Researchfish Administrator Dashboard – Quick Start Guide

(Please note this is intended as a quick guide to help Oxford users onto the system for the first time and to have a basic view of the information. More comprehensive training and guidance materials are available direct from Researchfish; see further information section at the end of this document.)

Oxford University subscribes to the RO Interface of the Researchfish system. Researchfish Ltd has made a separate dashboard available for administrators. This enables administrators to:

- View awards from funders that use Researchfish and share their data with institutions.
- Monitor the activity and submission of data by researchers (PIs and Students) to funders.

The Interface is available to Departments who wish to use it to monitor their rates of compliance and view or generate reports from the information entered by their PIs/Students.

User accounts can be set up for authorised administrators so they can view the portfolio of awards within a specific Department.

Requesting access to the Administrator Dashboard:

- Requests should be sent to the Oxford Researchfish Support Team in Research Services: rs-oxford.outcomes@admin.ox.ac.uk giving the name and email of the person to whom access will be given, and stating the relevant Departmental Unit(s) (name and Dept code).
  Users will be required to sign a User Agreement, and on receipt of this, access will be granted.
- The nominated administrator will receive an email invite from Researchfish to set up a User Account.
- Upon acceptance of the account invitation, you will receive a welcome e-mail from Researchfish but no action is required, it is for information only.

This document covers the following areas:

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1 Logging in and Accessing your Portfolio

Click on the email sent to you from Researchfish to initiate your account. When the registration process is completed this will be the first screen you see after logging into Researchfish:
2 Dashboard View

This tab is where PIs/students or team members will access their awards. As an administrator, click on the e-Val tab (circled in red). You will be taken to the Dashboard view (see below), with a range of further sub-tabs available ('Activity', 'Reports' etc):

Click on the box under Funder to expand the list of all funders for your Department (NB if you have access to the wider University dataset you will see all University grants listed):
The various funders, numbers of awards and PIs will be displayed. (The example above shows the funders for the whole University, most Departments will have only a couple of funders listed.) By clicking on a particular funder’s Location, Awards or PIs you will expand the list. For example by clicking on ‘AHRC, 527 awards’ (circled in green above) you would be taken to the below expanded view: (various information blocked out in this example).

Clicking the expanded funder’s Location, Awards or PIs again will close the list.

This page gives you a brief overview of all the awards for a particular funder, held in your Department. You are able to quickly see who has accessed their record and when, and whether the record is submitted. You can click through any of the links to look at a particular award or a
Pl/Students record etc. Clicking on the Award reference will take you directly to the information on a grant that has been entered into Researchfish so far. (This is live data, so information will be updated in real-time.)

This data can also be accessed via the Awards tab (see page 4/section 4)

### 3 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. Administrators can refer to these to follow up with their award holders. All those with a code 1 are included in the current submission period (i.e. the Funder is expecting outcomes to be submitted).

The values in the ‘Response Code’ column (see column highlighted in yellow) show whether a submission is expected and are defined as follows:

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 eg 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.**

**NOTE:** These are generic definitions of each response code, however individual Councils definitions of the response codes can vary, please see specific funder websites for further response code definitions.

**NOTE:** Every award with a Response Code of ‘1’ will contribute to Oxford’s compliance statistics, so it is important to ensure these are all correct. The Oxford Researchfish Support Team can request changes to response codes on your behalf.
4 Awards View

The 'Awards' tab allows you to locate specific awards by performing a search.

*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 (see page 6 / section 4.1).

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

4.1 Searching for an Award

The Awards Tab allows you to view a selection of data at a time and to see additional columns of information that have been entered to give structure to the Researchfish data, for example division, department (Node), sub-department labels and student/PI labels. This view is very helpful if you have access to the whole Researchfish dataset. This view also allows you to download information about an award into Excel.

To view the Awards tab click on the heading outlined in red below:

On the Awards Tab you have a series of boxes where you can build a query of the data (see screenshot below). For example to look at all response code 1 awards for a Reporting Node (ie department) from Arthritis Research UK:

- click AHRC from the drop down in the funder box (you can also select multiple funders).
- click on the 'Add search term'
- select 'Response Code'
- from the drop down select '1'
- click on the 'Add search term'
- select 'Reporting Node'
- from the drop down select ['a department name from the list']
- click on the 'Add search term'
- select 'Category'
- select 'PI or Student'
- from the drop down select 'PI'
- Then click on the 'Show Awards' button (circled in green below)
It is possible to continue to add further search terms to this list, for example adding Submission status or Division. In all cases you click ‘Add search term’ to do this and then use the relevant drop down list that appears.

When the data is displayed you can then click on the left hand ‘Change columns’ button to bring up a list of additional items to view on screen. (List of options displayed below ‘change columns button’)

The data produced in these award tab reports can be viewed on screen (with click through options as with the main Dashboard tab) or can be downloaded as an excel file by clicking ‘Download Award Details (RHT)’.

Once the results are displayed on screen, you can change the view to display 100 rows (shown below).

If you only have one page of results you can use your mouse to highlight the results and copy and paste it into Excel (which is quicker than a download). Alternatively you can use Snipping Tool to capture the results and paste it into an email/document if you are following up with PIs/Depts.

This data can also be accessed via the Dashboard tab (see page 2/section 2)
4.2 Reporting – Download Award Details from the Awards View

Download as an Excel file by clicking ‘Download Award Details (RHT)’

The file will start downloading and a note will appear in green (as shown in following screenshot). When the downloaded file is ready to view it will appear in the ‘My Downloads’ tab with a circled number next to it (see following screenshot).

Click on and then click the filename (as show in below screenshot) and it will open in Excel

The file that is generated contains much more data that you can see in the on screen search. Note: column headings are sometimes named differently in the exported file from what appears in an awards search onscreen. You can then easily delete columns, search and filter your awards – which is especially useful if you are looking through a large amount of data.

5 ‘Activity’ Data Tab

On the ‘e-Val’ tab you can also click on the sub-tab ‘Activity’
On the ‘Activity’ tab you can select which data you want to see in the fields ‘Activity in’; ‘Response Code’; ‘Reporting Node’; ‘for’; and ‘from’ and ‘to’ for a specific date range. Click ‘Apply filter’ and graphs and data containing the information requested will appear, (example following):
6 ‘Reports’ Data Tab

On the ‘e-Val’ tab you can also click on the sub-tab ‘Reports’

You can run one of the Standard Reports to make it easy to gain insights on the information reported in Researchfish for the node(s) that you have access to. Clicking on any of the sections (see examples with red boxes below) will generate a report based on your node (dept) information. You will be able to add a comparator, export the raw data (xls file) and export a word document of the particular report, or all of the reports in a combined word document after clicking on a section.
7 Reporting using the Export Tab

From the e-Val tab, click on the ‘Export’ sub-tab:

Under ‘Export Type’ there is a drop-down listing all the information in the Common Question Set** on Researchfish (location shown by green arrow). (If you wish to export the main award details, choose ‘Award Details RHT’ (shown in blue below) although this contains the same data included in the report as you get when you run a report from the ‘Awards’ tab (refer to page 4 / section 4).

If you want to download information for a particular ‘Common Question’ you can click on the drop down under ‘Export Type’ and select one of the Common Outcomes (examples shown in red).

You will then see another dropdown box where you need to select one of the 3 options shown under ‘Export Details’ (see screenshot on the right).

Under the Funder you can select one or many researcher funders – as many as apply to your Department/area if you wish.

Then click the ‘Download Export’ button.
You will then see a message in a green box:

![You Are Here](image)

This will give you an Excel download of the data. The file can be opened and saved in Excel and the data edited, filtered, etc.

**NB** if you are downloading information from the Common Question set and request award details (by selecting the ‘Entries with award details’) this will mean you get the same response repeated if it has been attributed by a researcher to more than one grant record.

** The Common Question Set comprises the following sections:

1. Artistic and Creative Products
2. Awards and Recognition
3. Collaborations and Partnership
4. Engagement Activities
5. Further Funding
6. Influence on Policy
7. Intellectual Property & Licensing
8. Medical Products, Interventions and Clinical Trials
9. Next Destination
10. Other Outputs & Knowledge/Future Steps
11. Publications
12. Research Databases & Models
13. Research Tools & Methods
14. Software & Technical Products
15. Spin Outs
16. Use of Facilities & Resources

8. Funder Submission Periods

- The Funders publish their submission periods within the Our Members section. This is accessed from the Researchfish home page.
- You can switch between the different funder types by clicking the relevant link – i.e. Public Funders; Charitable Funders; Research Institutions.
- Click on a funder ‘Organisation Name’ and you will see a description of the funder, their ‘Submission periods’ including ‘Active / Future Submission Periods’ and ‘Past Submission Periods and also information on the funder ‘Contact Details’.
- Each funder must first agree to share their data in order for users to see their awards. This is the case if ‘data sharing enabled’ appears in the Data shared with Research Organisations column.
9. Further Information

- Researchfish run training sessions aimed at Researchers using the PI interface and Administrators using the RO interface. See the listing of webinars on their website, together with other supporting materials: [https://eval.researchfish.com/helpwiz](https://eval.researchfish.com/helpwiz)
- If you have technical difficulty with Researchfish, please contact them directly, via their live chat or email link. Live chat is recommend for an instant response. Please note that phone lines are closed during the main funder submission period (Feb–Mar).
- Please visit the Researchfish YouTube Channel to access some of their help & support videos for e-Val users, such as locating awards, filtering award searches or monitoring PI activity on e-Val.
- Contact the Oxford Researchfish Support Team in Research Services with problems or requests for support: [rs-oxford.outcomes@admin.ox.ac.uk](mailto:rs-oxford.outcomes@admin.ox.ac.uk)
- Research Services has web pages about Researchfish with links to various help documents and sources which can be found at: [https://researchsupport.admin.ox.ac.uk/reporting/funders/researchfish](https://researchsupport.admin.ox.ac.uk/reporting/funders/researchfish)
- UK Research and Innovation (UKRI) (formerly RCUK) has general information pages on outcomes submission and Researchfish at: [https://www.ukri.org/funding/information-for-award-holders/research-outcomes1/](https://www.ukri.org/funding/information-for-award-holders/research-outcomes1/)