and the date range you want to view:
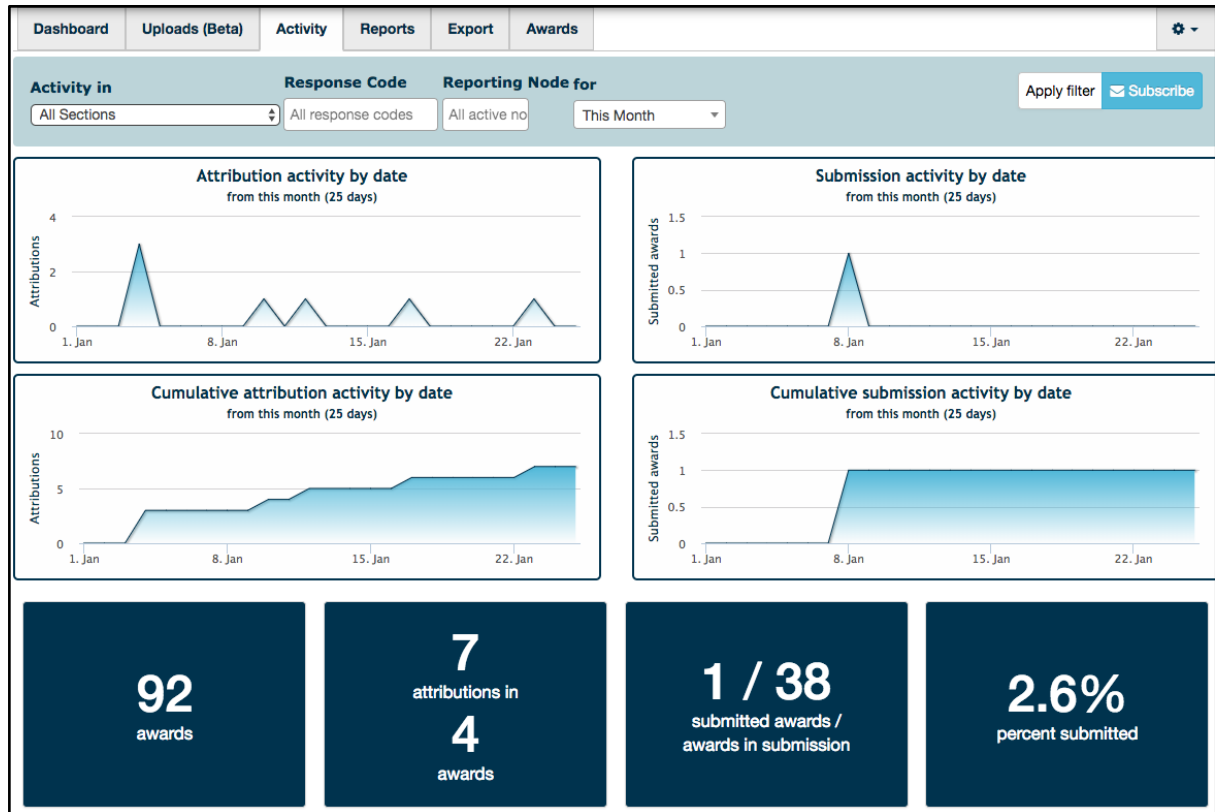


Activity allows you to monitor and track outcome attribution and award submission activity of award holder's whom hold awards at your organisation.

You can choose to filter based on various criteria, such as attributions across all outcome types, or just those of a specific section, such as Publications or by Response Codes and/or Reporting Nodes.

You can then choose to view the activity over the course of a day, week, month, or you can specify a custom time period.

Holding your cursor over a specific part of a graph will display the number of attributions or submissions for that that specific date.
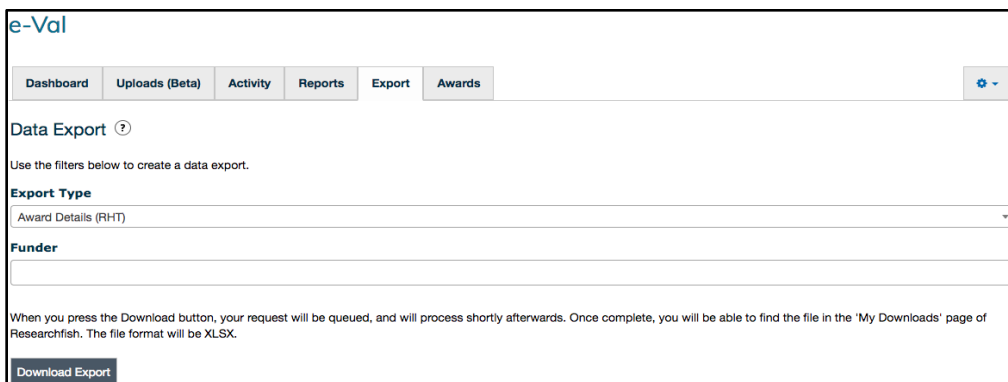
Reports

[Reporting Video](#)

Reports make it easy to gain insights on the information reported in Researchfish. Clicking on any of the output type sections will generate a report based on your organisation's information. You will be able to add a comparator, export the raw data and export a word document of the particular report, or all of the reports in a combined document after clicking on a section.

The full report or selected sections can be downloaded to a Word Doc (DOCX) or Excel (XLSX).

## Export

The Exports feature of e-Val allows you to Export the raw data collected by your award holders. You can create an Export using any of the Common Outcomes in use by your organisation, as well as selecting to view Live Data.

All Exports are constructed using the .CSV file format and will show in the 'My Downloads' page.



## Our Members

To view other members of the Researchfish community, navigate to the 'Our Members' page where you will also be able to see when other submission periods are taking place. Our largest 'multi-funder submission period' takes place from the beginning of February through to the middle of March. This includes UKRI, CRUL, BHF, NIHR and many more.

## Documentation

Updates on Researchfish Developments, User Group & Subgroup papers and lots of advise are all available on the Researchfish Documentation Space. There are always useful resources to find here and is always being updated.

## Help & Support

Help for award holders, access to support and Live Chat and much more assistance is available here.