How Researchfish works

Researchfish is a system used by research funders to gather information on the outcomes of the research they fund, and for researchers to report back to Funders on the outcomes of their research. This is done by selecting from a standard list of common outcome types, and then completing an online form to add the selected outcomes.

In some cases, there are additional questions to be completed, as required by each Funder.

Take the tour

On the main pages there is step by step guide showing how that page works. You can access it by clicking on the ‘How does this page work?’ button when you see it, on the right hand side of the page.
Creating an account

You can only create an account if you have received an email invite, either from your research funder (if you are a Principal Investigator (PI)) or from a PI.

Accepting an invite to join

You will receive an email invite like the one below.

Researchfish Research Team Invitation

admin@researchfish.com via amazonses.com

to me ▼

Dear <Your Name>,

<PI name> has invited you to their Researchfish Research Team.

To accept this invitation please click on the following URL:

https://sandbox.researchfish.com//5f3f8572e4d29dace6726c19936f03a6b0450905

5f3f8572e4d29dace6726c19936f03a6b0450905

Clicking on the link provided will take you to the 'accept invitation' page:

Accept Invitation

WELCOME TO RESEARCHFISH

You are about to activate an invitation for Peter Smith. Please select an appropriate option to continue:

- I already have a Researchfish Account
- I do not have a Researchfish Account

Not Peter Smith? If Peter Smith has forwarded this invitation to you, you should instead ask them to make you a delegate on their account.

Users who previously reported data to ROS, or other evaluation systems, and do not already have a Researchfish account will need to create one now. Usernames and passwords from other systems have not been migrated to Researchfish.

Select the option that applies to you and just follow the steps provided:

- already have a Researchfish account - takes you to the log in page
- do not yet have a Researchfish account - takes you to the account creation page shown below
Create An Account

Please complete the following information to create your free Researchfish account. You can use this system to create a Personal Portfolio and also to report outcomes to your Funding Organisation(s).

Username *

Spaces are allowed; punctuation is not allowed except for periods, hyphens, apostrophes, and underscores.

E-mail address *

A valid e-mail address. All e-mails from the system will be sent to this address. The e-mail address is not made public and will only be used if you wish to receive a new password or wish to receive certain news or notifications by e-mail.

Password *

Password quality:

Confirm password *

Provide a password for the new account in both fields.

Title *

Firstname *

Lastname *

CREATE NEW ACCOUNT

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My Awards

The main ‘My Awards’ page is where you’ll land every time you log in:
Example of a ‘My Awards’ landing page.

**During submission period**

If you are a PI, you will see some of the following statuses during the submission period. Refer to the ‘Submitting an award to the funder’ section for further details.

**AWARDS I AM RESPONSIBLE FOR**

<table>
<thead>
<tr>
<th>Funder</th>
<th>Award name</th>
<th>Submission status</th>
<th>Next submission period</th>
<th>Research Team</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Award for Singing</td>
<td>Not yet</td>
<td>Not yet</td>
<td>P Macartney</td>
</tr>
</tbody>
</table>

Example of an award during submission period.

**AWARDS I AM RESPONSIBLE FOR**

<table>
<thead>
<tr>
<th>Award name</th>
<th>Submission status</th>
<th>Days left for submission</th>
<th>Project team</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parent allergy award (FAB789635)</td>
<td>Submission required</td>
<td>1 month 2 weeks</td>
<td>Irene Merlot, Matt Wynes, Sarah Morgan</td>
</tr>
</tbody>
</table>

Example of an award during submission period, after it has been submitted.

**AWARDS I AM RESPONSIBLE FOR**

<table>
<thead>
<tr>
<th>Award name</th>
<th>Submission status</th>
<th>Days left for submission</th>
<th>Project team</th>
</tr>
</thead>
<tbody>
<tr>
<td>test01 - Outcome Check</td>
<td>Submission completed</td>
<td>1 month 2 weeks</td>
<td></td>
</tr>
</tbody>
</table>

Example of an award which submission is not mandatory, during submission period.
If you only collaborate on an award as a researcher, the submission status and the next submission period will be stated on the table.

Add outcomes to an award

Step 1: Click on the name of the award to which you wish to add outcomes.

Note: If you wish to add outcomes to more than one award, start the process from any award and at the end, select all the awards this outcome should be attributed to.
Step 2: On the award details page, select which outcome you wish to add from the list on the left, by clicking over the outcome type name.
Step 3: On the outcome listing page, click on the ‘Add new entry’ button to add a new entry for the outcome type you selected.
### Publications

- Added by: Mr. Gavin Redcick
- Date Added: 06 Jan 2017
- PubMed
- DOI
- In this award: Yes
- In personal portfolio: No

#### Test pub. In (Ed.), Test pub. (pp. ).
- Added by: Dr Irene Mélot
- Date Added: 06 Dec 2016
- Outcome is missing a start date.

- Added by: Mr Peter Innings
- Date Added: 21 Nov 2016
- PubMed
- DOI
- In this award: Yes
- In personal portfolio: Yes

- Added by: Mr Peter Innings
- Date Added: 21 Nov 2016
- PubMed
- DOI
- In this award: Yes
- In personal portfolio: Yes
You can find information on what to include and not include under each outcome section by clicking on the 'what should I report in this section?' bar.

Search for publications

This page will guide you through the features of the Publications look up tool, and also how to enter a publication manually if necessary.

Once you have followed the steps on Add outcomes to an award, you will then be presented with the following screen:
To change the publication source, simply select one of the titles in the tabs across the upper part of the screen i.e. Scopus, Web of Science, ORCID etc.
Each source will utilise a Unique Identifier to location a publication directly, we have included explicit instructions and explanations on the tab for each source.

**Looking up publications using unique identifier(s)**

Once you are within the appropriate source simply begin inputting your ID’s. These can be input one at a time, or in bulk.
Please note that if you are intending to bulk add these you will need to copy them from a pre-ordered list where one of the following criteria apply:

- all ID’s are on separate lines (use Microsoft Word, Notepad, or similar)
- all ID’s are within unique cells (use Microsoft Excel or similar)
- all ID’s are comma separated (use Microsoft Word or Excel, Notepad, or similar)

Enter the ID’s into the relevant box and then click the ‘Search of publications’ button to perform the search/look up.

**Manual search for publications**

If you do not have the ID for your publication(s) it is also possible to perform searches against various fields within each of the sources apart from DOI and ORCID.

If any special requirements or behaviours are expected of the source chosen, there will be displayed below the relevant source search.
<table>
<thead>
<tr>
<th>First Author</th>
<th>PubMed</th>
<th>Scopus</th>
<th>Web of Science</th>
<th>ISBN</th>
<th>Theses</th>
<th>Inspire/HEP</th>
<th>NASA/ADS</th>
</tr>
</thead>
<tbody>
<tr>
<td>yes</td>
<td>yes</td>
<td></td>
<td></td>
<td></td>
<td>yes</td>
<td>yes</td>
<td>yes</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Title</th>
<th>PubMed</th>
<th>Scopus</th>
<th>Web of Science</th>
<th>ISBN</th>
<th>Theses</th>
<th>Inspire/HEP</th>
<th>NASA/ADS</th>
</tr>
</thead>
<tbody>
<tr>
<td>yes</td>
<td>yes</td>
<td>yes</td>
<td>yes</td>
<td>yes</td>
<td>yes</td>
<td>yes</td>
<td>yes</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Any Author</th>
<th>PubMed</th>
<th>Scopus</th>
<th>Web of Science</th>
<th>ISBN</th>
<th>Theses</th>
<th>Inspire/HEP</th>
<th>NASA/ADS</th>
</tr>
</thead>
<tbody>
<tr>
<td>yes</td>
<td>yes</td>
<td>yes</td>
<td>yes</td>
<td>yes</td>
<td>yes</td>
<td>yes</td>
<td>yes</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Publication Year</th>
<th>PubMed</th>
<th>Scopus</th>
<th>Web of Science</th>
<th>ISBN</th>
<th>Theses</th>
<th>Inspire/HEP</th>
<th>NASA/ADS</th>
</tr>
</thead>
<tbody>
<tr>
<td>yes</td>
<td>yes</td>
<td>yes</td>
<td>yes</td>
<td>yes</td>
<td>yes</td>
<td>yes</td>
<td>yes</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Keywords</th>
<th>PubMed</th>
<th>Scopus</th>
<th>Web of Science</th>
<th>ISBN</th>
<th>Theses</th>
<th>Inspire/HEP</th>
<th>NASA/ADS</th>
</tr>
</thead>
<tbody>
<tr>
<td>yes</td>
<td>yes</td>
<td>yes</td>
<td>yes</td>
<td></td>
<td></td>
<td>yes</td>
<td></td>
</tr>
</tbody>
</table>

**Adding publications**

Once the search results (either using ID’s or manual search criteria) have been returned, you will be presented with a table similar to the following:

<table>
<thead>
<tr>
<th>Type</th>
<th>First Author</th>
<th>Other Authors</th>
<th>Title</th>
<th>Journal</th>
<th>Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Journal</td>
<td>Carter JG</td>
<td>Sherbon BJ, Viney IS</td>
<td>United Kingdom health research analyses and the benefits of shared data.</td>
<td>Health research policy and systems</td>
<td>2016</td>
</tr>
</tbody>
</table>

Select which of the publications you wish to add to the award using the corresponding tick box to the left of the search result, the background will change colour, highlighting the selection as shown below:
<table>
<thead>
<tr>
<th>Type</th>
<th>First Author</th>
<th>Other Authors</th>
<th>Title</th>
<th>Journal</th>
<th>Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Journal Article</td>
<td>Carter JG</td>
<td>Sherbon BJ, Viney IS</td>
<td>United Kingdom health research analyses and the benefits of shared data.</td>
<td>Health research policy and systems</td>
<td>2016</td>
</tr>
</tbody>
</table>

You will notice the section under the table change working to reflect your choices:
This selection is to inform you of any publications that have been marked for Adding to your award/portfolio. To remove an entry from this list simply deselect the check box from the table above.

Once you are happy with your selection, click on the ‘Add to Portfolio’ button to begin the process.

**Common error messages**

It is possible for your Searches to fail from time to time. If this happens you will be provided with an error code or statement to help diagnose where, and how the error occurred. The list below shows the most common errors:
● **REASON_DUPLICATE_ID** - The publication ID is already input into the search field.
● **REASON_ID_SYNTAX** - The incorrect Syntax has been used.
● **REASON_ID_MISSING** - The ID is recognised, the syntax is correct – the publication cannot be found.

If you encounter an error other than the ones listed above please send a screenshot of the error as well as any relevant details about its creation to support@researchfish.com.

**Connect to ORCID**

**Step 1:** Click on the 'Connect to ORCID' on the top right corner of the screen, under your name.

![Connect to ORCID](image)

**Step 2:** You will navigate to the ORCID site to either register a new account, or sign in to an existing account.
Once you complete connecting your ORCID ID to your Researchfish account, you will be taken back to the Researchfish interface.
All publications on your ORCID account will be automatically added to your Personal Portfolio.

Download an award

Step 1: Click on the name of the award you wish to download.

Step 2: On the award details page, click on the ‘Download Award’ button.
Step 3: Select the template format you wish to use and then click on the 'Download Award' button to initiate the download.
Add a Delegate (for Principal Investigators only)

A delegate is a person to impersonate you and add / attribute outcomes to awards on your behalf.

**Step 1:** Click on the name of any award you are responsible for.

**Step 2:** On the award details page, click on the ‘Add delegate or team member’ button.
Step 3: Select the appropriate role of the team member you wish to add.
Step 4: Fill in the details of the delegate you wish to add and then press the ‘Invite User’ button.
The person you have added will receive an invitation email and should follow the account creation steps in order to access the Researchfish system.

**Adding a Collaborator (for Principal Investigators only)**

A collaborator is a person who does research of their own.

**Step 1:** Click on the name of any award you are responsible for.
Step 2: On the award details page, click on the ‘Add delegate or team member’ button.
Step 3: Select the appropriate role of the team member you wish to add.
Step 4:
1. Complete the details of the collaborator you wish to add.
2. Select if you wish this person to have access to your Personal Portfolio (they will be able to add your outcomes to their own Portfolio and attribute them to awards).
3. Select which awards you wish this person to have access to (they will be able to add outcomes and attribute existing outcomes to other awards).
4. Press the ‘Send Invitation’ button.
The person you have added will receive an invitation email and should follow the account creation steps in order to access the Researchfish system.

Remove a Collaborator or edit their access permissions (for Principal Investigators only)

Step 1: Click on the name of the award you wish to remove the collaborator from.
Step 2: On the award details page, click on the name of the person you wish to remove access from the award.
Step 3: On the edit team member page, de-select the awards you do not wish this collaborator to have access to and then click on the ‘Save’ button.

Alternatively, you can remove the user from all access by clicking on the ‘Remove Team Member’ button.
Submitting an award to the funder (for Principal Investigators only)

When a submission period opens, special headers will be displayed on the ‘My Awards’ landing page.

**Step 1:** Click on the ‘Begin submission process’ button.
Step 2:

- Check if all relevant sections are completed, then tick the box to confirm that all outcomes for the award have been added.
- Tick the box to confirm that you agree to the funder’s Terms and Conditions.
- Click on the ‘Proceed to next award’ or ‘Submit to funder’.

Outcome listing pages

The outcomes listing page comprises two main areas:

- a customisation bar at the top
- a table listing the outcomes for a given category

The customization bar provides the following options:

**Current award:** this menu allows you to navigate between awards, if you have more than one. For example, if you are viewing the list of Publications for award X and choose to navigate to award Y, you will land on the Publications list for award Y.
Displaying: use this menu to navigate between outcome types. You’re chosen outcome category will also be displayed on the page title.

Sorted by: use this menu to sort the list of outcomes using one of the options provided.

Filtered by: this menu provides several options for filtering the outcomes list view.

In addition to the options above, the customisation bar also provides a button for adding new entries to the outcome category you selected.
The outcomes listing table lists all outcomes for the category you have chosen, depending on how you sorted and filtered the view.

**Personal Portfolio**

The Personal Portfolio area provides a repository of all outcomes that you have added yourself and / or added from awards for which you were given permission to use.

The outcomes’ listing layout is very similar to that on the ‘My Awards’ area.

**Profile Page**

The profile page provides an overview of your own personal portfolio.

The left-hand side column shows a list of common outcomes categories and how many entries you have for each, on your personal portfolio. At the bottom of this column you can see a few extra sections pertaining your personal history, which can be used to help you build a CV.

The middle column shows your personal details as per provided in the My Account area and a link to your ORCID account. It also provides a button for downloading your portfolio.

On the right-hand side column you can see how many total outcomes you have on your portfolio and also if any of those outcomes are not attributed to any award.
Adding outcomes to the Personal Portfolio

Adding outcomes to the Personal Portfolio is done in the same way as for adding outcomes to an award from step 2.

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
<th>Author(s)</th>
<th>Institution(s)</th>
<th>In personal portfolio</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chaudhry Nupur, (2008). Dark Victorians.</td>
<td></td>
<td>Dr Irene Melot</td>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td>Cunningham Chris E, Teale Glyn R, (2013). A profile of body mass index in a large rural Victorian obstetric cohort.</td>
<td></td>
<td>Dr Irene Melot</td>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td>[2015]. Doctor Who: City of Death.</td>
<td></td>
<td>Mr A Test</td>
<td></td>
<td>Yes</td>
</tr>
</tbody>
</table>

Page 1 of 1 (8 entries)
**Downloading the Personal Portfolio**

**Step 1:** on your Personal portfolio profile page, click on the ‘Download Personal Portfolio’ button.

![Screenshot of Personal Portfolio](image)

**Step 2:** Select which sections you wish to download, then press the ‘Download Portfolio’ button.

![Screenshot of Download Personal Portfolio](image)

**My Account**

Use this area to change your personal details and password.
Help & Support

You can find a link to the Help & Support at the top right of every page.

The following is an overview of topics you can find in this area of the Researchfish site:

- **User Guide** - a link to this user guide.
- **Forgotten username / password** - recovering your Researchfish username or password, or both.
- **Invitation help** - if you think you should have access to Researchfish but have not received an invitation email, you can contact your funder using this tool.
- **Join a webinar** - we hold regular webinars to show how to use the Researchfish system and answer questions from participants.
- **Frequently asked questions** - quick access to information frequently asked to the support team.
- **Watch help video** - video showing an overview of the Researchfish system functionality.
- **Contact us** - if you need further assistance, there are various options available for you to contact Researchfish's support team.
The following options are only available once you log in to the system:

- **Award details incorrect** - if you think the details show on an award's details page are wrong, you can use this tool to report that to your funder.

- **Submission help** - a direct link to the *Submit an award to the funder* section on this user guide.

- **Documentation** - links to various additional resources.

**How Can We Help You Today?**

- Award details incorrect
- Submission help
- Documentation
- User Guide
- Invitation help
- Frequently asked questions
- Watch help video
- Join a webinar
- Contact us