SRA & LUCRIS: A HOW-TO-GUIDE

LU:s strategic research areas

How and what you as an researcher should to add to LUCRIS in order report for the yearly SRA evaluations.
This guide includes:

1. Introduction: about the handbook
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1. Introduction: about the handbook

What is LUCRIS?
LUCRIS, a research information system based on the software PURE, is intended for registering and provide visibility for LU’s research publications, as well as for projects, collaborations and other research-related activities. 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.

Visit LUCRIS at http://lucris.lu.se

The Research Portal is located at http://portal.research.lu.se

This handbook
This handbook is dedicated for the Strategic Research Areas within Lund University. It is a step-by-step-guide on what information to enter, and how to do it. The guide includes:

- A checklist of what should be added
- A step-by-step guide

Support
Please do not hesitate to contact the support for further questions: servicedesk@lu.se add LUCRIS as the subject
2. Why use LUCRIS for this?

Some information needed for the monitoring and evaluation of the SRA is possible to collect, store and showcase in LUCRIS. This first overview (and key questions) should cover all the information you need in order to grasp what information you should add and what you can extract from LUCRIS.

The following list will describe what kind of information and how it should be entered in LUCRIS.

**WHAT IS IN ALREADY?**

- Information about name, workplace address, gender, current institution, position

**WHAT IS AUTOMATICALLY ADDED?**

- Any changes made in LUCAT concerning name and LU affiliation.
- Publications indexed by the database Scopus (added centrally once every month) - you don’t need to do anything
- External funding applied for and granted within the scope of the research environment.

**HOW DO I ADD IT?**

In the next chapter you will be able to follow a step-by-step-guide for each section in order to get all information into LUCRIS correct.

**What do I need to think about?**

When you add a project, research output or activity please make sure that all external and internal LU-affiliation are in place. This is how we can collect information from LUCRIS for the SRA evaluations!

**Internal affiliations and the SRA**

All LU internal affiliations should be as specific as possible and always correlate with the affiliations stated in e.g. the publication. Remember to always add the SRA as an affiliation to those activities, projects and publications conducted within the strategic research area.

**External organizations – collaborations**

All collaborations between the SRA and external alliances such as companies, research institutes and universities is an important issue to evaluate. To be able to use LUCRIS in this matter it is of great importance that information about the different kind of collaborations in entered in a correct way in to the system.
How can we measure external collaborations?

We can extract lists of entered external organizations from all parts of LUCRIS; so every time you add an external partner in a project, a research output or an activity: make sure to add his/hers affiliation!

The name of the external organisation is always to be entered in English; the external organisations are searchable in a list – just search the name of the affiliation and add it to your collaborator.

In order to collect and extract the affiliations in the most affiant way from LUCRIS: affiliations must be added at its top node. Meaning we will collect all collaborations connected with e.g. Copenhagen University but not down to department level.

Who will see and extract information from LUCRIS?

Public interface – showcasing the SRA at LU

Information about activities and project will be visible directly at the Research Portal when you save with “Public” set under Visibility. Research outputs will be visibly at the research Portal when an Editor has validated the submission (this in order to have the highest possible metadata standard).

Some information under the personal profile is always visible (name, contact information etc.). Information about gender, previous employment, education and qualifications is not visible in the public portal.
What do I need to add to LUCRIS? A Checklist

All external collaboration added in affiliation to the SRA can be collected. So make sure that you affiliate your collaborators correct, read more in the step-by-step guide. Impact activities are not limited to any specific information category in LUCRIS but can be registered in all modules.

Under Personal profile:
- Information about degrees (added under “Education/ Qualifications”)
- Start year at the SRA (changed in “Organizational affiliations”)
- Researchers from the strategic research environment who have been employed or engaged by industry or industrial research institutes (added as “Positions outside LU and previous positions”)

Under Research output:
Different types of Research output can be added. The SRA monitoring and evaluation focuses on the following types specified below, so make sure that at least these are added to your profile.
- Other scientific peer-reviewed publications (not indexed in Scopus)
- Peer-reviewed conference papers
- Other scientific publications (books, theses, etc.)
- Immaterial property rights (added under the research type Patent, applications added with the Publication status “Submitted”, Accepted as “Published”)
- Public impacts through for instance textbooks (added as any research output with publication category “Popular science”)
- Doctoral thesis

Under Activities:
Different types of research related activities can be added in LUCRIS. The SRA monitoring and evaluation focuses on the following types specified below, so make sure that at least these are added to your profile.
- Conferences and seminars arranged and organized. (Added as “Participating in or organizing an event”, note that the role should be specified)
- Hosting external visitors. (Added as “Hosting a visitor”)
- Research visits by personnel in the strategic research environment and duration (added under “Visiting an external institution”)
- Research impact to the public realm, e.g. through supporting government in setting policy or standards (added as “Talk or presentation”, “Consultancy, expert advice and memberships”)
- Public impacts through for instance media, textbooks, conferences, popular science presentations and policy lobbying (added as “Talk or presentation”, “Consultancy, expert advice and memberships/Conferences”)
- Contract education (added under “Other” → “Commissioned education” or “Visiting an external institution” → research or teaching at external organisation)

Under Projects:
- Important collaborations or strategic alliances with companies, institutes or other organizations in relation to the strategic research environment (added as Projects with information about the collaborators and their affiliations)

WHAT DO I NEED TO ADD?

Under Personal profile:
- Information about degrees (added under “Education/ Qualifications”)
- Gender
- Start year at the SRA (changed in "Organizational affiliations". NB! This information will not be correct automatically if you started at the SRA before 2016)
- Researchers from the strategic research environment who have been employed or engaged by industry or industrial research institutes (added as “Positions outside LU and previous positions”)

1) Log in to LUCRIS (lucris.lu.se)
2) Click the tab “Personal”

3) Information from LUCAT

Information about name, address, current affiliation is collected from LUCAT. Any corrections in this fields should be done in LUCAT. Please use separate button for this ("Update personal information in LUCAT").

4) Click “Edit profile”
Following fields should be filled:

- Start year at the Strategic research area. Change in “Organizational affiliations”.

  Edit start date at the SRA if not correct.

- Researchers from the strategic research environment who have been employed or engaged by industry or industrial research institutes. Should be added as “Positions outside LU and previous positions”.

  ![Organisational affiliations](image)
Please add the Appointment in the text field and at the external organisation at its top node.

Ex.

APPOINTMENT:
Post doc, Department of Political Science

EXTERNAL ORGANISATION:
University of Copenhagen
• Information about completed degrees. Should be added under “Education/Qualifications”.

Fill in the form:

Please state in the field “Qualification” the degree as:
- Professor
- Adjunct professor
- Docent
- Doctoral degree
- Licentiate

Also add Year of PhD/Licentiate degree.


WHAT DO I NEED TO ADD?

Under Research output:
In all research output added in affiliation to the SRA all collaborations, external, can be collected. So make sure that you affiliate your collaborators correct, read further down.
• Other scientific peer-reviewed publications (not indexed in Scopus)
• Peer-reviewed conference papers
• Other scientific publications (books, theses, etc.)
• Immaterial property rights (added under the research type Patent, applications added with the Publication status "Submitted", Accepted as "Published")
• Public impacts through for instance textbooks (added as any research output with publication category "Popular science")
• Doctoral thesis

How to add research output

1) Choose Research output 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.

2) When using the Add new button brings up a Submission guide, it provides suggestions based on the most common types of information.

3) You now have the option Choose submission. This means that you choose which specific information you want to add.
4) 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.

![Choose submission](image)

5) You can also import information from a database or file formats such as RIS. Read more on how to do this in the LUCRIS-manual at staff-pages: [https://www.staff.lu.se/research-and-education/research-support/lucris-research-information-system/help-and-support](https://www.staff.lu.se/research-and-education/research-support/lucris-research-information-system/help-and-support)

6) 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.

7) NB! Remember to always add the SRA as an affiliation in connection your name to those publications conducted within that line of work. This is the only way to single out the information we need to do evaluations in LUCRIS on work within the SRA:s.

*To change/ add affiliation:*

a) Add all contributors to the output.

b) Change affiliation by clicking “Edit”

![Authors and affiliations](image)
c) You can change internal affiliation if needed by ticking or un-ticking the box/boxes, add e.g. the SRA. The SRA will appear if you are correctly affiliated to the SRA.

You can also add other internal or external affiliation. Please search for the external organisation by clicking “Affiliate to another organizational unit”.

NB! Affiliations always be at is top node, e.g University of Copenhagen, not at department level. Collaboration is calculated on institutional level.

8) When you are finished make sure that the level of visibility your entry is set to:
   - **Public – no restriction**, i.e. visible to everyone who searches on LU's Research Portal.

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*. 
5. Activities: step-by-step

WHAT DO I NEED TO ADD?

Under Activities:

- Conferences and seminars arranged and organized. (Added as “Participating in or organizing an event”, note that the role should be specified)
- Hosting external visitors. (Added as “Hosting a visitor”), note that the SRA evaluation only counts when the visit is more than two weeks
- Research visits by personnel in the strategic research environment and duration (added under “Visiting an external institution”)
- Research impact to the public realm, e.g. through supporting government in setting policy or standards (added as “Talk or presentation”/ “Consultancy, expert advice and memberships”)
- Public impacts through for instance media, textbooks, conferences, popular science presentations and policy lobbying (added as “Talk or presentation”/ “Consultancy, expert advice and memberships/ Conferences”)
- Contract education (added under “Visiting an external institution” \rightarrow research or teaching at external organisation)

1) You make this choice either via the green Add new button on the right or click on + which appears when your mouse cursor is over the module Activities.

2) When you click on one of the headings it shows sub-categories, for example under Activities \rightarrow Participating in/ or organising an event there are a number of activity categories that can be chosen from.
3) The following categories should be used in order to meet the standards of the evolution of the SRA:s. Please read more on the previous page:

- **“Participating in or organizing an event”**
  Please state:
  - Event – please read more about how to add Event further down.

- **“Talk or presentation”**
  Please choose suitable activity form, public presentations (not for an audience within academia) please use “Public lecture/ debate/ seminar”.

- **“Consultancy, expert advice and memberships”**
  Please choose suitable activity form.

- **“Visiting an external institution”** → Research or teaching at external organisation
  Please state:
  - Visited organisation - remember to enter the information about the external organisation at its top node (eg. University of Copenhagen). Specific details can be added in the “Description”.
  - Period of time (minimum two weeks)

- **“Hosting a visitor”**
  Please state:
  - Period of time (minimum two weeks)
  - Name of the visitor and his/hers affiliation as the external organisation. Remember to enter the information about the external organisation at its top node (eg. University of Copenhagen).

- **Contract education (added under “Visiting an external institution” → research or teaching at external organisation**
  Please state:
  - Add the information about the contract education under “Evet”. Add the education as an event of the Type “Course”.

4) 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.
5) Please add all participants and make sure to state your/their roles.

6) In order to evaluate Conferences you’ll need to add information about the Event (the conference/seminar etc). Information about the event is retrieved or added to the list of events managed in LUCRIS. Click on “Add Event”:

7) Search for the event, if it is not already in the list, click “Create new”
Add relevant information about title, dates and place. Please pay attention to the “Degree of recognition” to the event. This should be set to either “International”, “National” or “Local”.

8) When you are finished make sure that the level of visibility your entry is set to:
   - **Public – no restriction**, i.e. visible to everyone who searches on LU’s Research Portal.

9) Click **Save** furthest down.

WHAT DO I NEED TO ADD?

- Important collaborations or strategic alliances with companies, institutes or other organizations in relation to the strategic research environment (added if in that form as Projects with information about the collaborators and their affiliations)

1) Choose project type:
2) Fill in required 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.

3) Please add all participants to the project. When you add an employee within LU to a project, the person is notified of the project’s entry in LUCRIS. However, the message does not go out to external members who have been added to a project.

4) If it is a project with external collaborating institutions (outside LU), tickmark this.

NB: External people added to a project must be asked for their consent.

5) You will be able to create connections to other projects, research outputs, activities and granted funding (in LUCRIS called “Awards”) under the section “Relations”.
6) When you are finished make sure that the level of visibility your entry is set to:
   • **Public – no restriction**, i.e. visible to everyone who searches on LU’s Research Portal.

7) Click **Save** furthest down.
7. Help and support

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