The purpose of this guide is to show the basic functions of LUCRIS. LUCRIS is LU:s adaptation of PURE, a Current research Information System. You’ll find more technical guides when logged in in LUCRIS (in the right hand corner).
# LUCRIS the guide

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## Table of content

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is LUCRIS?</td>
<td>3</td>
</tr>
<tr>
<td>1. Getting started</td>
<td>4</td>
</tr>
<tr>
<td>1.1 Log in</td>
<td>4</td>
</tr>
<tr>
<td>1.2 Available languages</td>
<td>4</td>
</tr>
<tr>
<td>1.3 Personal Profile</td>
<td>5</td>
</tr>
<tr>
<td>1.4 What shall I do first? Minimum requirements</td>
<td>5</td>
</tr>
<tr>
<td>1.4.1 Checklist for minimum requirements</td>
<td>5</td>
</tr>
<tr>
<td>1.5 Email set-up and messages from LUCRIS</td>
<td>6</td>
</tr>
<tr>
<td>1.6 Roles in the system</td>
<td>7</td>
</tr>
<tr>
<td>1.7 Administrative role in LUCRIS</td>
<td>7</td>
</tr>
<tr>
<td>1.7.1 Apply for administrative authority/role in LUCAT</td>
<td>8</td>
</tr>
<tr>
<td>1.7.2 Administrative profile</td>
<td>8</td>
</tr>
<tr>
<td>2 Searching LUCRIS</td>
<td>10</td>
</tr>
<tr>
<td>3. Add new information</td>
<td>12</td>
</tr>
<tr>
<td>3.1 Importing information</td>
<td>14</td>
</tr>
<tr>
<td>3.1.1 Internal and external people in case of import</td>
<td>15</td>
</tr>
<tr>
<td>3.2 What do I do if I discover errors in my information?</td>
<td>16</td>
</tr>
<tr>
<td>3.2.1 Add/remove yourself</td>
<td>16</td>
</tr>
<tr>
<td>3.2.2 Changing incorrect information</td>
<td>17</td>
</tr>
<tr>
<td>4 Updating your profile in LUCRIS</td>
<td>18</td>
</tr>
<tr>
<td>4.1 Personal overview (Researcher presentation)</td>
<td>18</td>
</tr>
<tr>
<td>4.1.1 Editing your profile</td>
<td>18</td>
</tr>
<tr>
<td>4.1.2 Information to add to the personal profile</td>
<td>18</td>
</tr>
<tr>
<td>4.1.3 Re-using information from LUCRIS for local web pages</td>
<td>20</td>
</tr>
<tr>
<td>5. Modules in LUCRIS</td>
<td>21</td>
</tr>
<tr>
<td>LUCRIS Modules right now:</td>
<td>21</td>
</tr>
</tbody>
</table>
5.1 Research Output (Publications and other expressions of research results) ................................... 22
  5.1.1 Information that can be entered .................................................................................................... 22
  5.1.2 Automatic retrieval from other systems ...................................................................................... 23
  5.1.3 Re-using information ...................................................................................................................... 23
  5.1.4 The validation workflow of research output .............................................................................. 23
  5.1.5 Filtering options for Research output .......................................................................................... 24
  5.1.6 Importing/ entering an existing list of publications in LUCRIS ............................................... 26

5.2 Activities (Research-related activities) .......................................................................................... 29
  5.2.1 Information which can be entered ................................................................................................ 29
  5.2.2 Recommendations for entering activities .................................................................................... 30
  5.2.3 Review procedure ........................................................................................................................... 31
  5.2.4 Visibility in the portal ..................................................................................................................... 31
  5.2.5 Use of the various types of activity .............................................................................................. 31
  5.2.6 Activity types ................................................................................................................................... 32
  5.2.7 Re-use of information on activities ............................................................................................... 35

5.3 Curricula Vitae (CV module) .......................................................................................................... 36
  5.3.1 Create a CV: ..................................................................................................................................... 36

5.4 Awards (Grants) ..................................................................................................................................... 37
  5.4.1 Entering a contract .......................................................................................................................... 37
  5.4.2 The visibility of the contract in the portal .................................................................................... 37

5.5 Projects ..................................................................................................................................................... 38
  5.5.1 Registration of projects ................................................................................................................... 38

6 Support and administration organisation ................................................................................................. 40
What is LUCRIS?

LUCRIS, a research information system based on PURE software, is intended for registering and provide visibility for LU’s research publications, as well as for projects, collaborations and other research-related activities. Visit LUCRIS at [http://lucris.lu.se](http://lucris.lu.se)

LUCRIS consists of a registration interface, which is only accessible to researchers and other staff at LU, and a public Research Portal that shows certain parts of the information from LUCRIS. The Research Portal is located at [http://portal.research.lu.se](http://portal.research.lu.se) and linked to individual staff profiles in LUCAT. In addition, several other websites can republish the information and thereby spread it to LU’s numerous internal and external target groups.

LUCRIS is a relational database, which means that you can create links and relations between various data in the system. You can, for example, link publications to projects, which you can in turn link to contracts. You can highlight contributions you have published after a conference as a relation to the keynote lecture you gave at the conference. And of course the more such relations you create, the greater the visibility of your h...

How information entered in LUCRIS is spread by various channels to LU’s numerous target groups.

On the LU Staff Pages you can find more specific information on your particular task or role in LUCRIS, based on your role at LU such as Vice-Chancellor or doctoral student: [http://www.staff.lu.se/research-and-education/research-support/lucris-research-information-system](http://www.staff.lu.se/research-and-education/research-support/lucris-research-information-system)
1. Getting started

1.1 Log in
You log in to the LUCRIS registration interface using your LUCAT-ID and the associated password at http://lucris.lu.se

1.2 Available languages
When the system is launched, the input interface will be in English only. A comprehensive Swedish version of LUCRIS will also be available at a later date. The first time you log in, you have the option of choosing a Swedish or English interface.

To change the interface language, click on your user name in the top right corner. Under Profile → Language settings. Under Language you can then choose the language you want for the input interface. Under Default submission language you can choose whether you want to see Swedish or English boxes first in cases where you can enter information in both languages.

Certain information (regardless of the chosen input language) can be entered in both Swedish and English. Switch between the Swedish and English input field by using the Swedish or British flag symbols. The flags are either directly adjacent to a specific field or the language can be changed using the flags in the top left corner.

When you add information in a module, you can always switch language by clicking on the Swedish or British flag. If you want to have both languages, fill in using one language and then switch to the other. This brings up an empty field. You also have the option to choose Translation under the flags in the top left corner. Clicking there brings up all the fields where there is an option to write in both Swedish and English, giving you an overview of the fields that lack translation.
1.3 Personal Profile
When you log in, the landing page is your personal profile page, which shows the information that you or others have entered or that has been imported from other systems at LU. You can see publications, activities, projects, contracts, information from LUCAT as well as the people and organisations that, through your publications and activities, make your network visible. This tab is called Personal Overview.

You can also see your public profile in the Research portal by clicking: “View personal profile in the LU Research portal”.

If you are a LUCRIS administrator, your first page will consist of an overview of the unit you administer under the tab Editor and show if you have tasks waiting for you in the system – editorial tasks. If you are to review output in LUCRIS, see the relevant separate manual.

1.4 What shall I do first? Minimum requirements
During the LUCRIS introduction process, minimum requirements were drawn up for entering information in the system. The minimum requirements are to ensure that the most important points about each person are presented. Please note that there may be local work processes and division of work that affect the minimum requirements. If you have any questions, please contact your local support.

1.4.1 Checklist for minimum requirements:
☐ Click on Edit profile
  - Fill in a description of your research in Swedish and English under Research – the English text is prioritised (there is also an option to describe collaborations, teaching, creative research etc.). Please enter information if possible both in English and in Swedish. If you e.g. don’t enter information in the Swedish box the Swedish version of the Research Portal will contain no information about your research.
- Add a profile photo (if this is not done via the administrator at faculty level)
- Check the visibility level at the bottom of the personal profile. If your profile is to be public, it should have the status “Public” under Visibility – if not, change it.

□ Project: project descriptions can be given in both scholarly and popular science versions, and in both English and Swedish. The scholarly English texts are to be prioritised.

Please note: when you link an LU employee to a project, the project is added to their profile. If you add an external person (outside LU), you must have their consent.

□ Externally financed research: creates relations to entered externally financed contracts (Awards).¹
- Doctoral degree projects: all doctoral thesis projects are to be registered as a Project of the type Dissertation.
- Other projects: projects that are not externally financed can also be registered in LUCRIS. Note any relevant local practice.

□ Research output: check that your publication list is correct (if you had publications in LUP that were transferred to LUCRIS). It will continue to be mandatory to register all research output that you publish in your capacity as a researcher at LU.

□ Activities and Prizes: optional, or according to local (faculty) practice and eventually established LU-wide practice. External persons added to activities or prizes must be asked for their consent.

Other:

□ Organisation: if you are in charge of an organisational unit at LU that conducts research activities, this is to be presented in LUCRIS. All such groups present in LUCAT are to add a short description of their research activities in both English and Swedish. Other texts, such as those for research groups are entered directly in LUCRIS.

1.5 Email set-up and messages from LUCRIS
LUCRIS will notify you via email of any changes in the system concerning the information you added /that has been added in your name. These messages are sent so that you know what has been imported or added in your name. If something is wrong, you can discover it immediately and go into the system to Disclaim content – i.e. state that you are not the right author of a specific publication. You can also view information someone else has added in your name and complement the entry if any information is lacking.

You can always change your messaging and email settings by clicking your username in the top right-hand corner when you are logged in to LUCRIS.

¹ In the future you will also be able to seek your current contracts via the Awards module in the left margin and create projects directly from them.
The menu that drops down on the left, when you have clicked your username, contains:

- Message settings which allow you to activate or deactivate the information you wish to receive from the various modules in the system.

- Email settings which allow you to set the frequency of emails/messages from various parts of the system. For example, the system notifies you of changes in the information you have entered yourself or that someone else has entered in your name. We recommend that you set the email notifications to *Mails are sent instantly*.

*Please remember that, before you move on, all changes must be saved by clicking at the bottom of the page.*

### 1.6 Roles in the system

Your options in LUCRIS depend on the role you have, or have been allocated, in the system. There are several different roles you can have in the system and these can be added when required.

Everyone with a LUCAT ID automatically has the **Personal user** role, which means that you can log in and edit information about yourself and register publications, projects, activities etc. in your own name.

There is an option to delegate editing rights to a **trusted user**. This is a person who can log in to LUCRIS and is allowed to act on someone else’s behalf, to edit the personal profile for example. A trusted user has the same authorisation as the person who delegated the rights and can carry out exactly the same actions in the system. Trusted users log in as themselves and can then switch to the other person’s account. You add a **trusted user** via the settings in your profile:

![Add trusted user](image)

### 1.7 Administrative role in LUCRIS

In specific cases, e.g. librarians who are to review publications in LUCRIS or people who are to generate reports for an organisational unit, you may need other authorisations/roles in LUCRIS. Most roles can be applied for and are referred to as **“Editor”**. An editor/reviewer is responsible for a specific type of content at a specific organisational unit. A reviewer can create, read, update, remove, approve/validate information. All roles which start with “Administrator” are known as global roles.
and cannot be limited to a specific organisational unit but allow the holder to work with LU’s entire stock.

1.7.1 Apply for administrative authority/role in LUCAT:
In order to apply for an authorisation/role in LUCRIS, proceed as follows:

1) Apply to the faculty representative or other person appointed at the faculty (if you are uncertain as to who that is, please email servicedesk@lu.se).

2) In your application, state what authorisation you are applying for and for what organisation (activity organisation) it is to apply.

3) Applications are sent from the faculty representative to the general LUCRIS working group at Servicedesk@lu.se

4) The application is approved and the role is added in LUCRIS by the Administrative Group.

1.7.2 Administrative profile
Please note that with each new role, new related tabs will appear when you log in to LUCRIS. Above all, you will see a tab called Editorial and one called Personal (if you can’t see the Personal tab, see the instructions below under “Administrative personal profile”). There is also something called Dashboard which enables you to follow entries etc. of types of information relevant to you.

1.7.2.1 Administrative personal profile
If you have an administrative role in LUCRIS as well as a personal profile in LUCRIS which is to be visible in the Research Portal/updated, the tab for personal profile must be made visible. When you are entered as a reviewer in the system, the tab for your personal profile is automatically hidden. This can be reactivated under set-up, below your log-in identity in the top right-hand corner.
If you want to have your profile visible in LUCRIS, activate “Always show the personal workspace”. Please note that this does not make your profile visible in the Research Portal, but merely creates a tab called “Personal” in which you can edit your profile. In order to make your profile visible in the portal (you are automatically set to visible if you have a research-oriented title in LUCAT) go to your personal profile, click Edit profile… and at the bottom change your Visibility to Public.
2 Searching LUCRIS

Once you are logged in to LUCRIS, you can see all the information contained in your profile via Personal overview.

If you click any of the other modules such as Research Output, you can search not only among your own publications but also those of your colleagues. Through the various modules or the search box at the top right in LUCRIS, you can thus access all of LU’s stored information. Please note that not all information in LUCRIS is visible in the public Research Portal, but as an employee, you can always access it via LUCRIS.

How to proceed:
1) Click on the module in which you want to search, for example Research Output.
2) You get a searchlist of your own publications. To search beyond your own publications, click to remove the My content filter.
3) Conduct a search in the system. You now get hits from everything in the database, even that which has not yet been reviewed in the system and become public in the Research Portal.
4) Note the difference between the status of a publication (published/unpublished, etc.) and its status in the review flow (i.e., waiting to be validated by the library). Those that have not yet been reviewed are waiting as *For validation*; the ones that have been validated have no status.
3. Add new information
The system’s logic is based on you:

1) Choosing what you want to add: publication (Research Output), research activity (Activities) or research project (Projects) etc.

2) You make this choice either via a) the green Add new button on the right or b) click on + which appears when your mouse cursor is over the module you want to add information to.

3) Using the Add new button brings up a Submission guide, which provides suggestions based on the most common types of information.

4) You now have the option Choose submission. This means that you choose which specific information you want to add to: activities, research output etc. What you add will be immediately visible in your profile in the Research Portal except for the information you add in the Research output module, which will be reviewed before being made public.

5) Regardless of which module you choose, you get a number of headings under each module. When you click on one of the headings it shows sub-categories, for example under Research
Output → Contribution to Journal there are a number of publication categories that can be found in a journal.

6) You can also import information from a database or file formats such as RIS. Read more on how to do this in the chapter “Import information”.

7) You fill in the information. All fields marked with a red asterisk * are mandatory in the system for technical reasons. Other fields are optional, but the more correct information you enter in the system, the better and more usable the information that can be retrieved by others. The level of ambition depends on you as a researcher and any relevant local practice.

8) When you are finished, choose the level of visibility your entry is to have in the system under Visibility.

You can choose between:

- **Public – no restriction**, i.e. visible to everyone who searches on LU’s Research Portal.
- **Campus – restricted to IP range**, i.e. only accessible within LU/LTH.
- **Backend – restricted to Pure^2 users**, i.e. only for others who are logged in via the LUCRIS registration interface at LU.
- **Confidential – restricted to associated users and editors**, i.e. only accessible for those who have entered the material and the editors and administrators who will process it.

*N.B!* In LUCRIS we only use the Visibility Public - if you want to limit the visibility of a specific file, do this in relation to the file. Please note: the system cannot handle classified material.

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2 LUCRIS is based on software called Pure.
9) The procedure for saving your entry/making it public may differ slightly depending on the module you are in and whether or not there is a process for quality assurance.

- **Projects and Activities**
  - Click *Save* furthest down.
- **Publications**
  - Choose status and then click on *Save*.

You can choose between save and continue later by selecting the status *Entry in progress* and then *Save*, alternatively if you want to send on your publication for review to your local library; choose *For validation* and then *Save*.

### 3.1 Importing information

Some modules allow you to retrieve information from other sources. For example, in the *Research Output* module, you can enter publications by importing RIS and/or BibTex files (e.g. from reference management systems such as EndNote) or run searches in various databases.

*Please note that errors can creep in when you import information; pay attention to the affiliations!*

Select either *Import from online source* or *Import from file.*
3.1.1 Internal and external people in case of import

When you import information, the system wants to help out by matching people already in the system with the names in the items you import. For example, the name Anna Andersson is linked to an Anna Andersson employed at LU. Sometimes these connections are wrong, so it is important to check carefully that the author information is correct. Correct author information, name and affiliation, is a pre-requisite for correct data to be retrievable from the system, in the case of interdisciplinary and external collaborations, among other things.

3.1.1.1 Internal people

LU employees, both current and former, are to be entered as internal people and their affiliation is to correspond to that on the publication. Internal people are illustrated with a black silhouette and when this is present, there is also a link to the person’s LUCAT entry. This is also what makes the publication show up in the person’s list of research output. People who enter publications from a previous/parallel position at another higher education institution are also to be listed as internal, BUT the current affiliation at LU should be unticked. Read more under Change affiliation below.

3.1.1.2 External people

An external person is illustrated by a white silhouette and has no link to anyone in LUCAT. The person’s affiliation is to be added (see how under Change affiliation below). External affiliation is to be added at the level of the higher education institution, i.e. never division/department but instead Uppsala University, for example. The name of the institution is always to be entered in English; many of the names are already present in the system, so search the list first. If the affiliation is not present, click Create new and it will be added to the list.

3.1.1.3 Changing affiliation or external/internal

In order to change/add an affiliation or change a person’s status from external to internal or vice versa, click Edit.
To change the status from external to internal or vice versa, click Change person in the upper right-hand corner.

Then search for the relevant internal person by selecting Replace or select Make external.

Change or remove internal affiliations by unticking the boxes under the name. Please note that only the affiliations stated in the publication are to be included.

Add external affiliation via Affiliate to external organisation.

Save by clicking Update.

3.2 What do I do if I discover errors in my information?

3.2.1 Add/remove yourself

If you have been incorrectly added to a publication/project etc. you can cancel the connection between yourself and the information in question by clicking Not mine - disclaim content. The same applies if you find information in LUCRIS to which you should be linked, but for which you have been entered as external instead of internal.

How to proceed:

1) Search for the information in LUCRIS
2) Click the cogwheel which appears after the title of the publication in the list when you run the cursor over it, click "Mine - claim content" or "Not mine – disclaim content" accordingly.
3.2.2 Changing incorrect information
If you discover errors in a research output that is already public, you can go into LUCRIS, search for
the output and make the desired change. The item will then be sent back for review/validation and
the change will be applied in the portal as soon as it has been approved by your local reviewer.

You can correct errors in other modules yourself and the change will be applied immediately in the
Research Portal.
4 Updating your profile in LUCRIS

4.1 Personal overview (Researcher presentation)

4.1.1 Editing your profile …

… as a researcher

In order to add or change information in your personal profile, go to Personal overview and click Edit profile…

… as an administrator

If you want to edit a profile for someone else, go to the Masterdata tab, select Persons in the left-hand menu and search for the person in question. You are authorised to do this on the basis of your status as an Editor of Persons, which you can apply for via LUCAT.

4.1.2 Information to add to the personal profile

It’s possible to get some information directly from LUCAT. Below you will get a statement of which fields that are available and how they will be filled in and if they will be accessible through the Research Portal or not.

- **First name**: always visible (generated from LUCAT)
- **Last name**: always visible (generated from LUCAT)
- **Gender**: not visible (generated from personal ID)
- **Date of birth**: not visible (generated from LUCAT)
- **Nationality**: not mandatory and not shown (used in some local evaluations)
- **Name options**: added when needed. Options available are:
  - **Default publishing name** – default name. Not shown in the portal.
  - **Former name** – imported from LUP initially; when changes are made in LUCAT in the future, please save the name history here. Shown in the right column at the Research portal, under the name.
  - **Known as name** – alternative name forms for examples names in Islandic, and other spelling options. Replaces First name and Last name in the demonstration of the Research Portal if this field is added.
  - **Portal sort name** – used to control the sorting in the portal. Is added by the researcher when needed. Is not shown in the portal.
- **Title**: In the Research Portal, in the personal page, all titles that you added in LUCRIS along with the one set as you employment in PRIMULA is shown under your name. In the brown box to the right in the portal you’ll see your role as stated in LUCAT. Alternatives available are:
  - **Title**: added from LUCAT, and this information is added from Primula. Shown under the name/head line. Not editable.
  - **Academic degree**: these are added manually. Are shown in the right column, directly under the name in the research portal.
  - **Honorary title**: is added manually.
  - **Legal title**: is added manually.
  - **Post-nominal title**: post-nominal title: is added manually.
  - **Designation**: is added manually.
  - **Other titles**: are added manually.
ID:
- Scopus author ID: is added by the researcher. Is not shown.
- Researcher ID: is not added by the researcher. Is not shown.
- ORCID: is added from LUCAT. Are shown under Links.

Profile photo: is shown in the Research portal.
Recommended for the photo is:
- Width: between 400 and 1200 pxl
- JPEG-format, quality 90
- Color space: sRGB (some iPhones/Safari web readers have problem reading AdobeRGB)
- 4:3- or 5:4-format is better suitable for standing portrait

Links: Alternatives available are:
- Personal homepage – link to personal homepage, generated from LUCAT, is shown with their own lead text in the right column in the research portal.
- Link – is shown with single lead text or “other links” in the right column before the contact information in the portal.

Profile information: text field (both in Swedish and in English).
Please enter information if possible both in English and in Swedish. If you e.g. don’t enter information in the Swedish box the Swedish version of the Research Portal will contain no information about your research.
The following head lines are shown in this order, if corresponding field contains text:
- Research – overall description of the research activities. Always placed on the top.
- Artistic work – are always used by the Faculty of Performing Arts.
- Teaching – to those that wants to use the personal profile in LUCRIS as the only personal presentation page it’s possible to insert a shorter description of their education.
- Professional work – for example working consultants, architects etc.
- Outreach – overall description of all cooperation with the surrounding world, details are put into Activities.
- Societal impact description of what effects the cooperation efforts have reached.

Start date as an independent researcher / retirement date: is not shown

Affiliations: are always shown (added from LUCAT)

Position outside of LU: Add employments outside LU, present and earlier. Voluntarily, can be reused in the CV module.

Field of study: free text field with the option to add the Qualification (for example Bachelor/Master/Ph.D. in XXX)

Professional qualification: Are shown under the name in the Research Portal, after Academic degree.

External positions: Voluntarily, can be reused in the CV module.

Keywords:
- UKÄ: all research areas must use the classification UKÄ. OBS! UKÄ classification is necessary for a person to be visible when you use UKÄ to filter the information in the portal.
- Keywords: the option to add new free keywords.

Visibility: Possibility to make a personal profile visible at the Research Portal (if not already), should be set to "Public - no restrictions".
4.1.3 Re-using information from LUCRIS for local web pages
Any information you add about yourself can be re-used by local websites, among others. Please contact the page manager for your departmental web page to find out how your particular department/faculty works with re-using researcher presentations.
5. Modules in LUCRIS

LUCRIS consists of a number of modules which are completed separately but which can subsequently be linked to each other. This allows the connections between a publication and a project or funder, for example, to become apparent.

The module menu is always visible in the left-hand column.

The PURE software can offer a number of different modules. In LU’s installation of PURE, i.e. LUCRIS, we have chosen not to activate all available modules, which means that other modules may be added at a later stage. Some modules cannot be removed even if we don’t use them, e.g. Applications and Ethical reviews.

LUCRIS Modules right now:

Research Output, see chapter 5.1

Activities, see chapter 5.2

Curricula Vitae, see chapter 5.3

Awards, see chapter 5.4

Projects, see chapter 5.5

Prizes and distinction, see http://www.staff.lu.se/research-and-education/research-support/lucris-research-information-system/modules-in-lucris/prizes
5.1 Research Output (Publications and other expressions of research results)

LUCRIS handles publications, but also other forms of research output. The National Library of Sweden and the Swedish Research Council use the designation “forskningsoutput”, which we adopt as the Swedish term for Research output in LUCRIS. The management of Research output in LUCRIS is described in detail in the LUB practice documents (these can be downloaded from www.medarbetarbetarwebben.lu.se/lucris). Here, we present only the general sections.

In LUCRIS, you can register the various types of output that are requested in the new SwePub guidelines as well as some others. If there are any uncertainties about what kind of publication is to be used, contact your reviewer/support.

All research output that is registered or centrally imported from various databases is reviewed before it goes public. This means that when an output has been registered, it is sent For validation, and once a reviewer has validated the item it goes public in the portal. Until it has been validated, it is only visible on the researcher’s own LUCRIS page.

5.1.1 Information that can be entered
The following matrix shows what kinds of research output can be registered in LUCRIS. The help texts in the system aim to facilitate the choice of output. If in doubt, contact the support team for help.

<table>
<thead>
<tr>
<th>Main category</th>
<th>Subcategory</th>
<th>Swe-Pub requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contribution to journal</td>
<td>Article</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>Letter</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>Debate/note/editorial</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>Review of book/film/exhibition etc.</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>Special issue (editor)</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>Published meeting abstract</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Review article</td>
<td></td>
</tr>
<tr>
<td>Chapter in book/ report</td>
<td>Book chapter</td>
<td>Yes</td>
</tr>
<tr>
<td>conference proceeding</td>
<td>Entry for encyclopedia/dictionary</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>Chapter in report</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>Preface to conference proceeding</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>Foreword/postscript</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Paper in conference proceeding</td>
<td>Yes</td>
</tr>
<tr>
<td>Contribution to conference</td>
<td>Paper, not in proceeding</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>Poster</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>Abstract</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>Other</td>
<td></td>
</tr>
</tbody>
</table>
5.1.2 Automatic retrieval from other systems
Publications which have at least one affiliated author from Lund University are retrieved centrally from Scopus. If you have any questions about the entries we retrieve centrally and how long this process usually takes, please contact the support team.

You can also set alerts in Scopus, for example, to download information about your publications which are indexed there. These alerts are set up via Research output ➔ Import from online source. Contact the LUCRIS support team if you need help.

5.1.3 Re-using information
Information about a large number of publications is sent to the national research database SwePub, but also to DART and Open AIRE. Research output which has been sent to SwePub is subsequently searchable in PRISMA, among other systems.

5.1.4 The validation workflow of research output
Once you have registered your publication and saved it as For validation, it is sent via the system to your reviewer. The reviewer is determined by the unit you have chosen under Research output.
managed by… (the review is automatically assigned to the main unit to which you are affiliated), but you can always contact the support team if you have questions about your registration and review. Once the reviewer has validated your information, it is made public in the portal. If there are any questions concerning the registration, the entry is sent back to you and is given the status of Entry in progress instead. In that case, you will receive a notification to this effect from LUCRIS.

5.1.5 Filtering options for Research output
When you go into the Research output module as an ordinary user, you can view your own publications, but also search for other people’s publications in LUCRIS.

5.1.6 Pre-set filters
There are two pre-set filters, i.e. two permanent search settings which you only need to click, visible on the left in the menu under the module name once you click it. These filters are called Editable and My research output.

Editable contains all the items which are still at some editing stage. I.e. items that you have entered but a) not forwarded for validation, in which case they are marked as Entry in progress, or b) have forwarded for validation but which have not yet been validated, in which case they are marked as For validation. None of these items are visible in the public portal until they have been validated by a reviewer, at which point they will also disappear from the list of Editable items.

This list may contain several/other outputs if you have a role in the system which is connected to the Research output module.

My research output searches for all the research output present in LUCRIS and linked to you. This applies both to the items which have been validated and those waiting to be validated and listed as Entry in progress.
5.1.5.2 Setting your own filters
You can set up your own filters and your own searches which you can save so that they are always applied to your profile. As an example, if you are a head of department/research leader and you want to stay up to date with the current and previous publications of a specific organisational unit.

Searches are conducted from the search field. Remove any previous searches (e.g. if My content is pre-set, you can remove it by clicking the little cross before the filter name). You then construct your search by clicking on the little funnel symbol:

You can choose between a number of filters and then build up your search by adding various filters one after the other.

Once you are satisfied, click on the little pin after all the filters.

Name your search and it will be saved under the other searchers to the left under Research output.

The search will now remain on your profile until you remove it. Every time you want to be informed, for example, about new doctoral theses at the Faculty of Social Sciences, you only need to click your saved search.
5.1.6 Importing/entering an existing list of publications in LUCRIS

If you wish to add an existing list of publications to your LUCRIS profile, for example a list including works you have authored outside your position at LU, you can do so. The advantage is that this provides a coherent picture of your research achievements and you can re-use the entry when using the CV module, for example.

Please note that it is important, for each entry you add or import, to check and change your affiliation to the one that applied at the time of publication. It is the affiliation in the publication which determines which affiliation is to be used in the registration. You are to retain your link to your LUCAT but must untick your current affiliation (see 5.1.6.4 Changing affiliation in an entry).

You can get your entries into the system in various ways, depending on whether you have saved them somewhere. Unfortunately, you cannot import a list of publications available in Word or similar format; in that case, the publications must be registered manually.

If you have the publications in a reference management system such as EndNote or RefWorks (see 5.1.6.1 Importing from a reference management system/RIS file) or if most of your publications are indexed in a database such as Scopus, PubMed or Embase, they can be imported directly from within LUCRIS (see 5.1.6.2 Importing from a database). If the items are in other databases, you can usually save them as a file which can then be imported into LUCRIS (see 5.1.6.3 Creating an RIS file).

5.1.6.1 Importing from a reference management system/RIS file

If you have a list of publications saved as an RIS – or BibTex file (which can be done from most reference management systems and bibliographical databases) you can import in to LUCRIS by:

1) clicking "Add new" or ‘+’ after Research output in the left-hand menu.

2) Click “Import from file”

3) Select the type of file in which you saved your material.

4) Upload the file and check that your entries have been transferred correctly.
Short video tutorials are available on the Staff Pages: [http://www.staff.lu.se/research-and-education/research-support/lucris-research-information-system/modules-in-lucris/research-output](http://www.staff.lu.se/research-and-education/research-support/lucris-research-information-system/modules-in-lucris/research-output)

### 5.1.6.2 Importing from a database
If your publications are indexed in Scopus, Embase or PubMed, you can import them directly to LUCRIS.

5) Click “Add new” or ‘+’ after Research output in the left-hand menu.
6) Click “Import from online source”

7) Select the source you want to search in and run your search.
8) Click “Import” on the publications you wish to add. Please note that you must approve the affiliations in the first step; there are some problems with the automatic matching of affiliations about which you can read in Appendix 1.
9) You then click “Import and review” which allows you to review the information to ensure it has been entered correctly.

Short video tutorials are available on the Staff Pages: [http://www.staff.lu.se/research-and-education/research-support/lucris-research-information-system/modules-in-lucris/research-output](http://www.staff.lu.se/research-and-education/research-support/lucris-research-information-system/modules-in-lucris/research-output)

### 5.1.6.3 Creating an RIS file
Most bibliographic databases allow you to compile and save a list in various machine-readable formats, e.g. RIS format. Locate the publications you wish to transfer to LUCRIS; then check for the possibility of exporting the references in RIS format. Save the RIS file on your computer and follow the instructions for uploading an RIS file in LUCRIS, as described in 5.1.6.1 Importing from reference management systems/RIS files.
5.16.4 Changing affiliation in an entry

1) Click “Edit” after your name

2) Click any affiliations not applicable at the time of publication

3) Add the correct affiliation by clicking “Affiliate to an external organisation...”. Please note that you need only enter the university and country (not detailed affiliation to a department, division, etc). Most higher education institutions are already entered in the system and therefore searchable by their names in English. If the institution is not listed, click “Create new...”.

28
### 5.2 Activities (Research-related activities)

Research-related activities are a way of describing the part of LU’s research which is not presented in the form of some kind of output, but concerns how and where research is presented, communicated and made visible.

#### 5.2.1 Information which can be entered

In LUCRIS, you can register the following research-related activities:

<table>
<thead>
<tr>
<th>Main category</th>
<th>Sub-category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Publication peer-review and editorial work</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Journal editor or guest editorship</td>
</tr>
<tr>
<td></td>
<td>Editor of series</td>
</tr>
<tr>
<td></td>
<td>Editorial board/committee member for journal or series</td>
</tr>
<tr>
<td></td>
<td>Journal/manuscript peer review</td>
</tr>
<tr>
<td></td>
<td>Membership of peer review panel or committee</td>
</tr>
<tr>
<td>Participating in or organising an event</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Participation in conference</td>
</tr>
<tr>
<td></td>
<td>Organisation of conference</td>
</tr>
<tr>
<td></td>
<td>Participation in workshop, seminar, course</td>
</tr>
<tr>
<td></td>
<td>Organisation of workshop, seminar, course</td>
</tr>
<tr>
<td></td>
<td>Participation in public lecture/debate/seminar</td>
</tr>
<tr>
<td></td>
<td>Organisation of public lecture/debate/seminar</td>
</tr>
<tr>
<td></td>
<td>Participation in festival/exhibition/concert/performance</td>
</tr>
<tr>
<td></td>
<td>Organisation of festival/exhibition/concert/performance</td>
</tr>
<tr>
<td>Talk or presentation</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Invited talk</td>
</tr>
<tr>
<td></td>
<td>Presentation</td>
</tr>
<tr>
<td></td>
<td>Public lecture/debate/seminar</td>
</tr>
<tr>
<td></td>
<td>Performance</td>
</tr>
<tr>
<td>Consultancy, expert advice and memberships</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Consultancy</td>
</tr>
<tr>
<td></td>
<td>Consultancy (in kind)</td>
</tr>
<tr>
<td></td>
<td>Member of peer review panel or committee (not publications)</td>
</tr>
<tr>
<td></td>
<td>Expert assignment</td>
</tr>
<tr>
<td></td>
<td>Work for advisory/policy/evaluation group or panel (non-public/non-government/industry)</td>
</tr>
<tr>
<td></td>
<td>Work for advisory/policy/evaluation group or panel (public/government/UN/EU etc.)</td>
</tr>
</tbody>
</table>
### Visiting an external institution
- Member of external research organisation
- Member of board/committee/council etc.
- Research or teaching at external organisation

### Hosting a visitor
- Hosting a visitor

### Examination and supervision
- External reviewer of PhD thesis/ faculty reviewer
- Examination
- Supervision
- Supervision of Postdoc
- Supervision of PhD Students
- Supervision of Master’s students

### Other
- Business cooperation
- Commissioned education
- Media participation
- Engagement in schools

### 5.2.2 Recommendations for entering activities
Activities are not included in the LU-wide minimum level of what is to be entered in LUCRIS. The faculties may have their own practice, e.g. with regard to certain types of activity which are to be entered by the faculty’s researchers. All LU researchers are free to enter the types of activities they wish to include in their public profile. Thus there is no decision or practice on the entry of activities across all faculties as there is for research output. However, the following chapter describes the intended use of the LUCRIS activities module. The activities module in its present form was introduced with version Pure 5.7, to which LUCRIS was updated in January 2017.
5.2.3 Review procedure
No review procedure is compulsory for activities. Registered activities become visible immediately in the portal (if visibility is set to public). The units that wish to edit their researchers’ activities can appoint a user who is allocated the role of Editor of Activities.

5.2.4 Visibility in the portal
Researchers make their activities visible in the portal on a voluntary basis. Local recommendations may apply. The activities are visible on a person’s profile page and if they have been linked to a project or a research output, for example.

5.2.5 Use of the various types of activity

5.2.5.1 Categories
Division into categories is not an exact science and some of the categories may overlap somewhat. NB! It is the lower level that is primarily visible in the portal, the CV and so on. So the most important thing is that the lower level feels relevant to the researcher.

The most important principle for the choice of activity type: use the subtype which feels most relevant to the activity in question.

As a researcher or at the department/faculty, if you find a category or a useful division to be missing, we kindly request that you let the support team know so that the category can be added. We will gradually improve the module on the basis of the input we receive. Decisions on new categories are taken by the administrative organisation with the support of the general LUCRIS working group, “LÖAG”.

5.2.5.2 Relations
Links to other content, such as publications or projects, can be made where this is desirable. These connections also become visible in the portal. The connections are made under Relations.

It is possible to connect several internal people to one activity. In that case, the activity is also visible on the other people’s pages. To do this, add the person and search among LU employees. Once you have connected an LU-affiliated person to your activity, “Internal person” will appear under their name – this indicates a link to the person’s LUCAT, which enables the entry to appear on
that person’s own list as well. It is also possible to link external people, in which case their consent should be requested to allow their name to appear in the portal.

5.2.5.3 Roles
Under each type of activity, a series of roles are defined. It is important to go in and adapt/adjust the role to the specific activity as there are many different options. The roles appear in a drop-down menu once you have clicked Edit after your name.

Please note that all the people added to an activity are to have a role in the system.

5.2.5.4 Changing activity type
It is possible to change activity type by using the “Change template” button in the right-hand corner. Please note that if you change to a type with different fields in the form, information may be lost. The lost information can be retrieved from History and Comments.

5.2.6 Activity types
5.2.6.1 Publication peer review
Here, you register activities concerning the peer review of publications. Select the most appropriate subtype. NB! Forms which do not concern publications but rather applications, etc., are to be entered under Consultancy, expert advice and memberships.

The form allows you to register information on one of the three following: journal, publishing house or event. If you enter a journal, the publisher will be indirectly linked to the entry.

Subtypes:

- Journal editor or guest editor
- Editor or Series
- Editorial board/committee member for journal, or series
- Journal/manuscript peer review
- Membership of peer review panel or committee

5.2.6.2 Participating in or organising an event
Here, you register activities concerning participation (without a specific personal contribution) or organisation of an event, e.g. a conference. NB: if you have made an individual contribution with its own title which is different from the title of the event, this should be entered under Talk or presentation instead.
To register participation only in an event, without any organisational or personal contribution, use the category “Participation in…”.

To register participation in the organisation of a conference, use the category “Organiser of”. It is common to have both organised and taken part in a conference, but in that case registration as an organiser only is sufficient. If you have both organised and made an individual presentation, these should be registered as two activities. As much of the metadata will be the same, it can be expedient in such situations to use the duplication button (in the lower right-hand corner) in order to change only your role in the new entry, for example.

Remember to adapt the role to the subcategory, i.e. if you enter Organisation of conference, the role should be Organiser (see how to do this under 5.2.5.3 Roles).

Subtypes:

- Participation in conference
- Organisation of conference
- Participation in workshop, seminar, course
- Organisation of workshop, seminar, course
- Participation in public lecture/debate/seminar
- Organisation of public lecture/debate/seminar
- Participation in festival/exhibition/concert/performance
  Here, include activities within artistic research but also participation in events such as Kulturnatten.
- Organisation of festival/exhibition/concert/performance

5.2.6.3 Talk or presentation
Here you register activities for which you have made a personal specific contribution to an event such as a conference, if your contribution had a specific title which was different from the event’s title. The title of the contribution is to be entered in the title field.

Subtypes:

- Invited talk
  - can be used for academic and non-academic contexts in which you took part as an invited speaker.
- Presentation
  - can be used for all other kinds of presentations, including oral presentations of posters. Please note that written contributions in the form of proceedings or a poster, for example, are to be registered as Research output.
- Public lecture/debate/seminar
  - can be used to specify that the event in question was public.
5.2.6.4 Consultancy, expert advice and memberships

Here you register activities such as consultancy commissions, expert assignments and participation in various contexts related to the professional role of the researcher. Enter the appropriate title to be shown from the display list; it can be a very brief description of what the assignment was so that this is apparent already from the display list. Where the subcategories overlap, the researcher can decide which is most suitable.

Subtypes:

- Consultancy
- Consultancy (in kind)
  Use this if it is of interest to point out that the consultancy was provided without remuneration
- Member of peer-review panel or committee (not publications)
  e.g. of applications.
- Expert assignment
  For various kinds of expert assignment.
- Work for advisory/policy/evaluation group (non-public/non-government)
- Work for advisory/policy/evaluation group (public/government /EU/UN)
- Member of external research organisation
- Member of board/committee/council

5.2.6.5 Visiting an external organisation

Here you register visits to external organisations in your role as a researcher or lecturer. It is compulsory to state the institution involved, whose name will appear as the title in display lists etc.

Subtypes:

- Research or teaching at external organisation

Hosting a visitor

Here you register your role as a host to an external guest. It is compulsory to provide the visitor’s name. As the visitor’s name will appear in the portal, it is important to obtain that person’s consent first.

Subtype:

- Hosting a visitor

5.2.6.6 Examination and supervision

Here you enter information on examination (e.g. role as reviewer) and supervision. *NB! It is the supervisor/examiner who is to enter the information on his or her assignments as supervisor/examiner – not the student.* Information on the doctoral student/student/examinee can be entered but it is voluntary. The name of the student is entered in the title field.
Subtypes:

- **External reviewer of PhD thesis/Opponent**
- **Examination**
  Can be used for examinations which are not supervision of doctoral students but which the researcher considers to be qualifying nevertheless.
- **Supervision**
- **Supervision of postdoc**
- **Supervision of PhD**
- **Supervision of Master’s student**

### 5.2.6.7 Other

Here you enter activities of types which do not fit into the other categories. The list of types available will be developed in the future.

Subtypes:

- **Business cooperation**
- **Commissioned education**
- **Media participation**
  All kinds of appearances in the media (except individually authored articles which are registered as research output!). A new model for media management will be introduced during 2017 or 2018.
- **Schools engagement**

### 5.2.2 Re-use of information on activities

Some faculties will gather information on certain types of activities for local reports. Contact your head of department/dean for more information.
5.3 Curricula Vitae (CV module)
The CV module aims to make it quick and easy to re-use the data entered into the system in an elective and editable CV format. You decide which parts of the information you have entered into the system you wish to re-use in the CV module.

5.3.1 Create a CV:
- Click ‘+’ which appears when you run the mouse over Curricula Vitae.
- Choose one of the CV formats.
  - Private – the CV is only in your LUCRIS profile and not visible on the Research Portal.
  - Public – your CV appears on your profile on the Research Portal, under a separate tab.
  - Highlighted CV – select the publications you wish to highlight in your general presentation page on the Research Portal.
- Click the fields you wish to include.
- You can edit the CV and then save it in a series of different formats, such as Word or PDF.

On the Staff Pages, there are a couple of brief video tutorials on how to create a CV:
http://www.staff.lu.se/research-and-education/research-support/lucris-research-information-system/modules-in-lucris/research-output
5.4 Awards (Grants)
External funding of research (grant-funded or contract research) is defined via each contract (Awards in LUCRIS, not to be confused with the awards in the sense of distinctions which appear under Research-related activities). A contract is the document drawn up between the researcher at LU and an external party (funder) once external research funding has been awarded, for example.

Please note that applications and the application process are not dealt with by LUCRIS at all. It is only the contracts themselves, i.e. funded applications, that are to be included. The Applications module is still visible in the system, however, as it is not technically possible to hide that module. The function for creating applications in the system is de-activated.

5.4.1 Entering a contract
LUCRIS only manages metadata about contracts and all contract documents are entered centrally in LUCRIS. The central management of contracts aims to improve the coverage and data quality in the records and in LUCRIS while increasing the efficiency of local management at faculties and departments.

Administrators and finance officers at the departments send scanned copies of the contract together with details of the local administrator to the function address: kontrakt@fsi.lu.se The function address is staffed by Research, External Engagement and Innovation which is responsible for ensuring that the incoming contracts are registered in official records and in LUCRIS.

Once the contracts are entered into LUCRIS, they can be linked to one or several research projects, for example.

5.4.2 The visibility of the contract in the portal
Once it is entered into LUCRIS, a contract becomes visible only in LUCRIS, i.e. not in the Research Portal. Contracts which are linked to a project will become visible in the project itself within a day or so. Only the title, funder and date are visible in the public Research Portal.
5.5 Projects
The characteristic of a project is that it is a research activity limited in scope and time, unlike an organisational unit. Sometimes, the project is linked to particular funding, project staff can be both external and internal people (unlike research teams which are an organisational unit and can only have internal members).

LUCRIS classifies projects into the following main groups:

<table>
<thead>
<tr>
<th>Main category</th>
<th>Swedish designation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research</td>
<td>Forskning</td>
</tr>
<tr>
<td>Consultancy</td>
<td>Uppdragsforskning</td>
</tr>
<tr>
<td>Dissertation</td>
<td>Avhandling</td>
</tr>
<tr>
<td>Network</td>
<td>Nätverk</td>
</tr>
<tr>
<td>Other</td>
<td>Övrigt</td>
</tr>
</tbody>
</table>

5.5.1 Registration of projects
All LUCRIS users can create projects. However, it should be the project manager or a person appointed by them who creates the project. When you add an LU staff member to a project, that person is notified of the project’s creation. The notification does not go out to external members added to a project. External people added to a project must be asked for their consent. Projects are immediately visible in the Research Portal.

All project types have the same composition of fields in which to describe the project.

- **Nature of activity type:**
  Select one or more of the following:
  - *Interdisciplinary research:* Tvärvetenskaplig forskning
  - *International collaboration:* Internationellt samarbete
  - *National collaboration:* Nationellt samarbete
  - *Collaboration with industry:* Samarbete med industri
  - *Collaboration with municipalities and county councils:* Samarbete med kommuner och landsting
  - *Collaboration with schools:* Samarbete med skolor
  - *Internal collaboration (LU):* Internt samarbete (LU)
  - *Clinical research:* Forskning i universitetssjukvården
  - *Artistic research:* Konstnärlig forskning
  - *Teaching:* Undervisning
  - *Individual research project:* Individuellt forskningsprojekt
• **Title:** add a title in both Swedish and English if possible. You can switch languages in the upper left-hand corner, or click Translation in the left-hand menu.

• **Short title**

• **Acronym**

• **ID:** This offers the same ID options as Awards.

• **Description:** Brief project description, max 400 characters, preferably in both Swedish and English, with the research community as the target group.

• **Layman’s description:** Brief popular science description, preferably in both Swedish and English.

• **Participants:** Internal or external people/organisations (Participants/Collaborators).
  
  o External people added to a project must have given their consent.
  
  o If a person is added, information on the organisations to which that person is linked also appears. Non-relevant organisational affiliations must be unticked.
  
  o Each person added must be assigned a role in the project:
    
    ▪ **PI - primary investigator (PI): forskningsledare (PI)**
    
    ▪ **CoI - co-investigator (CoI), project participant: forskare, projektmedlem**
    
    ▪ **Researcher: forskare.**
    
    ▪ **Project communication officer: projektkommunikatör**
    
    ▪ **Project coordinator: projektkoordinator**
    
    ▪ **Administrator: administratör**

• **Project managed by:** The department or other organisation whose administrator can support the registration/editing of the project. To be entered by the person who enters the project, but can be changed.

• **Collaborative partners:** Click yes if this is a collaboration project, and the organisations listed under Participants above will appear. You can edit the list if you wish. Search for collaborative partners/organisations under Add collaborator...; if they are not yet in the database, you can add them by clicking Create new.... Organisations are to be entered according to the form "Organisation (university or similar.), Country" e.g. Copenhagen University, Denmark. NB! One of the collaborative partners must be marked as Lead.

• **Life cycle:** Start year/end year for the project. The end year field can be left empty if you wish.

• **Curtailed:** If the project was terminated ahead of time, tick this box.

• **Keywords:** Classification according to the Swedish Higher Education Authority and free subject words.

• **Files and access:** Add document: Possibility of adding e.g. a more detailed project description – the research presentation of the project can be added as a PDF, e.g. the version submitted to the funder.

• **Links:** Links to the project website outside LUCRIS.

• **Relations:** Links to publications, activities, contracts, main project, etc. Please note that publications that are authored (only) by people external to LU who are included in an LU project cannot be entered in LUCRIS.
6 Support and administration organisation

LUCRIS support consists of both a central and a local support organisation. Technical questions, development questions and suggestions for improvements are handled by the LUCRIS administration organisation. Questions on input and input policy are answered by local support. Certain faculties have their own local support channels, but you can always contact the staff at Servicedesk who will direct you to the right support.

Servicedesk and LUCRIS support are reached via:

- E-mail: servicedesk@lu.se
- Web forms at: support.lu.se
- Phone: 046 222 90 00 (Monday–Friday 08:00–17:00)

Find out more about LUCRIS at:
https://www.staff.lu.se/research-and-education/research-support/lucris-research-information-system