

Current **R**esearch Information **S**ystem

CRIS-Manual

Version 1.1

Table of contents

1. Introduction.....	3
2. First login	3
3. Help	5
3.1. Leave a comment to a specific content.....	7
3.2. Help texts.....	7
4. How to start: Personal data and user profile	9
5. Add new research output.....	14
5.1. Publications – Metadata.....	14
5.1.1. Create from template.....	15
5.1.2. Import from online sources.....	17
5.1.3. Import from file	19
5.2. Publications not referring the Universität Hamburg (UHH).....	20
5.3. Insert full texts.....	21
6. Adding research activities	24
7. Create a curriculum vitae (CV)	25
8. About ‘Applications and contracts, Awards, and Projects’	28
9. Research network.....	29
10. Contact information	30

1. Introduction

The Current Research Information System (CRIS) provides the opportunity for every scientist of the Universität Hamburg to keep track of his/her research activities.

The software used is PURE which was manufactured by *Atira* and acquired by Elsevier in 2012. All content editing takes place in the web browser.

2. First login

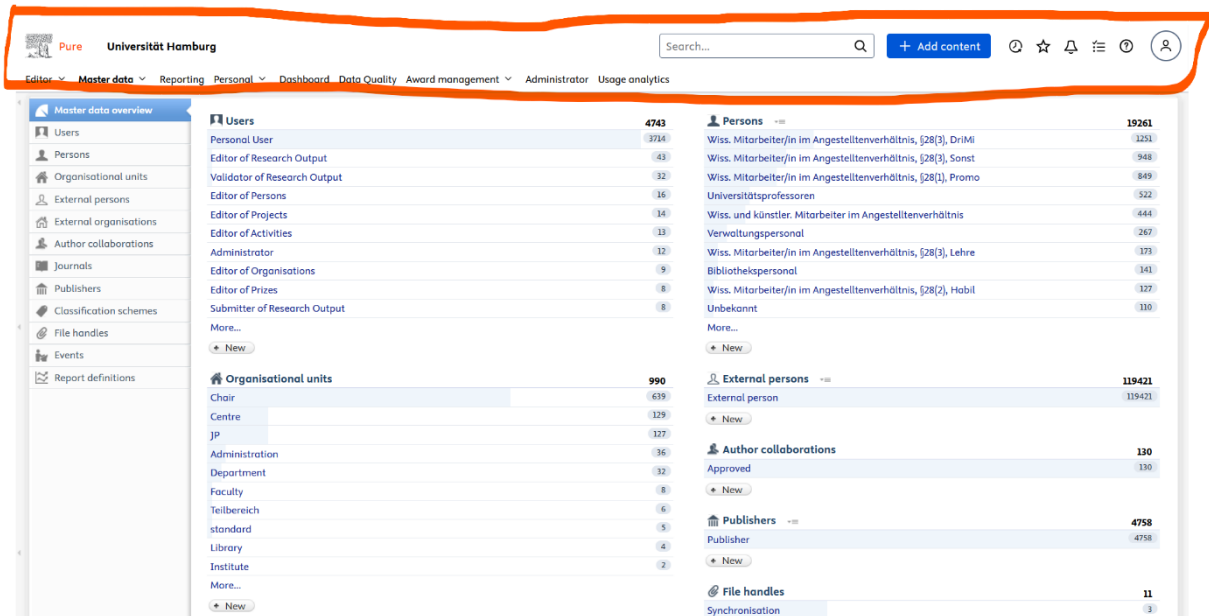
For the log-in function, the **B-identifier** (*B-Kennung*) with the associated **password** is needed. This information is also used to enter e.g. the *KUS-Portal*, *STiNE* or *Sharepoint*. The B-identifier contains three letters, four numbers and always starts with a 'b'. If support is needed regarding the identifier and/or the password, please contact the RRZ-ServiceLine (rrz-service@uni-hamburg.de) or visit the website of the RRZ: <https://www.rrz.uni-hamburg.de/passwort-kennung/kennungen.html>

At first login the CRIS will ask for the preferred language. English or German can be chosen.

There is always the possibility to change the language again in the user profile. This is independent of the language setting chosen before. (See page 10)

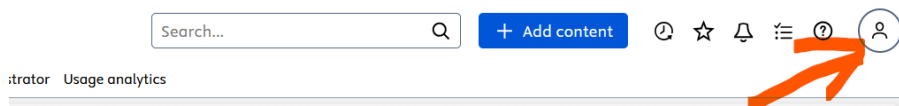
New header

In Pure version 5.30.1, the layout of the FIS changes with the introduction of a new header. This is still optional, but will be mandatory from version 5.30.2.

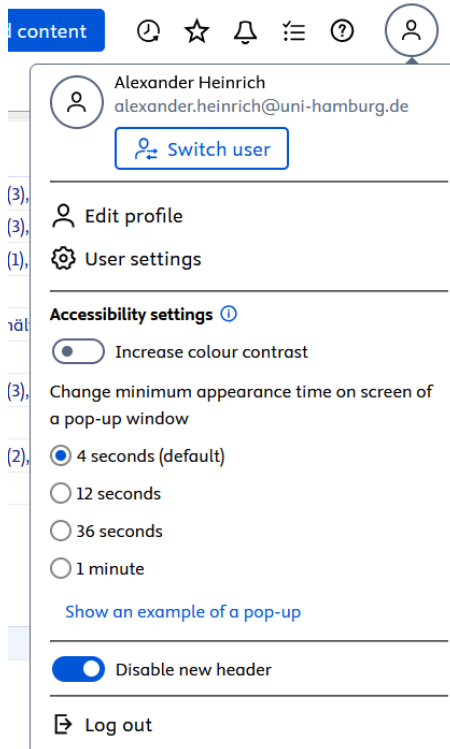


The new header contains the familiar functions and some additional features. It has a slightly different structure. The help area is now hidden behind a question mark. 'Tasks' and 'Notifications' now have their own menu item. The 'Tasks' can be permanently shown or hidden.

Under the 'Profile' menu item (see screenshot below, highlighted in orange) you will find the main settings, which were previously accessible by clicking on the B-Identifier in the old header.



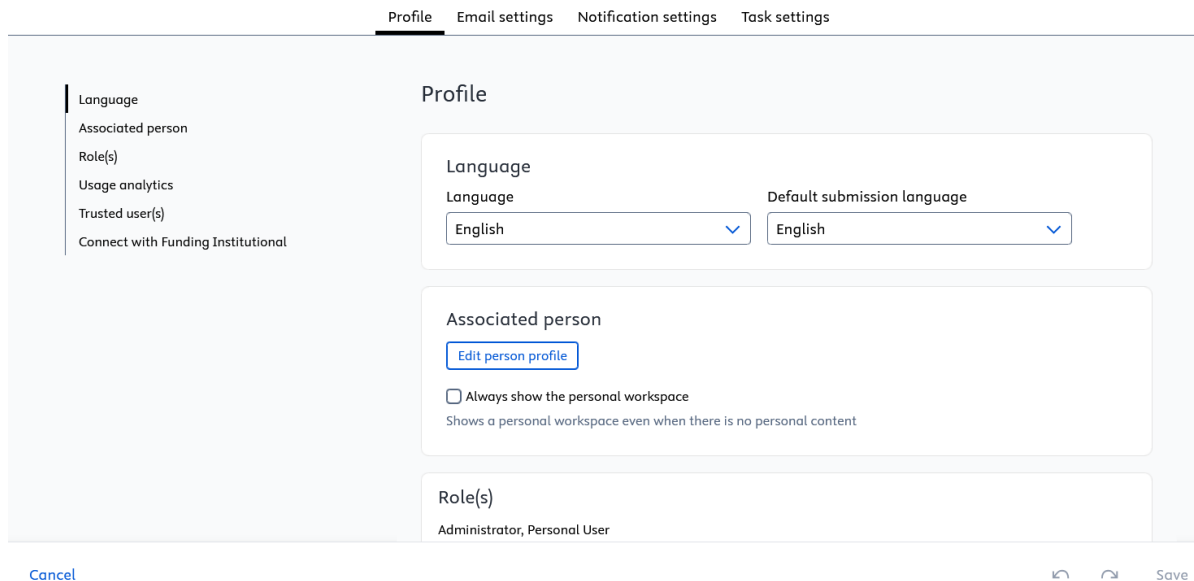
Clicking on the 'Profile' will open the following pop-up window:



The pop-up window displays the user profile for Alexander Heinrich (alexander.heinrich@uni-hamburg.de). It includes a 'Switch user' button and a list of settings: 'Edit profile', 'User settings', 'Accessibility settings' (with a sub-setting for 'Increase colour contrast'), 'Change minimum appearance time on screen of a pop-up window' (with options: 4 seconds (default), 12 seconds, 36 seconds, 1 minute), 'Show an example of a pop-up', 'Disable new header' (checked), and 'Log out'.

Under 'Edit profile' you will find the familiar user profile. Under 'User settings' you will find, among other things, the language setting, an overview of your roles in the FIS and the 'Trusted user(s)' setup.

User settings



The 'User settings' page has tabs for 'Profile', 'Email settings', 'Notification settings', and 'Task settings'. The 'Profile' tab is active, showing a sidebar with links: Language, Associated person, Role(s), Usage analytics, Trusted user(s), and Connect with Funding Institutional. The main content area is titled 'Profile' and contains three sections: 'Language' (with 'Language' and 'Default submission language' both set to 'English'), 'Associated person' (with an 'Edit person profile' button and a checkbox for 'Always show the personal workspace'), and 'Role(s)' (listing 'Administrator, Personal User'). At the bottom, there are 'Cancel' and 'Save' buttons.

The 'Trusted user(s)' function is the same as in the old header.

✕

User settings

Profile

Email settings

Notification settings

Task settings

Language

Associated person

Role(s)

Usage analytics

Trusted user(s)

Connect with Funding Institutional

Role(s)

Administrator, Personal User

Usage analytics


[Read more about usage analytics in Pure](#) ➔

Trusted user(s)

Add users you trust to act on your behalf using your account

Alexander He

Q

 **ba02402 - Heinrich, Alexander**, alexander.heinrich@uni-hamburg.de

User

Connect with Funding Institutional

Enter the ID from Funding Institutional to connect your user

Cancel

↶ ↷

Save

As usual, you can enter other people who should maintain your data in the FIS on your behalf. If the person in question is not yet in the FIS, please contact us and we will add them as soon as possible.

Contact: fis@uni-hamburg.de

Help

3.1. Leave a comment to a specific content




















Messages can be sent to other users within the CRIS as follows:

On the left navigation bar you will find **'History and comments'**. Here, a comment can be left in the system, or sent directly to a corresponding editor.

3.2. Help texts

In the CRIS, a context-sensitive help is available. It can be activated by moving the mouse over the small 'i' next to the belonging field description, or with a single click on the i-symbol right above in the head line to see all help texts at once.

The following icons are used in the CRIS:

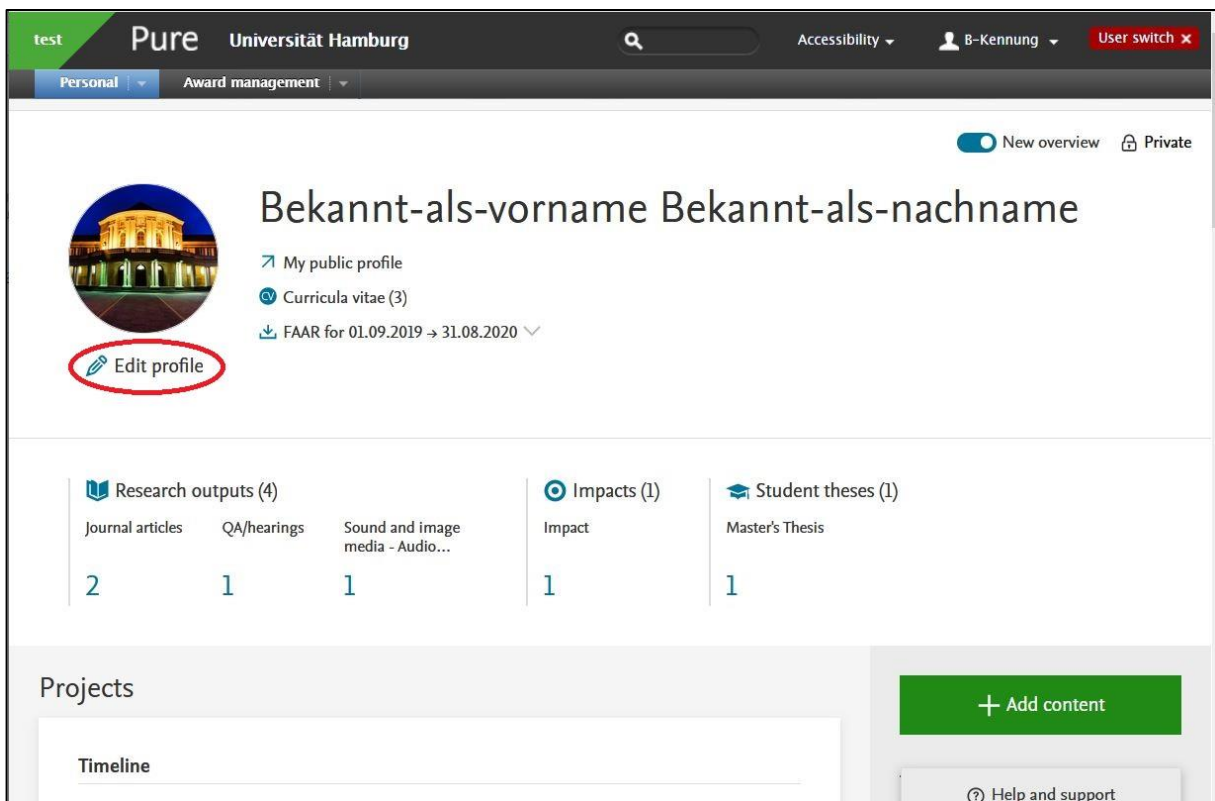
Icon	Meaning
	Help
	Add to favorites
	Actions
	Research outputs
	Organizational unit
	Applications and contracts
	Prizes
	Awards
	Projects
	External persons
	Persons
	Users
	Delete
	Copy
	Synchronized content
	Activities
	Open Access
	View
	Edit

3. How to start: Personal data and user profile

At the start page, an overview of all stored data belonging to the user's account is given.

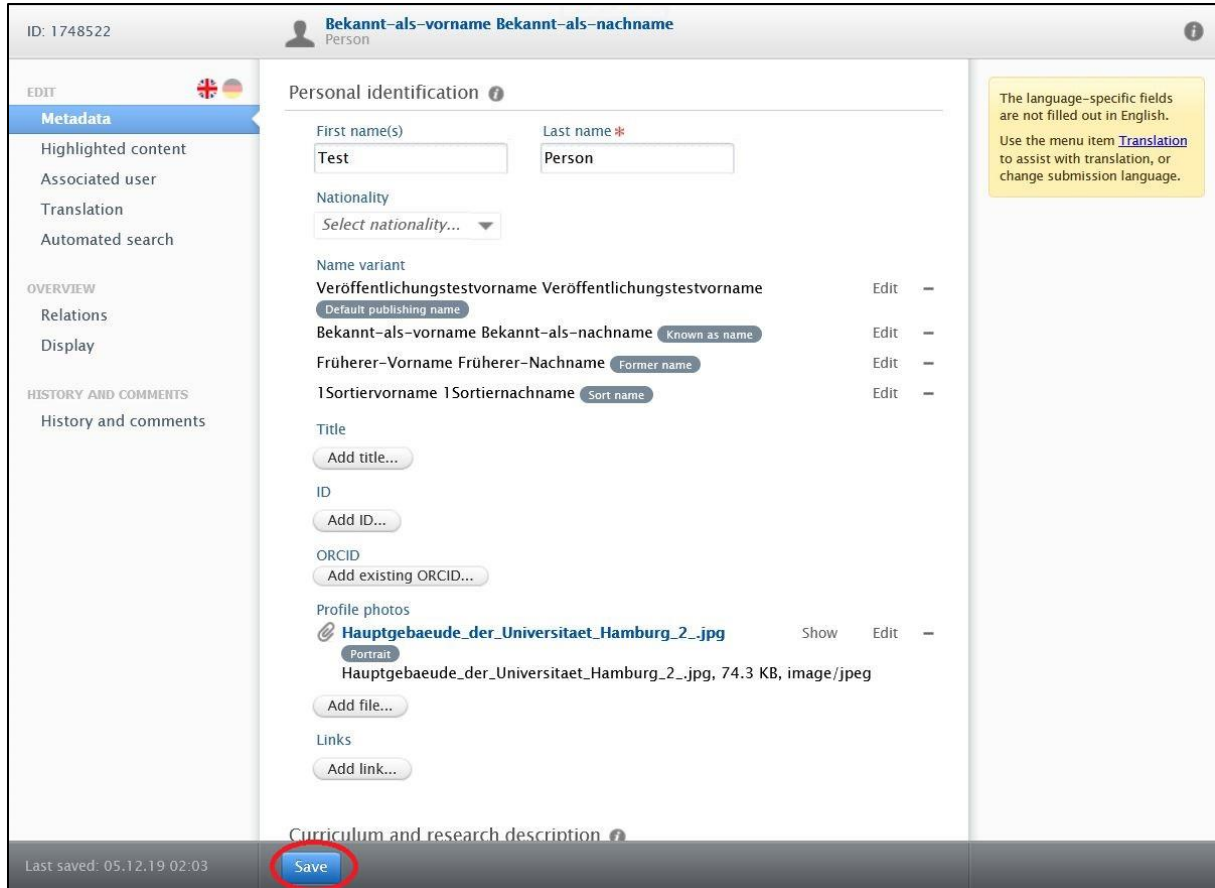
Under '**Personal**', personal data is seen which was synchronized with the personnel management system *KoPers*, and the identity management system *IDMS*.

Go to '**Edit profile**' to change or add non-synchronized profile data.



The screenshot displays the 'Pure' profile page for a user at the University of Hamburg. The header includes the university logo and navigation links. The main profile section shows a circular profile picture, the user's name, and links to 'My public profile', 'Curricula vitae (3)', and 'FAAR for 01.09.2019 → 31.08.2020'. An 'Edit profile' button is highlighted with a red circle. Below the profile section, there are three columns: 'Research outputs (4)' with sub-items 'Journal articles' (2), 'QA/hearings' (1), and 'Sound and image media - Audio...' (1); 'Impacts (1)' with 'Impact' (1); and 'Student theses (1)' with 'Master's Thesis' (1). At the bottom, there is a 'Projects' section with a 'Timeline' and a green '+ Add content' button. A 'Help and support' link is also visible.

Use the blue 'Save' button below to save changes.



NOTE:

All primary personal data is synchronized automatically with source systems.

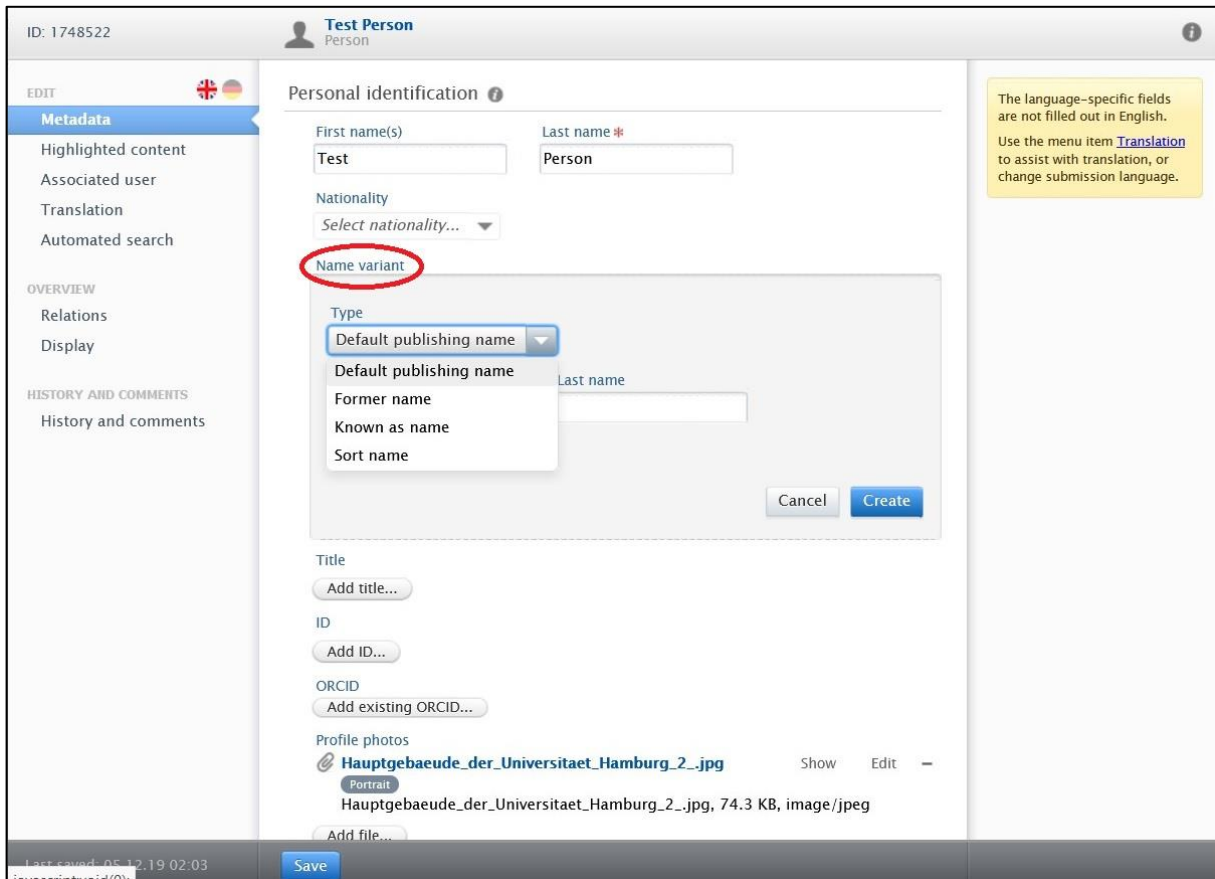
Synchronized content cannot be altered in the CRIS, and is marked with the icon: 

Please contact the CRIS team if a correction of personal data is needed.

For contact information see '10. Contact information'.


Requirements of correction will be forwarded to the responsible department.

If a different name than the synchronized one is or was used for publishing research outputs, an alias can be added via '**Name variant**':



ID: 1748522

Test Person
Person

EDIT 

Metadata

- Highlighted content
- Associated user
- Translation
- Automated search

OVERVIEW

- Relations
- Display

HISTORY AND COMMENTS

- History and comments

Personal identification

First name(s) Last name

Nationality

Name variant

Type

Default publishing name

Former name

Known as name


Sort name

Title

ID

ORCID

Profile photos

 [Hauptgebaeude_der_Universitaet_Hamburg_2_.jpg](#) Show Edit

Portrait

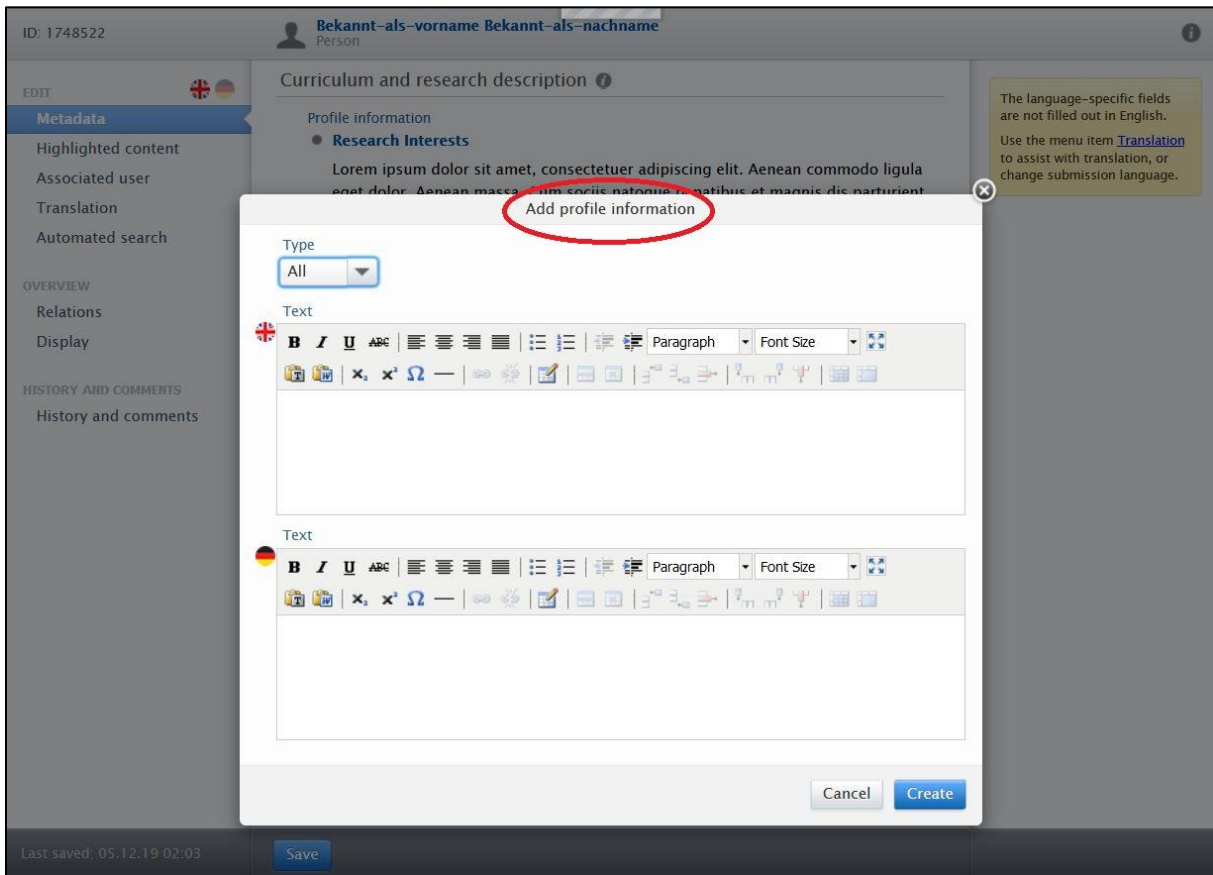
Hauptgebaeude_der_Universitaet_Hamburg_2_.jpg, 74.3 KB, image/jpeg

Last saved: 05.12.19 02:03

javascript:void(0)

The language-specific fields are not filled out in English. Use the menu item [Translation](#) to assist with translation, or change submission language.

Under ‘Curriculum and research description’ → ‘Add profile information’ general information can be added, as well as research topics, transfer actions, facilities etc..



The screenshot shows the FIS-Portal interface for editing a profile. The main section is titled 'Curriculum and research description'. A modal dialog box titled 'Add profile information' is open, featuring a 'Type' dropdown set to 'All' and two text input areas with rich text editors. The background page shows a sidebar with 'Metadata' (Highlighted content, Associated user, Translation, Automated search) and 'OVERVIEW' (Relations, Display). A 'Save' button is at the bottom left, and a 'Create' button is at the bottom right of the dialog. A warning box on the right states: 'The language-specific fields are not filled out in English. Use the menu item [Translation](#) to assist with translation, or change submission language.'

Main research topics and other content will be seen by public in the *FIS-Portal*:

<https://www.fis.uni-hamburg.de/>

NOTE:

All research content which is marked as ‘Public – No restriction’ and ‘Validated’ will be displayed.

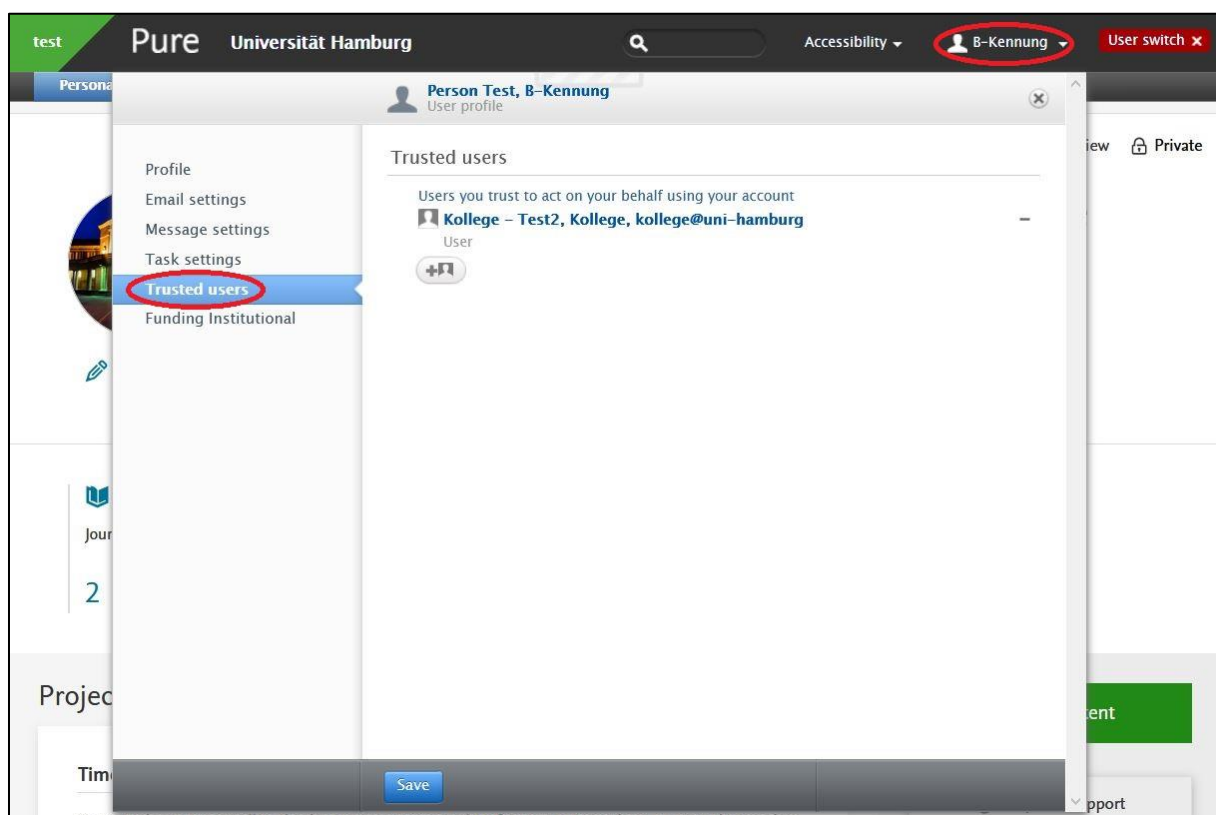
(See 5.1.1. Create from template)

In addition to the personal profile, there is also the **user profile**. By clicking on the **B-identifier icon** (top right), system language, trusted users, information emails, messages, and tasks can be set by the user.

'Trusted Users'

A trusted user can be assigned when another user should be allowed to manage the primary user's personal CRIS content, e.g. a secretary or student. To assign a trusted user, the B-identifier or name of the person must be added under 'trusted users' in the user menu.

Note: The trusted user also needs a B-identifier and a CRIS-user account.



4. Add new research output

The university bibliography will be seen in the CRIS. All bibliographic data between 2009 and 2013 was adopted from the system *Pica*. All other research data has to be filled in the CRIS, starting from 2014.

Research content in the CRIS consists of different data:

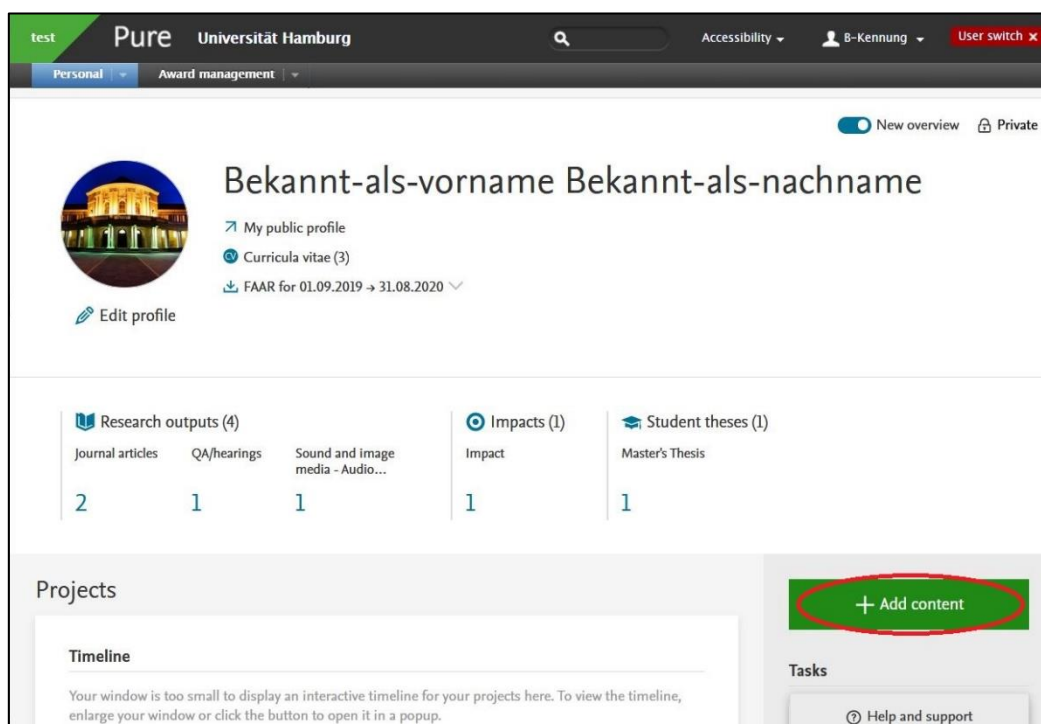
- Bibliographical data (metadata)
- Full text (common: pdf-file)
- Research data (source data in different formats)

For research data storing, the RDM provides a repository which can be found under:

<https://www.fdr.uni-hamburg.de/>

5.1. Publications – Metadata

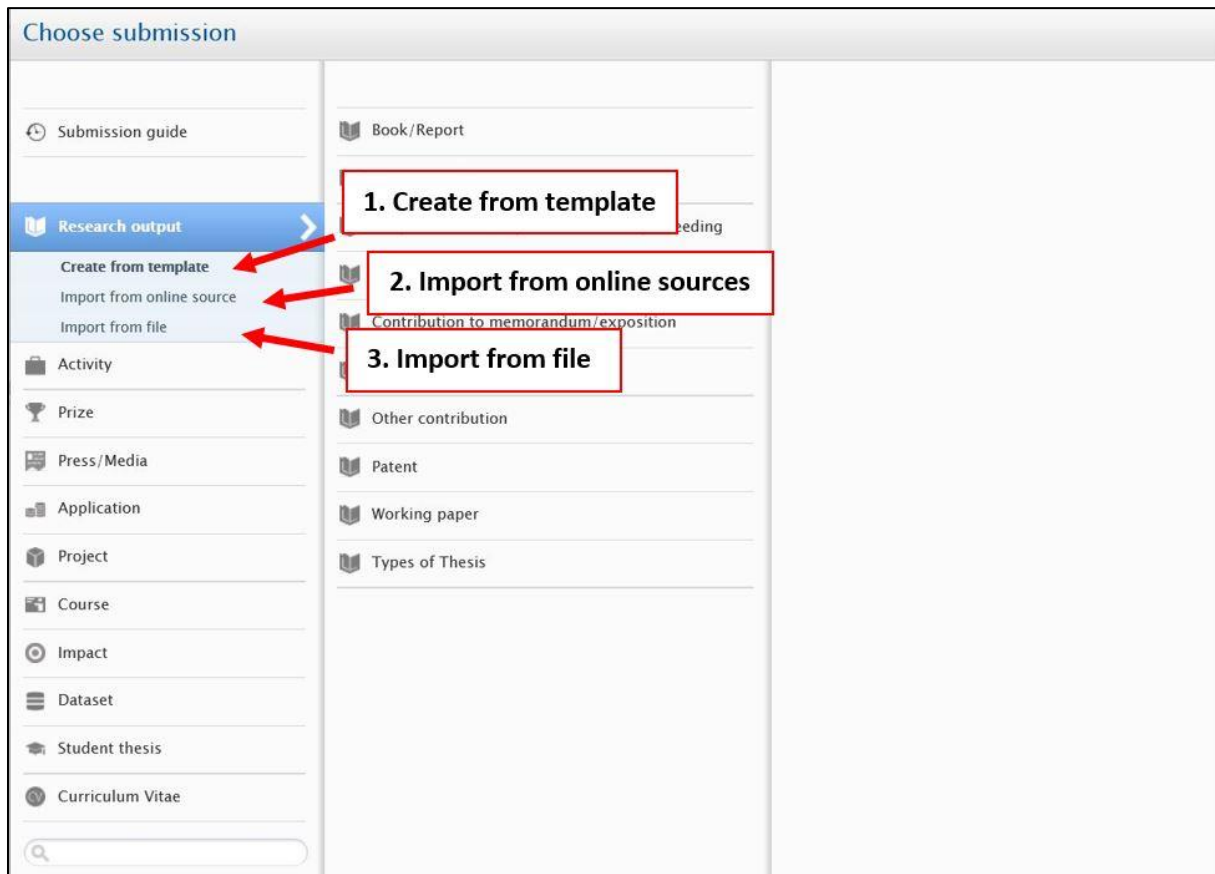
Open **'+ Add content'** (green button at the right side) to add new research content.



All content can be added in different languages (e.g. title).

Please keep in mind that content added in English will not be automatically translated into German and the other way around!

A new window appears '**Choose submission**'.
 There are three options to add new research content.



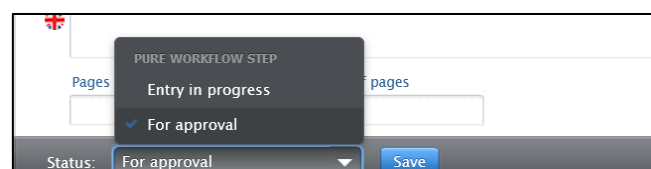
5.1.1. Create from template

Under '**Submission guide**' (top left), help can be found for choosing the research output type.

Choose the research output type which fits best, e.g. 'Contribution to journal' → 'Journal articles'.

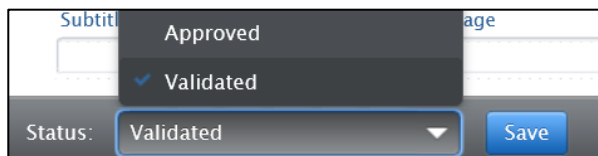
A template will open to fill the publication's metadata into the associated fields. The person who creates the new research input will be added automatically as an **author**. Additional authors (or editors, illustrators, etc.) can be added and set in the right order if needed.

The **progress status** ('status' at the end of the template) is pre-set to '**Entry in progress**'. By saving the entry with this setting, data can still be changed in the template afterwards.



Set status to '**For approval**' if all data is filled into the associated template fields. This leads to the following attributes:

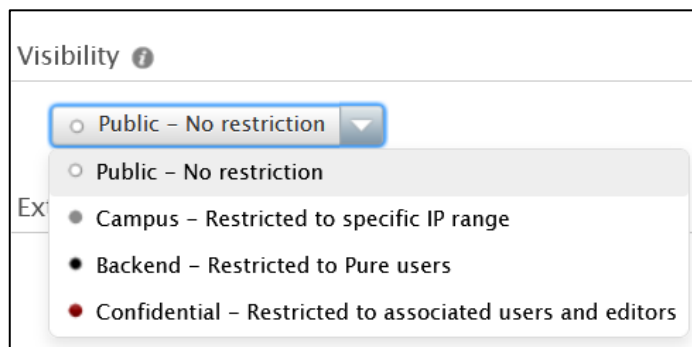
- 1) Research output will be published on the personal UHH website (via FIONA: FIS-Box or FIS-Data):
https://www.fiona.uni-hamburg.de/funktionen/templates.html#sort_t1=&index_t1=f
- 2) The RDM-Team, or the according validator to a specific organizational unit, will get a message to validate the newly added research output. Here, two opportunities are possible:
 - a) The status is set to '**Approved**' → Research output will be displayed in FIONA
 - b) The status is set to '**Validated**' → Research output will be displayed in FIONA and other portals: *FIS-Portal* and *Schaufenster of Hamburg Open Science*



The **visibility** of an added research output can be set independently, no matter in which progress the status is.

The following settings of visibility are given: 'Public – No restriction', 'Campus – Restricted to specific IP range', 'Backend – Restricted to Pure users' and 'Confidential – Restricted to associated users and editors'.

When visibility is set to 'Public – No Restrictions', research output will be displayed on the web page and portals immediately after validation.



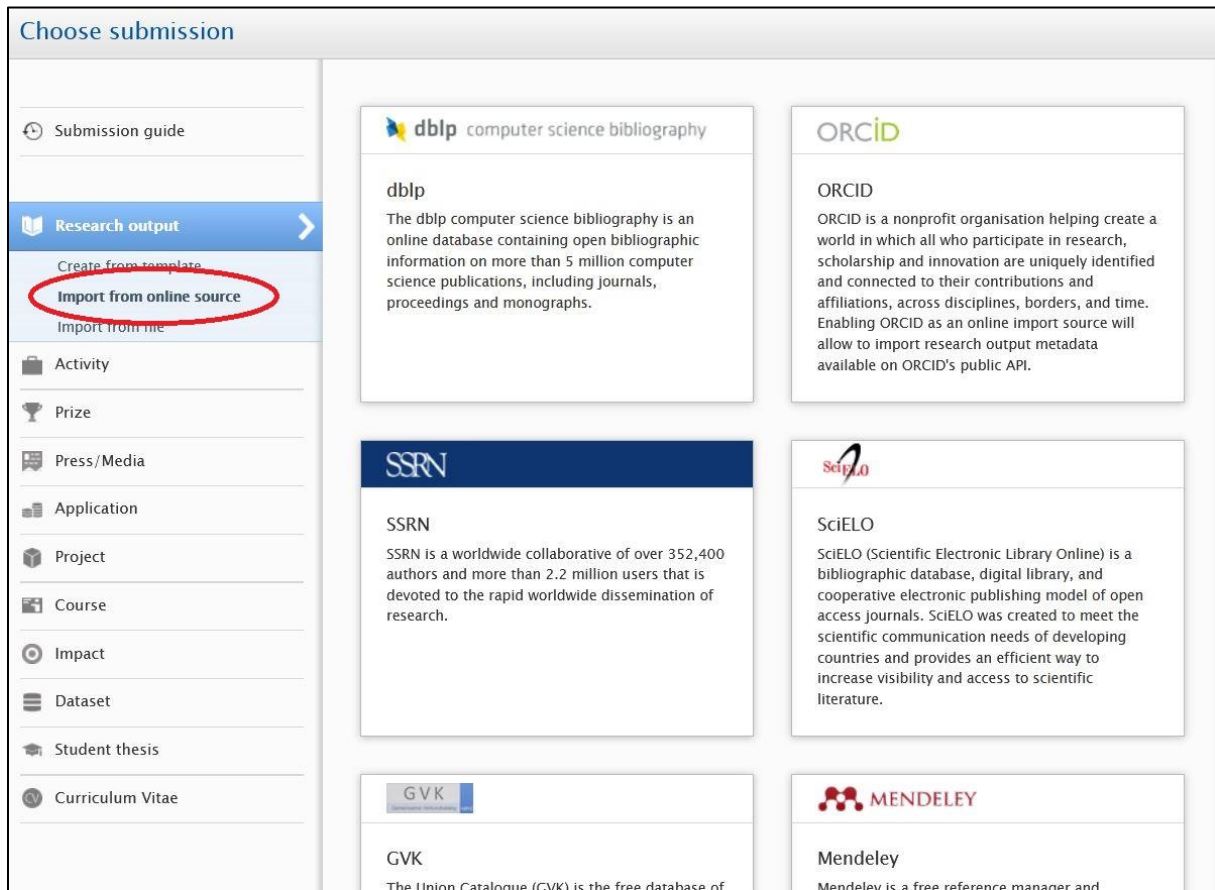
5.1.2. Import from online sources

The CRIS is linked to various online sources.

At the moment those sources are ORCID, Mendeley, dblp, SSRN, Web of Science, GVK, PubMed, Crossref, arXiv, SAO/NASA Astrophysics Data System and Espacenet.

If the publication is (known to be) found in one of these sources, metadata can be imported, completed, and edited as well, by simply choosing an online source and searching for someone's publications.

All search results can then be imported individually.



The screenshot displays the 'Choose submission' interface. On the left is a sidebar with a menu where 'Research output' is selected, and 'Import from online source' is highlighted with a red circle. The main area shows a grid of six boxes for different online sources: dblp, ORCID, SSRN, SciELO, GVK, and Mendeley. Each box contains the source's logo and a brief description of its database.

Source	Description
dblp	The dblp computer science bibliography is an online database containing open bibliographic information on more than 5 million computer science publications, including journals, proceedings and monographs.
ORCID	ORCID is a nonprofit organisation helping create a world in which all who participate in research, scholarship and innovation are uniquely identified and connected to their contributions and affiliations, across disciplines, borders, and time. Enabling ORCID as an online import source will allow to import research output metadata available on ORCID's public API.
SSRN	SSRN is a worldwide collaborative of over 352,400 authors and more than 2.2 million users that is devoted to the rapid worldwide dissemination of research.
SciELO	SciELO (Scientific Electronic Library Online) is a bibliographic database, digital library, and cooperative electronic publishing model of open access journals. SciELO was created to meet the scientific communication needs of developing countries and provides an efficient way to increase visibility and access to scientific literature.
GVK	The Union Catalogue (GVK) is the free database of
Mendeley	Mendeley is a free reference manager and

Choose submission

- Submission guide
- Research output**
 - Create from template
 - Import from online source
 - Import from file
- Activity
- Prize
- Application
- Award
- Project
- Funding opportunity
- Facility/Equipment
- Curriculum Vitae

Web of Science

Clarivate Analytics

Import from Web of Science (lite)

Publication title, ID, DOI or ISBN in Web of Science

If you enter a ID here, the other fields are ignored.

Author's name

First name last name or just last name, e.g. "Albert Einstein" or "Einstein"

Author IDs

Author IDs, eg. ResearcherID and ORCID

Year interval

From To

Organisational unit name

3 results

Based on matching identifying field(s), a duplicate of this research output already exists. [View potential duplicate](#)

High Resolution Measurements of Nitrous Oxide (N2O) in the Elbe Estuary

Lisa Brase, Hermann W. Bange, Ralf Lendt, Tina Sanders, Kirstin Daehnke, 2017 DOI.

Other

Based on matching identifying field(s), a duplicate of this research output already exists. [View potential duplicate](#)

Anthropogenic changes of nitrogen loads in a small river: external nutrient sources vs. internal

Import from Web of Science (lite)

Web of Science

Clarivate Analytics

High Resolution Measurements of Nitrous Oxide (N2O) in the Elbe Estuary

Lisa Brase, Hermann W. Bange, Ralf Lendt, Tina Sanders, Kirstin Daehnke, 2017 DOI.

Author match

Author in Web of Science	Author and affiliations in Pure
1 Brase, Lisa	<p>Brase, Lisa</p> <p>Dr.</p> <p>lisa.brase@uni-hamburg.de</p> <p>Zentrum für nachhaltiges Forschungsdatenmanagement (FDM)</p> <p>Person: Verwaltungspersonal (Staff)</p> <p>Zentrum für nachhaltiges Forschungsdatenmanagement (FDM)</p> <p>Fakultätsübergreifende Einrichtungen und Zentren</p> <p>Organisational unit: Centre</p>
2 Bange, Hermann W.	<p>Bange, Hermann Werner</p> <p>External person</p>
3 Lendt, Ralf	<p>Lendt, Ralf</p> <p>Dr.</p> <p>ralf.lendt@uni-hamburg.de</p>

After the import, a template will open according to the chosen publication type. Here, the template will have most of the fields already filled in by the automated online source import.

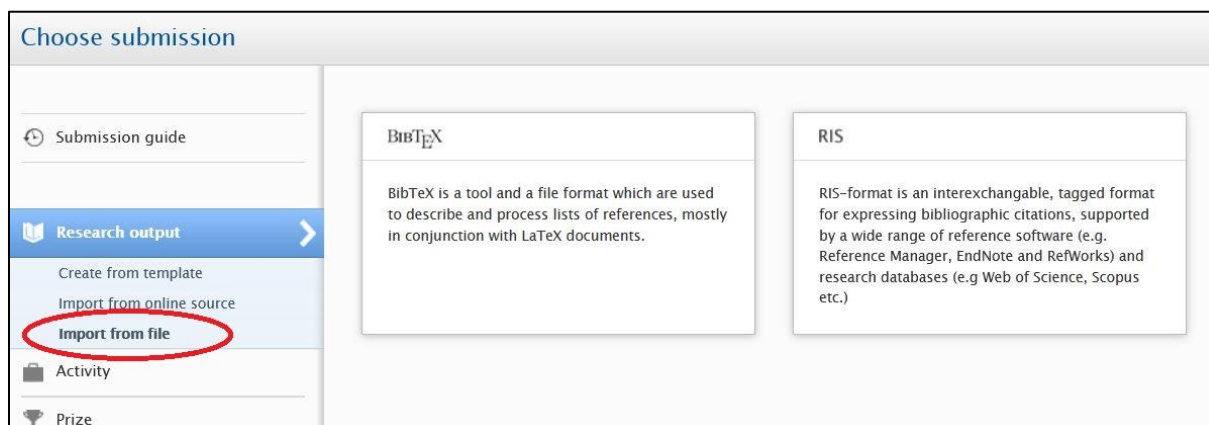
NOTE:

Not all sources deliver correct metadata! Transmission errors can occur, e.g. wrong publication type, or the wrong person was chosen due to same name identity. Especially, authors that have the same name can lead to an error of choosing the wrong author, or the person who added the publication is not listed as one of the authors.

Please correct and add publication information (metadata) and set process status and visibility as described in '5.1.1. Create from template'.

5.1.3. Import from file

The CRIS provides the opportunity to import publication metadata from BibTeX- or RIS-files which were created by a bibliographic program or other sources. Simply follow the menu to upload a file.



The file's contents will be displayed, and data sets can be imported individually. After the import, a template will open according to the chosen publication type. Here, the template will have most of the fields already filled with the existing metadata information of the source file.

Please correct and add publication information (metadata) and set process status and visibility as described in '5.1.1. Create from template'.

NOTE:

Transmission errors can occur, e.g. wrong publication type, or mistake in filling the correct metadata in the fields found in the source BibTeX- or RIS-file.

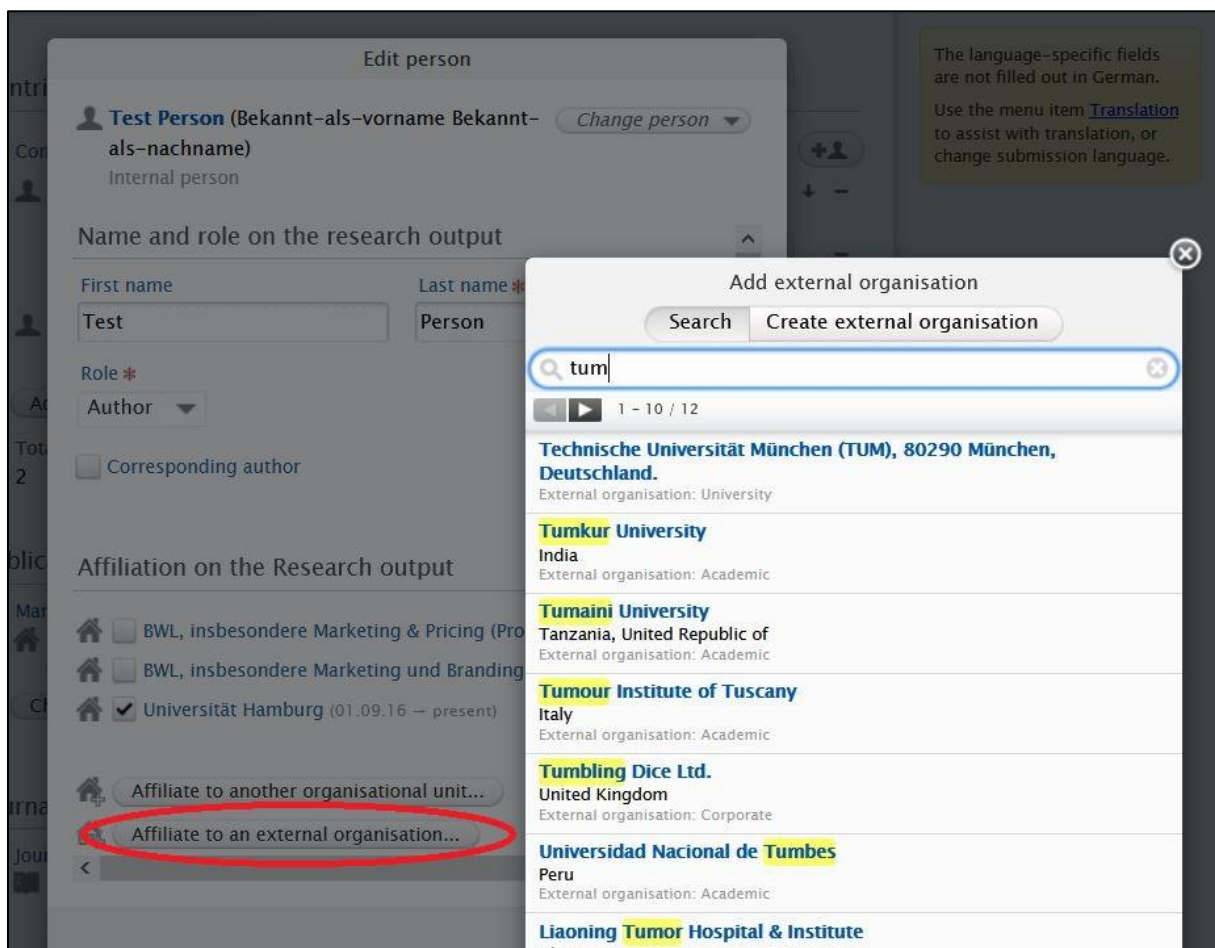
5.2. Publications not referring the Universität Hamburg (UHH)

If a publication was written before the authoring researcher came to the UHH, the organization unit (affiliation) must be changed to the former working institution.

To change the affiliation a new one must be added. Open **'Edit'** next to the author in the section **'Contributors and affiliations'**.

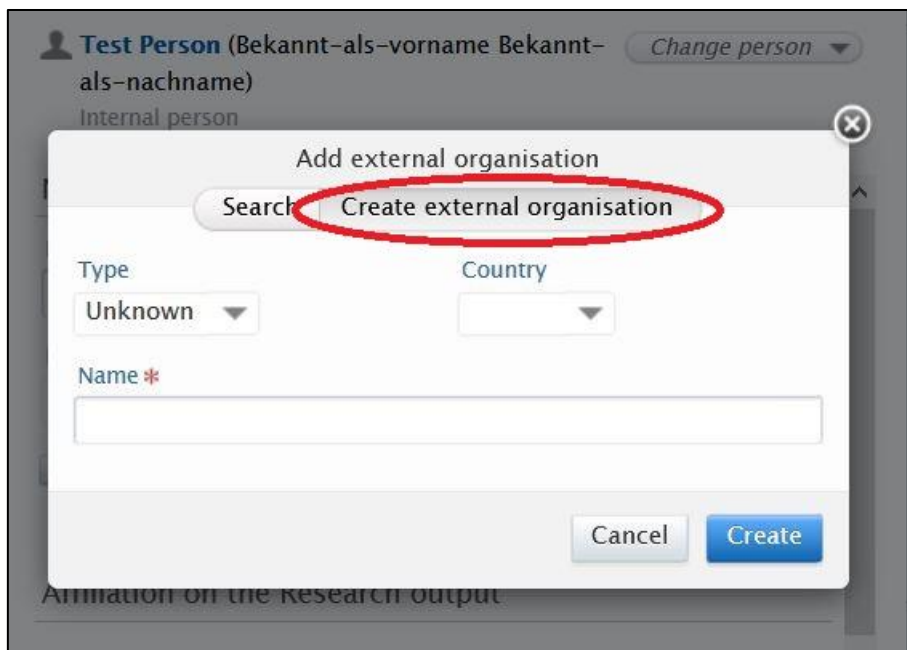


The following window opens:



Chose **'Affiliate to an external organization'** to search for the former affiliation in the list.

If the former affiliation cannot be found, a new one must be added by going to **'Create external organization'**. A template will open to fill in the associated information. (Please only add the name of the primary organization unit, e.g. only the name of the university without any departments etc.!))

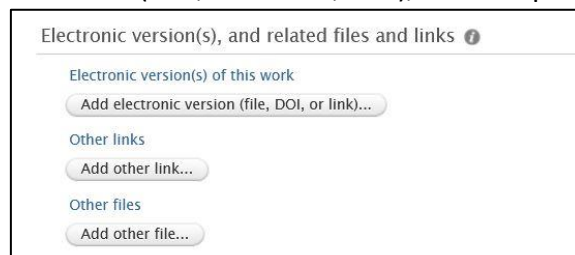


Chose **'Create'** to finish the template and add the new affiliation to the list.

5.3. Insert full texts

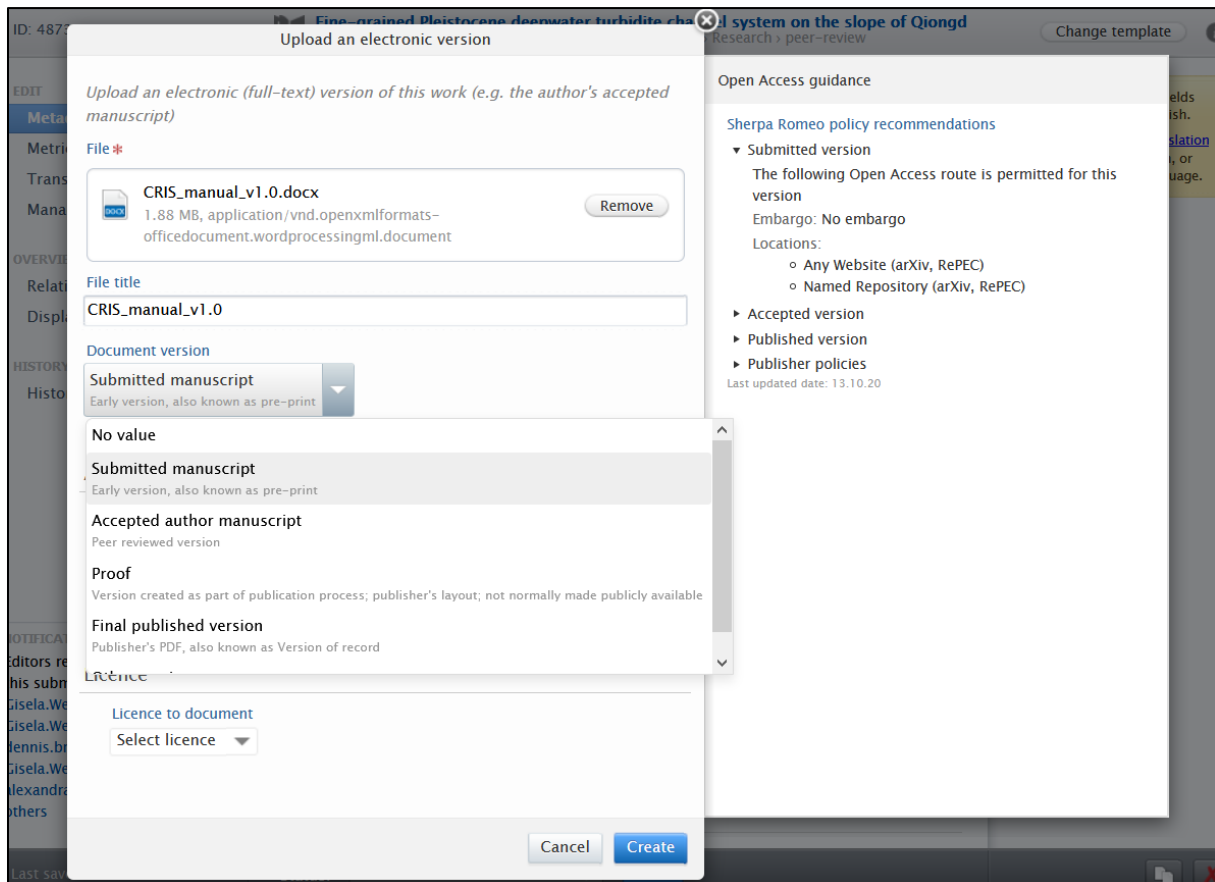
In the frame of UHH efforts to focus on Open-Access (OA) and OA-portals (e.g. <https://www.oa.uni-hamburg.de/> or [Hamburg Open Science](https://www.hamburg-open-science.de/)), the UHH highly recommends to upload full text versions of publications. Please pay attention to the license agreement!

Under **'Electronic version(s), and related files and links'** within the template, publication files in pdf format, as well as links (DOI, web links, etc.), can be uploaded.



The process of uploading a digital version of a publication to the CRIS is seen as a secondary publication! The permission to publish a secondary publication is in dependence of the particular publisher or journal. More information will be find in the publication contract between the author and the publisher/journal.

More information about uploading full text versions can be found under the '**Sherpa Romeo policy recommendations**'.



The screenshot shows the 'Upload an electronic version' dialog box in the CRIS system. The dialog has the following sections:

- Upload an electronic (full-text) version of this work (e.g. the author's accepted manuscript)**: Includes a file upload area with a file named 'CRIS_manual_v1.0.docx' (1.88 MB, application/vnd.openxmlformats-officedocument.wordprocessingml.document) and a 'Remove' button.
- File title**: A text input field containing 'CRIS_manual_v1.0'.
- Document version**: A dropdown menu with options: 'Submitted manuscript' (Early version, also known as pre-print), 'Accepted author manuscript' (Peer reviewed version), 'Proof' (Version created as part of publication process; publisher's layout; not normally made publicly available), and 'Final published version' (Publisher's PDF, also known as Version of record).
- Licence to document**: A dropdown menu with 'Select licence'.

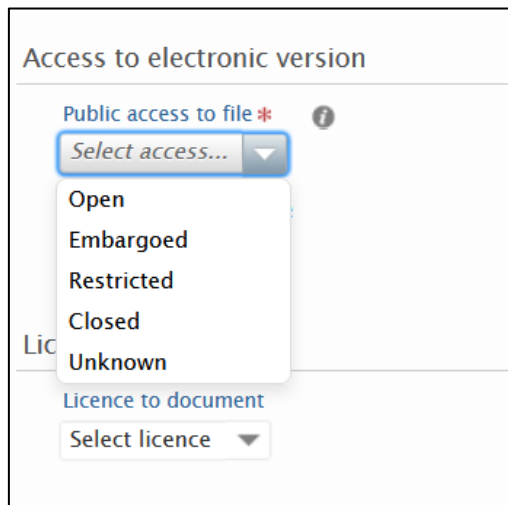
At the bottom of the dialog are 'Cancel' and 'Create' buttons. The background shows a list of publications and a sidebar with 'Open Access guidance' including 'Sherpa Romeo policy recommendations'.

Under '**Document version**' choose the correct one of the following variations:

- Submitted manuscript (Early version, also known as pre-print)
- Accepted author manuscript (Peer reviewed version)
- Proof (Version created as part of publication process, publisher's layout, not normally made publicly available)
- Final published version (Publisher's PDF, also known as Version of record)
- Other version

Chose the correct '**Public access to file**' under '**Access to electronic version**':

- Open
- Embargo
- Restricted
- Closed
- Unknown

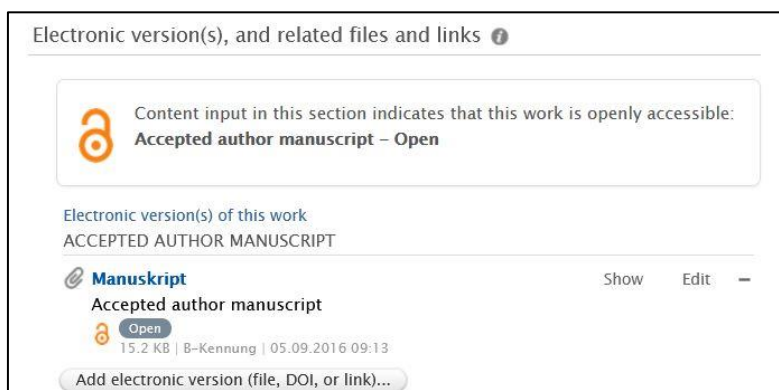


An *Open Access*-status will be reached by combining the settings 'Document version' → 'Final published version' or 'Accepted author manuscript' with 'Public access to file' → 'Open'.

Submitted manuscript (pre-prints) will not be displayed as OA versions in the CRIS.

If a publication is set to *Open Access* and has been validated, it will be automatically found in the *Open Access Portal of the UHH* (<http://www.oa.uni-hamburg.de>).

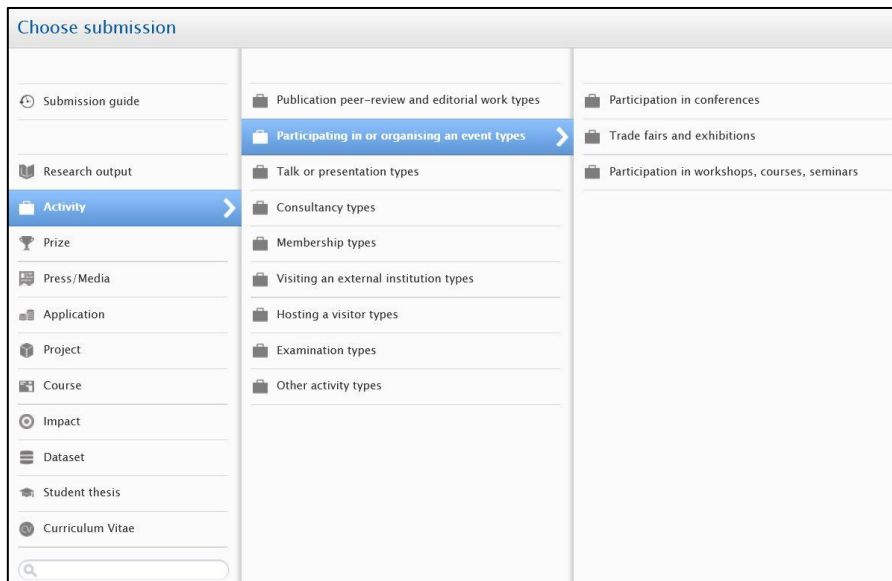
Open access publications are marked as followed:



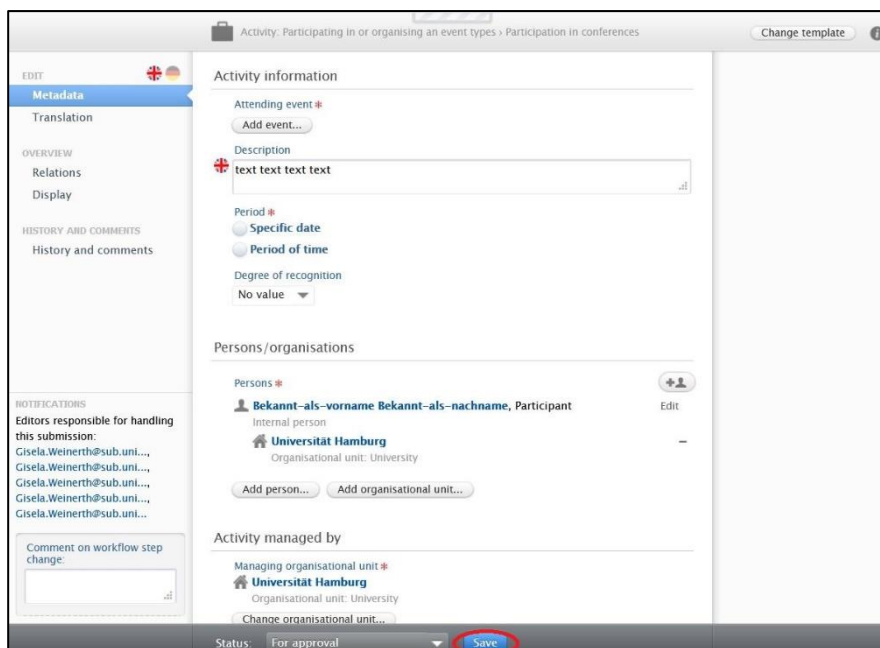
6. Adding research activities

The CRIS also provides the opportunity to add research activities.

An activity will be added by choosing the best fitting category:

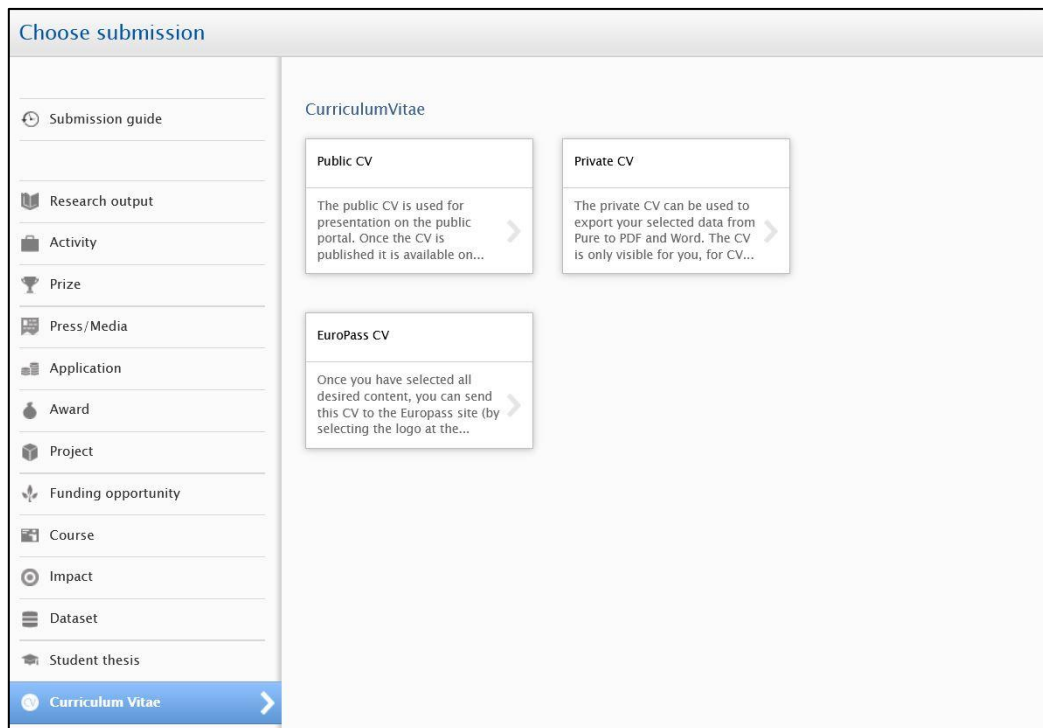


General information of the activity type will be seen at the top of the upcoming template, followed by Persons/organizations (standard setting: name of person who added the activity), and the organization unit which will manage the activity ('Activity managed by'). Chose **'Save'** to confirm and close the activity entry:

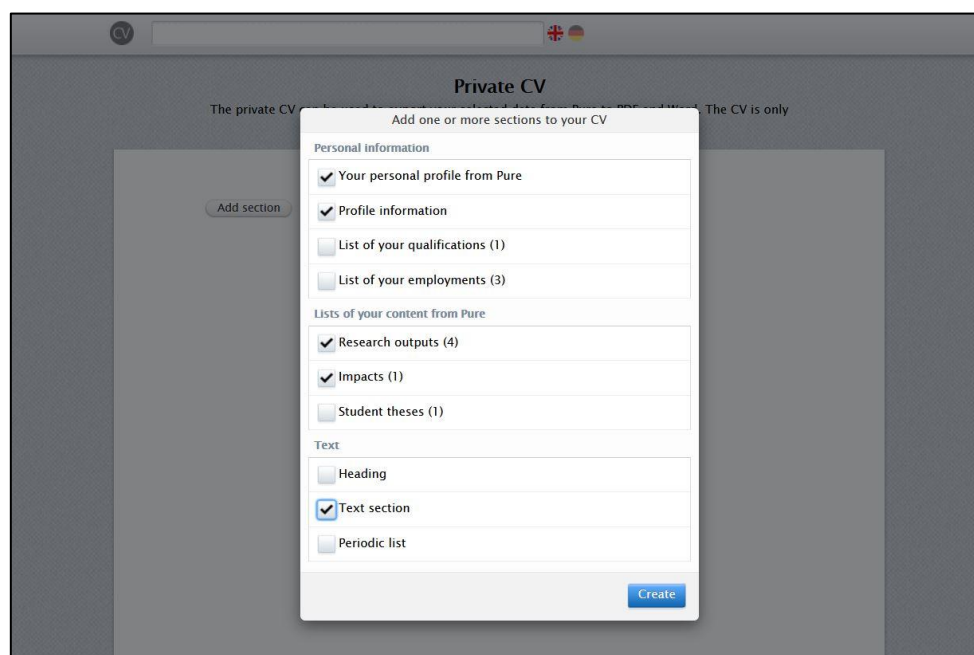


7. Create a curriculum vitae (CV)

The CRIS provides the opportunity to create a personal CV. A CV created in the CRIS can be done dynamically, meaning it will automatically update all information added to the personal profile (e.g. new research output).




A list of personal entries shows content which can be added to the CV. Only categories containing content will be visible.



An example of a private CV in the CRIS:

CV

Bekannt-als-vorname Bekannt-als-nachname private CV



Bekannt-als-vorname Bekannt-als-nachname


Private CV

The private CV can be used to export your selected data from Pure to PDF and Word. The CV is only visible for you, for CV editors related to you and for administrators.

Bekannt-als-vorname Bekannt-als-nachname

Universität Hamburg

Postal address:
 Mittelweg 177
 20148
 Hamburg
 Germany



--- Empty profile information ---

Research outputs

Marvs test publication
 Mundry, M. & Geänderter-Veröffentlichungstestvorname, G-V., 02.2016, In : BMC Bioinformatics. 10, 5, p. 100-122
For approval / Public - No restriction



Testpublikation 1: Tonaufnahme
 Person, T., 2016
For approval / Public - No restriction

Testpublikation 3
 Person, T. & Testbärt, D., 2016, In : Nature Communications.
For approval / Public - No restriction

Testpublikation 2: Stellungnahme
 Person, T., 2015
Entry in progress / Public - No restriction

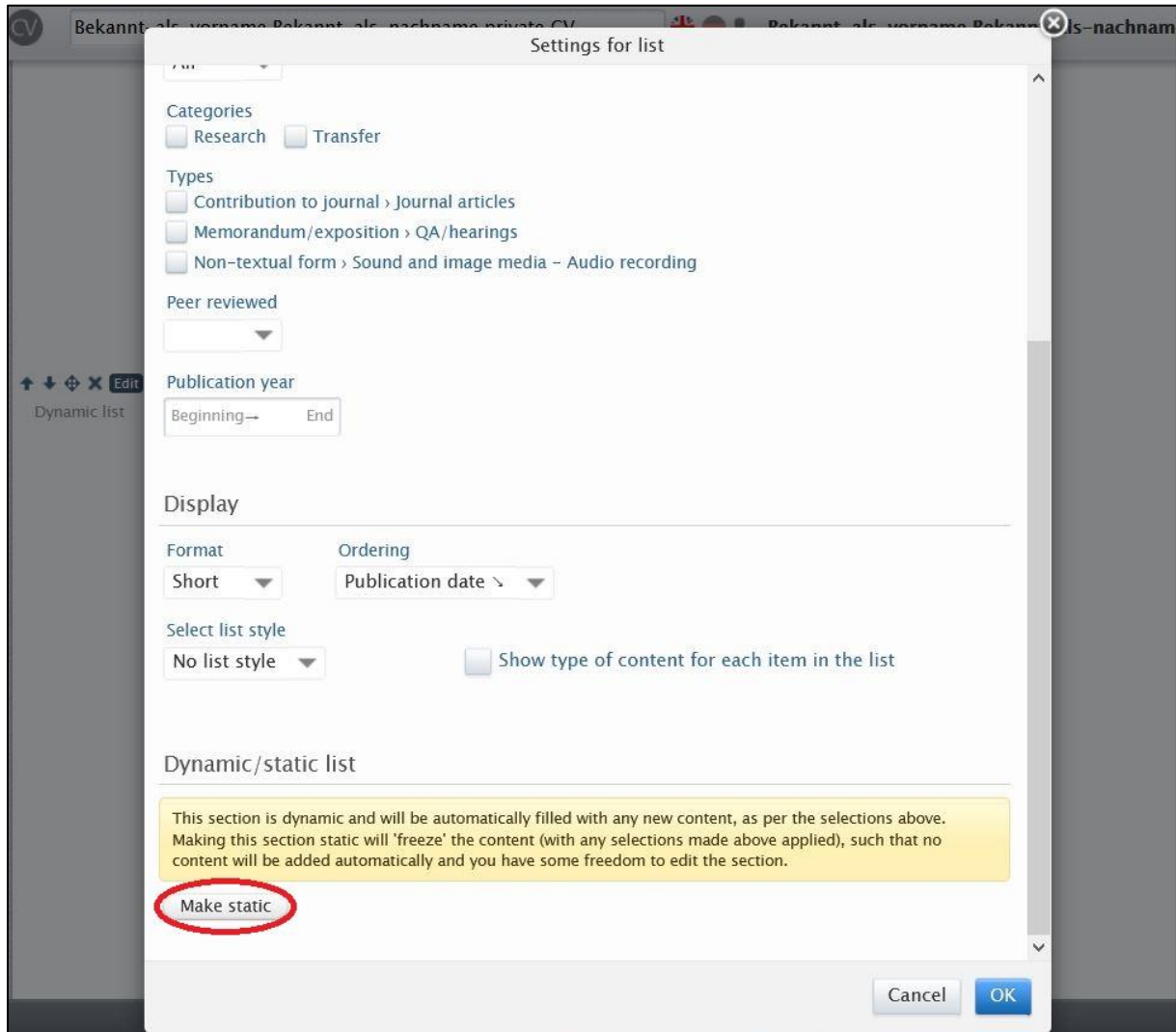
--- Empty heading section ---

Save

 Download as PDF
  Download as Word document

Language can simply be changed by choosing one of the two flags (top right, next to the entry field for the CV's title).

Every section can be edited separately, and set to '**Make static**' if needed. If content in the personal profile changes, those CV entries will be fixed and not alter dynamically.



Settings for list

Categories
☐ Research ☐ Transfer

Types
☐ Contribution to journal > Journal articles
☐ Memorandum/exposition > QA/hearings
☐ Non-textual form > Sound and image media - Audio recording

Peer reviewed
▼

Publication year
Beginning → End

Display

Format
Short ▼

Ordering
Publication date ▼

Select list style
No list style ▼

☐ Show type of content for each item in the list

Dynamic/static list

This section is dynamic and will be automatically filled with any new content, as per the selections above. Making this section static will 'freeze' the content (with any selections made above applied), such that no content will be added automatically and you have some freedom to edit the section.

Make static

Cancel OK

8. About 'Applications and contracts, Awards, and Projects'

All synchronized entries found in '**Applications and contracts**' are linked to department 4 ('*Forschung- und Wissenschaftsförderung*') of the presidential administration. This content is **confidential** information and thus can **only be seen by that individual user** (and in some cases the persons involved).

If data is added manually, please pay attention to the correct labeling. The entries will not be displayed in the *FIS-Portal*.

In '**Awards**' all entries linked to SAP (PSP-elements) will be shown. Also 'Awards' can **only be seen by that individual user** and will not be displayed in the *FIS-Portal*. In 'Awards' a link to the associated PSP-element is given to find and look at the financial data in the *Sharepoint*.

In '**Projects**' all user specific synchronized projects with SAP will be shown. Those entries are identical with the according 'Awards' entries but without financial data. This means the CRIS only 'knows' projects which are linked to an award.

NOTE:

Synchronized content in the CRIS is marked with: 

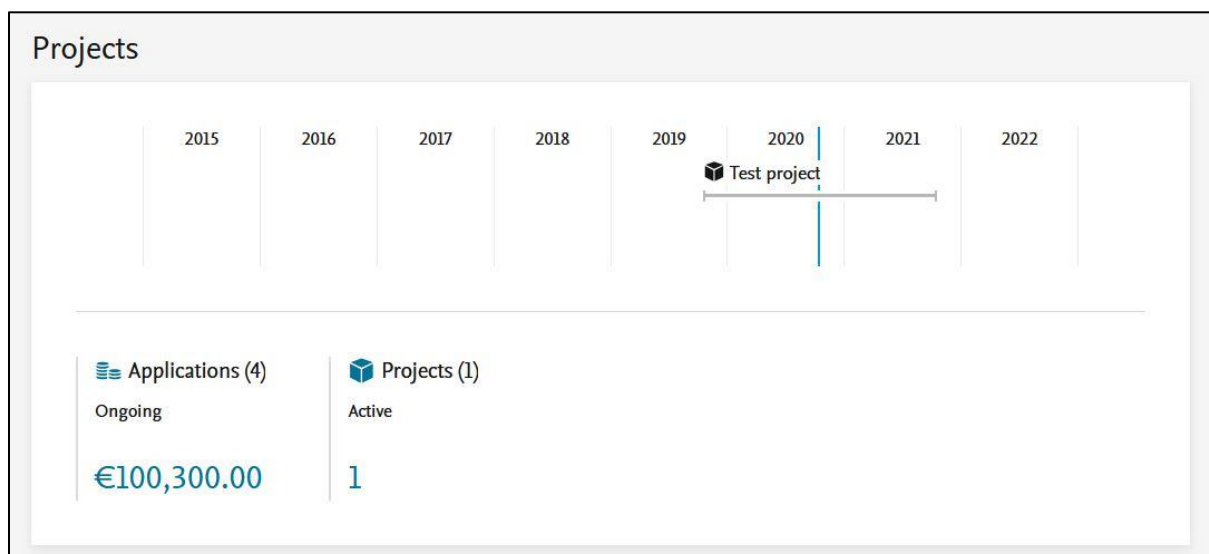
Data can be added but not deleted.

If a correction is needed (e.g. due to mistakes in the data set), please contact:

fis@uni-hamburg.de

Requirement of correction will then be forwarded to the according department.

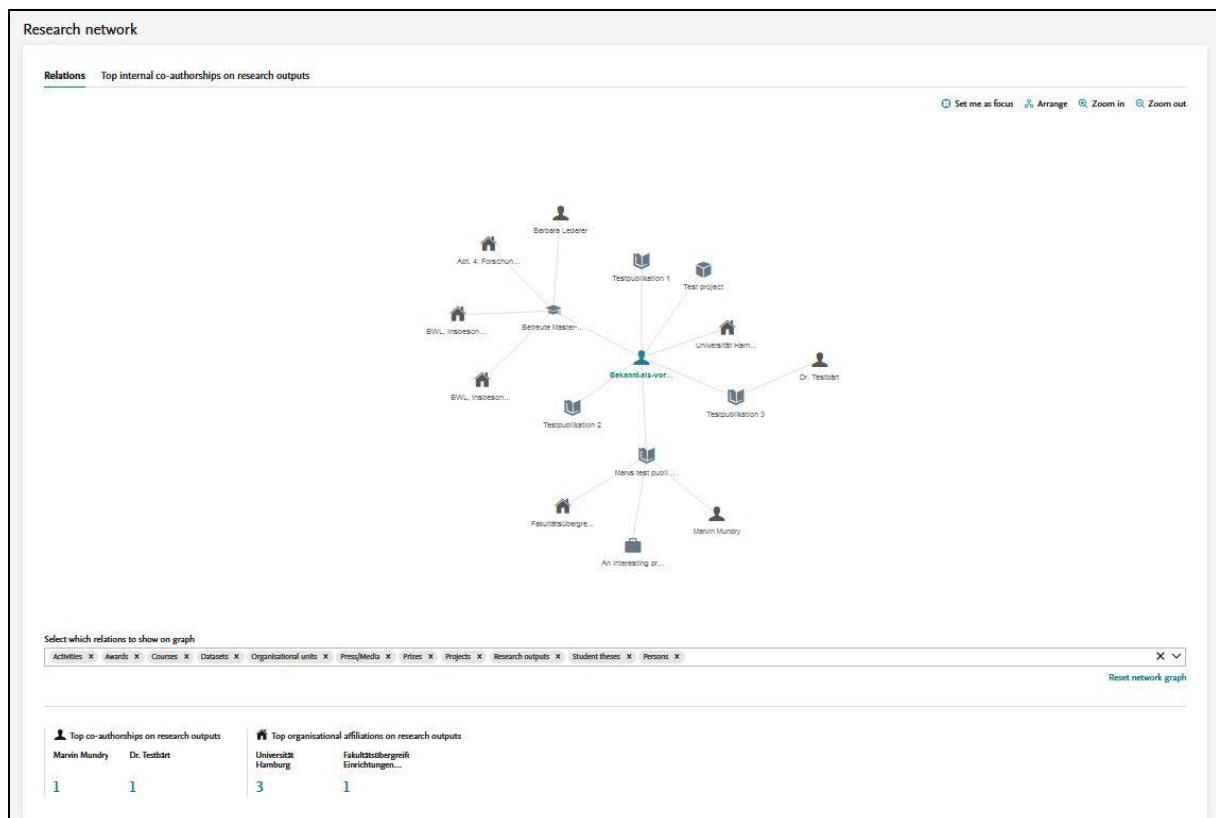
There is also a time line of personal projects seen in the personal profile:



9. Research network

An overview of all personal content in the CRIS can be found at the bottom of the personal profile.

Here, all research data sets (publications, projects, persons, activities, ...) are shown as one big network:



10. Contact information

Please contact us for help, or when there are questions:

CRIS-Team:

Dr. Lisa Brase, Phone: +49 40 42838-7043

Dr. Steffen Grünler, Phone: +49 40 42838-8790

Alexander Heinrich (Tue, Wed, Thu), Phone: +49 04 42838-4366

Email: fis@uni-hamburg.de

Manuals/video help: Behind the question mark you find the 'Help and support' section in the CRIS (top right). Additional manuals and videos are provided by *Elsevier*. Furthermore, there is manual in German.

CRIS-Homepage: FAQ-section and news: <http://uhh.de/fdm-fis>

Note to requirements of corrections in the personal CRIS content:

Please send an email for requirements of correction to the generic CRIS email address!

Requirements will be forwarded to the according source systems where the CRIS data is connected to.

Please understand that correction of data can take a little bit longer in some cases!