This user guide documents all of the module's major fields and their functions; for a basic guide to the mandatory/ most important fields, please consult the Quick Guide.

Some of the fields outlined below are, to an extent, optional, as long as the relevant information is included elsewhere: these are clearly indicated.

A. Understanding Impact

Before using the module, it is important for users to be certain that what they want to document meets the definition of impact. For REF2014, the first exercise to assess impact, HEFCE defined it as:

an effect on, change or benefit to the economy, society, culture, public policy or services, health, the environment or quality of life, beyond academia.

**Impact must:**
- Be based on research
- Bring benefit to a non-academic group or community
- Create a change in the way a community, business, organisation or other group creates policy, carries out its work, makes money, proposes and executes regulations or laws, views a particular issue, etc.
- Only be claimed by the university at which the research was carried out, not by HEIs to which a researcher subsequently moves.

**If you have meaningful answers to the following questions:**
- Who benefited from my research insights?
- In what way did they benefit?
- How many people/organisations benefited from these insights?
- Where are they? (Geographically, and/or type of research user, e.g. a company, a community group, a country, people living in a particular region, patients, practitioners (medical, social worker, etc.)
- What evidence do I have that benefit occurred and that it can be traced back to my research insights?

then impact has probably been achieved.

**BUT –**
If you delivered a lecture to a public audience, undertook consultancy based on your knowledge of the field but not on a particular piece of your own research, took part in a festival or other, similar outreach work, this is more likely to be ‘activity’ rather than ‘impact’.
B. Capturing impact using the PURE impact module

The impact module can be used to:

i. Plan for future impact, e.g. at funding bid (Pathways to Impact) or post-award stage.

ii. To document impact(s) that are in progress or have recently occurred, and to update the details, metrics, etc. as the impact matures. In this mode, the impact module can be used in either of the following ways:

   a. To create a single record that describes multiple impacts arising from a project or linked series of projects, in the form of a regularly updated impact ‘diary’. This mode is potentially more beneficial in terms of case study purposes in creating an impact narrative describing multiple impacts;

   OR

b. Where there is more than one kind of impact arising from a research project or projects, to create separate records for each different type/strand of impact.

We recommend mode iia., i.e., creating a single record whose status can be updated using the Impact Status pull-down menu as the impact moves from planning stage through to maturity.

If you prefer to create separate records for different types of impact and/or different impact stages, remember to disambiguate the records by varying the impact title slightly. This is necessary to avoid creating duplicate records (the system does not warn of duplication). You must also use the relational links buttons to indicate that there is a relationship between this and other impact records associated with a single project or suite of projects.

iii. To maintain a record of impact that has ended but might be used for a future case study, or for archival purposes.
1. Creating a new impact record
2. Impact status [required field]

Choose:

- **Ongoing** if the impact has begun and is in progress
- **Planning** if you are using the module to plan for potential future impact
- **Completed** if the impact phase has come to an end, and it is envisaged that no/little further impact will occur
- **Closed record** if the impact has not reached a significant level and no further impact is expected to occur

3. Impact Information
a. Title [required field]

The title can be anything meaningful to you, and ideally would include an indication of the type of impact that occurred, and the beneficiary, e.g.:

- Helping an SME to grow
- Working with Google to develop and implement a new search algorithm
- Policy change within Manchester children’s services
- Altering public perceptions of WWII through exhibitions and theatrical performances

As we approach the REF, it is likely that we will introduce a simple coding system to add to record titles, to indicate records that are intended to be developed into case studies.

If the impact derives from a single research project, you may prefer to choose a title that indicates which particular project underpins the impact; if so, be careful to include some wording that differentiates it from the project record, to avoid creating duplicates.

b. Description of this impact(s) record
[OPTIONAL FIELD, PROVIDING THE INFORMATION IS PROVIDED IN THE ‘NARRATIVE’ FIELD BELOW]

Provide a little more detail, if considered necessary, about the impact and beneficiaries indicated in the title. The following are examples of ongoing impacts at various stages of development, from early to more advanced:

- **Since 2013, our team has been engaged in a KE project with an SME based in Newcastle to incorporate our work on pricing models into their business practice. Early indications are that this has led to increased efficiencies, which in turn has allowed the SME to increase its turnover.**

- **Our search algorithm project, in which Google was a collaborative research partner, has recently (December 2014) completed and the algorithm is undergoing testing at Google. It is envisaged that the Beta version will be rolled out later this year (2015) and will make searches faster and more accurate.**

- **Anticipating the implementation of new regulatory oversight measures, Manchester children’s services approached us in 2012 with a view to using our work on safeguarding to design and implement internal policy reforms. The new policy, which was rolled out in January 2014, resulted in an immediate change in social worker practice. There has been an observable drop in the number of adverse incidents since April 2015, and other council areas are considering adopting a similar approach.**

- **Our project “Anything to Anywhere”: Women Pilots in WWII led to a series of public exhibitions throughout the UK, which ran from November 2013 until September 2014. The exhibitions created huge media interest and**
sparked a debate about women’s ‘non-combatant’ roles during WWI – and, indeed, in other wars. The influential Orange Tree Theatre in Richmond was so inspired by the exhibition that it revived a WWII play about women aviators; this is also scheduled to begin touring in 2016.

c. Beneficiaries
[OPTIONAL FIELD, PROVIDING THE INFORMATION IS PROVIDED IN THE ‘NARRATIVE’ FIELD BELOW]

Provide brief detail about the beneficiaries, including quantitative information, e.g.:

− Newcastle SME: turnover increased from £100,000 p.a. to £300,000; jobs created – sales force increased by two.
− Google; ultimately, once new search tool rolled out, millions of Google search users worldwide.
− Manchester social workers, supervisors and managers; at-risk children in the city. In the near future, social workers and children in other UK council areas.
− Visitors to exhibitions and theatre-goers; reviewers, people who read the reviews and participated in the debates.

d. Narrative
Use this box to describe the impact(s) in more detail. Include qualitative and quantitative data about the benefit arising from your research, and the beneficiaries. Think about:

− How many people/organisations have benefited, directly or indirectly?
− How much income has been generated for your external partner organisation, or money saved?
− How many lives have changed for the better, and in what way(s)?
− Have your research insights changed anyone’s opinions about something, prompted a change in the law or regulatory oversight, caused an organisation to take action or do something differently?

Include as much qualitative detail as possible, if it is available.

If you are creating a single record with multiple impacts arising from one or a series of linked projects or pieces of research, this field provides a good opportunity to build up a narrative that describes all of these impacts, and how they can be linked back to your original research.

If the record is being used for planning purposes, include estimated numbers of future beneficiaries, etc.
e. Category of impact

If you are not sure which category your impact falls into, or if the record is being used to describe or capture multiple impacts, we recommend choosing Other, and making sure that the impact/different types of impact are outlined in more detail in the Narrative field above.

f. Impact level

The categorisation should be altered as the impact develops. We recommend only using the default 'No value' if projected impact does not occur, or any impact that does occur is insignificant and the record is to be closed.

4. Evidence
Clicking the button pulls up a dialogue box with additional pull-down menus and fields:

![Add impact evidence dialog box](image)

a. **Evidence indicator [optional]**
   Pull-down menu that allows you to indicate whether the evidence to be uploaded under the Evidence document section is:
   - Qualitative
   - Quantitative
   - Other/Both

b. **Period [Mandatory]**
   Two radio buttons allowing the input of either
   - A specific date when the impact occurred, which is consistent with the uploadable evidence
   - A period of time over which the impact occurred

   Note that, in either case, only the year field is mandatory.

c. **Evidence title [optional]**
   Use to indicate what type of evidence is described and/or uploaded below, e.g. ‘corroboratory letter’; ‘media feature’; ‘report corroborating impact’; ‘web page corroborating impact’.

d. **Evidence summary [optional]**
   Input notes about the corroboratory documents and links which can be uploaded below.

e. **Evidence contact information [optional]**
   These three text fields should be used for details of external institutional or personal contacts who can corroborate one or more aspects of the impact described in the impact record.
f. **Evidence documents and links**
   
i. The **Add Document** button opens up a dialogue box that allows the user to drag-and-drop or to browse for and upload a file, and to add further details about the nature/content of the file. The ‘File Title’ box is automatically populated once the file is uploaded. Note that only one file can be uploaded at a time; the process must be repeated for every file uploaded.

ii. Clicking the **Add link** button opens a dialogue box that allows the user to save a URL and some explanatory detail about which aspects of the impact described in the record the web page corroborates.
Note that cutting and pasting a URL into the **Web address (URL)** field saves only one page, not a whole website; and, as with document upload, only one URL can be added at a time.

**IMPORTANT:** Note also that saving a web page in this way does not create a permanent snapshot of the page on the day it was uploaded. As web pages change frequently and/or are deleted, it is best to take a screenshot and upload it as a file using the **Add Document** box if you want to be sure of preserving the content of the page.

5. **Participants and affiliations [MANDATORY]**

At least one **Person** must be added to this section, and an **Organisational unit** can be added if desired. In both cases, people and departments/faculties/centres/organisations either within or outside the university can be added who are associated with the project.

There are two ways to add a person: either by clicking the icon to the right of 'Persons', or by clicking the button beneath it. Clicking the icon brings up a slightly different dialogue box than when you click the button, but the same information is searched for. The screenshot below indicates the ore user-friendly dialogue box that appears when you press the 'Add person’ button.

An organisational unit can only be added by clicking the button below the section heading.

**a. Add person**

Opens a dialogue box with two top-level buttons – ‘Search’ and ‘Create external person’

- Choosing ‘Search’ allows the user to browse and pick an associate from the university's internal listings.
Choosing ‘Create external person’ brings up a further dialogue box with a number of fields and pull-down menus:

b. Add organisational unit
As above, there is the option of searching for internal departments and other organisational units, or creating an external organisation.

Clicking on the Create external organisation button brings up a further dialogue box:
6. Impact managed by
Clicking the button allows the user to search for departments and other organisational units within the university.

7. Keywords
Add keywords that categorise the content; this assists with searching for reporting purposes, and for identifying related projects and topics when planning impact case studies.

8. Files
This section could be used to store a case study file, Pathways to Impact statement, impact plan, or URLs for project websites.

Functionally, it is essentially identical to the ‘Evidence’ section above, with two buttons:

a. Add document
b. Add link

As before, they allow documents and links associated with the impact to be uploaded and annotated.
a. Documents

If you are adding a document, you will see this screen:

**Filename**
Dragging files across to the Filename box will upload that file to the record. It will automatically use the name of that file to populate the ‘File title’ field.

**Visibility**
This relates to who will be able to view the document being uploaded, not the entire record. The level of visibility is detailed against each category in the pull-down menu.

**Type**
The type refers to the type of document being uploaded, i.e., text, audio/visual, media file, etc.

b. Links
Web address (URL)
Note that cutting and pasting a URL into the Web address (URL) field saves only one page, not a whole website; and only one URL can be added at a time.

Note also that saving a web page in this way does not create a permanent snapshot of the page on the day it was uploaded. As web pages change frequently and/or are deleted, it is best to take a screenshot and upload it as a file using the Add Document box if you want to be sure of preserving the content of the page.

Description
This box is for a short description of the information that the website contains.

9. Relations

Clicking any of the buttons brings up a search box that is used to access data already entered into the system – it does not allow uploads from external sources. Search boxes allow the user to find other impact strands associated with the current impact – this will assist in developing high-impact case studies.

At a very minimum, associations should be made between the impact described and:

a. Other impacts arising from the same project or linked projects (if any).
b. The original research project or projects that gave rise to the impact(s) described above.
c. Outputs from the original project or projects that resulted in the impact(s).
It may be the case, particularly when planning for impact or with early-stage impact, that there are as yet no outputs from the original research, but if you cannot link past impact(s) you have described in the record to a piece of research, then the details you have input should be recorded as an ‘activity’, using the Activities module, not an ‘impact’.

Other potentially useful relations are:

a. Press clippings
b. Activities

c. Equipment
d. Datasets

10. Visibility

By default, set the visibility level to ‘Backend – Restricted to Pure users’.

If you wish only your collaborators and Impact Officers/administrators with editing rights to see a record, set the visibility level to ‘Confidential’.